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STEP 3 — TAKING STOCK AND PLANNING AHEAD

Purpose

This step recommends some simple actions that you can take to think about how your plan will progress over the coming months.

What's involved

Taking stock of the resources, information and support that you have at your disposal and planning the way ahead.

Useful resources

Information Sheet E – Support for Community Led Planning
Resource Sheet 1/3 – Volunteering hints and tips
Resource Sheet 3/1 – Funding advice
Resource Sheet 3/2 – Creating a simple project plan
Resource Sheet 3/3 – Template evaluation form
Local resources – contact your Rural Community Action Network (RCAN) member for details

Introduction

Now that you have attracted interest in the plan and set up a steering group to oversee the process, you will probably be keen to press on with the job of identifying issues of local importance which can be addressed by your community. However, before you do this, it's advisable that you spend some time doing a bit of preparation; taking stock of the resources and support that you have at your disposal and thinking about how you can make best use of these over the coming months.

This preparation needn't be arduous. Below are some pointers that will help you to think about how you can move your plan forward.

Taking stock of what you've got

The success of your plan will depend on the ability of your community to make the most of the resources, information and support available to it. At this stage it is worth making sure that you can account for the following:

Contact with volunteers
Probably the most important resource that will sustain your plan are the volunteers who can drive the process forward and help to undertake specific tasks as needed. Although you should by now have a steering group in place, it's important that you continue to maintain contact with everyone else in the community, to recruit and retain as many volunteers as possible.

Hopefully your first event will have attracted a number of potential volunteers. If not, there's still time to get more people involved. Using the hints and tips contained in Resource Sheet 1/3, you can still devise other ways of recruiting volunteers as your plan progresses.

See also: *Resource Sheet 1/3 – Volunteering hints and tips*

Access to funding

One of the impressive features of Community Led Plans is that they require relatively little initial investment to make them work. Often communities undertaking plans find that they only need a modest sum of money to produce their plan, covering expenses such as the hire of rooms for meetings, resources that might be needed for consultation with the community and the publication of the final plan. Once plans are completed however, they can be used to lever in significant external funding and support for the actions they propose.
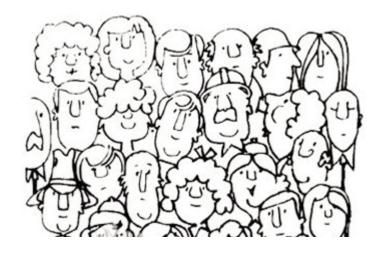
If you haven't already done so, now is the time to think carefully about how you might seek to raise funds sufficient to cover the costs of developing your plan. Using Resource Sheet 3/1, have a go at putting together a simple budget that will account for likely income and expenditure.

See also: *Resource Sheet 3/1 – Funding advice*

Support

Remember, your community shouldn't be working in isolation to produce the plan! Make sure your steering group has developed a close working relationship with your parish/town council, as they have a vested interest in supporting the plan's development and any actions your community proposes. Likewise, there is also merit in contacting relevant officers at your local authority at this point. They should be able to help you access information and facts about your area and will also want to be kept informed about the plan's progress. Last but not least, if you have any questions or concerns about what to do next, officers from your Rural Community Action Network (RCAN) member will be more than willing to help. Put these contacts to good use and you should have no problems producing a high-quality, effective plan.

See also: *Information Sheet E – Support for Community Led Planning*

Planning ahead

If you're happy that you've got the resources, information and support you need, you're ready to start thinking about putting these to best use and moving forward.

Developing a project plan

Creating a simple project plan is a good way of setting out the work that needs to be done over the coming months; certainly to the point of finalising the plan (Step 7). This needn't be anything overly complicated or time-consuming. Rather a project plan should be seen as a practical tool that can help you to think through what needs to be done when, and by whom. It can also help you to clarify the next steps of the plan with everyone involved; especially those on the steering group.

Using Steps 4 to 7 outlined in this toolkit and Resource Sheet 3/3, try putting together a simple project plan, thinking carefully about all the tasks that you think will need to be done to get it to the stage of publication.

See also: ***Resource Sheet 3/2 – Creating a simple project plan***

Monitoring and evaluating progress

Some organisations that provide funding for Community Led Plans require community groups to monitor and evaluate their plan's progress to make sure that key quality criteria are met. However, rather than being just a bureaucratic requirement, the process of monitoring and evaluating can actually be very beneficial to any community group undertaking a plan as it can help to make sure that things stay on track and ensure that the outcomes that everyone desires are achieved. Groups that have undertaken some form of monitoring and evaluation are also much better prepared when it comes to reviewing their plan at a later date (Step 9).

Included in this toolkit are some practical resources that can help you to monitor and evaluate your Community Led Plan as it progresses. In the index section you will find a simple checklist that you can use to make sure you have done everything that's needed for each of the 9 steps. It is also recommended you use the template provided in Resource Sheet 3/3 which allows you to assess progress as you go along, requiring supporting evidence and comments.

See also: ***Resource Sheet 3/3 – Template evaluation form***

By the end of this stage, it is recommended that you have:

- **Made sure that you have enough funding, volunteers, information and support needed to continue with your plan**

- **Produced a simple project plan that will help you undertake steps 4-7**

- **Started to use the evalution form provided in Resource Sheet 3/3.**

!

ADVICE SHEET 3

STEP 3   FUNDING ADVICE

Use this for

Thinking about how you can finance the development of your plan.

See also...

Resource Sheet 2/2 – Model constitution for steering groups
Resource Sheet 3/2 – Creating a simple project plan

The basics

Although Community Led Plans represent excellent value for money, allowing communities to get many things done using volunteer effort alone, they still involve some expenses that need to be budgeted for and carefully managed.

It is up to your community to decide who will take responsibility for managing the plan's finances. In some cases, it may be appropriate for your parish or town council to manage these as part of their routine business. Alternatively, your steering group can perform this role if it has a written constitution such as the one provided in Step 2.

See also: **Resource Sheet 2/2 – Model constitution for steering groups**

Financial management should be seen as part of the overall planning process for your plan. This need not slow things up, but it must be able to tell you whether you will have enough money in the bank to cover the costs of the things that you want to do!

In discussion with members of your plan's steering group, think carefully about how you expect your income to match up with any expenditure. You can do this using a budget template like the one shown overleaf.

Remember, planning ahead can save you time and effort in the long-run. Get a good understanding of your potential sources of income and expenditure now, and it will be much easier to raise the money you need and press ahead with work without delay.

Potential sources of income

There are a number of ways that your community can raise funds to cover the cost of developing your plan:

Grants
Grants are sometimes available to groups undertaking Community Led Plans. These can be national schemes such as Awards for All (see: **http://www.awardsforall.org.uk**/) or local schemes such as those run by some local authorities. Before applying to any scheme, it is important to think carefully about whether you are ready to accept a grant (i.e. have a constitution, bank account etc), know what you want the money for and how much you will need and are prepared to spend some time filling out the relevant paperwork and making your case. Speak to your Rural Community Action Network (RCAN) member to find out what grants you can take advantage of locally.

Parish/town council precept

Many communities are able to use part of their parish or town council's precept to fund their plan. The precept is money that can be raised through the local council tax to spend on improving the wellbeing of the local community. Parish and town councils calculate and decide their precept on an annual basis. If you involve your parish or town council in the planning process, you should have no problems arguing for funding from them!

Fundraising

Fundraising can be an excellent source of cash and a great way to demonstrate local interest and support to other funders. Some activities, such as raffles or cake sales can be very easy to organise. Others, such as sponsored fun runs or local plays might be more time consuming. Remember, the money that you expect to raise should always exceed the cost of whatever you choose to do.

Sponsorship

As your plan will have a high profile in your community, local businesses or benefactors may see value in sponsoring the work that you are doing. This may be in the form of money, but it could also be help in kind. For instance, local shops might be willing to provide refreshments at any events you are planning or the local newspaper may be willing to offer free advertising space.

Volunteering time in-kind

Last but not least, remember that the time volunteers contribute to the plan should also be valued. Often it can be useful to point this out to potential funders to demonstrate the value that can be added to their contribution.

Potential expenditure

The overall cost of developing your Community Led Plan will vary depending on the size of your community, the proposed consultation techniques and the design and format of your final report. Some plans have made do with a few hundred pounds, but most have needed £1,000 or so. Some typical costs for a Community Led Plan are shown in the budget template overleaf.

Producing a simple project plan can help you to factor in any potential expenditure into your own budget. By agreeing the different tasks that need to be carried out over the next few months between members of your steering group, you will gain a much more accurate idea of the costs that you can expect along the way.

See also: *Resource Sheet 3/2 – Creating a simple project plan*

Another good way of finding out how much everything might cost and the expenses involved is to contact a similar sized community in your area that already has a plan. Your Rural Community Action Network (RCAN) member should be able to put you in touch.

Further advice

For further advice about funding contact your RCAN member.

Another source of information is the Cash-online website, a resource set up to inform small charities and community groups about financial management. See: http://www.cash-online.org.uk

STEP 3 | FUNDING ADVICE

Template budget

Alpha Beta Community Led Plan Budget, 2011-12

Income

	Expected	Actual	Notes
Parish Council Precept	1,000		
Stall at village fun day	200		
Sponsorship from local shop	100		
Donations	50		
	£1,350	**£**	

Expenditure

	Expected	Actual	Notes
Village hall hire	160		8 Steering group meetings (1.5 hrs), 1 open day (4hrs)
Flyers	100		1,000 copies, 1 page, black and white
Collection boxes	15		Could make own
Stall at village fun day	20		Dependent on weather
Questionnaire printing	250		1,000 copies, 5 pages, black and white
Planning for Real model making	140		Costs could be saved by involving local school
Refreshments	40		Purchase from local shop
Out of pocket expenses for volunteers	200		
Printing of the plan	100		100 copies, 10 pages, colour
Website	75		Domain name and hosting
	£1,100	**£**	

Balance

	Expected	Actual	Notes
	£1,100	**£**	

| STEP 3 | CREATING A SIMPLE PROJECT PLAN |

Use this for

Deciding what needs to be done when, by whom and with what resources over the next steps of your plan.

See also...

Resource Sheet 3/1 – Funding advice
Resource Sheet 3/3 – Template evaluation form

Why create a project plan?

Many steering groups have found it useful to put together a simple project plan to help them think through the next steps of their Community Led Plan. This can save groups time and effort in the long run by making sure that everyone knows exactly what needs to be done when, by whom and with what resources.

It's up to your steering group to decide how much time to spend planning the work ahead. This will depend on how ambitious you want to be!

Below are some pointers for producing a simple project plan along with a template shown overleaf that you can adapt for your own use.

1. Decide what needs to be done
To start with, it is important that members of your steering group have read and understood the remaining sections of this toolkit. Think about how you can structure the work of your plan around the steps outlined. These should be thought of as broad objectives which frame everything else that you do.

2. Decide how you will do it
It is up to your community to decide how you will work towards each step of your Community Led Plan. This should be based on your aspirations for the plan, the local context and the resources that you have at your disposal. When planning this work, you will probably end up with a sequence of tasks that are often dependent on one another. Using the template provided overleaf try to think about each task in turn, mapping out who will be responsible for making it happen, when it needs to be done by and the resources that will be required (making sure all costs are reflected in your budget).

See also: *Resource Sheet 3/1 – Funding advice*

3. Do it!
This is the important part. Refer to your project plan frequently to make sure that you are on track. In some cases, you may need to change some of the tasks proposed as you learn from experience. This is quite alright, so long as you keep your sights on the bigger picture. Also, remember to keep everyone up to date with what's happening and evaluate progress as you go along.

See also: *Resource Sheet 3/3 – Template evaluation form*

Example project plan
(note, tasks listed are for illustrative purposes only)

Step/task	Who	Resources needed	Complete by — 2011 J	F	M	A	M	J	J	A	S	O	N	D	2012 J	F	M	A	M	J	J	A	S	O	N	D
Step 3: planning ahead																									
Compile a contact list of everyone that can help out with the plan	AE				▓																					
Secure parish council sponsorship	JF					▓																				
Organise social event to raise additional funds	NC/RN	Hire of village hall, refreshments					▓	▓																		
Step 4: understanding your community																										
Research local history	JB						▓	▓																		
Research census data	MH						▓	▓																		
Contact local authority to find out what plans already exist for the area	MH						▓	▓																		
Create discussion forum on Parish Council website	DC																			▓	▓					
Create graffiti wall for young people to write ideas on	AS	Plywood and paint needed																		▓	▓					
Design questionnaire and send to all households, businesses and organisations	W. Group	Printing of questionnaire (x 1,000)																		▓	▓					

STEP 3 — CREATING A SIMPLE PROJECT PLAN

Step/task	Who	Resources needed	2011 J	F	M	A	M	J	J	A	S	O	N	D	2012 J	F	M	A	M	J	J	A	S	O	N	D
Step 5: prioritising and planning action																										
Collate and analyse results from the consultation	MH/LR	In-kind time										█	█													
Publish results of the consultation in newsletter and on parish council website	AE	Printing of newsletter												█												
Hold open meeting for people to discuss and vote on ideas for action	RN/MH	Hire of village hall, refreshments													█											
Step 6: drafting the plan																										
Draft plan, to include what the plan is about, evidence of local needs and priorities and action plan	AE/ MH/JB															█	█	█								
Send draft to members of the community and interested organisations for comment	AE	Printing of draft plan (x 100)																	█	█	█					
Make changes to draft based on comments	AE/ MH/JB																					█				

STEP 3

TEMPLATE EVALUATION FORM

Use this for

Making sure that your plan is of the highest quality, by recording what you've done along the way.

See also...

Information Sheet F – Community Led Planning Checklist

Why use this evaluation form?

For Community Led Plans to be effective they need to be produced to a high standard. Whilst the 9 steps detailed in this toolkit are designed to help you achieve this, it is advisable that you spend some time reflecting on what you have done well, and what needs to be improved as you go along.

The template evaluation form provided below lists the key features of a high quality Community Led Plan. As you complete Steps 1-7, it is recommended that you record any work that you have done which demonstrates the 'quality' features of your plan. Not only can this help you to make your plan better where needed, you can also use it as evidence to inspire confidence in the organisations that fund or support the work you are doing.

Suggested template

[Name of community] Community Led Plan Evaluation Form				
Assessment criteria	**Yes**	**No**	**Evidence and comments**	**Signed**
Key organisations involved in the plan's development				
Rural Community Action Network (RCAN) member				
Parish/Town Council				
Local authority departments				
Other (please specify)				
Effective governance structure in place				
Representative steering group formed				
Purpose of steering group agreed				
Steering groups operations and responsibilities clearly defined				

Assessment criteria	Yes	No	Evidence and comments	Signed
Work planned, monitored and evaluated				
Budget produced				
Simple project plan produced				
Progress monitored using checklist				
Progress evaluated using evaluation form				
Local information and facts about the area researched				
Captured any existing information that tells you about the wellbeing of your community				
Existing plans and strategies for the area considered				
All sections of the community involved				
First event held to attract community interest				
Volunteers from all walks of life recruited				
Different consultation activities used				
All sections of the community involved in consultation activities (including those who do not usually get involved in community activities)				
Action plan adequately reflects community needs and aspirations				
Local information and facts about the area are considered in the action plan				
All contributions and feedback from the community are used to inform the actions proposed and presented in a way that is accurate and accessible to all				
Actions prioritised				
Actions clearly state who is expected to do what by when				
Action plan well publicised and publically available				
Actions link to local government strategic plans where possible				