LEEDS INFRASTRUCTURE CONSORTIUM

RESOURCE PACK

Introduction

This pack has been designed as a support pack for local organisations - mainly community and voluntary groups and small charities. It may be of use to larger organisations too.

It is intended to provide resources for new and established groups to enable them to access the information they need to operate effectively and efficiently.

The pack has been designed alongside a health check form developed by Inform Leeds (a network of frontline Community Development and Funding Advice workers). The health check form was intended to be used by workers when supporting local community groups and looked at a number of areas of operation. The aim was that a worker would do a health check with a group, identify the key areas for development and then signpost them to individuals or organisations who could provide more specialist support.

In 2010 members of LIC (Leeds Infrastructure Consortium) realised that the number of frontline support workers was decreasing and that there were fewer people to signpost groups onto. Knowing that groups still needed access to support and information, they decided to create this resource pack. It follows the same format as the health check and provides information and resources for groups to access.

Thanks to funding from Leeds City Council's infra-structure fund, the resource material has been made available on the LIC website www.leeds-ic.org.uk.

Health check

A copy of the health check can be downloaded from the Voluntary Action-Leeds website www.val.org.uk/page/health-checks. Although designed for use with a Development worker, groups should be able to use it on their own as follows.

Take a section, for example, Governance and read the page headed "Interpretation of the Stages". These show the stages a group goes through from when it starts, with no legal form, through to having more developed policies and procedures in place.

- No legal form →
- Vision / values / mission / objects →
- Legal form with governing document →
- Functional Committee / Board trained in roles and responsibilities, active at influencing strategic direction →
- Relevant policies, procedures and insurance in place →
- Strategic direction functional, compliance in order, equality and diversity addressed

Each has a coloured circle next to it and these correspond to the wheel on the page headed Group Progress. The aim is to mark off, on the wheel, what stage your group is at under the various headings and then join the marks together. This will give you an easy-to-understand diagram showing what stage your group is at. Those crosses that are nearest the centre of the circle indicate the areas where you need most help.

Once you have assessed your key areas for development, you can then access the relevant sections of the LIC website. We hope you will find information and advice to help your group develop, as well as ideas of where to go for more specialist or one-to-one advice if available.

We hope you find this pack useful. If you have any feedback, or can recommend other resource material that you have found useful, please contact Leeds Community Foundation (0113) 2422426.

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LEEDS INFRASTRUCTURE CONSORTIUM RESOURCE PACK

SECTION 1 – GOVERNANCE

Introduction

This section on **Governance** is part of an 8-pack series of resource materials that has been produced by the Leeds Infrastructure Consortium. For further information please go to www.leeds-ic.org.uk.

1. SETTING UP A GROUP

Sometimes a group of people come together with a shared vision to do something in their local community. Setting up a new group or organisation involves a variety of tasks and there are a number of things you will need to consider. The more aware you are of what you need to do, the easier the task will be. Good planning at this stage can save a lot of wasted effort or work later.

Why?

- Are you starting the group because of a local issue?
- What do you want to achieve?
- What are the 'aims' of the group/organisation?
- Is it just for the members i.e. a photography club, or the wider community?
- Have you local people who are already interested in the idea/activity/issue?
- Who are the potential beneficiaries / members? Do they want what you are offering?

Where will it take place?

- What area are you going to cover – a specific part of Leeds or the whole city?
- If you are just starting out you need to be as realistic as possible in terms of what you might achieve with the people and resources you have.
- Are there other groups doing similar things in the local area – can you link with them instead of setting up a new group? Duplicating can be expensive, a waste of resources and may not be supported by funders. Joining an existing organisation and working with them saves a lot of hard work.

Developing Ideas/Aims and a Plan

- Once you have got people interested then you need to get together to think about the goals/aims of the group and how to achieve them. This way everyone can have a say and feel involved in the group from the very start, so that no one person feels as if they have to do all the work.
- It may take more than one meeting to agree on the aims and objectives but once this has been agreed you can then concentrate on writing an action plan.
- The plan does not have to be lengthy but should set out what you want to achieve, how you are going to achieve it, who is going to do it, when it's going to be done by, and who will benefit. It should tell your members, supporters and other interested people what you are doing, why and how you will go about doing it.
- You will need:
    - Aims and objectives: what you aim to do
    - Methods: how you intend to do it
    - Resources: time, people, skills, money, equipment, premises (both what resources you have and what you might need)
    - Timetable: when things might happen

There are some building blocks that you need to agree at the outset:

- ***Values.*** What are the values you share as a group? For example, do you value equality / disabled people / democracy? Your group needs to agree on some shared values.
- ***Vision.*** What sort of world does this group want? “Our vision is a community of happy and fulfilled elderly Hindi women in Chapeltown.”
- ***Mission.*** This is what you want to achieve by setting up the group, its purpose. “Our mission is to support and enable elderly Hindi women in Chapeltown, Leeds to develop their full potential.”

2. CONSTITUTION

Although a group can carry on meeting informally for ever, there usually comes a time when they need to have a more formal status – when applying for funding, for instance. It is good practice to develop a constitution early on as it helps avoid confusion among group members.

A constitution is a set of rules by which the group will operate. Once the constitution is signed the group exists in law as “an unincorporated association”.

Most constitutions follow a similar format with headings as below:

- Name
- Aims
- Powers
- Membership
- Management Committee
- General Meetings
- Accounts / finance
- Alterations to the rules
- Dissolution (closure)

See guide 1a for more details about how to set up a constitution, together with a draft constitution to consider.

3. OTHER ISSUES

a. Management Committee

Most constituted groups elect a “management committee”, members of the group who are going to have more to do with the day-to-day activities in areas such as finance, administration etc. A management committee should have at least 3 people – usually Chairman, Treasurer and Secretary – but many have more than that. Every member of the management committee is individually responsible and liable for the running of the group even if some of the members take on more official positions.

See section guide 1b for further details.

b. Bank Account / Finances

You will need to open a bank account in the name of the group. Most banks provide services for charities and community groups. You need to agree some key elements: who is going to do the book-keeping? When is your financial year? Do you know how to produce a budget / annual accounts?

We recommend you have at least 2 signatories on the account (and they should not be members of the same family). It is a good idea to have 3 or 4 signatories, any 2 of which need to sign a cheque. Some other basic advice on financial matters includes:

- Cheque books, petty cash and account books should be kept in a secure place
- Cheques should not be signed by the person to whom the cheque is payable
- Where possible make payments by cheque and not cash
- Never sign blank or partly completed cheques
- Always get a receipt for payments made
- Do not pay bills without an invoice
- Pay all cash and cheques into the bank and keep a record of the date and amount paid in
- Give a receipt for any money received.

Don't worry, help is on hand via the West Yorkshire Community Accounting Service (WYCAS) who can help you with all of this. Contact Claire Welling claire.welling@wycas.org.uk 0113 270 6291. There is also a separate guide in this series on Finance, available from www.leeds-ic.org.uk.

c. Training

Voluntary Action-Leeds provides training on a huge range of subjects including: roles and responsibilities of management committee members, minute taking, fundraising etc. Some of these are free to start-up groups or those with a low income. Contact: Tina.ashby@val.org.uk 0113 297 7944 or go to web site www.val.org.uk/courses.php.

d. Insurance

You need to make sure that any events or activities you hold are properly insured and that you have carried out risk assessments. Training is available and further details can be found in Guide 6b of this series (Running Events).

e. Safeguarding

If your group is going to work with children (anyone under the age of 18) or vulnerable adults (not just a disabled or older person, any individual who needs to be able to trust the people caring for them, supporting them or providing them with an essential service, which could leave them vulnerable to abuse) you will need to have policies and procedures in place. Tom Holden, the Leeds Safeguarding Children Board's Third Sector Safeguarding Officer will be able to help you with all this. Contact: tom.holden@leeds.gov.uk 0113 395 1334. Further details can be found in Guide 6a.

f. Equal opportunities

It is good practice to consider equal opportunities before applying for funding. You do need to agree your own Equal Opportunities rather than just borrow someone else's policy statement so that you explore what issues of ethnicity/race, religion, gender and sexuality, ability/disability, age etc. are relevant to your group or organisation. When these have been discussed, referring to a draft policy from elsewhere may be helpful in identifying issues you might have missed. Equal opportunities policy should apply to members, beneficiaries, volunteers, and paid employees and management committee members.

4. OTHER USEFUL SITES

There is a range of useful information on governance on the following websites

www.ncvo-vol.org.uk/advice-support/trustee-governance/publications

www.sandy-a.co.uk: a private consultant offering useful information on governance and other legal issues

www.governancepages.org.uk: excellent website on various governance related issues

www.charity-commission.gov.uk: all the information you need to register as a charity

www.communitymatters.org.uk/resources.aspx: website full of useful information on all aspects of running a small community organisation

LEEDS INFRASTRUCTURE CONSORTIUM RESOURCE PACK

SECTION 1a: GOVERNANCE - CONSTITUTION

Introduction

This section is part of an 8-pack series of resource materials that has been produced by the Leeds Infrastructure Consortium. For further information go to www.leeds-ic.org.uk.

1. CONSTITUTION

A constitution is simply the aims and rules that your group will use. It's a written understanding of what your group is going to do and how it is going to do it. It is important because:

- Without this written understanding people can easily find themselves at cross purposes and the jobs won't get done.
- It will serve as a reference, and help to resolve problems in times of controversy.
- Outsiders, especially potential funders, will want to see that your group is democratic and accountable. This involves having a clear procedure by which decisions are made.

For these reasons it is important to get a constitution that actually reflects the way in which you do things, or want to do things. There is no point in lumbering yourself with a lot of bureaucracy you don't want, or writing down loads of things you don't intend to do, simply because you think they are what people expect. It is best to have a discussion in the group and decide what everyone wants to do, rather than send someone away to draft a long document that everyone ignores!

The following information will help you draw up a constitution for what is termed an 'unincorporated association'. It is entirely up to your members how you organise your group and, therefore, what you put in your constitution. This constitution will be suitable for your community group unless you plan to set up a limited company or a charitable trust – these are different types of organisations. Your constitution should reflect what your group wants to do, and so will be different from the constitutions of other groups. Even so, most constitutions have a similar structure and will have similar headings.

You will probably want to include sections on:

1. Name of Organisation
2. Aims (sometimes called Objectives) of Organisation
3. Powers
4. Membership
5. Management Committee
6. Duties of others
7. Finance
8. Meetings
9. Conflicts of interest
10. Amendments to the Constitution
11. Dissolution
12. Adoption of the Constitution

Don't think that you have to use complicated or legal language. The main point of a constitution is that everybody can understand how the group runs. You are writing it for people like yourself, not for lawyers. If you make things complicated then the chances are that nobody will understand it and everyone will ignore it. Appendix A gives an example constitution for a small group. A more complex draft constitution can be found in section 2 below.

2. SAMPLE CONSTITUTION

An example of the kind of statements that might be made in a constitution is given in the left hand column of the table below. It is not a model showing you what statements should be made. You should read the guidance in the right hand column to see what needs to be considered so that you may decide what is relevant to your own organisation.

Constitution of ....Group

1) Name The name of the group shall be ------------------------ Referred to hereafter in this document as 'the group'.	*Other terms used might be 'the association' or 'the organisation'. Include a clause allowing you to change the name if necessary.*
2) Aims/Objects The aim of the Group shall be to: -	*This should be a simple statement including aims (sometimes referred to as Objectives), geographical area and people benefiting. Be specific and realistic.*
3) Powers In order to achieve its aim the Group may: a. Raise money b. Open bank accounts c. Acquire and run buildings d. Take out insurance e. Employ staff f. Organise courses and events g. Work with similar Groups and exchange information and advice with them h. Do anything that is lawful which will help it to fulfil its aim	*This section shows the "powers" you will use to carry out your aims.* *These are examples of the most common powers. If you don't think the aim/object of your group is covered you can add to the list or take out any you think inappropriate. Think to the future and include as many powers as you are likely to need to avoid having to make changes to your constitution at a later date.*
4) Membership Membership of the Group shall be open to any individual over eighteen who supports the objects of the group and agrees to abide by the rules of the group. This includes: a. All those who have paid a membership fee and signed a membership form b. Other individuals and organisations who support the objects and have signed a membership form c. The membership of any member may be terminated for good reason by the Management Committee. The member concerned shall have the right to be heard by the Management Committee, accompanied by a friend, before a final decision is made. d. The secretary will maintain a list of members. e. There will be two types of meetings of the full membership:	*This is membership of the whole organisation not just membership of the management committee or the users of the service.* *Consider:* *Who can be a member? How do they become a member and how can membership be proved if there is a dispute (e.g. signing a membership form)? Is there a fee? Are there different types of membership (e.g. Full or Associate)? What are members' rights(e.g. voting)? How may membership be*

The AGM Special General Meetings At least (?) members must be present at these meetings for the meeting to have the power to make decisions.	*terminated (by member or by organisation)? When will members meet and how will those meetings be called? How many members will make a quorum (the number of members needed to be present to validate decisions)?* *You could discuss your membership with your group before you agree your constitution.*
5) Management Committee a. The Group shall be administered by a Management Committee of not less than three and not more than (?) individuals elected at the Group's Annual General Meeting by members. b. Members of the group and anyone who supports the objects of the group and has specific skills to bring are eligible to join the committee. c. The Officers of the Management Committee shall be: the Chair, the Treasurer and the Secretary. d. The Management Committee may co-opt individuals with specific skills onto the Committee. Co-opted members should make up no more than one third of the full membership. Co-opted members will/will not have the right to vote. e. The Management Committee shall meet at least three times a year. f. At least three Management Committee members must be present for a Management Committee meeting to take place. g. Voting at Management Committee meetings shall be by a show of hands. If there is a tied vote then the Chairperson shall have a casting vote. h. Minutes will be taken of each meeting and recorded by the Secretary. i. The Management Committee may establish any sub-committees required. All sub-committees will be subject to the terms of reference agreed by the Management Committee. They will be chaired by a member of the full Management Committee and must report to the Management Committee on their activities and decisions. j. The Management Committee shall have the power to remove any member of the Committee for good and proper reason. k. The Management Committee may appoint any other member of the Group as a Committee member to fill a vacancy, provided that the maximum number of management committee members is not is not exceeded.	*Consider:* *Who is eligible to join the management committee? How are they appointed? Who by? How long can they serve before they must stand for re-election? How are committee members suspended and for what causes (e.g. regular non-attendance of meetings)? How many meetings will there normally be? How many should be present for decisions to be made? Do co-opted members have the right to vote? What happens if there is a tied vote (The Chair only has a casting vote if the constitution allows it)? What Officer roles are there on your committee?* *A very small management committee is not ideal. Aim for at least five members. A large committee is equally problematic: have a maximum stated in your constitution of about 12.* *You may wish to agree in a separate policy what constitutes good and proper reasons for removal i.e. failure to attend meetings or bringing the organisation into disrepute.*

6) The Duties of the Officers The duties of the Chairperson shall be to: a. Chair meetings of the Committee and the Group. b. Represent the Group at functions/meetings that the Group has been invited to and c. Act as the spokesperson of the Group when necessary. The duties of the Secretary shall be to: a. Keep a membership list. b. Prepare in consultation with the Chairperson the agenda for meetings of the Committee and the Group. c. Take and keep minutes of all meetings. d. Collect and circulate any relevant information within the Group. The duties of the Treasurer shall be to: a. Supervise the financial affairs of the Group. b. Keep proper accounts that show all monies received and paid out by the Group. c. Prepare an annual report of income and expenditure for the AGM.	*These descriptions are the usual functions of these positions and could include variations dependent on the aims of your group.*
7) Finance a. All monies received by or on behalf of the Group shall be applied to further the aims of the Group and for no other purpose. b. Any bank accounts opened for the Group shall be in the name of the Group. c. Any cheques issued shall be signed by the Treasurer and one other nominated member of the Management Committee. d. A financial report shall be provided at each management meeting to monitor income and expenditure. e. The Group shall ensure that its accounts are audited or independently examined every year. f. The group may pay reasonable out of pocket expenses including travel, childcare and meal costs to members or Management Committee members.	*A minimum of two signatories is possible but it would be better to have two out of three or four. Do not use signatories from the same household.*
8) Meetings a. The Group shall hold an Annual General Meeting (AGM) in the month of .... b. All members shall be given at least fourteen days notice of the AGM and shall be entitled to attend and vote. c. The business of the AGM shall include: I. Receiving a report from the Chairperson on the Group's activities over the year II. Receiving a report from the Treasurer on the finances of the Group III. Electing a new Management Committee IV. Considering any other matter as may be decided	*Consider: When these will be called? How much notice is required? How members will be informed? How many members must be present for decisions to be made? How will voting take pace (e.g. show of hands or secret ballot)?*

d. At least (?) members must be present for the Annual General Meeting and any other General Meeting to take place. e. Election of committee members and officers will take place through a show of hands. f. A special General Meeting may be called by the Management Committee or …… members to discuss an urgent matter. The Secretary shall give all members fourteen days notice of any Special General Meeting together with notice of the business to be discussed	*If, for example, there was a particular event that affected your group, you could call a special meeting to discuss and agree a course of action.*
9) Conflict of interest When a committee member has an interest in an item discussed that conflicts with the general interest/benefit of the organisation, they will be expected to withdraw for the discussion and will not be allowed to vote on this item.	*State what the committee should do when a committee member has a personal interest in an item discussed e.g. a committee member works for a firm tendering for work.*
10) Alterations to the Constitution Any changes to this Constitution must be agreed by at least two-thirds of those members present and voting, at any General Meeting or Special General Meeting.	*You should allow a procedure for changing the constitution, including the name*
11) Dissolution The Group may be wound up at any time if agreed by two-thirds of those members present and voting, at any General Meeting. In the event of winding up, any assets remaining after all debts have been paid shall be given to another Group with a similar aim.	*State what will happen if the organisation closes down.*
12) Adoption of the Constitution Until the first AGM takes place the persons whose names, addresses and signatures appear at the bottom of this document shall act as the Management Committee referred to in this constitution.	

This Constitution was adopted on ....by

Name .... Position ....

Print Name...

Address ....

....

Signed ....

This Constitution was adopted on ....by

Name .... Position ....

Print Name...

Address ....

....

Signed ....

This Constitution was adopted on ....by

Name .... Position ....

Print Name...

Address ....

....

Signed ....

SMALL CHARITY CONSTITUTION

Suitable for small charities with an annual income under £5,000 that don't own a building or employ people and do not intend to register with the Charity Commission.

1 **NAME**

The charity's name is _ ____

2 **THE PURPOSES OF THE CHARITY ARE:-**

____

____

3 **TRUSTEES**

The charity shall be managed by a committee of trustees who are appointed at the Annual General Meeting (AGM) of the charity.

4 **CARRYING OUT THE PURPOSES**

In order to carry out the charitable purposes, the trustees have the power to:

(1) raise funds, receive grants and donations

(2) apply funds to carry out the work of the charity

(3) co-operate with and support other charities with similar purposes

(4) do anything which is lawful and necessary to achieve the purposes

5 **MEMBERSHIP**

The charity shall have a membership. People who support the work of the charity and are aged 18 or over, can apply to the trustees to become a member. Once accepted by the trustees, membership lasts for 3 years and may be renewed. The trustees will keep an up-to-date membership list.

The trustees may remove a person's membership if they believe it is in the best interests of the charity. The member has the right to be heard by the trustees before the decision is made and can be accompanied by a friend.

6 **ANNUAL GENERAL MEETING - AGM**

(1) The AGM must be held every year, with 14 days notice given to all members telling them what is on the agenda. Minutes must be kept of the AGM.

(2) There must be at least ___ members present at the AGM.

(3) Every member has one vote.

(4) The trustees shall present the annual report and accounts.

(5) Any member may stand for election as a trustee.

(6) Members shall elect between 3 and 10 trustees to serve for the next year. They will retire at the next AGM but may stand for re-election.

7 TRUSTEE MEETINGS

(1) Trustees must hold at least 3 meetings each year. At their first meeting after the AGM they will elect a chair, treasurer and secretary. Trustees may act by majority decision.

(2) At least 3 trustees must be present at the meeting to be able to take decisions. Minutes shall be kept for every meeting.

(3) If trustees have a conflict of interest they must declare it and leave the meeting while this matter is being discussed or decided.

(4) During the year, the trustees may appoint up to 2 additional trustees. They will stand down at the next AGM.

(5) The trustees may make reasonable additional rules to help run the charity. These rules must not conflict with this constitution or the law.

8 MONEY AND PROPERTY

(1) Money and property must only be used for the charity's purposes.

(2) Trustees must keep accounts. The most recent annual accounts can be seen by anybody on request.

(3) Trustees cannot receive any money or property from the charity, except to refund reasonable out of pocket expenses.

(4) Money must be held in the charity's bank account. All cheques must be signed by 2 trustees.

9 GENERAL MEETINGS

If the Trustees consider it is necessary to change the constitution, or wind up the charity, they must call a General Meeting so that the membership can make the decision. Trustees must also call a General Meeting if they receive a written request from the majority of members. All members must be given 14 days notice and told the reason for the meeting. All decisions require a two thirds majority. Minutes must be kept.

(1) **Winding up -** any money or property remaining after payment of debts must be given to a charity with similar purposes to this one.

(2) **Changes to the Constitution -** can be made at AGMs or General Meetings. No change can be made that would make the organisation no longer a charity.

(3) **General Meeting -** called on written request from a majority of members**.**

(4) Trustees may also call a General Meeting to consult the membership

10 SETTING UP THE CHARITY

This constitution was adopted on _____________ 20___ by the people whose signatures appear below. They are the first members of the charity and will be the trustees until the AGM, which must be held within one year of this date.

Signed	**Print name and address**
____________________	____
____________________	____
____________________	____
____________________	____
____________________	____
____________________	____
____________________	____
____________________	____
____________________	____
____________________	____
____________________	____

LEEDS INFRASTRUCTURE CONSORTIUM RESOURCE PACK

SECTION 1b – GOVERNANCE – SETTING UP A COMMITTEE

Introduction

This section is part of an 8-pack series of resource materials that have been produced by the Leeds Infrastructure Consortium. For further details please go to www.leeds-ic.org.uk.

1. STARTING UP A COMMITTEE

To run your group efficiently you will have to form a Management Committee (sometimes known as the Executive Committee). This is the group of people who are ultimately responsible for the running of the group/organisation. It manages the group's affairs on behalf of the members and is answerable to them.

The committee members have a responsibility to work together and to take decisions and share the responsibility for these decisions and actions. If your group/organisation becomes a registered charity, the committee members will then also become trustees of that charity. Most groups/ organisations who set up do not need to have charity status as the constitution provides the recognised legal status.

The committee is drawn from members of the group and is elected by them, usually at an Annual General Meeting (AGM). They may be elected by the full membership at the AGM or by the committee at its first meeting, according to the constitution. Although the officers carry out particular jobs in the group, they have no more legal or financial responsibilities than other committee members.

The work of the committee will include:

- meeting regularly and ensuring members are kept informed of dates/venues.
- managing finances, agreeing a budget, and a fundraising strategy.
- making sure the organisation is properly insured and also stays within the law.
- managing volunteers and employees (if applicable) and ensuring appropriate policies are in place; also developing other policies, e.g. Health & Safety and Equal Opportunities monitoring and evaluating projects and activities.
- having a shared vision and agreement about why the organisation has been set-up including clear roles, responsibilities, short and long term goals.
- a willingness to work together, plan projects and set targets.
- making sure the group does what it was set up to do, has enough money, does not go into debt and is well run.

2. MANAGEMENT COMMITTEE MEMBERS

The committee may also invite other people to serve on the committee (known as co-opting). They may be members of the group but can come from outside, and are generally co-opted because they have particular skills or knowledge, but do not always have voting rights (depends on what your constitution says).

A very small group may meet informally and have no elected committee. Many groups with modest aims and activities run very successfully like this. In this instance, the entire group is the 'management committee' and everyone is responsible for the group's affairs. It is usual, however, that funders will only fund groups with at least three officers on the management committee.

Although every committee member shares responsibility, this does not mean that each member has to do everything. The job of members is to ensure that someone does each task and reports back. The tasks may be done by committee members, members of the group or people from outside. The most important thing is that the committee should work together and take joint responsibility.

Most committees will include members who have special responsibilities and roles including a **Chair, Vice Chair, Secretary and Treasurer**. It is important that members who take up these roles understand their positions and the responsibility that goes with it.

The Chairperson

- Prepares the agenda and any papers for meetings (often with the Secretary)
- Chairs committee meetings and Annual General Meeting
- Has an overview of the organisation and its work
- Represents the group and speaks on its behalf
- Keeps the organisation on the right lines, supports and encourages other members and helps resolve conflict

They need to be able to: clarify, explain, lead, control, summarise, be objective and unbiased, avoid taking over, explain points and items where necessary, be prepared to alter the order of the agenda, make sure everyone has the chance to speak, discourage separate discussions, ensure that all members know what they are voting for, regularly sum up what has been decided and check that everyone is in agreement.

The Secretary

The tasks of the Secretary may include the following:

- prepare and circulate the agenda (with the Chairperson)
- provide committee members with any required information prior to the meeting
- take, write and circulate minutes
- write letters on behalf of the organisation (to be checked and signed by Chairperson) and inform the group of any correspondence received
- produce a written annual report
- ensure the organisation has adequate insurance
- book rooms, arrange meetings, receive correspondence and report to the committee
- keep a record of membership

The Treasurer

The tasks of the Treasurer may include:

- keeping accurate, up-to-date financial records and producing end-of-year accounts. This could mean arranging for an external examination of records in line with the group's constitution
- communicating with the bank and ensuring that statements are regularly received
- reconciling statements with the cash/receipt book and safely keeping cheques and mandates up-to-date
- putting a simple system in place for petty cash claims
- making sure that bills are paid promptly and all income is banked on a regular basis
- being able to give an accurate account of the group's financial position at any given time

- preparing an annual budget for the committee and reporting at the AGM on the end of year accounts
- ensuring that funds are spent in line with the group's objectives and that the money can be seen to have been used correctly
- keeping an inventory of all equipment.

Although the Treasurer is responsible for preparing a draft budget and reporting regularly, the full committee has a responsibility to: agree the budget and allocation of money; make grant applications; and chase committee members for receipts.

3. MEETINGS

Some people may ask why a meeting needs to be formal and structured including taking minutes. This is important for a number of reasons

- To make sure all management committee members have had the chance to discuss an issue
- To help resolve conflict and avoid confusion
- To prevent 1 or 2 people dominating the group
- To demonstrate good, democratic management

A more structured meeting allows everyone to get involved in a discussion and take a decision – by law all members are collectively responsible for what happens in the group's name.

a) Regular General Meeting

These are the regular meetings a group has to discuss what they are doing. It is generally accepted that a management committee should meet at least 4 times a year but many meet more regularly, particularly if planning a lot of events or activities. Dates for meetings should be agreed some time ahead so everyone can get the date in their diary.

b) Annual General Meeting (AGM)

An AGM is a yearly meeting of the group or organisation's full membership. It is a chance for everyone to hear from the people it has elected to run the organisation (the management committee). It needs to be held every year and all members need to be invited (how you define members will be agreed in your governing document). You can also invite members of the general public but only full members will be able to vote.

You need to give enough notice of your AGM (this will be stated in your governing document) – by an advert in the local paper, poster on community centre notice board or in writing, for instance.

There are some formal items that need to be on your Agenda as the AGM is the time when Management Committee members stand down and are re-elected. The agenda is thus

1. Welcome
2. Apologies
3. Approval of minutes of previous AGM
4. Matters Arising
5. Annual financial report/ annual accounts
6. Report from the Management Committee
   a. Chair
   b. Secretary
   c. Other committee members
7. Election of Management Committee
8. Other Agenda items

c) Quorum

A committee must be "quorate" to conduct business. This means there must be a certain number of committee members at the meeting for decisions to be made. The number of people required to make a quorum will be covered in your governing document and is usually related to the total number of people on the committee. We recommend this is at least 3 (for groups of say 8 members). If not enough people attend you should not proceed with the meeting and will need to call another one.

d) Agenda

It is always useful to have an agenda for the meeting so you remember to cover all the key items. These usually follow the same format for each meeting, adding new items as sub-headings if they need to be raised at a particular meeting. An example is given below with the suggested headings in bold.

THE ABC GROUP

Management Committee Meeting
May 23rd 2011 7.00 pm
The Green Community Building

1. **Welcome, Attendance and Apologies**. You need to keep a list of who was there. If a committee member is not able to attend they need to send their apologies.

2. **Approval of minutes of the last meeting**. You need to review the minutes and make sure they are accurate. If they are correct, the Chairman should sign and date the printed minutes and then the secretary should keep a copy. If some items are inaccurate then a note needs to be made and noted in the minutes of the current meeting. The chair still signs them but with a note saying "with amendments."

3. **Matters Arising**. If there are minor items on the previous minutes that need discussing or updating, do this now. As the agenda is the same for most meetings, many of the items can wait to be discussed under the headings below.

4. **Secretary's report / correspondence**: an update on any letters received or other administrative matters.

5. **Treasurer's Report**. Each meeting should have a financial update from the treasurer showing income / expenditure / bank balances.

6. **Item 1, 2, 3 etc:** this is where you discuss other key elements of your group's work. The headings will vary according to the group but might be: forthcoming events, membership, marketing etc.

7. **Any other business**. This allows members to raise short topics that have not been discussed or raised in the meeting.

8. **Date of next meeting**. It is best practice to agree at least the next meeting, if not further in advance.

Taking Minutes

Taking minutes is an important part of the job, and can be a bit daunting when you first start. Minutes are simply notes taken during the meeting to remind you what was discussed and agreed. They are important because:

- It is useful to have a written record of the meeting, what you've decided to do and who is going to do it – memories are unreliable! This is true even if the meeting is very small and informal.
- Minutes keep members of the group who weren't able to attend a meeting informed about what went on.

Minutes need to include some key details

- Name of organisation
- Type of meeting (General Meeting, Annual General meeting)
- Date and venue
- Members present and apologies
- Other people present and in what capacity
- Then follow the agenda items and record the key discussions under each item

It is always important to take note of any actions that are agreed and who is going to do them by being as specific as possible i.e. Andy agreed to check the price of the hall and ring the treasurer by Friday.

The minutes don't need to be long or complicated, in fancy language or perfect grammar. They do need to record clearly and simply what decisions were made at the meeting and who is going to carry them out. Many groups make the mistake of writing down all the conversations that take place in a meeting but all that is really needed is the key points and the actions. No personal remarks should be included in the minutes.

An example is given below:

We started the meeting and John and Brenda started to discuss the last meeting. The minutes said that John was meant to be producing a poster but he said he was sure it was not him and, if it was him, he had not done it. He was not happy that his name had been put down as he had not offered to do it. Then Brenda said that she thought Sue had offered so they asked her and she said yes, she had done a draft and she had copies with her for people to look at. John said he was happy that it was not him.

Compare that with the following:

The minutes from the previous meeting said that John was to draft a poster but it was actually Sue. She produced a draft that people commented on.

e) Term of office

Election of management committee members is key. The length of time a member can sit on the committee is called a "term of office". This is often 1-3 years before needing to stand for re-election. When this term comes to an end they need to "stand down" but can be re-elected if they put their name forward again. The committee needs to inform the membership who is standing down and who is prepared to stand again. They should also ask the full membership if anyone else wants to stand. At the AGM all members present have the right to vote. You can decide how the votes take place – show of hands, writing voting slips etc.

LEEDS INFRASTRUCTURE CONSORTIUM RESOUCE PACK

SECTION 1c: GOVERNANCE – LEGAL STATUS

Introduction

This section is part of an 8-pack series of resource materials that has been produced by the Leeds Infrastructure Consortium. This section, 1c, is about an organisation's legal status. For further information go to www.leeds-ic.org.uk.

1. LEGAL STATUS

Once the committee has been set up and you have decided to proceed with your plans, you need to agree your legal standing with regard to 'governance'. Voluntary organisations in England have a choice about what legal status to adopt. In the eyes of the law an organisation is either:
- an *unincorporated association* (a collection of individuals working together) **or**
- a *corporate body* (a body with separate existence from the individuals belonging to it)

In both cases the organisation may be able to claim ***Charitable Status***. Charities are exempt from most forms of direct taxation, from stamp duty on legal documents and the non-domestic rates on their property are reduced by 80%. Some sources of funding are only available to registered charities. An organisation can only register as a charity if the Charity Commission accepts that its aims or purposes are charitable. For further information there is a useful guide on the Charity Commission website with further details of how to apply:

http://www.charitycommission.gov.uk/Start_up_a_charity/default.aspx

Unincorporated Associations
There are different types of legal status but for most small groups starting up, a *constitution* (set of rules) provides the appropriate legal status. Most community groups starting up begin as unincorporated associations, and may stay that way, particularly if they are small. This means that they can decide for themselves how to run the group, agreeing the aims and basic rules so that everyone is clear how it will run and be managed. The law looks on an unincorporated organisation as a collection of individuals which means it cannot in its own right:

- hold property
- enter into contracts
- take part in a law suit

Its officers and committee members have to do things as individuals. If the organisation ends up borrowing money, they can be personally liable to meet any debts from their own pockets. This is called unlimited liability. Charitable trusts, registered charities which are not also registered as companies, and unregistered voluntary and community associations (small groups) all have the legal status of an unincorporated association.

Trusts
A charitable trust is a special kind of unincorporated association, set up to administer money or property (or both), which will usually be registered with the Charity Commission. Some voluntary organisations choose to have trusts to hold property for them, or to administer large amounts of money. A trust is set up by a legal document called a trust deed. A model trust deed can be obtained free from the Charity Commission. A trust is unincorporated and trustees are personally responsible for its actions and liable if it runs into debt. There are ways of limiting this, but it is advisable to seek legal advice when the trust is set up.

Companies Limited by Guarantee
A company limited by guarantee does not have shares or shareholders, and cannot distribute profits. Instead its members, who pay a subscription, are each liable for a limited sum if the company is wound up (the guarantee, usually a nominal sum of say £1). The members elect a board or a committee or directors and can remove them, but the board has day-to-day control of affairs. A limited company's rules are set out in a legal document called the Memorandum and Articles of Association. This must be carefully drafted, preferably with legal advice, because the company has no power to do anything not covered in it. Companies are regulated by Companies House under the Companies Act 1985. As a company, the organisation can hold property, employ staff and enter into contracts. If the company meets the requirements to have charitable status then it can also register as a charity with the Charity Commission. In this case, the directors of the company are also the trustees of the charity. A model *Memorandum and Articles of Association* for a charitable company can be obtained from the Charity Commission.

Community Interest Companies (CICs)
A Community Interest Company is a special type of company which is set up specifically to benefit the community rather than its owners, achieved by a community interest test which must be passed before the company can be set up. The company operates in a similar way to a company limited by guarantee but the Memorandum and Articles of Association must contain certain protections. In addition, there is an *asset lock* which means that the assets and profits of the company cannot be distributed to its owners except where allowed by legislation. CICs must also file a community interest report each year. They are regulated by the CIC Regulator and further information is available on their website (www.cicregulator.gov.uk).

Industrial and Provident Societies
These include co-operative societies for the mutual benefit of members, but also non-profit making organisations carrying out an industry, business or trade, for the benefit of the community. They must give all members an equal say in the running of the society. The society has corporate status, and can have share and loan capital, but must pay only moderate interest on any loan capital. Industrial and Provident Societies providing community benefit, are regulated by the Financial Services Authority and may be able to claim charitable status depending on their objects and the extent to which they provide public benefit. To claim the benefits of charitable status, such societies must register with the Charities Commission.

Charitable Incorporated Organisation (CIOs)
This is a new legal status introduced by the Charities Act 2006. The intention is to allow organisations to have the structure of a company without the need to register with both Companies House and the Charity Commission. CIOs will be regulated by the Charity Commission, which produced guidance on setting up as a CIO in March 2011. However the statutory regulations which will set out the full legal framework for CIOs have not yet been agreed by Parliament and so it is not yet possible to register as a Charitable Incorporated Organisation.

LEEDS INFRASTRUCTURE CONSORTIUM RESOURCE PACK

SECTION 2 – MARKETING & PR

Introduction

This section on **Marketing and PR** is part of an 8-pack series of resource materials that has been produced by the Leeds Infrastructure Consortium. For further information, please go to www.leeds-ic.org.uk.

1. What is PR?

An important part of any marketing strategy is the use of PR or Public Relations. This is quite specific and refers to how community groups can encourage the local media – newspapers, radio and television – to promote their work. Knowing how to write an effective media release could make all the difference to information appearing in the local paper, or not!

The key to getting good media coverage is having the ability to identify a good local news story when you see it. Local media prefer stories that contain genuine human or local area interest.

The best way of informing the local media about your news / event / group is by issuing a "media release" and sending it to the appropriate media organisations. This needs to contain key pieces of information such as who, what, why, when and where. There is an accepted format for releases to be sent in with a heading, short and concise paragraphs, good use of quotes, double line-spacing. Don't forget to include your contact details in case they need more information.

If you have something that is worthy of photographing, you can issue what is called a "photocall notice" which invites the media to send a photographer along. This needs to have very specific information about what they are able to photograph and exactly when and where they need to be. Newspapers will sometimes accept digital photographs that you have taken yourself but these need to be of sufficiently high quality.

To find out more about PR and how to write effective press releases, see Section 2a.

2. What is marketing?

Before you embark on a project or activity, you need to think about how to get your message across. The way in which you use communications and promotional activities to convey the right messages to your target audience is called **marketing.** It is very important because it helps people form an image of your organisation - who you work with and their needs. How you portray your image can affect the demand for your services, the level of support from the local community and funding for your work.

There are a number of things to think about when preparing a marketing strategy:

1. ***Image***: what kind of image do you want to portray via your name, logo, premises / meeting space?
2. ***Audience***: who are you aiming your message at – users, professionals, volunteers, funders, members? They may each need a different message and, in some cases, it will need presenting in a slightly different format.
3. ***Objectives***: what do you want to achieve – increasing the number of volunteers, spreading knowledge about your work, sharing key information.
4. ***Process***: how are you going to start marketing and who is going to do it.

5. ***Message***: is it a general or specific message you want to convey.
6. ***How***: what means can you use – social media, posters, adverts, newsletters, emails.

To find out more about marketing and how it can help your group, see Section 2b for further details.

3. Social Media

There is a growing interest in the use of social media (blogs, twitter, Facebook etc) to help get messages across but you need to learn how to use this effectively in order for it to work.

Leeds Social Media is a free advice session for community and voluntary groups, clubs, societies and small arts organisations. They provide regular drop in sessions where you can find out more and ask for advice. Go to http://socialmediasurgery.com/surgeries/leeds to find out when the next one is available.

4. Other Useful Resources

http://www.volresource.org.uk/briefing/market.htm: more information on marketing strategies

http://www.mediatrust.org: useful information media related issues

http://www.communitymatters.org.uk/resources_details.aspx (and search for marketing)

LEEDS INFRASTRUCTURE CONSORTIUM RESOURCE PACK

SECTION 2a – MARKETING – Public Relations

Background

Leeds Infrastructure Consortium has produced an 8-pack series of resource materials to help local community and voluntary groups. For further information, please go to www.leeds-ic.org.uk.

1. WHAT IS PR?

PR stands for Public Relations and is a way that community groups can encourage the local media – newspapers, radio and television – to promote the group's work.

Getting good media coverage is all about having the ability to identify a good local news story when you see it. The stories that the local media like best are those that contain genuine human or local area interest. They like to hear about anything that involves people doing things that are slightly out of the ordinary or are helpful for people to know about, and are connected in some way to the local neighbourhood. Your project is likely to be all of these things: it has direct benefits to local people as well as the wider community.

There are two main ways of capturing the interest of the media:

- ***A photocall notice*** (Appendix A) gives local media details of a forthcoming story with a good photographic opportunity. This should be issued to the media at least one week in advance of the event. It should be sent to the news editor or picture editor of your local newspaper and regional TV stations. Do not send a photocall notice to a radio station!!

- ***A media release*** (Appendix B) gives additional information on your grant or event. This should be sent to the news editors of your local media, including radio stations. You can issue a media release before an event, at the event or afterwards to any media who were unable to attend.

It is always important to follow up the issue of either notice with a phone call to check they have received it and have the information that they require. You can use this opportunity to answer any questions that they might have. Send the release, wait for a couple of days and then give them a ring but be careful not to call them too often, as this may be counter-productive and put journalists off. Busy newsrooms will receive hundreds of phone calls and emails a day.

2. PHOTOCALL NOTICES

When you are planning your photocall, think of creative images that will give readers an immediate idea of your story and will make a photographer want to attend. The more unusual, the better – remember a picture can speak a thousand words. Consider the following points:

- Are there any props you can use to tell your story visually?
- What is the best location? – a local landmark or specific place unique to your project?
- Can you incorporate any branding? – do you have branded t-shirts or caps?
- Backgrounds? – don't forget about the background - this can add to the local angle of the story
- Cheese! – happy faces will give your project a positive image

If you think your story is particularly relevant for a specific media outlet, you might want to contact it in advance to check what times might be mutually convenient. It may have more photographers during the day mid-week, than on the weekend, for instance. Clearly if it is an event you want covered, you won't be able to change this just to suit them, but may be able to stage a photo call at another time.

Even if you send out your photocall notice in time and follow it up with a phone-call, there are no guarantees that a photographer will attend. If a story breaks on the same day you may find that you lose out. Also, before you decide on a date, it is worth checking to make sure the event does not clash with another local event taking place in the area.

If a photographer fails to attend or another news story breaks, hold the photocall anyway and take your own photographs. Use the best quality camera available and vary the shots you take. Where possible, use a digital camera. If not, you will need to make sure the print is high quality. Send the print or a digital photo to the newspaper with the names of everyone in the picture attached and don't forget to include details of how they can contact you.

See Appendix A for a sample photocall.

3. MEDIA RELEASES

To help create publicity for your project, you can issue a media release to inform journalists.

Before you start to draft your media release, always answer the following five questions – the five questions a reporter will ask every time:

- ***Who***. Who is involved in the story – the project and those who will benefit as well as the fact that the Leeds Community Foundation is awarding the grant.
- ***What***. What is your project all about?
- ***Why***. Why is it newsworthy? Your project will have various benefits to the local community. You can always refer back to our section about "what makes a good news story".
- ***Where.*** Where exactly is the project taking place? Remember, your local press will always need a local angle.
- ***When***. News needs to be current, so let the media know as soon as possible. If you're planning an event you can always do a follow up release after the day.

Always use real quotes to tell the media just how a project works or how much the grant has enabled you to undertake.

The first paragraph of the press release should contain in brief detail what the press release is about. The second paragraph should explain, in detail: who cares; why you should care; where one can find it; when it will happen. Also, included in the second 'informative' paragraph is generally a quote that gives the release a personal touch. Press releases and news stories are boring to journalists without a 'human interest'. The third and generally final paragraph is a summary of the release and further information on your company with the company contact information clearly spelled out. The reason for putting most of the information up-front is because your press release will probably be edited by a journalist before it goes to print and they may reduce it in length by simply using the opening paragraphs.

Release Layout

- Use white A4 paper and mark it up as a media release.
- Use black ink and double space your story so it's easy to read
- Try to come up with a catchy heading or title and put this in bold. It needs to capture the interest of the journalist and encourage them to read on.
- If it's a photocall announcement, mark clearly the date, time and venue so a photographer knows exactly when and where they have to be. Tell them a bit more about what they might see if they appeared i.e. what might be most visually appealing.
- Always include a contact name and telephone number so they can easily reach you
- Remember to find out the newspaper's deadline so you get your story in on time

Broadcast (radio / TV)

Local radio stations in your area may well be interested in your project. Broadcasters will also be keen to uncover "radio personalities" and if you are a good talker then they may come back for interviews on a regular basis.

Local TV coverage is the most difficult to obtain, but it is possible if you have a highly visual and newsworthy story to capture their interest. Your story must have a visual impact, be exciting to the viewers and involve some action to keep them interested.

If you are approached to do a TV or radio interview, take as much information from the caller as possible about what the interview is about, when it will be broadcast etc. Remember, you will need to convey your message in a concise and accurate way. It is not uncommon for only one statement (or sound bite) from an entire 10 minute interview to be aired on television or radio.

Similarly for newspapers, a single statement (or quote) might be drawn from a longer interview and used in the report involving your group. It is vital to have the message (or messages) you wish to convey ready to go in the form of a tasty sound bite or quotable quote.

See Appendix B for a sample media release.

4. LOCAL CONTACTS

You need to think, very carefully, whether your news story is the right thing to send to radio and TV stations. Is there something they can record and play on air, someone to interview, something really different that stands out? A single film crew can have a huge geographical area to cover and they can often only do one or two features a day, so yours will need to stand out to get noticed. Don't think yours will be the only release they will receive that day. The newsdesk for the Yorkshire Evening Post, for instance, receives hundreds of press releases a day so sending a media release in does not guarantee it will appear in the newspaper.

The Yorkshire Post tends to focus on community stories with an unusual angle or that have particular significance. Whilst the Yorkshire Evening Post does cover more community-type activities, they are looking for those human interest stories that their readers will find most interesting. Neither paper is likely to cover a standard cheque presentation or community event so you need to do what you can to find an interesting angle or approach.

You don't always have to wait for a big story and photo opportunity either. The Yorkshire Evening Post, in particular, is happy to accept shorter stories about your work, achievements and activities – you may only get a paragraph but recognition for your work is always worthwhile.

Online

The Yorkshire Evening Post has a growing online presence with lots of information now available on its website. If you have a good quality, short video clip of your work you can send this in and see if it is interested in using it on its website for a period of time.

The Yorkshire Evening Post also has a popular "Community Hubs Online" section on its website, featuring news from different areas across Leeds – recognising that life is local. When organising your event you can make the most of this facility and promote what you are doing in the community. On the websites you will find ultra-local news, sport & entertainment, as well as debate on community issues. In addition, there are local planning applications, video, audio and slideshows and lots more - and all updated on a daily basis.

Andrew Hutchinson, Yorkshire Evening Post's Digital Community Editor, said: "We want these sites to be your daily source of news, sport and entertainment for the very latest on what's going on in your community. You might be a long-time resident of your community; you might only just have moved in - or perhaps you live out of the region and simply want to catch up on news local to you. Whatever your situation, if you are interested in life in your community, these are the websites for you."

If you have something that you think will fit well on the Community Hubs, send the release to Andrew directly on andrew.hutchinson@ypn.co.uk.

To find out more about the hubs, log onto your local one today.

www.crossgatestoday.co.uk
www.garforthtoday.co.uk
www.bramleytoday.co.uk
www.farsleytoday.co.uk
www.roundhaytoday.co.uk
www.headingleytoday.co.uk
www.horsforthtoday.co.uk
www.calverleytoday.co.uk
www.armleytoday.co.uk
www.wortleytoday.co.uk
www.beestontoday.co.uk
www.middletontoday.co.uk
www.pudseytoday.co.uk
www.rothwelltoday.co.uk
www.seacrofttoday.co.uk
www.woodhousetoday.co.uk
www.kippaxtoday.co.uk
www.moortowntoday.co.uk
www.chapelallertontoday.co.uk
www.guiseleytoday.co.uk
www.harehillstoday.co.uk

FURTHER INFORMATION

If you need specific help or advice about PR, you may want to contact the Media Trust who provides national and local training and support. Its website is www.mediatrust.org.

APPENDIX A

******PHOTO OPPORTUNITY******

CHANGING ROOMS UNVEIILED

WHAT: The opening of the new ……………….. Resource Centre

WHERE: Address ………………………………………………

WHEN: Friday, 18th March 2011

10.00am	Hot drinks and bacon butties
10.15am	Welcome Speeches
10.30am	Photo Opportunity

WHO: Local residents from xxx
Chairman of the xxx Group (put name)
Other members of the audience xxx

WHY: The group is celebrating 100 years of using the Centre, based in a former school, that now houses 20 different community groups and activities each week

WHAT: A visual display by young people aged 6-11 in colourful costumes depicting the history of Leeds through the ages.

For further information please contact

Name xx

Phone (including mobile if possible) xx

Email xx

APPENDIX B

For immediate release (date)

LOCAL COMMUNITY EYESORE TRANSFORMED

The 50-year old xxx Community Centre on xxx Road has re-opened its doors today following a major refurbishment project that has seen the basement transformed into a new community hub.

The red-brick building, a former school, is already well-used by local residents in xxx area for a range of activities such as xxx, xxx and xxx. This much-loved community facility was beginning to look at bit tired and shabby and was in much need of a facelift. The opportunity to transform the basement has been made possible by a grant of £xxxx from local grant-maker xxx and now means that a further 400 people a month can benefit from the centre.

The Resource Centre Treasurer, **…**(name)**……….** said: “The old pathway to the basement area at the back of the hall was unsuitable and unsafe for the elderly or those in wheelchairs. This award has helped us to provide easy access to that area and without it we simply wouldn’t be able to utilise this extra space for all local residents to enjoy.”

Suzie, one of the mothers whose child comes to the Mums & Toddlers session at the Centre said “the basement used to be very damp and smelly and could not be used for any activities but it is now a lovely, bright space which is easy to get to with prams and pushchairs. My 2-year old son, Josh, loves coming here and the new facilities are just fantastic.”

Xxxx (name, title, name of funder) explained: “We’re delighted to make this award as we know it will be a real benefit to local residents. Community Centres lie at the very centre of local communities and act as a central point for people of all ages to come together, share experiences and have some fun. We are sure it will be very well-used for many years to come.”

ENDS

For further information and interview opportunities please call xx on xx.

APPENDIX C

Media Name	Phone	Email
Regional Daily Newspapers		
Yorkshire Evening Post	0113 243 2701	yep.newsdesk@ypn.co.uk
Yorkshire Post	0113 243 2701	yp.editor@ypn.co.uk
Local Newspapers		
Leeds Weekly News Series	0113 238 8771	
Morley Advertiser / Observer	0113 252 3456	editorial@morleytoday.co.uk
Wharfe Valley Times Series	01943 850272	
Wharfedale & Airedale Observer	01943 465555	malcolm.hoddy@gazetteandobserver.co.uk
Ilkley Gazette	01943 607022	
Radio / TV		
The Pulse of West Yorkshire	01274 203040	
96.3 Radio Aire & Magic 828	0113 283 5600	
BBC Radio Leeds	0113 244 2131	radioleeds@bbc.co.uk
Galaxy 105	0113 213 1053	
Real Radio (Yorkshire)	0113 307 1444	
Sunrise Radio	01274 735043	Info@sunriseradio.fm
BBC TV (N, S and W Yorkshire)	0113 244 1188	leeds@bbc.co.uk
ITV Yorkshire Television	0113 222 8750	

Voluntary Action Leeds also have a very information website and produce e-news bulletins twice monthly. These resources are very useful if you want to get a message out mainly to other voluntary sector groups. To submit information for the website or E-news please email news@val.org.uk. You can subscribe to E-News at http://www.val.org.uk.

For detailed information on newspapers, by area and publication, see the Newspaper Society database at http://www.nsdatabase.co.uk.

LEEDS INFRASTRUCTURE CONSORTIUM RESOURCE PACK

SECTION 2b– MARKETING – Marketing

Background

Leeds Infrastructure Consortium has produced an 8-pack series of resource materials to help local community and voluntary groups. For further information, please go to www.leeds-ic.org.uk.

1. BENEFITS OF MARKETING

Before you embark on a project or activity, you need to think about how to get your message across. The ways in which you use communication and promotional activities to convey the right messages to your target audience is called **marketing.** It is very important because it helps people form an image of your organisation - who you work with and their needs. How you portray your image can affect the demand for your services, the level of support from the local community and funding for your work.

Many people think about marketing as relating only to a specific project or activity and so use it only "from time to time". Marketing is so important that it should, in fact, be a key and ongoing part of your ongoing activities. But why, what are the benefits?

Reaching and attracting new people. Marketing your community group and the work it does can attract new people to your group in a number of capacities - volunteers, members, donors, service users or activity participants.

Reaching different "target audiences". A thoughtful campaign can help you reach new groups of people. They could be different age groups, multicultural groups, interest groups, etc. This benefits your group by helping it grow and promoting diversity and new perspectives in your organisation. This in turn can energise your group - making it more attractive to further prospective new members, and making it more representative of the community it caters for.

Staying in touch with current friends. It can be easy for groups to overlook the fact that they need to keep marketing to existing "friends" as well as looking to attract new ones. Your group should start with contacting existing contacts before it starts marketing to potential new ones.

Building legitimacy. Good marketing helps your group become more visible in the public eye. When you are more visible and well-known to many, your community profile strengthens.

Building confidence. You need to show current supporters that you are doing what you have promised. Donors, in particular, need re-assurance that your group is committed to using their money in responsible ways. People generally prefer to give money to those who they trust. Volunteers and members want to be part of a group that is committed to achieving its stated aims.

Fostering goodwill. Positive public feelings can also result from an increased public profile - achievable through effective marketing. But even if your group is in the news for negative reasons, good marketing can neutralise these feelings or at least make the public more willing to listen to any explanations or counter points-of-view you may have.

Spreading knowledge. If your community group sees part of its role as educating the community about a cause, issue or problem in society, marketing your group also means your message is getting marketed. This can bring groups much closer to achieving their goals.

2. IMAGE

There are a number of key factors that help create the "image" of your organisation and this is key to your strategy.

Name: this should be memorable, meaningful or descriptive and, if at all possible, concise! Many name changes by larger, national charities have enabled them to use their name to be more descriptive of the service they offer or to be easier to remember. A good example is when the Marriage Guidance Council became Relate, to illustrate that they are about supporting relationships as opposed to "just" being about marriage.

Logo: what image does this convey? Do you need one or can you just use the name of your organisation?

Strapline: many organisations have a simple strapline of a few words that helps describe their work such as the WRVS – positive about age, practical about life.

Colour. If you can afford to use colour in your name / logo, stick to the same one so that people begin to associate the colour with your organisation.

Creating an image for your group is about much more than a name, logo and colour scheme, it also includes how you appear when people make contact with you. Don't forget things like:

- Ensuring phone calls are always answered, even if by an answering machine
- Answer phone messages should be friendly and informative
- Your reception area / meeting rooms should be clean & welcoming
- Be polite and friendly to visitors at all times
- Have information about your organisation in the waiting area – use this to blow your own trumpet by putting up certificates, thank you letters, press coverage etc
- Answer post and email promptly, even if only with a "holding reply" until you have time to fully deal with the request
- Avoid jargon

3. MARKETING OBJECTIVES / STRATEGY

A simple marketing strategy will show how you intend to promote your services / activities / events by answering the following key questions:

- Audience - who is likely to be interested in your work?
- Objectives – what do you want to achieve through your marketing?
- Process – who are you going to start marketing and who is going to do it?
- Message - what is it that you want to say / market?
- Means - how are you going to do it – posters, emails?

Audience

The first thing you need to do is identify your target audience(s) – who you want to get your message over to. This might be
- Users: young people, older people
- Professionals: those working in your field of interest such as health visitors, youth workers etc
- Volunteers: with specific skills or of a certain age / background
- Funders & potential funders: charities, companies, individual donors
- Members: people who specifically support your work

Each audience may need a different message and, in some cases, it will need presenting in a different format so it means something to them.

Objectives

You need to agree what your marketing objectives are so that you can determine what you need to do in order to meet them. You might want to:

- Increase the number of people your community group helps
- Reach and attract new people (volunteers, donors etc)
- Spread knowledge about what your organisation does and hopes to achieve
- Build credibility and links in the community for your organisation

In addition to this, the process of writing good marketing materials also helps you (as the organisation) to focus on your objectives and how you expect to achieve them.

Process

You need to agree a **budget** for your marketing activities as this will have a strong influence on what you can do.

Who is responsible for undertaking which tasks – a single individual or a group of people?

When does the marketing need to take place – there is little point advertising an event the day or even the week before it takes place, as this rarely gives people enough time to plan it into their diary. A good rule of thumb is to give 8-10 weeks notice, if possible.

4. CHOOSING YOUR MESSAGE

Your group will always have messages it wishes to get across. Sometimes this will be to tell people about the work of your group in general, other times it will be to advertise a specific event. Knowing what messages you want to convey is vital. Your community group needs to be able to determine those messages before it hits the media, designs the flyers or compiles its news release.

General messages can be classified as those which you want to convey most of the time. They will most likely relate to your group or organisation's underlying themes, motivations, values and attitudes. For example - the general messages a community-based sporting club might want to convey could relate to:

- Participation in sport
- Physical fitness and fun
- Teamwork
- Fair play and sportsmanship

You may already be very clear about these or you might want to get your members together for a bit of a brainstorm. You need to think about:

- Your activities, what your group does and why.
- Your beliefs, stances or philosophies.
- Your aims - what your group is striving to do or be.

Once these general themes or messages are clear, your group needs to make sure they are included in as many of your communications as possible - through any slogans or logos, in your letterhead, in a statement on your website, in any press releases or public stances your group takes. These general messages also need to be kept in mind and conveyed when you are trying to communicate a more specific message.

Specific messages are those you wish to convey that are directly related to a certain situation, activity, occasion or event relevant to your group or organisation. Using the sporting club example again, some different types of specific messages could be:

- A "join up now" or "buy a membership" message if on a membership drive or before the start of the season.
- An announcement on funding for a new development at the club's home ground, or the opening of such a facility.
- An announcement of other special club activities - camps, award nights, raffles, etc.

When conveying a specific message, you need to be very clear what the actual information is that you want to get out. You can use the basic steps below – Who, What, Why, Where & When.

- ***WHO*** are you trying to convey it to? (Current members, supporters or donors, to past contacts or to possible new contacts?)
- ***WHAT*** is the specific message you are trying to convey? (For example - your group's annual fundraising raffle or a successful funding application.)
- ***WHY*** are you conveying this message? (To encourage, recruit, gain support, raise funds, raise awareness, etc).
- ***WHERE/HOW*** are you going to convey this message (newspapers, other media, posters or fliers)? This question should be looked at in conjunction with the "WHO are you conveying it to" question, as there might be specific communications methods needed in order to reach your target audience.
- ***WHEN*** do you wish to communicate this message (Is there a specific timeline you are working to? Are there deadlines for your message, or is it news that has to be conveyed quickly for it to be meaningful?)

By working through these steps, your group or organisation should be able to work out the best way to convey your specific message - a way which not only reaches your target audience, but which also is a "good fit" with your group's general message.

5. WAYS OF MARKETING

Think about the different aspects of what you want to do and identify the most effective ways of communicating. Examples may include:

- Posters in Community Centres
- Fliers delivered to every home in the area
- Advert and / or articles in the local press
- A newsletter to promote your activities
- Taster events and Open Days
- Website, e-bulletins & Text Messages (mobile phones)

5.1 Free marketing

Not everyone has a big budget for marketing – or any budget at all! Here are some things you can do for free.

Word of Mouth/Name Dropping. This is a great place to start when it comes to marketing your group for free. Both involve your group – its members, supporters, donors, helpers, volunteers and stakeholders – spreading the word about your group and what it does through speaking to people and dropping your group's name into conversation.

Community Service Announcements. Radio and television stations often donate time to allow community groups and not-for-profits to "advertise" themselves for free. This can be an effective way of getting your group some free exposure in the electronic media.

Community Listings in local Newspapers. Many major newspapers have a community calendar or upcoming events listing or a What's On section. This is an option that is often overlooked, but it shouldn't be – it is cheaper than an advertisement and conveys all the information you need to a wide number of readers. It also appeals to an important target audience – people looking for things to do.

Links through other People's Websites. Your group could talk to similar organisations or local businesses to include your contact details on their websites. Those details could simply be a listing of contact information at the site, or actual links to your web page or e-mail contact. These sorts of links and referrals are free, but your group could be asked to reciprocate and include a link to the business or other group in return.

Let your E-Mail Market your Event. Look at your e-mail signature – if you send out an email, does your next event or activity get a plug?

Social Media. Facebook and Twitter are gaining in popularity and are a really good way of reaching a larger audience. In Leeds you can get help by contacting Leeds Social Media Surgeries – a free monthly drop-in advice session for community and voluntary groups. Go to www.socialmediasurgery.com for more information.

5.2 Low cost marketing

Adverts / Posters

There is a rule known as AIDA when preparing adverts:

A attract **Attention,** be eye-catching
I arouse **Interes**t in your product or service
D promote **Desire** for your product or service
A be persuasive enough to promote **Action**

First list the information that you need to include. A simple suggestion is to look at the 5 W's – Who, What, Why, Where and When – and include these details. If you are advertising the performance of a local theatre group, you need to include details such as the date, times, and location of the play along with its title and ticket prices, together with a phone number to call for tickets. If it is a fundraising event, you need to make sure that people know the cause/charity that is being supported.

Posters usually look good with one large graphic element that attracts the eye – perhaps a black and white drawing, a dramatic photograph, a diagram or some abstract design.

Then decide on the colour theme. If you can afford to print the text and image in colour, then this is often most effective on a simple, plain, white background. It also means it is easy to print directly from your printer, if you are doing the printing in-house. If you can only print in black ink, then perhaps you can make the poster more eye-catching by buying some brighter, coloured paper to print onto. Be very careful about printing words on top of pictures as they often become very difficult to read. In these cases it is often best to make the text white or a contrasting colour to the image behind it so that it stands out more.

The layout is also very important. Research has identified that people read adverts in a particular order by following the eyepath. First they look at the picture, then the headline. They then look in the bottom right hand corner (so site the name and logo of your organisation here). Sometimes they stop here and look no further but, if they read more, they then go to the caption on the picture, other illustrations and headings and then they read the body of the text.

Remember that the aim of the poster is to draw people's attention to it so make sure that:

The words / writing are big enough to read
The font used is easy to read, try to avoid too much fancy script
The layout is attractive and the final product encourages you to read it

Decide how you are going to print it. If you have a budget, you may be able to work with professional printers / designers to get the posters done. If you only have a small budget you are likely to be producing it in-house off your own printer so you may choose black print on coloured paper.

You also need to think about where you are going to display them - schools, libraries, community centres, windows of homes of members, local shop windows. This will determine the size of your poster. Most are A4 in size as they are easy to print off a home printer and can fit onto notice boards, in windows etc more easily.

Invitations

Before creating your invitation you will need to take into account how many invites you need to send out, the theme you are using (if any) and whether you are hand delivering, posting or emailing your invitations.

Make a list of all of the information that needs to be included on your invitation. This needs to provide your guests with enough information to feel prepared for your party or gathering.

- Names of organisation or hosts.
- Type of event (birthday party, community event, meeting, fundraising event, etc.).
- Place, Date, Time.
- RSVP date and phone number.
- Any special dress requirements from black-tie to bathing suits.
- Be specific about who is invited, whether addressee only, with guest, or with family members.
- If guests are not from your local area, include a map to the location of the event.
- Send anywhere from 8 - 2 weeks in advance depending on formality of occasion. As a rule of thumb the more formal, the longer the lead-in time needed.

If you are using Microsoft Word you can select one of the ready-made invitation design templates. On the main menu click "File" and then "New" and then "templates on Office online". You can then select any option i.e. "Invitation Cards", download your preferred design and enter the details for your event. You can download a huge variety of templates and use them like this. Some groups use Microsoft Publisher which is desk-top publishing software that is quite easy to use. Or you can just simply use Microsoft Word and design your own invitation, insert images / pictures, change the font and add borders, too.

When you have finished, proof and finalise the invitation. You can print the document on paper, card or send it by email. Bear in mind that if you have done an invitation using a programme like Publisher, some people may not be able to open your invitation unless you save the document as a different file type. You can download free pdf software (www.pdf995.com) and use this to convert a Microsoft Publisher file to a pdf file that most people should be able to open, as long as they have the right software.

LEEDS INFRASTRUCTURE CONSORTIUM RESOURCE PACK

SECTION 3 - FINANCE

Introduction

This section on **Finance** is part of an 8-pack series of resource materials that has been produced by the Leeds Infrastructure Consortium. For further information, please go to www.leeds-ic.org.uk.

Finance

Finance is an absolutely vital element for any voluntary or community organisation to be effective. Organisations of all sizes need to make sure that they have an effective financial system in place that is appropriate for the size of their organisation. This is needed so that your management committee, your members, the general public and any funders know that you are operating legally and effectively. Many funders, for instance, will ask to see your accounts or income/expenditure details before they consider offering you a grant.

We have produced a short guide (section 3a) that talks about the four foundation stones of good financial management

- Planning
- Procedures
- Recording
- Reporting

LEEDS INFRASTRUCTURE CONSORTIUM RESOURCE PACK

SECTION 3a – FINANCE GUIDE

Introduction

This section is part of an 8-pack series of resource materials that has been produced by the Leeds Infrastructure Consortium. For further information, please go to www.leeds-ic.org.uk.

1. PLANNING

Whatever size your organisation is, you need to have a plan of what you are going to do. When you express this in terms of money, it is called a budget. There are different sorts of budget; for example, if you are applying for funding for a particular activity, this would be a project budget. This may be one part of the whole organisation's budget. Ideally the budget is prepared, reviewed and approved by the management committee on (a minimum of) an annual basis, before the new financial year starts.

The budget needs to include all income and expenditure items.

- Income can include: grants (from a range of organisations); subscriptions (if you charge members an annual fee, for instance); donations; fees for services; income from fundraising events and activities; bank interest.
- Expenditure includes: staffing / sessional staff; premises and utilities (rent, rates, heat and light, telephone); promotion and publicity (postage, printing, stationery); travel & transport; volunteer expenses; training; book-keeping & payroll. You also need to include any capital costs you may have for office and computer equipment, for instance.

For a template budget proforma produced by WYCAS, go to www.wycas.org.uk/UserFiles/File/Finance_Resource_Pack/Budget_proforma.xlsx.

2. PROCEDURES

This includes who will do what, when and how it will be done.

The first important rule is that the organisation's money should be kept separately and this usually means having its own bank account. Many banks offer free banking to community organisations. You will need to sign a Bank Mandate and provide sample signatures. It is usual (and good practice) that two signatures are required on each cheque.

Roles within the organisation need to be well defined, and the Treasurer's role is important for financial management. Although the entire management committee is responsible for financial management, the treasurer needs to ensure that recording and reporting procedures are in place, so that the management committee understands the organisation's financial position.

Financial rules are also needed to guide individuals on which expenses can be claimed, who can authorise payments and to ensure that error and fraud are prevented.

A template of financial rules is available on WYCAS' Good Practice Guide at www.wycas.org.uk/UserFiles/File/Good_Practice_Guides/GPG_No_2_Financial_Procedures.pdf

3. RECORDING

The organisation is responsible for looking after its money and, for that reason, needs to record the money in and money out transactions. This will allow a picture to be built up of income and expenditure over a period. This can be compared to the budget during the course of the year as well as informing the annual accounts statement.

There are many different ways of running an accounting system, for example, writing details in a book, or on the computer in an excel spreadsheet. Larger organisations often use specialised software such as SAGE or Quickbooks.

The key details you need to include (for both bank and petty cash transactions) are:

- Date
- Income: the amount, where it came from i.e. the source, what it was for and the receipt number you have allocated
- Expenditure: amount, what it was for and a reference back to the original invoice or expenditure voucher.
- If you have received funding (e.g. a grant) for a specific purpose this is called a restricted fund, and you will need to use a code, or way of identifying these transactions in your records.

In addition to keeping a record as above, you will also need to find a way of keeping the receipts and invoices that provide the proof that you have received / spent the money you have recorded. Many funders will ask for copies of these (or, on occasions, the original receipts).

This record should be reconciled to (matched back to) your bank statement (or the balance in your petty cash tin) as a check for errors and uncashed cheques.

For a schematic diagram showing the importance of the cashbook and how reports flow from it please see section 3b.

A working copy of WYCAS' Excel cashbook is available at www.wycas.org.uk/UserFiles/File/Finance_Resource_Pack/WYCAS_Cashbook_Template.xls

An ideal example of a cashbook is available from WYCAS at www.wycas.org.uk/UserFiles/File/Finance_Resource_Pack/Ideal_cashbook.xlsx

4. REPORTING

Management accounts can and should be used in the course of the year to show the management committee how actual financial activity compares to the budget or just to inform planning decisions. The information for these reports should be easy to extract from the recording system at any point in time.

You may also need to produce reports on particular restricted funds – for example, when you need to complete a monitoring return.

The constitutions of voluntary and community organisations almost always state that the management committee must produce annual accounts.

At the end of the organisation's financial year it should produce its financial statements in 2 parts: the first part showing the story of what has been received in and paid out in the course of the year and the second part showing the snapshot of the balances held at the year end. This should be done using the recorded information.

The accounts can be prepared yourself, or you can use an accountant to prepare them for you – for a fee. If you are unsure of what you need to do or the format of the financial statements, help can be found at www.wycas.org.uk (see further information).

Independent Examination / Audit

There may be a need to have the organisation's accounts checked by a suitably qualified person independent of the organisation. This may be stated in the constitution, or a funder may require it, or (if a charity) the Charity Commission may require it.

An independent examination is a simpler form of scrutiny than an audit but it still provides trustees, funders, beneficiaries, stakeholders and the public with an assurance that the accounts of the charity have been reviewed by an independent person.

Only very large organisations or those where it specifically states it in their constitution are required to have a full audit.

Further information

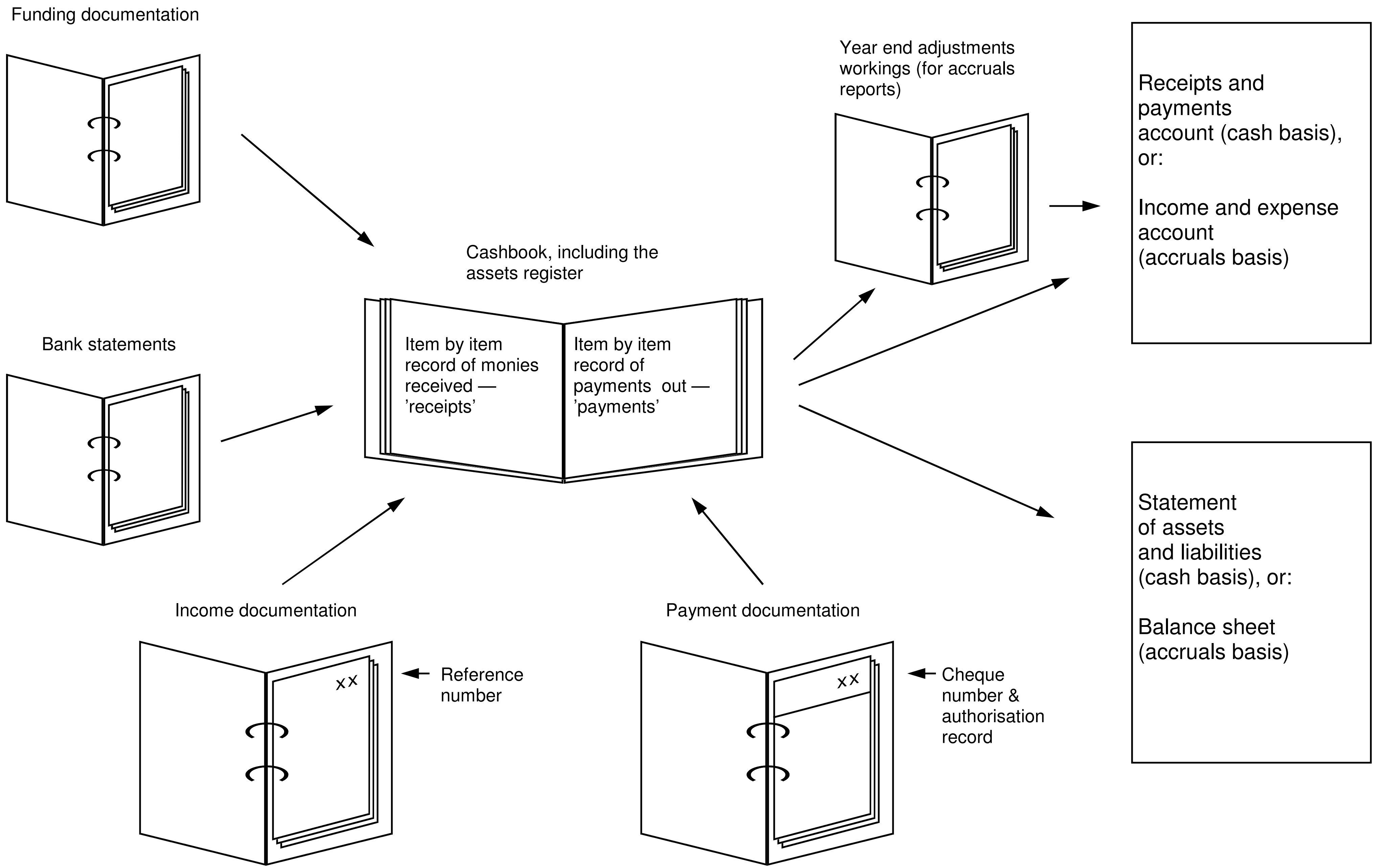
In Leeds we are fortunate to have an excellent organisation called WYCAS – West Yorkshire Community Accounting Service. It is based at Stringer House in Hunslet and provides a range of financial support for organisations including: information, training, advice, good practice guides, bookkeeping and accounts preparation and independent examination. A large amount of information is immediately accessible on www.wycas.org.uk.

WYCAS has a dedicated Community Accountant for organisations based in Leeds so she should be your first port of call – Claire Welling on 0113 270 6291 or email claire.welling@wycas.org.uk.

One useful WYCAS publication is called "Money Management for Community Groups". This is a user friendly, jargon free guide to financial management and accounting for small charities and community organisations. It can be obtained free of charge from WYCAS through their website, or telephone 0113 270 6291.

Alternatively follow these links to the 4 sections of the booklet:
Budgeting www.wycas.org.uk/UserFiles/File/Finance_Resource_Pack/Resource_pack_pt_1.pdf
Recording www.wycas.org.uk/UserFiles/File/Finance_Resource_Pack/Resource_pack_pt_2.pdf
Rules www.wycas.org.uk/UserFiles/File/Finance_Resource_Pack/resource_pack_part_3.pdf
Reporting www.wycas.org.uk/UserFiles/File/Finance_Resource_Pack/resource_pack_part_4.pdf

An example of the books and records you need to be keeping that support the financial reports that you produce



LEEDS INFRASTRUCTURE CONSORTIUM RESOURCE PACK

SECTION 4 – NETWORKS AND PARTNERSHIPS

Introduction

This section on **Networks and Partnerships** is part of an 8-pack series of resource materials that has been produced by the Leeds Infrastructure Consortium. For further information, please go to www.leeds-ic.org.uk.

Value of Networks and Partnerships

We believe in the concept of "no man is an island" and would warmly encourage groups to find out about relevant networks and partnerships in your area of work – be that geographically based, or themed based (i.e. older people, young people etc).

We have produced a range of further information for you to consider.

Local Networks

A helpful guide to the local networks can be found in section 4a. This includes key alliances and organisations such as:

- Leeds Initiative
- Third Sector Leeds
- Leeds Infrastructure Consortium

and the following forums

- BME Network
- Children, Young People and Families Services Forum
- Environment Forum
- Third Sector Health and Well Being Network
- Tenfold (was Learning Disabilities Forum)
- Leeds Older People's Forum
- Physical and Sensory Impairment Network (PSI Network)
- Volition

Benefits of collaboration

The Charity Commission Collaboration checklist can be found in section 4b or by visiting http://www.charity-commission.gov.uk/library/chkcolab.pdf.

For the Charity Commission's report on the benefits of collaboration please visit http://www.charity-commission.gov.uk/library/guidance/rs24text.pdf

For the Charity Commission Collaboration toolkit please visit the Commission's website at www.charity-commission.gov.uk/library/colltoolkit.pdf

There is a wealth of information about the benefits of partnerships and collaboration (and even merger) on organisations on the BASSAC website – www.bassac.org.uk. Their strapline is very clear about the potential benefits – "we believe that by working together, organisations can learn from each other and deliver their services more effectively."

LEEDS INFRASTRUCTURE CONSORTIUM RESOURCE PACK

SECTION 4a – GUIDE TO LOCAL NETWORKS

Introduction

This section on Networks and Partnerships is part of an 8-pack series of resource materials that has been produced by the Leeds Infrastructure Consortium. For further information, please go to www.leeds-ic.org.uk. This particular situation helps explain how partnerships work in Leeds.

1. KEY NETWORKS IN LEEDS

Leeds Initiative

The key "partnership" group is The Leeds Initiative, the city's local strategic partnership. Founded in 1990, its aim is to "bring together the public, private, community, voluntary and faith sectors to work together to achieve success, encourage improvement, and tackle and overcome problems for the benefit for all citizens now and in the future." The Leeds Initiative is also responsible for developing the "Vision for Leeds", the long-term plan for the city.

A new structure for the partnership will come into operation from April 2011. There will be a board and five strategic delivery partnership boards:
- Children and families
- Safer and stronger communities
- Sustainable economy and culture
- Regeneration
- Health and Well Being

www.leedsinitiative.org
0113 247 8989
info@leedsinitiative.org
Leeds Initiative, Civic Hall, Leeds LS1 1UR

Third Sector Leeds (TSL)

Third Sector Leeds is an alliance of voluntary and community organisations, charities, faith groups and social enterprises working in Leeds. It aims to be the point of engagement with the third sector in Leeds, working together to: develop third sector policies; engage with and influence decision makers and co-ordinate representation of the third sector on statutory partnerships and boards.

Membership comprises a number of networks across the city including: Advice Leeds, VCFS IYSS Forum, Children & Young People's Forum, Environment Forum, Older People's Forum, Learning Disabilities Forum; Physical & Sensory Impairment Network, Volition, Leeds Accommodation Forum, Leeds Faith Forum/Leeds Churches together in Mission; BME Network; Leeds Infrastructure Consortium. A number of specific infra-structure groups are also members in their own right including: Leeds Community Foundation; Groundwork; Learning Partnerships; St Anne's; re'new; Leeds Housing Concern; Voluntary Action – Leeds; and Leeds Voice.

www.val.org.uk/page/about-tsl 0113 213 2592
david.smith@voice.org.uk Stringer House, 34 Lupton Street, Hunslet, LEEDS, LS10 2QW

Leeds Infrastructure Consortium (LIC)

LIC is a support network of infrastructure organisations in Leeds who together provide the structure for the third sector to grow. The members of LIC work together to support front-line voluntary and community sector organisations through development, partnerships, networking, information and representation.

www.leeds-ic.org.uk
email: richard.jackson@val.org.uk
Tel 0113 297 7920
Stringer House, 34 Lupton Street, Leeds LS10 2QW

2. KEY FORUMS / NETWORKS IN LEEDS

Support for organisations working to deliver services to, and for, specific groups of people in Leeds is available across a range of service areas, for example:

BME Network

The BME Network's mission is to develop and strengthen a network of BME voluntary and community groups in Leeds focusing on enabling and promoting BME representation at all levels in the city. It is the Network that provides BME sector representation on the Third Sector Leeds Leadership group. It provides a range of services including:

- Initial point of contact for all BME groups seeking support and development
- Health check
- Referral to appropriate organisation e.g. VA-L, Voice, WYCAS, PERS, LCF or others
- Guidance to achieve quality marks e.g. Quality First
- Events
- Co-ordination of BME networks at West Yorkshire level

Key contacts: David Odonukwe / Annette Morris 0113 213 2599

Children, Young People and Families Services Forum

This supports organisations that work with, deliver or support children, young people and their families. It provides infrastructure support, information and opportunities to all Voluntary Community and Faith Sector organisations that deliver children's services from 0-19yrs or 25years if they have additional or special needs. The Forum currently has 350 members from varying organisations across the city and meets on a six weekly basis. It also has a coordinating group of 35 key organisations consisting of the elected representatives and additional organisations who find this group of benefit. For more information email jeannette.morris-boam@leedsvoice.org.uk or ring 0113 213 2590.

Environment Forum

Brings together local community groups including those improving the environment and neighbourhoods in Leeds and local branches of national groups campaigning on global issues. It helps them to influence environmental strategy and policy in Leeds and beyond. The neighbourhood element of the co-ordinator's role involves promoting and supporting the work of groups working to improve local environments and encouraging working in partnership to improve environments at a neighbourhood level as well as supporting VCFS groups to influence locality-based environmental decision-making in each of the three 'wedges' of Leeds.
For more information contact becki.tighe@leedsvoice.org.uk

Third Sector Health and Well Being Network

A network of 300 organisations impacting on the health and wellbeing of the population of Leeds. The aim of the Health Forum is to contribute towards improving health and wellbeing in Leeds by facilitating a network that enables the VCFS to play a meaningful role in strategic decision-making and delivery of health services. For more information email razwanah.alam@leedsvoice.org.uk

__Tenfold – (Leeds Voluntary Sector Learning Disability Forum)__
Tenfold supports 67 member organisations from the third sector, who either provide services for, or who represent, people with learning disabilities. The main aims of Tenfold are to bring about improvements in the lives of learning disabled people by providing excellent, relevant and timely information; representing its members with a strong and strategic voice; driving positive change (research and policy work, campaigning, public relations). Main strategic groups:

- Learning Disability Executive
- Learning Disability Partnership Board
- Adult Safeguarding Group

For more information visit www.tenfold.org.uk, ring 07576 952527 or email info@tenfold.org.uk

__Leeds Older People's Forum__
The aim of LOPF is to ensure that all older people in Leeds achieve and enjoy a good quality of life. It has a membership of 118 voluntary sector organisations working with older people across Leeds, including the Neighbourhood Network Schemes. The Forum supports its members and ensures the voluntary sector is involved in planning, developing and managing services for older people in Leeds. For more information visit www.opforum.org.uk, email info@opforum.org.uk ring 0113 244 1697 or write to Leeds Older People's Forum, Suite 17D, Joseph's Well, Hannover Walk, Westgate, Leeds LS3 1AB

__Physical and Sensory Impairment Network (PSI Network)__
A network of 54 voluntary, community and faith groups of disabled people, and of groups/organisations providing services for people primarily with physical and sensory impairments. They work together to share information, improve communication, and represent the interests and concerns of disabled people. For more information contact Ann Crossland on 0113 297 7942 or email ann.crossland@val.org.uk or visit www.val.org.uk/page/psinetwork

__Volition__
Volition is an alliance of voluntary sector organisations that either provide mental health services for, or work with people who have mental health needs. They have over 80 members working in health, social care, advocacy, housing, the arts, community development, counselling and therapy & carers' support. Volition's aim is to: promote networking & partnership across the voluntary sector and with other sectors; provide information about and for the sector; and ensure that the mental health voluntary sector is represented and able to participate in strategic planning both in Leeds and nationally. For more information contact: www.volition.org.uk, email info@volition.org.uk, ring 0113 274 9585 or write to 26 St Michael's Road, Headingley Leeds LS6 3AW

3. KEY REGIONAL FORUMS / NETWORKS

__Involve (formerly the Yorkshire & the Humber Forum)__

Provides a regional voice for the voluntary and community sector (VCS) in Yorkshire and the Humber. It is a member led network of networks with over 100 members linking to more than 20,000 front line groups. Involve brings together voluntary and community sector organisations to ensure that the sector has the right support and structures to contribute to regional activity. Involve believes that by placing the voluntary and community sector at the heart of the region, we can create an inclusive and vibrant region – with a high quality of life for all. Involve, Suite D10, Joseph's Well, Hanover Walk, Leeds LS3 1AB Tel: 0113 394 2300 Email: office@involveyorkshirehumber.org.uk

WYLDA

The voluntary and community sector support and development consortium for West Yorkshire. Its mission is to ensure that sustainable and appropriate support and development is in place in West Yorkshire to meet the needs of all frontline voluntary and community groups. In order to carry out activities and work towards our mission and aims, WYLDA makes use of a district-level infrastructure consortia in the five districts of West Yorkshire (Bradford, Calderdale, Kirklees, Leeds and Wakefield), as well as a number of sub-groups, project groups, and links with other groups.
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LEEDS INFRASTRUCTURE CONSORTIUM RESOURCE PACK

SECTION 5 - FUNDING

Introduction

This section on **Funding** is part of an 8-pack series of resource materials that has been produced by the Leeds Infrastructure Consortium. For further information, please go to www.leeds-ic.org.uk.

Funding Advice and Support

Having appropriate resources to deliver services is very important for running an effective and successful charitable organisation. We have produced a brief guide that covers a range of areas that you need to consider to secure financial resources including:

1. Planning
2. Different ways to generate income
3. Applying for funding to Trusts and Funders.

The guide intends to provide basic information you will need to consider and it is not intended to be a definitive and exhaustive document on funding. It can be found in section 5a.

Other Help

Fit4Funding: the main point of reference for detailed advice about funding. It provides: a useful website with detailed information, access to specialist grants databases where you can search for funders, a calendar with deadlines for various programmes. They also provide training (directly and via Voluntary Action Leeds) and a newsletter (for which there is a subscription fee). www.fit4funding.org.uk

Voluntary Action Leeds: offers introduction to fundraising courses; and access to one of the grants databases called FunderFinder. They also have a small grants advice worker, Kathy Faulks, who can provide some advice. www.val.org.uk.

Leeds Community Foundation: a range of grants available for local groups. Go to www.leedscommunityfoundation.org.uk/grant-making.

Larger groups may be interested in commissioning opportunities. Information can be found both on the **Fit4Funding** website (www.fit4funding.org.uk) and via **Leeds Voice** who manage the Supporting Links to Commissioning project. www.leedsvoice.org.uk/strategyteam/commlinks.html

NCVO (National Council for Voluntary Organisations) also have a useful section on funding: http://www.ncvo-vol.org.uk/advice-support/funding-finance

Funding Central: a national website that provides information on a range of fundraising sources. www.fundingcentral.org.uk

Other useful sites include:
- www.tax-effective-giving.org.uk: how to raise funds in a tax efficient way
- www.how2fundraise.org: useful hints and tips on how to fundraise
- www.fundraising.co.uk: more information successful fundraising

LEEDS INFRASTRUCTURE CONSORTIUM RESOURCE PACK

SECTION 5a – FUNDING RESOURCE PACK

Introduction

This section on **Funding** is part of an 8-pack series of resource materials that has been produced by the Leeds Infrastructure Consortium. For further information, please go to www.leeds-ic.org.uk.

This section, 5a, is a more detailed guide to funding.

1. PLANNING

Before starting any activities to generate income your group needs to agree a plan. This should embody the overall aims and objectives of your group and detail:

- the scope of the activities you intend to fundraise for
- what you will do to source the money
- how you intend to do it
- who will be responsible
- timeframe to raise the income

It is very important that the funding plan is agreed by the group management committee or board of trustees and the people involved in the delivery of the activities including staff/volunteers. This will ensure that you gather as many ideas as possible at the same time as engaging group members to participate in the fundraising activities.

The success of the funding plan is also underpinned by good financial management and planning. Your group also needs to have good systems in place to be ready to ask for funding, receive it, manage it, account for it and report back to any stake holders you need to including group members, service users, the local community, donors, sponsors and/or funders.

Having a funding plan will give an “edge” to your group when seeking and securing funding for your group. Leeds Community Foundation estimates that, out of a sample of 100 projects that applied for funding, 30% didn’t have a budget for the year, 40% didn’t have an annual business plan and over 70% didn’t have a funding plan.

Drafting the Plan

A funding plan shouldn’t be too demanding or complicated for your group to produce. It needs to reflect the level and complexity of your organisation and the activities and services your group provides. Above all, the plan should be practical and useful for the people delivering it.

Finalising the plan will probably take at least 2-3 sessions. Whatever form, sample or tool you decide to use, you should consider the following check list:

a. Do you have a clear mission and long-term purpose? Does your constitution/governing document cover the activity you intend to do (consult your constitution/governing document)?
b. Do you have an annual work plan with clear goals and objectives (list of activities and services you deliver that are in line with the aims and objectives of your group)?
c. Are your management committee/board of trustees, staff/volunteers committed to and involved with the group?

d. Do you have funding knowledge and experience on the committee/staff/volunteers? If not can you get advice from someone who has, or perhaps train someone up to gain knowledge and skills?
e. Do you have an annual budget with details of all income and expenditure of the activities/services your group intends to deliver?
f. What system are you going to use to track applications, donations, and any fundraising activity – written, computerised, spreadsheet?
g. Details of key activities/services your group will deliver that explain WHAT you want to do, WHEN, WHERE, WHY, GOAL, HOW MUCH

The Plan

There are different templates available; a very simple model would look like this:

Activity Plan					
Group Name	The ABC Support Group				
Aim and Purpose of Group	To provide healthy activities for people in Beeston				
Period covered by plan	April 2011 to April 2012				
Activity /service (What)	**When**	**Where**	**Why**	**Goal**	**How Much**
Running healthy living information sessions	1 a month x 10 months starting in April 2011	In the local community centre	To improve the local health of people in Beeston	10 people to each session	£25 a month room hire; £30 a month tutor costs; £15 a month refreshments
Produce a written guide to local services	To be ready by September 2011	To hand out and have in libraries	Because our members have said they want it	Produce and distribute 100 copies	£100 printing costs
Have a celebration event / meal	To take place in October 2011	In the local community centre	To raise profile of our group and bring local people together	50 people to attend each session	£200 for room hire, £300 for refreshments, £50 for marketing flier

Once the activity plan has been developed, you can produce a budget for the year (see section 3 on Financial management). This needs to show how much you need to raise and how you will raise it. Based on the above example, you need to raise £70 a month x 10 months for the healthy living sessions, £100 for the leaflets and £550 for the event so your target is £1,350.

You can then decide if you can cover these costs from money you already have in the bank, from contributions from members or if you have to seek funding elsewhere. These are explored further below.

Do's and Don'ts of Funding Plan

Do's

1. Agree funding plan with all group members, review results regularly and update if necessary.
2. Share fundraising responsibilities between members of the group and state clearly who is responsible for each activity
3. Be aware of the strengths and weaknesses of your group and focus on the activities you can realistically deliver
4. Have clear fundraising targets. Make sure your fundraising activities have responses to what, when, how, who and why
5. Have a wide range of different sources of income to support your work and tap on local resources available to your group. Remember very few funders/donors will provide ongoing or indefinite funding.

Don'ts

1. Impose a plan on the group
2. Rely on one source of funding to provide all income for your group
3. Delegate all the fundraising responsibilities to one person
4. Set unrealistic targets: being over/under ambitious

A really useful guide on how to write a fundraising plan can be found at:
http://www.fit4funding.org.uk/assets/uploads/files/fundraising_strategy.pdf

2. SOURCES OF INCOME

It is always best practice not to start an activity until you know where the money is coming from or, if possible, have it all in the bank already.

There are different ways to obtain money to cover your activities. Having a broader range of income sources is better than relying on one. We suggest you consider the following:

Charging

If you are running events or activities, they don't have to be free, you can always make a small charge to people who are attending. If you have a way of getting people to pay in advance, this is better. If an event is costing you £500 and you hope that 100 people will each come and pay £5, but you only get 50 people there, it means you may end up losing £250.

Donations

Do you know local people / organisations who might make a donation towards your work – individuals, companies for instance? If you want to plan a bigger project, you might want to run a number of events that are specifically to raise money – collections in supermarkets, sponsored events or a fundraising meal. You could set up a membership scheme and get people to donate a specific amount of money a month, quarter or year.

Grants

These can be very important sources of funding for voluntary and community organisations. Grants are sometimes available from the government (central and local), or from grant-making trusts and organisations. To apply for a grant your group will usually have to write a proposal or complete an application form. Most requests are to fund a specific project as opposed to ongoing running costs and, if successful, you will then need to make sure you manage the grant and the project carefully. Finding suitable grants and writing bids or completing application forms takes time and the number of sources for grant funding are decreasing so groups are advised not to rely solely on grants. See section 3 below for further details.

Contracts and Commissioning

In recent years some funders (especially local and central government and other public sector organisations) have stopped giving grants in favour of offering money through a commissioning process. With a grant you apply to the funder for an activity or event that you want to run, and they decide if they will fund it. With commissioning it tends to be the funder that decides what activities they want to support, or what outcomes they would like to achieve, and they then ask organisations to submit a bid outlining why your group is the best one to do the work. If you are successful, you then have to sign a contract to confirm you will deliver the activities. The application and decision-making process is longer and more complex and not something that all groups can cope with. For further details on commissioning visit

http://leedsvoice.org.uk/supporting-links-to-commissioning/

http://www.fit4funding.org.uk/commissioning/introduction/

Trading

This refers to "the generation of income through the provision of goods and services to the general public". It has become an important source of funding for charities and community groups and has led to the growth of "social enterprises" (organisations that trade for social purposes). Charities and community groups are allowed to trade (if their governing documents allow it) although there are some restrictions on what you can do. The Charity Commission provides extensive information on the legal aspects and we recommend you seek advice to make sure your group would comply with law, taxation and you are aware of legal responsibilities. For further details please visit http://www.charity-commission.gov.uk/publications/cc35.aspx.

Activities for trading can range from car boot sales, sales for charity on eBay to running a community café, charity shop, or printing and selling a magazine.

For further information on different sources of funding please visit:
http://www.ncvo-vol.org.uk/advice-support/funding-finance/income-sources

3. APPLYING TO FUNDERS

Grants and Awards are a very important source of funding for voluntary and community organisations. To begin with you need **your plan** (as in section 1 above).

Most funders ask similar questions:

- What does your group do and is it formally constituted as a group / charity?
- What activity/service you want them to fund specifically?
- When/where the activity will take place? How your group will deliver it? Who will benefit?
- Why you want to do it – is there a need, have you done any consultation?
- What will the benefits be – will it improve the skills of individuals, clean up an area of Leeds, help raise you profile, improve the health and wellbeing of local people?
- How will you measure the benefits – asking people, getting them to fill in questionnaire for instance?
- What is the cost of the event / activity / programme and will it offer good value for money?
- Is it a one-off event/ activity or ongoing? If the latter, what are your plans for funding it once the grant you are applying for is finished?

You may have answered all these questions in your annual plan but, if not, it is worthwhile sitting down with your committee members and answering the questions together. This is a very good way of making sure your planned activity or programme is the right thing to do to target the people you want to help. It also means you don't just make up an activity just because there appears to be money available for it, without knowing that there is a real need for it.

Then you need to **research** the potential funders (see section below). When looking to see if your project is eligible, look at areas such as:

- What kind of organisations do they fund i.e. registered charities only, community associations, sport clubs, social enterprises,
- What type of projects do they support i.e. children and young people, environment, new projects only, ongoing, based in South Leeds only, etc
- What costs will they cover: ongoing costs and overheads, capital costs only, etc

They are usually very clear in what they can and cannot fund and there is little point applying for a grant unless you meet the criteria. If they say "we focus on supporting projects in South Leeds", and you are in North Leeds, you have very little chances of success. If they specifically say they don't fund applications for capital items, then you are wasting time and the cost of a stamp by even applying for a computer. Do read their guidelines carefully.

Then look at the **application details** – is there a form, do you need to ring first and request a pack, do they offer help? When is the **deadline** for when they need all the information by?

Some funders will say you can contact them first, by phone, to check your project is eligible. If they offer this we warmly recommend you do get in touch as this can allow you to explain what you want to do and they often provide helpful guidance and advice. Sometimes they will suggest you don't apply and, although disappointing, this can save you time and money! You can ask them to: explain more about their criteria and priorities and explain any questions you are not sure about on the form.

Now it is time to **apply**. You often only have one chance to submit a really good application and, if you are not successful, you often have to wait a further 12 months before you can apply again so it is worthwhile spending time in making sure your first attempt is a good one.

1. Before you answer any question or draft your proposal, read the grants criteria carefully and fully. Read the application form first and plan what information you will put in each section or you will end up repeating yourself or providing the wrong answers in different sections.
2. Provide clear, concise answers and do not use jargon or words or the funder might not understand what you mean and this can count against your application. If you want to take a group of children for a day out to the seaside, just say this and stress the benefits. Do not write – the trip will deliver on all the outcomes of the Every Child Matters agenda and lead to the long-term amelioration of healthcare….
3. Make sure your budget shows what you will spend the grant on and is linked to your description of what you want to do. It needs to add up. Don't be tempted to ask for more or less than is necessary.
4. Make sure you have covered every section – incomplete application forms are one of the main reasons that grant applications are refused.

If the guidelines ask for a letter (and don't give you any specific questions to answer), we recommend that this is no longer than 2 pages. The suggested structure would be:

- What is your group called, what does it do, what legal status does it have (constituted group, charity etc)?
- What is the activity you want to do – who will benefit, where and when will it take place?
- Why do you want to do it – what is the need?
- What will the outcomes / benefits be and how will you measure them?
- How much do you want – a brief budget breakdown should be sufficient (this can be included separately)?
- Have you raised any other funding yet?

Don't forget to see what other documents / information the funder might need. This is usually a copy of your governing document and recent accounts / income & expenditure. If they ask for this please make sure you include it with your application or explain why, if you cannot provide the information. Most funders will not consider the application until they have received all the details they need. However, beware of sending too much information!

Don't forget to keep a copy of the application, criteria and guidance for your records.

If you **don't receive funding** the funder may be able to give you feedback and you can use this to see how to improve on a future application. Many funders don't provide this feedback, however, and often the reason is just because they have received too many applications and not enough money.

If your application **is successful** you will usually get an offer letter, sometimes enclosing the cheque at the same time. Please do write and acknowledge the donation and say thank you. Recent research by Leeds Community Foundation shows that 65% of groups receiving a grant don't even bother to say thank you!

If there are any conditions attached to the grant, you usually have to meet those before they release the money. Try to do this as soon as you can to show that you are an efficient group.

If you experience problems in delivering the project, it is always best to let the funder know as soon as possible. They may be able to help and advise or let you alter what you are spending the grant on. If you do need to change your plans, do not just go ahead and do this without consulting the funder first. You have applied for a grant to do what you said you would do in the application and they may well ask for the money back if you do something different. It is usually easier to "fix" problems at an earlier stage than at the very last minute when you have to report back and risk returning the grant to the funder.

4. FURTHER INFORMATION

Fit4Funding: the main point of reference for detailed advice about funding. www.fit4funding.org.uk

Voluntary Action Leeds: offer introduction to fundraising courses; and access to one of the grants databases called FunderFinder. They also have a small grants advice worker, Kathy Faulks, who can provide some basic advice on funding. www.val.org.uk.

Leeds Community Foundation: a range of grants available for local groups. Go to www.leedscommunityfoundation.org.uk/grant-making.

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NCVO (National Council for Voluntary Organisations) also have a useful section on funding: http://www.ncvo-vol.org.uk/advice-support/funding-finance

Funding Central: a national website that provides information on a range of fundraising sources www.fundingcentral.org.uk

LEEDS INFRASTRUCTURE CONSORTIUM RESOURCE PACK

SECTION 6 – PLANNING

Introduction

This section on **Planning** is part of an 8-pack series of resource materials that has been produced by the Leeds Infrastructure Consortium. For further information, please go to www.leeds-ic.org.uk.

There are lots of elements involved in good planning but the ones we are going to highlight in this section are:

- How to write a simple business plan
- Health and Safety
- Risk Management
- Insurance

1. BUSINESS PLANNING

A business plan is a document that describes an organisation – what it does, what it aims to achieve and how this will be accomplished. A good business plan can help you apply for external funding, guide decision making, identify potential problems and measure your success.

The plan should include the following sections:

Executive summary
A summary of key points from your business plan, including highlights from each section

Business description
What your organisation does, the history of the organisation and the vision for the future

Products and services
A description of your products and services, what differentiates them from others' and any planned developments

Marketing and competitors
The size and target of your market, who else offers similar services and products, strategies for promoting your organisation

Management team and key personnel
The structure of your organisation, profiles of members of the management team and their skills and information regarding other personnel

Operational plan
The logistics of your organisation – your location, who owns your buildings, processes for providing your services, management information systems, IT systems and any planned developments

Financial forecast
Financial plans for the next three years, with detailed information for the next twelve months – cashflow forecasts, profit and loss accounts and balance sheets – and risk analysis.

For more detailed information on putting together a business plan visit Business Link's website at http://www.businesslink.gov.uk/bdotg/action/layer?topicId=1073869162

2. HEALTH AND SAFETY

Management committee members and trustees of charities are responsible for ensuring that the organisation is properly and legally managed. This includes complying with charity and other relevant laws and safeguarding money, property, people and reputation. Funders will want to know that your group is doing this, as their reputation may also suffer if something goes seriously wrong in a project they are funding.

In order to manage events and activities safely it is important to have effective Healthy & Safety systems in place. You may already have a Health & Safety Policy but this tends to focus on the needs of the people that operate or run an organisation and its premises rather than on the beneficiaries of the service provided. This means that many activities you provide are not covered in your organisation's Health & Safety Policy so you may need to look at developing additional systems.

A valuable tool is a Venue Health and Safety Check, which is a list of all the safety aspects that the worker needs to check before starting the activity and should be carried out for both indoor and outdoor venues. It can also be a check undertaken before booking a venue to ensure it meets the standards required.

Health and Safety Procedures should be prepared for all activities. They should be easy to read and designed so that anyone who takes on this activity will immediately understand what is required of them to ensure the activity is managed safely. Safety Procedures can also be prepared as a checklist, but unlike the venue Safety Check they should consider all aspects of managing an activity safely.

The following organisations can provide more information on health and safety related issues:

The Health and Safety Executive
Help line 0845 3450055. Web Site www.hse.gov.uk. There are several free leaflets giving clear and simple advice. Order publications from 01787 881165.

***The Health and Safety Handbook*:** This step-by-step guide is specially written for the voluntary sector, taking into account recent legislation. Checklists help you to write your own health and safety policy, covering volunteers and staff. Available from Directory of Social Change website www.dcs.org.uk

3. RISK MANAGEMENT

When you are running an organisation and planning activities you need to think about what might go wrong. This might be rain on the day of your fete, an accident, complaints about advice given or rejection of a grant application you are relying on. These are all examples of risks. You need to think about actions you can take to prevent or reduce the risk and deal with the consequences if it does happens. This is Risk Assessment and Management.

People often think of risk just in terms of health and safety, but it is far wider than this and includes anything that could have a significant impact on the organisation's governance, management, activities or reputation. Risk management does not require high levels of knowledge and technical skills. Like most aspects of good management it depends a lot on common sense and planning ahead.

The Management of Health and Safety at Work Regulations 1999 requires all organisations to do a risk assessment identifying risks to employees, clients, members of the public and anyone who comes onto the premises or uses its services. They must then draw up an action plan that shows the proposed control measures that will reduce the risks and/or minimise the impact.

Appendix 1 provides a sample Health and Safety Risk Assessment Process, suitable for a large event or a high-risk activity. For a simple activity, e.g. organising a jumble sale, a list of the identified risks and their control actions may be adequate.

4. INSURANCE

The types of insurance cover you need depend on how your organisation is set up, whether you have employees, run events, own a building etc. Shop around for insurance to find the best deal. Some companies offer specialist packages for the voluntary sector. Ask an Insurance Broker to find such a company for you.

Compulsory Insurance

- Employers Liability (if you employ staff – this should also cover volunteers)
- Road Traffic Insurance (if you run a vehicle)

Essential Insurance

- Buildings, Contents and Plate Glass windows
- Public Liability – This is very important as it protects the group from claims for injury, loss or damage. Make sure your policy explicitly includes volunteers and members.
- Special activities – to cover a short or one off activity not covered by other polices.
- Professional Indemnity – if you give advice or professional services.

If you own your own building then you will need buildings cover. Even if you only rent premises or hire them for a short period, you may need contents insurance.

If you have trustees then trustee liability insurance is available.

For information about insurance for events, see section 6b of this guide.

5. WHERE CAN I GET HELP OR FURTHER INFORMATION?

This information sheet is only a starting point. You may find it helpful to get further support and information to help you understand your legal responsibilities, carry out risk assessments and develop and write your policies and procedures.

Voluntary Action Leeds
Voluntary Action Leeds, Stringer House, 34 Lupton Street, Leeds LS10 2QW Tel 0113 297 7920

The Charity Commission
There is a help line on 0845 300 0218. You can download free copies from the website or ring 0870 333 0123 www.charity-commission.gov.uk.

- CC49 Charities and Insurance
- Charities and Risk Management

VolResource: www.volresource.org.uk this web site has lots of useful information on Risk Assessment, Health and Safety and Insurance for the Voluntary Sector. The site has details and links to other useful resources and sites.

Voluntary But Not Amateur: a guide to the law for voluntary organisations and community groups. Ruth Hayes and Jacki Reason. 7th Edition 2004. This covers relevant legislation including charity law, employment & finance law, Data Protection Act and more.

PERS – The Pay and Employment Rights Service – is a charity promoting good practice and employment. They support and train employers across Yorkshire and advise employees and offer consultancy, training, leaflets and factsheets. Telephone 01924 439381, email admin@pers.org.uk or visit www.pers.org.uk

APPENDIX 1 HEALTH AND SAFETY RISK ASSESSMENT PROCESS

A template for carrying out a health and safety risk assessment can be found below. You should involve staff, volunteers and users in carrying out your assessment. It is also important to get expert advice if you are unsure about what is required. You can use this template to assess other risks, for example planning and funding a new activity.

Risk Assessments should be carried out for **all** trips and activities. They are the best way of both:

- Adequately planning for safety
- Evidencing an organisation's efforts to meet their Duty of Care.

Risk Assessment involves looking at a planned activity and the location for that activity. It is the process of identifying potential hazards and finding ways to reduce or control the risk they present. It involves:

- Identifying potential hazards and the dangers they present
- Assessing the level of risk and the likelihood of the danger occurring
- Identifying who is at risk
- Identifying control measures to prevent or manage the risk
- Assessing the effect of the control measure
- Recording the process

All risk assessments must be written down, dated and signed. This will assist workers in seeing how current and valid the assessment is. They should be active working documents and must be accessible, both physically and in terms of how easy they are to understand and use. Any worker should be able to pick up a risk assessment and be able to:

- See where potential danger may occur and why
- See what the worker is expected to do to prevent or manage this risk
- Feel confident and able to manage the activity safely with all control measures in place
- Feedback to you as writer of the Risk Assessment if the control measures don't work or need revision.

Risk assessments should always be undertaken before an activity takes place for the first time in order to ensure they are planned safely. They should form part of the planning process to decide whether or not the activity is safe to run. They should then be reviewed on a regular basis – either annually or 6 monthly depending on your organisation's perception of the need. They do not otherwise need to be redone except in the following situations:

- Whenever anything changes – the clients, the staff supervising, the venue, the activity
- Whenever an incident occurs that suggests current control measures are inadequate
- When an activity takes place outside, the Risk Assessment should be redone on the day the activity takes place, preferably an hour before, to ensure the assessment is done in the same conditions that the activity will take place. Environmental conditions can change rapidly.
- When using professional venues for events, they should have done their own assessments. However, you may need to inform the centre of any particular needs of your client group that may affect risk. You will also have to risk assess anything that happens between activities.

Risk Assessment (model form for voluntary and community groups)

Have you carried out a 'risk assessment' for the activities of your group? No? Complete this form for your activity and keep a copy on file. Make sure that you act on any areas of concern arising from the assessment. Unless we ask for it you don't need to send us a copy. It is recommended that a checklist be prepared and a risk assessment carried out before any one-off activities or purchases. For ongoing activities (e.g. regular meetings) the Checklist and Assessment need only be revised annually.

The group leader should ensure that a health and safety briefing is given at the commencement of the activity to all participants and leaders.

Organisation name ....

Where is the activity taking place? .... Date of activity ....
Brief description of activity ....
....
....
....

Number of participants.. Number of leaders ....
Name of Child Protection Officer .... Name of qualified first aider ....
Date risk assessment carried out ....
Who attended the risk assessment meeting? ....
....
....
....
Signed .... Print name ....
Position in the group ....

A risk assessment is an evaluation of hazards and the chance that it may cause harm, and any factors that can affect the chance and extent of the harm both to participants and leaders. This assessment should consider both the potential severity of the consequences and the number of people who may be exposed to each hazard. Ideally you should carry out this assessment with all those taking part in the activity, including children and young people.

Hazard Describe the potential hazard	**Harm** Describe the harm it my cause	Assessment of Risk			**Who is at risk?**	**Control Measures** What can be done about it?	**Final Assessment of risk**
		Level of harm if hazard occurs	Likelihood of hazard occurring	Assess ment of risk			
Example							
Rough terrain causing children to trip	*Cuts and grazes*	Low	Low	Low	*Children* *Staff*	*Warning of potential danger.* *First aid.*	Low

You may need more space so please make copies of this page to continue your assessment.

HOW TO COMPLETE YOUR RISK ASSESSMENT

Hazards and Harm Columns 1 & 2

Identify a range of hazards, considering every aspect of an activity from the physical environment to the activity itself. For example, consider the hazards presented by:

- landscape –a river, rocky ground
- Vegetation - patches of stinging nettles or brambles
- Wildlife – from wasps and spiders to cows and dogs – dog muck
- Litter – broken glass, needles from syringes
- Unsafe equipment – damaged swings, slides etc
- Hot weather causing sunburn, dehydration etc
- Public access – leading to abduction or molestation of a child
- Hazards relating to the activity – e.g. if playing rounders, a child could be hit by a bat or a ball.
- Transport to and from activity
- Hazards relating to food if eating is involved in anyway.

Be specific when identifying hazards: don't say 'weather' is a hazard because it isn't. Particular types of weather might be. What are they and what harm do they cause the child? e.g. hot weather causes sunburn, sunstroke and dehydration. Don't put several hazards under one umbrella hazard as different control measures may be needed for each. Some people put everything needing the same control measure (e.g. first aid) under the same hazard – this is a mistake because although first aid may be a way of **managing** a variety of medical emergencies (e.g. trip over a tree root and a fall from a high slide), the way to **prevent** the accident occurring in the first place may be very different.

Assessment of Risk (Columns 3, 4 & 5)

Risk is assessed by weighing up the level of harm caused by the danger you identify against the likelihood of the danger occurring. The result is what you would write in the Assessment of Risk column. You may choose to do this by saying the risk is High, Medium or Low or by using numbers to score the risk. If using numbers, a Key Code should always be included on the Risk Assessment sheet.

Control Measures (Column 7)

Control measures can be **PREVENTATIVE,** allowing you to reduce the risk of the danger from occurring, or **MANAGING,** helping you to manage the situation if the danger does occur. Think about both aspects when writing control measures. Control Measures should always be specific to the hazard identified.

Final Assessment of Risk (Column 8)

Finally, assess the risk once your control measures are in place. If it is still high, consider choosing an alternative activity. You are aiming to reduce your risk to Low in this column as it is unlikely that you will ever eliminate risk altogether. You should aim to prevent what harm you can from occurring, and prepare to effectively manage any risks you cannot eliminate.

LEEDS INFRASTRUCTURE CONSORTIUM RESOURCE PACK

SECTION 6 – PLANNING

Introduction

This section on **Planning** is part of an 8-pack series of resource materials that has been produced by the Leeds Infrastructure Consortium. For further information, please go to www.leeds-ic.org.uk.

There are lots of elements involved in good planning but the ones we are going to highlight in this section are:

- How to write a simple business plan
- Health and Safety
- Risk Management
- Insurance

1. BUSINESS PLANNING

A business plan is a document that describes an organisation – what it does, what it aims to achieve and how this will be accomplished. A good business plan can help you apply for external funding, guide decision making, identify potential problems and measure your success.

The plan should include the following sections:

Executive summary
A summary of key points from your business plan, including highlights from each section

Business description
What your organisation does, the history of the organisation and the vision for the future

Products and services
A description of your products and services, what differentiates them from others' and any planned developments

Marketing and competitors
The size and target of your market, who else offers similar services and products, strategies for promoting your organisation

Management team and key personnel
The structure of your organisation, profiles of members of the management team and their skills and information regarding other personnel

Operational plan
The logistics of your organisation – your location, who owns your buildings, processes for providing your services, management information systems, IT systems and any planned developments

Financial forecast
Financial plans for the next three years, with detailed information for the next twelve months – cashflow forecasts, profit and loss accounts and balance sheets – and risk analysis.

For more detailed information on putting together a business plan visit Business Link's website at http://www.businesslink.gov.uk/bdotg/action/layer?topicId=1073869162

2. HEALTH AND SAFETY

Management committee members and trustees of charities are responsible for ensuring that the organisation is properly and legally managed. This includes complying with charity and other relevant laws and safeguarding money, property, people and reputation. Funders will want to know that your group is doing this, as their reputation may also suffer if something goes seriously wrong in a project they are funding.

In order to manage events and activities safely it is important to have effective Healthy & Safety systems in place. You may already have a Health & Safety Policy but this tends to focus on the needs of the people that operate or run an organisation and its premises rather than on the beneficiaries of the service provided. This means that many activities you provide are not covered in your organisation's Health & Safety Policy so you may need to look at developing additional systems.

A valuable tool is a Venue Health and Safety Check, which is a list of all the safety aspects that the worker needs to check before starting the activity and should be carried out for both indoor and outdoor venues. It can also be a check undertaken before booking a venue to ensure it meets the standards required.

Health and Safety Procedures should be prepared for all activities. They should be easy to read and designed so that anyone who takes on this activity will immediately understand what is required of them to ensure the activity is managed safely. Safety Procedures can also be prepared as a checklist, but unlike the venue Safety Check they should consider all aspects of managing an activity safely.

The following organisations can provide more information on health and safety related issues:

The Health and Safety Executive
Help line 0845 3450055. Web Site www.hse.gov.uk. There are several free leaflets giving clear and simple advice. Order publications from 01787 881165.

***The Health and Safety Handbook*:** This step-by-step guide is specially written for the voluntary sector, taking into account recent legislation. Checklists help you to write your own health and safety policy, covering volunteers and staff. Available from Directory of Social Change website www.dcs.org.uk

3. RISK MANAGEMENT

When you are running an organisation and planning activities you need to think about what might go wrong. This might be rain on the day of your fete, an accident, complaints about advice given or rejection of a grant application you are relying on. These are all examples of risks. You need to think about actions you can take to prevent or reduce the risk and deal with the consequences if it does happens. This is Risk Assessment and Management.

People often think of risk just in terms of health and safety, but it is far wider than this and includes anything that could have a significant impact on the organisation's governance, management, activities or reputation. Risk management does not require high levels of knowledge and technical skills. Like most aspects of good management it depends a lot on common sense and planning ahead.

The Management of Health and Safety at Work Regulations 1999 requires all organisations to do a risk assessment identifying risks to employees, clients, members of the public and anyone who comes onto the premises or uses its services. They must then draw up an action plan that shows the proposed control measures that will reduce the risks and/or minimise the impact.

Appendix 1 provides a sample Health and Safety Risk Assessment Process, suitable for a large event or a high-risk activity. For a simple activity, e.g. organising a jumble sale, a list of the identified risks and their control actions may be adequate.

4. INSURANCE

The types of insurance cover you need depend on how your organisation is set up, whether you have employees, run events, own a building etc. Shop around for insurance to find the best deal. Some companies offer specialist packages for the voluntary sector. Ask an Insurance Broker to find such a company for you.

Compulsory Insurance

- Employers Liability (if you employ staff – this should also cover volunteers)
- Road Traffic Insurance (if you run a vehicle)

Essential Insurance

- Buildings, Contents and Plate Glass windows
- Public Liability – This is very important as it protects the group from claims for injury, loss or damage. Make sure your policy explicitly includes volunteers and members.
- Special activities – to cover a short or one off activity not covered by other polices.
- Professional Indemnity – if you give advice or professional services.

If you own your own building then you will need buildings cover. Even if you only rent premises or hire them for a short period, you may need contents insurance.

If you have trustees then trustee liability insurance is available.

For information about insurance for events, see section 6b of this guide.

5. WHERE CAN I GET HELP OR FURTHER INFORMATION?

This information sheet is only a starting point. You may find it helpful to get further support and information to help you understand your legal responsibilities, carry out risk assessments and develop and write your policies and procedures.

Voluntary Action Leeds
Voluntary Action Leeds, Stringer House, 34 Lupton Street, Leeds LS10 2QW Tel 0113 297 7920

The Charity Commission
There is a help line on 0845 300 0218. You can download free copies from the website or ring 0870 333 0123 www.charity-commission.gov.uk.

- CC49 Charities and Insurance
- Charities and Risk Management

VolResource: www.volresource.org.uk this web site has lots of useful information on Risk Assessment, Health and Safety and Insurance for the Voluntary Sector. The site has details and links to other useful resources and sites.

Voluntary But Not Amateur: a guide to the law for voluntary organisations and community groups. Ruth Hayes and Jacki Reason. 7th Edition 2004. This covers relevant legislation including charity law, employment & finance law, Data Protection Act and more.

PERS – The Pay and Employment Rights Service – is a charity promoting good practice and employment. They support and train employers across Yorkshire and advise employees and offer consultancy, training, leaflets and factsheets. Telephone 01924 439381, email admin@pers.org.uk or visit www.pers.org.uk

APPENDIX 1 HEALTH AND SAFETY RISK ASSESSMENT PROCESS

A template for carrying out a health and safety risk assessment can be found below. You should involve staff, volunteers and users in carrying out your assessment. It is also important to get expert advice if you are unsure about what is required. You can use this template to assess other risks, for example planning and funding a new activity.

Risk Assessments should be carried out for **all** trips and activities. They are the best way of both:

- Adequately planning for safety
- Evidencing an organisation's efforts to meet their Duty of Care.

Risk Assessment involves looking at a planned activity and the location for that activity. It is the process of identifying potential hazards and finding ways to reduce or control the risk they present. It involves:

- Identifying potential hazards and the dangers they present
- Assessing the level of risk and the likelihood of the danger occurring
- Identifying who is at risk
- Identifying control measures to prevent or manage the risk
- Assessing the effect of the control measure
- Recording the process

All risk assessments must be written down, dated and signed. This will assist workers in seeing how current and valid the assessment is. They should be active working documents and must be accessible, both physically and in terms of how easy they are to understand and use. Any worker should be able to pick up a risk assessment and be able to:

- See where potential danger may occur and why
- See what the worker is expected to do to prevent or manage this risk
- Feel confident and able to manage the activity safely with all control measures in place
- Feedback to you as writer of the Risk Assessment if the control measures don't work or need revision.

Risk assessments should always be undertaken before an activity takes place for the first time in order to ensure they are planned safely. They should form part of the planning process to decide whether or not the activity is safe to run. They should then be reviewed on a regular basis – either annually or 6 monthly depending on your organisation's perception of the need. They do not otherwise need to be redone except in the following situations:

- Whenever anything changes – the clients, the staff supervising, the venue, the activity
- Whenever an incident occurs that suggests current control measures are inadequate
- When an activity takes place outside, the Risk Assessment should be redone on the day the activity takes place, preferably an hour before, to ensure the assessment is done in the same conditions that the activity will take place. Environmental conditions can change rapidly.
- When using professional venues for events, they should have done their own assessments. However, you may need to inform the centre of any particular needs of your client group that may affect risk. You will also have to risk assess anything that happens between activities.

Risk Assessment **(model form for voluntary and community groups)**

Have you carried out a 'risk assessment' for the activities of your group? No? Complete this form for your activity and keep a copy on file. Make sure that you act on any areas of concern arising from the assessment. Unless we ask for it you don't need to send us a copy. It is recommended that a checklist be prepared and a risk assessment carried out before any one-off activities or purchases. For ongoing activities (e.g. regular meetings) the Checklist and Assessment need only be revised annually.

The group leader should ensure that a health and safety briefing is given at the commencement of the activity to all participants and leaders.

Organisation name ....

Where is the activity taking place? .... Date of activity ....
Brief description of activity ....
....
....
....

Number of participants.. Number of leaders ....
Name of Child Protection Officer .... Name of qualified first aider ....
Date risk assessment carried out ....
Who attended the risk assessment meeting? ....
....
....
....
Signed .... Print name ....
Position in the group ....

A risk assessment is an evaluation of hazards and the chance that it may cause harm, and any factors that can affect the chance and extent of the harm both to participants and leaders. This assessment should consider both the potential severity of the consequences and the number of people who may be exposed to each hazard. Ideally you should carry out this assessment with all those taking part in the activity, including children and young people.

Hazard Describe the potential hazard	**Harm** Describe the harm it my cause	Assessment of Risk			**Who is at risk?**	**Control Measures** What can be done about it?	**Final Assessment of risk**
		Level of harm if hazard occurs	Likelihood of hazard occurring	Assess ment of risk			
Example							
Rough terrain causing children to trip	*Cuts and grazes*	Low	Low	Low	*Children* *Staff*	*Warning of potential danger.* *First aid.*	Low

You may need more space so please make copies of this page to continue your assessment.

HOW TO COMPLETE YOUR RISK ASSESSMENT

Hazards and Harm Columns 1 & 2

Identify a range of hazards, considering every aspect of an activity from the physical environment to the activity itself. For example, consider the hazards presented by:

- landscape –a river, rocky ground
- Vegetation - patches of stinging nettles or brambles
- Wildlife – from wasps and spiders to cows and dogs – dog muck
- Litter – broken glass, needles from syringes
- Unsafe equipment – damaged swings, slides etc
- Hot weather causing sunburn, dehydration etc
- Public access – leading to abduction or molestation of a child
- Hazards relating to the activity – e.g. if playing rounders, a child could be hit by a bat or a ball.
- Transport to and from activity
- Hazards relating to food if eating is involved in anyway.

Be specific when identifying hazards: don't say 'weather' is a hazard because it isn't. Particular types of weather might be. What are they and what harm do they cause the child? e.g. hot weather causes sunburn, sunstroke and dehydration. Don't put several hazards under one umbrella hazard as different control measures may be needed for each. Some people put everything needing the same control measure (e.g. first aid) under the same hazard – this is a mistake because although first aid may be a way of **managing** a variety of medical emergencies (e.g. trip over a tree root and a fall from a high slide), the way to **prevent** the accident occurring in the first place may be very different.

Assessment of Risk (Columns 3, 4 & 5)

Risk is assessed by weighing up the level of harm caused by the danger you identify against the likelihood of the danger occurring. The result is what you would write in the Assessment of Risk column. You may choose to do this by saying the risk is High, Medium or Low or by using numbers to score the risk. If using numbers, a Key Code should always be included on the Risk Assessment sheet.

Control Measures (Column 7)

Control measures can be **PREVENTATIVE,** allowing you to reduce the risk of the danger from occurring, or **MANAGING,** helping you to manage the situation if the danger does occur. Think about both aspects when writing control measures. Control Measures should always be specific to the hazard identified.

Final Assessment of Risk (Column 8)

Finally, assess the risk once your control measures are in place. If it is still high, consider choosing an alternative activity. You are aiming to reduce your risk to Low in this column as it is unlikely that you will ever eliminate risk altogether. You should aim to prevent what harm you can from occurring, and prepare to effectively manage any risks you cannot eliminate.

LEEDS INFRASTRUCTURE CONSORTIUM RESOURCE PACK

SECTION 6b – PLANNING – RUNNING EVENTS

Introduction

This section on **Running Events** is part of an 8-pack series of resource materials that has been produced by the Leeds Infrastructure Consortium. For further information, please go to www.leeds-ic.org.uk.

FIRST STEPS

Whether you are looking to organise a fundraising event, an awards ceremony, or a social gathering for local residents, the steps you need to take will follow a similar pattern.

- Make sure your objectives are clear
- Plan and delegate
- Budget - get the costings together
- Think about safety, licences and regulations
- Plan your marketing and publicity
- Sort out the detail
- Survive the big day!
- Mop up and review

The aim of this guide is to take you through some of the elements you need to think about and some of the pitfalls you should try to avoid!

1. MAKE SURE YOUR OBJECTIVES ARE CLEAR

Why do you want to hold the event and how will you measure success? It is important that everyone understands what you want your event to achieve so you can tell if it has succeeded. Some examples may include:

- Raise the profile of your group: measure the number of new people who get in touch as a result
- Attract new supporters: how many donations or new members did you get?
- Launch a new campaign or appeal: what kind of press and other coverage did you receive
- Raise money: what was the profit?
- Simply have some fun: did you get good feedback?

Who is the event targeting? You need to think about this very carefully because this may well determine other aspects of the event - location, date, ticket price etc. It this:

- Current members?
- Prospective new members and, if so, are they adults, older people, young people?
- People with a specific interest i.e. environment for instance?

By knowing exactly where you are headed, you are more likely to reach your goal.

2. PLAN AND DELEGATE

With your objectives in place, you now need to draw up an outline plan.

One of the first considerations is agreeing a date for your event. Make sure that you allow enough time to organise everything and promote the event, and check that the date doesn't clash with similar events locally or major activities like World Cup finals.

Next, choose your venue. Is it available on the date? What's the maximum capacity? Is there enough car parking? Does it have disabled access? Are there any restrictions on use, e.g. sale of alcohol? Do you need catering facilities? Can you cover the cost?

Draw up a timetable with all the main dates and deadlines on it, to clarify how much work there is to do and when. Don't forget notice periods, if any licences or registrations are required. (See section 4 below).

Most events are too much work for one person to organise, so try to get more people involved. If you belong to a group, you may find this support readily to hand, but it may offer the opportunity to recruit new people who share your interests and bring relevant skills. Think about asking other local organisations to get involved. They may have the expertise to take a major aspect of the event off your hands.

Give everyone clearly defined roles. Who will look after the logistics (securing a venue, provision of facilities, health and safety issues)? Who will keep track of the finances? Who can take care of the publicity and marketing? Who can check out any legal responsibilities?

Arrange regular planning meetings and produce meeting notes with assigned action points.

Although you do not need to be a formally constituted group to run an event or activity, if you are thinking of running a number of them, or doing them regularly, you may wish to consider becoming constituted. The guide "Introduction to Volunteering" has all the relevant information you might require.

3. BUDGET - GET THE COSTINGS TOGETHER

Expenses

Events cost money – usually more than you anticipate - so it is important that you create a detailed budget. Consider everything you need to spend money on including:

- Venue hire
- Parking
- Security
- Insurance
- Advertising
- Design work
- Printing (tickets, signage, posters, flyers, programmes, raffle tickets)
- Phone bills & postage
- Volunteer expenses
- Prizes
- Hire of equipment (PA system, portaloos, tables, glassware etc)
- Decorations
- Games & entertainers
- Refreshments
- Transport
- First aid provision
- Fees for licences and permissions
- Speakers expenses
- Photography

Decide which of these are fixed costs and which are variable. For example, the cost of hiring the venue is likely to stay the same regardless of the numbers attending (fixed cost), but the costs of catering or printing will alter according to the number of people (variable). This will allow you to re-calculate your budget easily, should the scale of your event change.

Note which items have up-front costs or deposits and make sure you have the cash to cover them. Check if any costs are refundable if for any reason you need to cancel the event, e.g. for bad weather

Income

Are you looking to generate any income from this event or cover the costs from existing funds?

Here are some of the common sources of income:-

- Ticket sales (minus complimentary tickets)
- Regular income
- Cash donations & pledges
- In kind donations (goods and services)
- Food and drink sales
- Bar sales
- Competition entry
- Sponsorship
- Grants
- Programme adverts
- Raffle tickets
- Product sales
- Auction
- Charging stall holders

If the sole aim of the event is to raise money you should generally aim to bring in three times as much as you spend. The A - Z of Fundraising Ideas in Appendix A includes activities which may help to boost your funds.

If you are relying on ticket sales, it is important that you pitch your ticket price appropriately, both to suit your target audience and achieve the profit you are seeking. See Appendix B for help with calculating your ticket price.

It is vital that you know how much you need to raise to break even and you should aim to raise this **before** the day, to avoid sleepless nights! Consider asking for event sponsorship from individuals or local businesses, or promote advance ticket sales.

There are a number of financial procedures to build into your planning too. How will you record income received and all expenses? How will you keep on track against agreed budget? What facilities and procedures will you need for cash handling and safe storage on the day? You should use a safe if available, but otherwise keep it in a locked room. At least two people will need to be present when counting cash and this needs recording and banking as soon as possible. How will you transport money after the event?

4. THINK ABOUT LICENCES, SAFETY, REGULATIONS AND INSURANCE

Licences

Find out about regulations early on in your planning. There are some events for which you need either to obtain a licence or to give prior notice in writing to the local authority, the police, or to the fire service. These include events involving:-

- Door to door or street collections
- Lotteries and raffles (although many, incidental, charitable lotteries are classed as exempt)
- Bingo
- Car boot sales
- Music and dance events

- Stage performances
- Films
- Sports events
- Bars
- Street parties
- Processions
- Meeting in public places
- Public address sound systems
- Performance of copyright music

Leeds City Council acts as the local licensing authority for licences and permits required by: the 2003 Licensing Act which covers alcohol and regulated entertainment, including temporary event notices; the Gambling Act 2005 which covers Lotteries and Amusements; and permits for street and house to house collections. See Appendix C for an outline and essential contact information. Make sure that you apply for any licences required in plenty of time.

Safety

As event organiser, you have a responsibility for the health and safety of those who are taking part in your event, whether employees, volunteers or the general public. Managing risk is about taking a common sense approach to any hazards that might be involved in your event, however big or small, and putting systems in place to remove the risk or reduce it to an acceptable level. Carrying out a risk assessment is an essential part of this process – there are four key steps:-

1. identify the hazards/dangers/exposures
2. decide who might be harmed and how
3. evaluate the risks, deciding whether existing systems in place are adequate or whether safer systems are required
4. record your findings

If you are organising a major event, the HSE website, www.hse.gov.uk/risk, has a wealth of information

Don't forget, if you are hiring a venue or using external suppliers, check that they have appropriate health and safety systems in place, and have carried out their own risk assessments.

Other Regulations

If you are planning an event where food is being prepared and served, you may need to comply with Food Hygiene regulations. Leeds City Council's Environmental Health Services can provide specific guidance on food safety on the following telephone numbers:

Food Safety Enquiries:	0113 2477789
Food Poisoning:	0113 2476286
Email address:	env.health@leeds.gov.uk.

Even if the regulations don't apply to your event, it is still good practice to follow the 4 C's, namely:

- **Cleaning** – effective cleaning of hands, equipment and surfaces to get rid or stop the spread of bacteria.
- **Cooking** – ensuring that food is thoroughly cooked and that reheated food is piping hot all the way through.
- **Chilling** – making sure that food is chilled properly and kept out of the fridge for the shortest time possible to stop harmful bacteria developing.
- **Cross-contamination** – avoiding the possibility of the spread of bacteria between food, surfaces or equipment. This often occurs when raw food touches or drips on to ready-to-eat food e.g. whilst holding a barbecue.

If you are organising a sporting event which takes place on the highway, road or a public place, check out The Good Practice Safety Guide published by the Home Office. It covers everything from use of barriers and traffic safety signs to emergency procedures.

www.homeoffice.gov.uk/publications/police/operational-policing/event-safety-guide

If your event involves children or vulnerable adults, consider whether safeguarding is an issue. See the Introduction to Volunteering information pack for more on this subject.

Insurance

Any event involving the public requires Public Liability insurance. This protects the organisation (or the members of the governing body) from claims made by volunteers, trainees or members of the public for death, illness, injury or loss or damage to property caused through the negligence of the organisation or someone working on it. It also protects volunteers/ trainees who may be sued as individuals for injury/ damage caused to a third party.

If you are a formally constituted group you may already have insurances in place. You still need to check that these will extend to include any claims arising from the event you are planning. If not, it may be possible to arrange a special activities policy to cover Public Liability, Theft of Money, even cancellation of the event due to adverse weather conditions.

- Don't make the assumption that your activities are covered by the insurance of the organisation whose building you have hired. Always check their policy to make sure you are fully covered.
- Shop around for insurance to find the best deal. Some companies offer specialist packages for the voluntary sector. Ask an Insurance Broker to find such a company for you.
- When completing a proposal form (application form for insurance), do so very carefully. Answer every question and make sure the information you have given is accurate. Failure to give all the relevant information, or misrepresentation of information, may cause the insurance company to refuse to pay out on a claim.
- Unincorporated Associations should remember that although insurance is taken out in the name of the committee of the organisation, the proposal form must be signed by an individual. State clearly that this individual is taking out the insurance on behalf of the organisation's Management Committee.
- Make sure you are up to date with premiums.
- Never admit responsibility for an accident even if you know you are responsible. Some insurance companies refuse to pay out if you accept liability without their permission.

5. PLAN YOUR MARKETING AND PUBLICITY

Our separate guides to Marketing and Public Relations (section 2) have a wealth of information on this subject. You need to consider what it is about your group and event that you want to market:-

- Who is likely to be interested in it (is your target audience – young, old, professional, general public, press, local residents)?
- How much money do you have to spend on it?
- Do you need posters or flyers? If so, who is going to print them? Where will you place them? Do you need to print tickets or invites?
- Have you thought about using the local media?
- If your budget is tight, there are a number of free marketing opportunities, including community listings, social media such as Facebook and Twitter, links through other people's websites and word of mouth.

Remember you don't need to wait until every last detail of your event is finalised before getting your publicity out.

6. SORT OUT THE DETAIL

Now is the time to add the detail to your outline plan. A detailed timetable of what is happening where and when is very useful.

Consider everything you will need for your event and ensure it has been reserved, ordered or printed as necessary.

Confirm all bookings in writing. It is advisable to have written contracts with major suppliers and sponsors setting out responsibilities, costs and cancellation rights.

Work out the number of people you'll need to help prepare for and carry out the event:-

- Which roles need skilled volunteers or just willing hands?
- What is the time commitment? When do you need them and for how long?
- Who will recruit, communicate with and organise them?
- How will helpers be transported? Will their expenses be covered?

Have cancellation and contingency plans. What happens if it rains? What if you don't sell enough tickets?

Think about communications. Who needs to be briefed before the event? How will you communicate with participants and contractors on the day? Do you need signage, a PA system? What if there is an emergency? Circulate key contact details in advance and let people know where and how to find you.

Appendix D Event Checklist has a list of prompts which you may find useful.

7. THE BIG DAY!

As a final check ensure:

- all fire exits and emergency routes are clear, any hazards have been removed and first aid provision is in place
- signage and directions are in place
- communications systems are working
- all materials and documentation are in place
- sponsors' branding is in place
- banking materials (float, cash box, receipt books etc) are stored safely and securely
- key contact numbers are to hand

Now brief your volunteers:

- Summarise key roles and areas of responsibility
- Identify first aider(s)
- Logistical information about the event e.g. timings
- Full information about venue and facilities (toilets, fire evacuation procedures, parking etc)
- Key people to alert if issues arise
- Emergency communication plan

During the event, ensure everyone is safe and enjoying themselves.

8. MOP UP AND REVIEW

Once the clearing up is done, there are still a few tasks to complete, including:-

- Collect and bank any money promptly and chase any which is outstanding
- Issue final press releases
- Send out thank you letters to helpers, sponsors and organisers, celebrating what you have achieved
- Distribute any remaining prizes

Make time to review your event objectives and targets, so that you can make recommendations for the future. Seeking feedback from volunteers and attendees can be really helpful.

Appendix A:

A - Z of Fundraising Ideas

A is for:- Abseil Aerobics Art exhibition Auction	**B is for:-** Barbeque Back to front day Bike ride Book sale	**C is for:** Car boot sale Carol singing Coffee morning Craft fair Competitions
D is for: Dinner/Dance Dog walk Dress down day Dry cornflakes competition	**E is for:** Easter egg hunt Egg rolling competition Exhibition	**F is for:** Fancy dress Fashion show Fete Fortune telling
G is for: Games Evening Garden Party Golf competition	**H is for:** Hair Beading Hair shave Hill walking	**I is for:** It's a knockout Ice cream eating Italian Evening
J is for: Jazz Evening Jewellery sale Jumble sale	**K is for:** Karaoke evening Kidnap and ransom Knobbly Knee contest	**L is for:** Ladies Night Line dancing Lotteries
M is for: Marathon dance Market stall Masquerade Ball Mystery tour	**N is for:** Name the teddy Nature Walk Noodle sucking	**O is for:** Odd jobs Onion peeling competition Open Gardens Orienteering
P is for: Painting competition Pet show Pile of Pennies Plant stall	**Q is for:** Quasar Night Question of sport Quiz Evening	**R is for:** Raffle Reunion Rowing challenge
S is for: Shocking sock/tie day Sponsored silence/slim/swim Sweepstake	**T is for:** Themed night Tombola Treasure hunt	**U is for:** Underwear party Uniform free day University challenge
V is for: Valentine's day Video night	**W is for:** Walking Wine tasting Window cleaning	**X is for:** Xmas Fair Xmas Raffle Xtra special event
Y is for: Yoga session Yard of Ale contest	**Z is for:** Zany dress day Zombie Party	

Appendix B

Calculating Ticket Prices

Here is an example of how to calculate your ticket price

1 Calculate overheads (fixed costs)

Venue	£500	
Equipment hire	£250	
Printing	£250	
	--------	If you sell 10 tickets or 250 these costs remain the same
Total	£1000	

2 Note other facts

- The maximum capacity of the venue is say 250 people
- The minimum projected ticket sale is 200 people
- Variable costs (catering etc) are £20 per head
- Overheads = £1000

3 Base ticket price

Overheads		Minimum projected sales		Base ticket cost		Variable costs per head		Base ticket price
£1000	÷	200	=	£5	+	£20	=	£25

4 Final ticket price

Add at least 30% to offer a reasonable profit and a limited contingency should you not reach projected minimum sales. £25 + 30% = £32.50. Round up to sensible promotion price of £35 per ticket.

5 Profit projections

Tickets sold – total costs = Profit

No of tickets sold	Cost per ticket	total sales	Costs	Total costs	Profit
100	£35	£3500	100 x £20 + £1000	£3000	£500
200	£35	£7000	200 x £20 + £1000	£5000	£2000
250	£35	£8750	250 x £20 + £1000	£6000	£2750

Appendix C

a) Licences and Permits

Providing or Conducting Various Forms of Entertainment

Leeds City Council's Entertainment Licensing Section issues various licences and permits. The Council act as the Licensing Authority under the 2003 Licensing Act, granting licences associated with alcohol and regulated entertainment. Depending upon the type of entertainment you plan to stage, you may need to obtain an Occasional Public Entertainment Licence from Leeds City Council. This is required for all events that feature any one or a combination of the following types of entertainment as a main feature of the event: Pre-recoded music (relayed by any method of CD, mini-disc, cassette, record or radio), live music, Karaoke, dancing, cabaret or entertainment of a similar nature.

You can apply to the Council for the following licences and permits:

1) Licences/certificates issued under the Licensing Act 2003

- Premises Licences - to authorise the following licensable activities:
  - Sale by retail of alcohol.
  - Provision of regulated entertainment.
  - Provision of late night refreshment.
- Personal Licences - for individuals to allow them to authorise the sale and supply of alcohol in venues that have a premises licence.
- Club Premises Certificates - to authorise certain activities at qualifying registered clubs.
- Temporary Event Notices (TENs) - to permit temporary events to take place allowing certain licensable activities such as the sale of alcohol.

2) Licences issued under the Gambling Act 2005.

3) Lotteries and amusements.

4) Permits for street collections, house to house collections, scrap metal dealers, motor salvage operators and game dealer licences.

Temporary Event Notice

If you wish to hold an ad-hoc event in England or Wales, you must give a Temporary Event Notice (TEN) no later than ten clear working days before the event (not including the day the Council receives the notice, or the day of the event). If the premises where the event is to be held is in areas governed by two or more local authorities applications must be made to each. You must also give a copy of the notice to the police no later than ten working days before the event.

You must be 18 years or older to give a TEN and can give a maximum of five TENs per year. If you are a personal licence holder, you can give a maximum of 50 TENs per year. Your event must involve no more than 499 people at any one time and last no more than 96 hours with a minimum of 24 hours between events. The premise in question can have no more than 12 events per calendar year.

Holding a Street Event

Because highways can be dangerous places and provide access to individual properties it is recommended that you hold your event off the highway, in a hall, park, garden or something similar. However, if you cannot arrange for your event to be off the highway then you will be required to submit a road closure application form for approval at least six weeks before you want the closure or diversion.

The form, 'application for temporary traffic regulation order' can be obtained via a link on the Council's website entitled, 'Road and footpath closures and diversions'. Contact: Highways Services, Middleton Ring Road, Leeds LS10 4AX Fax: 0113 2478428.

When the application is received it will be assessed. Officers may need to meet with you, the police and possibly Metro depending on the request. If the request is approved there will be a charge of between £900 and £1300 for the traffic regulation order. The traffic regulation order follows a legal process that takes a minimum of three weeks to complete. Payment must be received before this can begin.

When closing a road and diverting traffic you must provide road signs and suitable barriers in accordance with Chapter 8 of the traffic signs manual published by the Department for Transport. You will need to agree a suitable diversion route with us and the Police. Access for emergency vehicles may be needed during a road closure.

Under normal circumstances, signs and barriers are placed by Leeds City Council Highway Services personnel. However, in certain circumstances the applicant will be responsible for the supply and placing of signs and barriers for road closures. Advice will be provided on where signs must be in placed. The cost of erecting, maintaining and removing diversion route road signs will be the responsibility of the contractor/company organising the works.

Other considerations that will need to be taken in to account for an 'outside' event are:-

- Before making an application gaining the support of home owners and businesses who will be affected by the closure including those who normally parked on the street(s) concerned.
- Consider the needs for emergency access, and the rights of individuals on foot. Request for roads which are bus routes are likely to be refused.
- Ensure that Leeds City Council is indemnified against all claims for accident or injury caused by, or in consequence of, the erection of the signs and barriers.
- Any damage which the Highway Authority considers has to be repaired then the organisers will be responsible for the costs.
- Ensuring that arrangements are in place for the appropriate recycling and disposal of waste either by those attending the event or by the organisers where large quantities are left after the event. Large quantities should be bagged and taken to any of the Council's 11 Household Waste Recycling Centres around the City, which are open 7 days a week, and where such waste can be conveniently disposed of free of charge.

Special Event Liquor Licensing

At many celebrations, your visitors may want to enjoy an alcoholic drink(s). If your event is a street party the simplest way to ensure that everyone who wants to enjoy a drink is a BYO (Bring Your Own) arrangement, with each guest bringing along a selection of soft and alcoholic drinks to be shared amongst party goers. However, if you wish to sell alcohol at your event you will need to apply for either an Occasional Licence or Occasional Permission. For further details contact Licensing Section, Leeds District Magistrates, PO Box 97, Westgate Leeds LS1 3JP Telephone: 0113 245 9653

Application forms and guidance

If you need to make an application under the Licensing Act 2003 you can find further information on the Council's Website: www.leeds.gov.uk/licensing. The Section's telephone line is open Monday to Thursday 9am - 5pm and Friday 9am - 4:30pm on 0113 247 4095. Leeds City Council Licensing Section, Entertainment Licensing, Civic Hall, Leeds LS1 1UR. Telephone: 0113 247 4095 Fax: 0113 224 3885 E mail: entertainment.licensing@leeds.gov.uk Website: www.leeds.gov.uk/licensing

b) Undertaking a raffle

Raffles are held primary to raise money for a particular item. It may be a new roof for your place of worship, community centre, sports equipment for your local team, or computers for your school, but usually it is for a good cause. Raffles are less time-intensive to organise than other types of fundraisers and less expensive to run. Such raffles can help boost your overall profits if held as part of a larger fundraising event.

Small raffles

'Raffles' are considered to be a 'small lottery' in the eyes of the law, therefore, this means that you do not need a licence to hold a small raffle on the actual night of an event, as long as you meet these conditions:

- Any prizes purchased – as opposed to donated – are worth a total of no more than £250. However, donated prizes can be of unlimited value.
- All tickets are sold on the premises
- All tickets are sold on the night
- The raffle is drawn the same night
- The raffle is not the main reason for the event
- All of the proceeds apart from money spent on prizes and other necessary expenditures in organising the lottery must go towards supporting your group's activities or some other good cause
- There are no cash prizes
- Prizes containing alcohol are only included if the event is being held on licensed premises
- Tickets must not be sold for more than £2

Typically this sort of raffle would be held using basic cloakroom-style tickets, which only feature the ticket and book number. Slightly different rules apply for 'larger raffles'.

Larger raffles

If you have read the guidelines above and your raffle does not fit into the category of small raffles then you may need a licence. As a guide, if you would like to sell tickets in advance, to members of the general public or have cash prizes then you probably do need a licence. Typically this sort of raffle features pre-printed tickets, which must feature the name of the charity and its registered charity number.

Contact the Council for information about obtaining a licence which is covered by the Gambling Act 2005. It may be that your venue already holds a licence, or you might need to apply for one from scratch. Remember to allow sufficient time for this process in your planning. Records should be kept of how many tickets were sold and unsold. The Council will tell you more when you apply for your licence.

The three categories of exempt lottery which do not require any kind of authorisation by a local authority are:

- Customer lotteries – business owners run these and only sell tickets to customers
- Private society, work or residents lotteries – tickets are only sold to members
- Incidental non-commercial lotteries – must be held at non-commercial events and all money must be given to a charity or fundraising group

Even within these exempt groups there are relevant rules and regulations that must be followed. If you're still unsure, consider contacting the Council's Licensing Section or the Institute of Fundraising on 020 7840 1000. The Section's telephone line is open Monday to Thursday 9am - 5pm and Friday 9am - 4:30pm on 0113 247 4095.

<u>House to House Collections</u>

To carry out house-to-house collections for charitable purposes over a period exceeding 28 days in the Leeds area you need a licence from Leeds City Council. If you wish to carry out house to house collections for a period less than 28 days you can apply for a Certificate of Exemption from West Yorkshire Police.

Applications must be in the form prescribed by the local authority. You must be a fit and proper person.

NOTICE

The above information should be used as a guidance tool. Only the courts can give an authoritative opinion on statute law. Every effort has been made to ensure this information is accurate but in an attempt to simplify the law, omissions have been made. Please refer to the Licensing Act 2003 and associated regulations for full details of the law. If you are still unsure or concerned about the matters raised in by the above guidance then you should seek your own legal advice.

Appendix D
Event Checklist

Timing	Action	Achieved
As soon as possible (ideally more than 2 months before)	• Prepare budget breakdown for event • Agree a date • Select a venue and confirm availability • Carry out a risk assessment of the venue and arrangements • Arrange first aid cover if needed • Arrange insurance • Book venue • Check if alcohol or other licenses are required if applicable and apply in good time • Notify police/ambulance services/council if necessary • Make any necessary bookings with suppliers:- food, PA system, portaloos • Invite local dignitaries to attend • Seek volunteers to help on the day • Contact local paper and radio station and build up a relationship with the reporter • Organise press releases to announce the event, invite people to volunteer and buy tickets • Ask local companies for prizes	
A few weeks before the event	• Update the press and attract further supporters • Keep records of ticket sales and money received • Send out any information participants may need, tickets, map, letter, itinerary for dignitaries. • Draw up safety procedures and rotas needed • Plan the day of the event	
A few days before	• Notify the police of the numbers expected if necessary • Revisit and make final plans for your site • Assemble all your equipment • Brief your helpers and confirm safety procedures • Check all bookings and that all your needs are met (enough power sockets etc)	
On the day	• Re-brief helpers and check safety procedures • Set up site • Set up all signs/decorations and car park • Register all entrants/take entrance money or tickets • Welcome and thank the attendants • Check everyone is safe and enjoying themselves • Take photos • Clear up • Bank any money • Congratulate yourself and the team on a hard day's work	
After the event	• Send thank you letters to helpers • Send out final press release • Collect and bank any money • Send out chasing letters for any money owed if necessary • Celebrate such a successful event	

LEEDS INFRASTRUCTURE CONSORTIUM RESOURCE PACK

SECTION 7 – MONITORING AND EVALUATION

Introduction

This section on **Monitoring and Evaluation** is part of an 8-pack series of resource materials that has been produced by the Leeds Infrastructure Consortium. For further information, please go to www.leeds-ic.org.uk.

When you start a project you plan it carefully. Monitoring and Evaluation is about measuring that you are meeting that plan, and if you are not, finding ways to make changes to keep you on track.

You need to collect information about your services and activities; test them to make sure they give you the information that you need; check that the methods you use to collect that information works; evaluate the information to see what it tells you; look for ways to improve on your performance; and start the cycle again, but collecting more, perhaps different information.

Where to start?

Whether you are a new or a more established group you will need to monitor and evaluate your activities or services.

There are different ways to do this and these will depend on your group and what you want to achieve. Monitoring and evaluation is a good way to bring members of your group together and get them involved. It can keep people motivated and ensure they feel valued and can see the value of your work. Not only that, most funders require you to do it.

The aim of this guide is to give you some ideas about how you might go about monitoring and evaluation.

1. DEFINITION

Let's be clear what we mean:

Monitoring: the routine and systematic collection of information against a plan. The information might be about activities, products or services, users, or stakeholders or about outside factors affecting the organisation or project. Or put simply, collecting evidence that you have delivered what you said you were going to deliver.

Evaluation: making judgements about the value of any component part of an organisation or its products, services or benefits, or about the organisation as a whole. Again put simply this means some form of report or document where you look at what you have done to see if other people could learn from it or could you have done some things better.

So why is it important?

From a funder's point of view, it allows them to see that the money they gave you has had a benefit, and you have delivered what you told them you were going to do in your application.

For an organisation, it has a lot of benefits - not least that if you get it right funders don't ask for their money back! It allows you to keep track of where your project is and where it might go next. Some of the benefits are:

- learning from your experience and using this learning to help your organisation develop and improve
- responding to the changing needs of users
- making sure that what you are doing is what is needed by users
- understanding your project better - the strengths and weaknesses
- using your limited resources as effectively and efficiently as possible
- demonstrating your successes to others
- enabling staff to reflect on the difference their work is making - this can be very motivating!

2. MONITORING

The recommended approach to monitoring is a simple and straightforward one, involving four key stages. This broad framework provides a useful structure for addressing the challenge of monitoring and evaluation, particularly for groups that are inexperienced:

Stage 1: Plan and prepare

Here organisations or projects need to make sure they are clear about their work: identifying the outcomes or changes they are looking to achieve and the outputs that will help them make this happen. They can consider their resources to carry out monitoring and evaluation (skills, knowledge, funds) and make sensible decisions about what they are going to monitor and evaluate. It is not necessary to monitor everything at once, or to measure everything over a very long time (like a year). You could do some monitoring with spot checks and a week long collection of specific data.

Stage 2: Monitor and evaluate

During this stage, the organisation or project can put their monitoring and evaluation plan into action. They will use the planned methods to collect information, collate it over a period of time, and to analyse it.

Stage 3: Pilot the project

Test out the methods you have decided on and check that they are going to give you the information you need. You may find you have to change a question, or that users do not understand part of a question.

Stage 4: Review and use information

This stage is all about learning from experience and drawing useful conclusions about the way forward for the organisation or project. What has gone well - can you build on successes? Where has work been less successful - can you learn from mistakes and change things in order to work more effectively?

Some of the key words in Monitoring and Evaluation are

Outputs - all the detailed products, services and activities actually provided for users. In other words this can be a simple counting of numbers,for example, the number of people who turned up to an event or the number of newsletters you sent out.

Outcomes - all the benefits or changes that happen for the users as a result of your outputs/activities. This one takes a bit more thought. It is really about what you hope to achieve by running your project, for example: a reduction in levels of obesity or an increase in self confidence for participants of a group. These are more difficult, but not impossible to measure.

Impact - is much broader, sustained and long term change. It will usually involve changes that are brought about by a range of outcomes, and as a result of action by a number of agencies. Not all impacts will be wholly attributable to your work and it is never safe to claim that. But if your work has helped to reduce obesity by teaching people how to exercise more and eat healthily, and you can prove that for your area, then claim it as your contribution to the impact. Unfortunately, the terms Impact and Outcomes are sometimes confused and used inter-changeably.

Until recently, funders have tended to be interested more in outputs - what services or activities a project has spent the money on. But increasingly, Government Departments, local authorities and other service commissioners now want to know more about the outcomes of organisations' activities and projects. Outcomes are the "difference" an organisation or project makes to the lives of users. This may happen quickly or come about over a period of time, but the essential element is change. Outcomes usually involve words that indicate a change: reduced, increased, improved, developed, expanded etc. An outcomes approach will be important for organisations in future.

3. DEVELOPING INDICATORS AND TARGETS

An essential part of a monitoring and evaluation plan is to set some appropriate indicators: specific, observable characteristics that can be measured or assessed to show the quality or quantity of aspects of the organisation or project, or the results of its activities. Indicators are the signs that give you information about your project's progress and success. Output indicators are fairly straightforward - how many, how often etc - and tend to reflect quantity. Outcome indicators need a bit more thought, as they will be providing the evidence that change is occurring - the quality aspects. You will be monitoring the indicators to demonstrate the outcomes. Some examples:

- Outcome: users have increased knowledge about availability of benefits
- Indicator: benefit take up increases

- Outcome: users are better able to budget and mange money effectively
- Indicator: fewer users need to access the emergency funding available

- Outcome: users have increased opportunities to find paid employment
- Indicator: users are attending more job interviews

Having identified the indicators, you then need to assign targets to them. These specify the level and quality of activities and achievements that an organisation or project expects. For example, in the first six months of the project 20 fewer people will need to access the emergency fund. On your evaluation you can explain why you did or did not reach the target. Often targets will be needed when making a funding application and they can help with work planning, both for the project as a whole and for individuals. It is important that you set your own targets - those imposed by others may not be sensible or realistic.

4. OTHER USEFUL WEBSITES

http://www.navca.org.uk/localvs/lio/measuringeffectiveness: a guide on measuring effectiveness
http://www.improvingsupport.org: plenty of useful information
www.ces-vol.org.uk: Charities Evaluation Service, details about training / further information
http://www.biglearningzone.org.uk/: this is the Big Lottery's guide to outcomes but has great information that is of use to all groups

LEEDS INFRASTRUCTURE CONSORTIUM RESOURCE PACK

SECTION 7a – HOW TO MONITOR

Introduction

This section is part of an 8-pack series of resource materials that has been produced by the Leeds Infrastructure Consortium. For further information, please go to www.leeds-ic.org.uk.

1. INFORMATION COLLECTION METHODS

There are many ways to collect the information needed to monitor and evaluate a project. Think about what fits your organisation or project (and the users) best. Don't forget that in many cases, some useful information may already be available: the organisation doesn't need to collect this again. Some of the techniques are:

Feedback forms
Short evaluation forms can be really effective in gathering ideas and responses quickly and easily. The problems can be that people may tell you what they think you want to hear. If given a form after a training lesson people often will answer scaled questions i.e. 1 to 6 but fail to answer the more in depth questions because it will take too much time.

Questionnaire or survey:
This is a really easy option, but remember there are a number of issues, for example:

- How many questionnaires will you need to send out to get a reasonable response?
- Is English or literacy an issue for your participants?
- If you use scales (e.g., 1 to 5) in the questions, can people sit in the middle?
- Are your questions neutral so you don't accidentally bias the results?

Focus groups
Gather together a few people to discuss a clear set of issues or ideas. This can take a bit of organising and you need to be careful to capture the ideas and comments. Always worth recapping and checking on what has been said.

In depth interviews
Time consuming but can gather a lot of really useful material. Make sure you plan your questions carefully, train you staff or volunteers to LISTEN to the answers and talk to a range of people, and check with the participants by reading back their answers, that you have captured their meaning properly.

Observation
Take photos, videos or make notes on what you see. Be clear and make sure you are collecting the information that is important. You should also remember to tell people that you are doing this and what the information is to be used for. Many projects insist on having participants sign a waiver on this and do be careful photographing children or vulnerable people without the correct permissions.

Diaries
Ask people to keep a record of their experiences. If your project lends itself to this it's a great way to gather information to support case studies.

Case studies
Focus on a detailed exploration of a small number of examples of your work with users - make sure you pick ones that focus on the main objectives of your project.

Evaluation workshops
Get people together and use practical activities to gather feedback and monitoring information on your work. Children can be asked questions about their favourite activities and can express that by jumping on or off coloured mats. Groups can be asked to draw pictures or write short pieces to show what their vision of the future of the organisation might be.

2. FEEDBACK FORMS

These have an immediacy that is often useful. You can ask a group that has just used your services to say what they think about them, or you can collect information over a longer period with a similar form. Feedback forms are usually shorter than questionnaires and less detailed, but could use some of the same systems – even numbered scales, clear questions, space for comment in text boxes. You may want to use pictures instead of numbers in a scale, for example, smiley faces or weather symbols as people readily recognise the meaning of these, and they can help people who do not read well.

See the enclosed example feedback form for a suggested template.

3. QUESTIONNAIRE / SURVEY

The first question to ask before start to design a questionnaire is

What information do I need to know?

- Who will be completing it?
- Will you ask people to complete the survey anonymously?
- Will you have different groups of people to complete it – users, funders, staff, other stakeholders etc
- Do you want to know about their feelings about your services or what service they actually use?
- Will you ask open questions for them to complete.. “What I like about the service…” or get them to tick boxes. Tick boxes are easier to quantify when you come to analyse the results but qualitative questions probably tell you more about how the service is perceived.

Often if you send out a questionnaire the return rate is very low, 5% is often considered very good. One method to increase this take up is to allocate staff or volunteer time to sit with users and go through the forms with them (this may also work where English is not the first language). This does have some drawbacks as users may give you the answers they think you want rather than what they really think. Training for volunteers and staff is important to maximise the level of trust your clients have in the person asking the questions, leading to more honest, unbiased answers.

You need to ask yourself how many questions will be enough? This is a fine balance between too many, with the risk of no-one completing the survey, and too few which could lead to there not being enough information to do a good analysis. Piloting a questionnaire is a good idea and you may find supplementary questions you need to ask or questions that do not give you the kind of answers you need and have to be re-written.

It is also good to pick a scale that does not have a mid point (4 or 6 choices not 5). This stops people choosing the easy option of the neutral middle ground. With an even number of options they have to approve or disapprove. Again, it might be worth thinking about using pictures instead of numbers in a scale.

It is generally best to write different kinds of questions in the survey and to be sure you can quantify most of them, but have at least one box for free text for extra comments that might be quoted in your final report. To get the best out of your questionnaire you may need to repeat it some time later and compare the results.

See the enclosed example questionnaire for a suggested template.

4. FOCUS GROUP

A focus group is a group of people invited to come and talk together informally about their experience of the service or product you produce. In setting up a focus group you should take into consideration:

- The skills of your staff or the person running the meeting. They must be able to make everyone feel safe and comfortable about sharing ideas.
- The people invited. These should be people who have used the service or product and can be counted on actually saying something about the service in the meeting. If they do not it is the job of the person running the meeting to make them feel comfortable enough to share.
- The time you set for the meeting. It should suit your users.
- The place of the meeting. It needs to be comfortable for them to relax and share honestly what they think.
- Refreshments. Alcohol is not appropriate.
- The ground rules. These need to be explained to everyone so that they feel safe in sharing their experiences or comments
- What information you want to gather and what questions you want answers to

After the group has met you should produce a report which sets out who attended the group, what issues were identified, specific examples and quotes if appropriate, a conclusion and what happens next.

5. INTERVIEW

An interview, in this context, needs to have a set of appropriate questions that every interviewee is asked. There could be a small section for additional comments, but these are more difficult to evaluate (subjective) but useful as interesting comments to include in your final report. Interviews can be recorded on paper as they happen or taped or videoed (with client's permission). Note that transcribing (typing them up) taped interviews always takes much longer that you expect!!

Interviewer
Name/ Case number
Which part of our service(s) was used?
How often? Are you part of a group session?
Did you originally ask for one to one counselling?
Would you use other services if we were able to provide them: individual counselling? Drop in days to meet other clients and workers? Coffee mornings?

Thinking about your current counselling:
What are your feelings about:
· The room used
· The time you come
· The length of the session
· The counsellor's knowledge
· The content of your sessions

Service User interviews

Semi-structured interview questions

Each question below can be followed up/expanded as required. If the interviewee says something that you feel merits more discussion then do explore with further questions. Each interview should last approximately 20 -30 minutes but may be less according to the interviewee.

Introduce topic – e.g. I am here today to find out how you feel about the project and how it works for you. Use this time to chat about general pleasantries so they become familiar and comfortable. Ensure interviewee knows why they are being recorded – i.e. for transcription.

Stress confidentiality of data.

Questions

Q1. Who do you like to talk to most here at project? (establish role of named person)

- Why do you like to talk with that person the most?
- What sort of things do you like to talk about?

Q2. Do you like the way staff communicate with you?

- If yes, what's good about it?
- If no, what's wrong/what doesn't work?

Q3. Do you have the opportunity to talk to staff here at the project?

- What kinds of things do you talk to the staff about?
- Do you think they listen to what you say?
- Do you think they have time to listen to you?

Q4. Do the staff talk to you about things happening here at the project? E.g. activities and events

Q5. How do you feel about the level of support you get here at the project?

Q6. Are you able to take part in the activities here at the project?

- If yes, what do you do and how do staff help you?
- If no, why you don't take part?

Q7. If you have a problem can you talk to staff about it?

Q8. Do you think that staff are interested in your problems and take time to listen to them?

Q9. What would you change about the project?

- Offer a choice beginning with 'nothing"– include more time, more people, conversation groups, news groups, more activities, special help

Q10. Apart from staff do you talk to anyone else here?

Q11. Do you have a say in how the project is run? (e.g. facilities, food, activities)

- If yes, can you give any examples?
- If no, why not?

Q12. Finally, is there anything else about the project you would like to talk about or tell me about?

6. OBSERVATIONS

When doing observations, especially of children and young people, you will have to have permission from the individuals concerned or their parents. If this involves using a camera or video then you will need to get permission in writing for the process and will need to define *very clearly* how the images will be used. Written permissions need to be stored for years unless the images are destroyed – as a check on how they can be used.

Observations can be done in different ways. It is important to define what you want to find out from the observation. The behaviours of observed children/young people/individuals can be recorded in a logbook, captured on video tape or in photographs. Usually video and photographs are accompanied by some explanatory text.

Examples

- Looking at the body language of someone giving a short presentation.
  Do they look confident? Do they have specific habits that could be corrected (wringing their hands, swaying, not smiling etc)?
- Watching to see what toys a specific child chooses to play with and how they interact with other children and staff.
- Seeing how a group works together to solve a problem. Is there a leader? Does everyone contribute? How do they tackle the task?

Example Observation Form

Project ________________ Staff Member ________________ Date________

Group or individual observed ______________________________________

Observation	Analysis	Future Action

1. Recording is most useful when done shortly after the session, to capture accurately what happened and why.

2. Record names or code names and link these to your database or list of members/contacts, so you can monitor individual progress.

3. The left hand column records **what** happened, in terms of behaviour and relationships, more than activity. This should be accurate observation, not judgemental conclusions. While the 'activity' context is important, **what** people did, said or how they behaved is what you should focus on. The purpose is to:
• Create accurate records of work done
• Develop records of group and individual changes
• Record examples of circumstances and incidents in youth work
• Establish data on local conditions and influences

4. The middle column is for your perceptions or speculation on **why** things happened in the way that they did. These may relate to a change in the group dynamics as someone arrives or leaves, an intervention from a worker or actions taken by a young person (or member of the public in relation to the group). The purpose is to:
• Understand and learn from experience
• Interpret cause and effect
• Note possible risks in future work

• Refine approaches
• Communicate with co-workers

5. The right hand column is to record your thoughts on future action, to act as a reminder and to share information within the staff team. As well as any actions you may want to record, try to capture how your approach to this group or individual may need to change or continue, in the light of your current thinking.

6. Conclusions reached should be recorded in brief. These will need reviewing over time and during supervision to gauge their accuracy and relevance.

7. DIARIES

These can be an easy way for people to keep a record of their experience of your project and provide very personal feedback. They can use this record to help them fill in questionnaires, take part in interviews or focus groups and provide the basis for detailed case studies.

8. CASE STUDIES

Case studies allow you to focus on a detailed exploration of a small number of examples of your work. You need to get permission from a group or person to use them as a case study. Even if you have this permission, it is usually better to make them anonymous. The person or group being discussed could be designated with Group A or Person B or you could change the names and some of the less critical data (age perhaps) to protect their identity.

You should include background information on the subject of the case study, their circumstances before taking part in your project, what your project did and what involvement you had with the subject, the results of your project's involvement and, if appropriate, quotes or photographs to support your findings.

9. EVALUATION WORKSHOPS

These are a way to gather information from people using practical activities. For example, you could ask groups to write short pieces about their experience of your organisation or how to improve things. Children can express their views about activities in a fun, practical way. It may be appropriate to use techniques from other methods, for example, observations or carrying out short interviews, to help you record the results.

LEEDS INFRASTRUCTURE CONSORTIUM RESOURCE PACK

SECTION 7b – PRODUCING EVALUATIONS

Introduction

This section is part of an 8-pack series of resource materials that has been produced by the Leeds Infrastructure Consortium. For further information, please go to www.leeds-ic.org.uk.

This method uses a series of questions to be asked when producing an evaluation and was originally designed for an external evaluator to use to measure the results and challenges of a project. It could however be used internally, if the evaluator writes it up objectively. Each question could then provide a section of a written report. However, the process of the evaluation is more important than producing an end document - unless your funder requires you to have a written report.

Summary:
1. Vision and aims of the project
2. History of the project
3. The people involved
4. The Activities
5. Management
6. Finances and Fundraising
7. Wider context
8. Feeling the Story
9. Assessment, options and recommendations
Taking the Evaluation further
Checking your impressions- activities for a forum

1. Identifying vision and aims

Question: What is our story?
It is essential to start from the vision or aims of the group. Many grass roots groups are not good at telling others what they do or why they do it. This is often in spite of being very good at what they do. Most groups know what and why they do things but often they will not have any written vision or aims. Sometimes the vision is held by a few people, the founders of the group or key personnel. A group cannot be evaluated unless you can measure what has been achieved against what the aim was.

The group must be able to recognise these aims. Some groups will give their aims as a list of all the different activities that have sprung up over the years in an ad hoc way because of individual initiatives and available funding. These aims are tricky because they don't spring from the fundamental vision of the project. So try to simplify the aims into a phrase that encompasses everything they do.

2. History of the project

Question: What is the history of the project?
This is the core of the evaluation process. By listening to people together telling their story the heart and soul of the project is revealed. This can be achieved quite simply by asking the group when the first germ of the project began to grow, proceeding to when it actually started, going through key events before bringing it up to the present. Trying to get people to be precise about dates will make everything much clearer for everyone.

Going through this process is likely to bring up other issues -- particularly those ones people might prefer to keep hidden. These issues can be discussed at the time or noted and picked up later. Often you just have to let it flow.

3. Identifying people involved

Question: Who is involved in the project?

In grassroots groups ***people*** are always the key and will always be the most important influence on the progress of the project. What is important is the culture of the group - what things are considered most important and what methods are considered acceptable. Discerning the culture of the group or conflicting cultures within the project is a key task for the evaluator. Understanding the culture of the group often helps you make sense of the overall story.

It can be helpful to divide the people involved into three groups:
- The key individuals who really own the project
- Other individuals working or volunteering in the project
- Partners and others involved in the project but outside it

This will give you a good idea of who you're going to need to contact during the evaluation. This contact can take different forms:
- Individual interviews. Face-to-face or by telephone.
- Interviews with two or more people. This can be helpful when there are clear groups of people e.g. committee members, volunteers etc
- Group interviews, maybe using a workshop type approach
- Questionnaires. Maybe in different forms for different groups. Remember to make these as simple as possible, preferably of the tick box variety with space for people to write comments if they want. Using a variety of different methods will help in what is called triangulation - seeing the same issue from different perspectives. This is a crucial technique which should be used throughout an evaluation.

4. The activities of the project

Question: What we do we do?

Most mainstream evaluations seem to concern themselves with this dimension of the project -- what are the outputs. These are important, of course, but grassroots projects often find them difficult because they do not have the resources or organisation to conduct rigorous monitoring of their work. They just get on with doing what they're doing. This is why they are often good at producing results - they do not have bureaucracy 'getting in the way'.

Nonetheless, the evaluator will need to get a clear idea of what the project does.
The following methods are useful:
- Listing all the activities that are the responsibility of the management group. Get a rough idea of which workers and volunteers deliver these and who uses them.
- Visit activities when they are taking place.
- Examine such records as do exist and try to interpret what they mean! Look for ways of supplementing these existing records e.g. reports, minutes, fundraising applications.

Are there any ways of determining the effectiveness of the activities? The following can be considered:

- Questionnaires which should be as simple and to the point as possible
- Participant observation at activities
- Individual interviews with users
- Group interviews with users
- Records of some form which indicate how users have developed through their involvement in activities or in consequence of them (case studies, participant comments etc)

5. The management of the project

Question: How do we manage the project?

Understanding the management of a grassroots project is at least as important as evaluating what it does because management is often what grassroots projects really struggle with.

A basic management chart is a good place to start. However, these very rarely tell the whole story. Questions like - who actually runs things? How are decisions really made? Where do workers get their support from? - asked in the context of the management chart will often be revealing.

Sometimes management charts are very misleading. Occasionally a project is, in practical terms, managed by an individual. In this case the chart counts for nothing but only the individual workers' and volunteers' relationship to the dominant individual.

Information that tells you about the management of the project:

- In minutes and reports
- To whom is the project management group responsible? A church management group, an umbrella group or the Charity Commission?
- What are the grievance and disciplinary procedures - if any?
- Are lines of responsibility and accountability clear or confused?

Your pervading question should be: how are things really being managed here?

6. Finances and fundraising

Question: How is the project funded?

Money tends to be the overriding concern for grassroots community groups. Lack of funding and insecurity of funding are almost always what the groups feel they need help with. Evaluation helps them into a position where they are more likely to be successful in fundraising.

However, sometimes the changes necessary in order to make fundraising more successful can easily mean the group moves away from the culture and ethos which makes it what it is. This is the dilemma which faces all grassroots groups. Do we remain small, struggling and authentic or do we become more professional?

For an evaluation you will want to look at the following aspects of the project's finances and fundraising:

- Accounts. Most projects often have reasonable accounts even when other aspects of administration are fairly chaotic. If accounts are chaotic this needs to be sorted out. You will also need to satisfy yourself that there is no evidence of financial mismanagement and corruption.
- Financial practice. There should be written rules about how money is managed. It is important to identify unsafe practices such as the signing of unwritten cheques.
- Develop a funding history -- this generally closely maps the overall history of the project.
- Is funding secure or is it only short-term with no likelihood of renewal?

- Look at funding applications. Why have they succeeded? Why failed?
- Is training in fundraising needed? Or do they just need to get down and do it? Or are there fundamental problems in getting funds?
- If there are fundamental problems what are the causes? A problem with the quality of work being done? A problem in documenting and writing it up? Or is the work fundamentally difficult to fund?

Generally you need to be a bit stricter in areas concerning finance. Proper financial procedures are a safeguard that every project needs.

7. The wider context of the project

Question: What links are there to other projects or communities?

Some projects are good at networking, others remain introverted and isolated. Similarly, some projects are deeply aware of their community, whilst others simply do their own thing regardless of what the community's real needs are. It is important to get some idea of how well-connected a project is. The following questions are worth asking:

- What other projects and agencies is this project aware of?
- What is its understanding of its local community?
- Is it connected with any local forum?
- How much is the project meeting a unique need? How is it fitting into other provision?

You may identify other external organisations, projects and agencies that will be able to give you some perspective on this project.

8. Feeling the story.

Question: What do people feel about the project?

The exercise consists quite simply in asking people to say, in turn, what they enjoy about the project, what their sorrows and hopes are, and what they feel are the threats to the project. These can be simply recorded on flipcharts, as people make their contributions. It is an exercise which helps people to tell their story, not so much in narrative form, which they have done during the history session, but in the language of feelings.

This exercise can be used with different groups.

9. Assessments and recommendations

Question: How does an outsider see the project?

People tend to think that evaluations are all about recommendations and immediately turn to this part of the report. The process of evaluation is the most important part, but, nonetheless recommendations have their part to play.

In the final report try and write it in an objective manner i.e. without making overt judgments. This provides the freedom to tell the story as you see it without getting into the complexities of how good or bad it is. But you will be expected to make some kind of assessment and this can be done in a separate section. It may be best to separate these assessments into their constituent parts.

Don't write:
The youth club itself is well-run and enjoyed by the young people but its management can be chaotic and the participation of young women is limited.

Do write:

- Youth club nights are well-run by a well motivated staff
- All the indicators showed that young men enjoyed the youth club
- Young women find the club too male orientated and their attendance has declined
- The management tends to be chaotic unnecessarily increasing stress for workers and occasionally meaning important things don't happen

This gives a series of clear points which can be systematically addressed.

Recommendations

It is not always necessary to give any recommendations. They won't necessarily be very useful and could be seen as both critical and unenforceable.

The management committees of most grassroots projects tend to have big weaknesses and it is only really useful pointing out clear problems which they can solve e.g. the worker would benefit from having one member of the committee who was her line manager rather than everybody doing it at different times!

Training tends to be intimidating for grassroots groups unless you can point them very specifically to training that will be useful for them (and maybe give them some idea of how to fund it).

99% of grassroots groups are struggling for funding so the suggestion that more funding is needed is probably the worst thing you can say to them. It is better to help them be realistic with the money that they have got.

Options

One of the best ways to help the group engage with an evaluation is to present them with some options which they can genuinely choose between. You may be pretty sure they are never going to choose some of the options but even so putting them into the position where they can make that choice will probably do them a lot of good!

For example:
The problem of the male dominated youth group might be solved by the following options:

1. Concentrate on running a good boys club with male orientated activities
2. Recruit female volunteers who can work with the young women during club nights
3. Set aside one night as girls only
4. Seek to work with the council youth worker with a specific brief for working with young women

Taking the evaluation forward

Having gone through these questions with the group, you need to spend some time writing it up and reflecting. This should lead you into identifying what further work you need to do. This often requires another meeting with your key contacts so make sure you have collected together necessary telephone numbers to allow you to arrange visits etc.

You will generally find yourself wanting to undertake some of the following activities (some of these are repeated from above):

- Visiting the group's activities
- Preparing questionnaires for workers, volunteers and users
- Arranging interviews with key people in groups
- Telephoning others with a perspective on the project
- Examining the project's documentation and records.

These can all be drawn up into a timetable which will give you a good idea of how long the evaluation is going to take. It is always a good idea to keep in regular contact with your key contacts, checking out intuitions, asking questions for clarification and developing the relationship. The more they are involved in the evaluation the more meaningful and useful it will be for them.

Project staff and volunteers can be more involved in certain aspects of the evaluation, especially talking with users about their feelings concerning the project. This can cut down the work you have to do and develop the sense of an evaluation which includes everyone. In this case there will need to be some direct contact with users from you, just to ensure that uncomfortable stories are not being suppressed!

How to check and present your results to the group.

Forum - bringing it all together

In some projects it can be appropriate to run a forum for everyone involved in the project at the end of the evaluation process. This gives you the opportunity to check out some of your emerging perceptions of the project and to involve everyone in the process of the evaluation.

Possible activities for the forum:
- Get everyone to stand in a line in order of how long they have been involved with the project
- In threes encourage people to share what is their best memory of the project. Get people to share some of these with the whole group
- Combine threes into sixes and get those sixes to write down their joys, sorrows, hopes and fears on a flipchart sheet divided into four
- Put these flipchart sheets up around the room and give people time to look at them all
- Plenary: draw out common themes and issues. Move into a general discussion.

LEEDS INFRASTRUCTURE CONSORTIUM RESOURCE PACK

SECTION 8 – RESOURCES

Introduction

This section on **Resources** is part of an 8-pack series of resource materials that has been produced by the Leeds Infrastructure Consortium. For further information, please go to www.leeds-ic.org.uk.

Resources for operation

Recruitment Issues

The Pay and Employment Rights Service (PERS) provides a wide range of free publications covering all aspects of employment law. The information is free to download from the PERS website but they do ask for your postcode and other basic information before you can access the publications. Go to www.pers.org.uk or call 01924 428030.

You can advertise for paid job vacancies on the Voluntary Action-Leeds website – go to www.val.org.uk/page/jobs

Payroll – Voluntary Action-Leeds provides a chargeable payroll service for help paying your staff. For more information go to www.val.org.uk/page/payroll or call 0113 297 7929.

Volunteering

Developing a Volunteer Programme - including help with the placement and recruitment of volunteers and ensuring that volunteers have maximum impact and benefit to your organisation, as well as meeting their own needs. For more information contact Leeds Volunteer Centre at Voluntary Action-Leeds – go to www.val.org.uk/page/i-need-volunteers or call 0113 395 0405.

Venue search

Finding venues – for office space, meetings or service delivery. Use the Leeds Community Accesspoint database hosted on the Leeds City Council website (www.leeds.gov.uk/communityaccesspoint) to search for organisations with meeting rooms and accommodation in Leeds.