



Resources for **small groups**

Introduction

Merton Voluntary Service Council works to support and inspire the voluntary, community and faith sectors in Merton.

As part of this work we provide a range of advice and information services.

We are always happy to work on a one to one basis with any group in the borough, but we are aware that small groups, which are often run entirely by volunteers, can find it particularly difficult to get one to one advice and support at times which work well for them.

To help meet these particular needs we have produced a number of fact sheets. The resources in this pack are available at our web site (www.mvsc.co.uk). There you will also find fact sheets about financial management and a range of sample policies and procedures which you can adapt to your own specific requirements.

We hope you find this information useful in the management of your own voluntary, community or faith organisation.

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Chair
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An introduction to fundraising

Most groups find that having some funding enables them to do far more than they would otherwise be able to. Even for the smallest support or self-help groups, a few hundred pounds can help publicise meetings, attract members, hire transport, or make use of better, more accessible premises. Other groups may have far greater needs for funding, say for buying major items of equipment or employing workers.

This page looks at where to start with fundraising. In particular, it considers:

- why you need to plan your fundraising and how to go about doing it;
- how to decide what to fundraise for; and
- how to decide on a budget.

Where to start

Before you start fundraising you need to have a clear idea of what you want the money for. Funders prefer to fund a group with a clearly defined idea of what they want to achieve, how they will achieve it and how much everything will cost.

Fundraising needs to be done in a systematic way and you need to have a clear plan before you start. In some cases, plans can be fairly simple and straightforward but where there are a larger number of issues to consider the planning process will take longer.

There are any number of different ways to carry out a project, and what you decide to do will depend on how your group works, what resources you already have and how much you feel you could successfully raise (it is worth remembering that a small group with little or no funding to date is likely to have great difficulty raising hundreds of thousands of pounds). You need to have thought about all these issues before you start approaching potential funders.

Preparing a budget

Costing up your project needs to be done carefully and two particular issues you need to consider are:

- *Are your costs accurate?* E.g. have you compared prices? If seeking to employ a worker, do you know how much to pay?
- *Have you included everything?* E.g. maintenance of equipment; national insurance and pension contributions for staff; inflation & salary increments for longer projects; out-of-pocket expenses for volunteers. A new project may also mean added 'core' costs: more stationery, more telephone calls, bigger premises etc.

Your project needs to be cost effective to attract funding but don't underestimate your budget in the hope that it will make your project look more attractive. If your budget is too low, it may make the project unworkable. Your aim should be to get an accurate, comprehensive estimate of your costs. However a funder may only offer to pay you part of what you asked for. If so, a good budget will help you identify whether a smaller project is viable or you need to raise more money elsewhere.

Developing a fundraising strategy

For most groups, fundraising is not a one-off event. Over time you may well find various parts of your work funded from a number of different sources, all of which come to an end at different times. It therefore makes sense to make fundraising part of your planning process. At the very least, it is important to know when each piece of funding runs out and to decide beforehand what you will do when that happens. It is worth remembering that the time between submitting an application and receiving any grant can be many months, so think ahead.

Applying for funding

Once you have decided what you need funding for and identified some funders who may be interested, you need to put together your application in a clear and concise way.

Some funders produce packs and require you to complete an application form. Others may give you less information and ask you to put your application in a letter. Try to write your letter to cover the points in this sheet.

What will funders want to know?

Despite the differences in application processes, there are certain pieces of information that all funders are likely to need to enable them to make their decision:

- *information about your group*: what you do already, how long the group has been in existence, what your objects are, the skills of people involved, how the group is managed, etc.;
- *information about your project*: what you want the funding for and why, what tasks you will carry out, how the project will be managed;
- *how you know there is a need*, what research you have done;
- *information about the people who will benefit from your project*: who they are, how many of them and in what ways they will benefit. Also, how beneficiaries and the wider community are involved in managing, delivering and/ or shaping the project;
- *why this funder might want to fund your project*: how you and your project fit with the priorities of the particular funder to whom you are applying;
- *any other funding you have received towards the project*, or applications you are making, or resources you will be using to deliver the project. These resources do not have to be money. They might also be staff or volunteer's time, donations of equipment, assistance from businesses etc.;
- *how much you are requesting* from them and for what items (if not for the whole project);
- *how you will monitor and evaluate the project* and what you intend to happen to the project once their funding runs out.

Certain funders may want additional information such as details of the policies and procedures you use, information about other similar or related services in your area, or details on the involvement of volunteers in planning and delivering the project. Providing the right information therefore depends on knowing exactly what each funder requires.

Funders will generally require you to send additional documents with your application. Often they will specify exactly what should be sent. If they don't, you need to limit your enclosures to relevant information, which would probably be your constitution, your most recent annual report and accounts and your budget for the project. In the case of new groups who will not have a set of accounts, it might be best to send your organisation's budget forecast for the coming year or years.

Some basic tips on writing applications

- Generally speaking, it helps if you emphasise the benefits of your project from the point of view of your users rather than your organisation, e.g., employing an administrative worker will enable you to improve the service you offer to your clients.
- Avoid jargon, acronyms, technical language, etc.
- Wherever possible provide specific numbers for members, service users etc. (e.g. say "we run a drop in attended by an average of 70 older people" rather than "we provide a drop in for older people").
- Keep your application short, concise and logical. If you are applying by letter, address it personally to the appropriate person. Avoid using "Dear Sir/Madam", try and keep to two sides of A4 and break down into paragraphs for each of the issues overleaf (if you can however try not to make this look as though you are answering questions).
- If possible ask for a specific amount. Avoid vague phrases such as "we would be grateful for any donation". However you should consider what sum you would consider if not awarded all you ask for—and what makes the project unviable.
- Make sure your letter or application form is signed and that you provide all the information the funder asks for.
- Get help. Ask others to read your application before you submit it.

After submitting your application

If your bid is unsuccessful, try and find out why. You may be able to get feedback which will improve your applications in the future.

On the other hand, if you are successful, try to develop a relationship with the funder. Keep in regular contact with them, provide all the information they ask for and let them know how the project is progressing. By funding you, they have already shown that they are willing to support your organisation. Developing a relationship with the funder will put you in a stronger position for attracting further funding from them in the future, perhaps for a different project.

Finally, if you do receive a grant, remember to say thank you!

In summary

Your application should be designed to show that:

- your groups is well managed and will handle any funds it receives correctly;
- your project is a good idea which will meet genuine needs and will work; and
- you are aware of the priorities of the funder and can demonstrate that you meet them.

General appeals will not allow you to do this. Each application needs to be written specifically for that funder.

Charity registration

The *Charity Commission* has a duty both to register and regulate charities in England and Wales. If your group meets certain criteria, you must register and your group then becomes accountable to the Charity Commission for the way it acts.

Who should register as a charity?

The criteria for registration are:

1. the objects of your group (as set out in your constitution) are charitable as defined by the Charity Commission and
2. your income from all sources is in excess of £5,000 per year, or
3. your group has a permanent endowment (e.g. funds that have been given to the group on the condition that they are never spent, or property that is not allowed to be sold), or
4. your group has the rateable use of any land or buildings (charity registration entitles a group to a reduction of 80% on business rates).

Many voluntary and community groups will meet at least one of 2), 3) or 4) above (e.g. even small groups will often have an income of over £5,000 in a year). The key issue with regard to charity registration therefore tends to be around criterion 1), whether the group's objects, its overall aims, can be defined as charitable.

Charitable objects and public benefit

To be considered a charity, a group must exist exclusively for the benefit of the public. All of the group's activities must benefit a significant section of the public. The implications of this are:

- All of the group's activities must be charitable, not just some of them.
- The definition of a 'significant section of the public' depends on the type of work the group is engaged in.
- The charity must exist for the benefit of the public, rather than for specific individuals. Therefore self-help groups tend not to be accepted as charitable, as they benefit the people who formed the group, rather than the wider public.

Charitable objects and the 13 heads of charity

In addition to its definition of public benefit, the Charity Commission uses other criteria (known as heads) to determine whether a groups objects are charitable. The 13 heads of charity are:

1. the prevention or relief of poverty;
2. the advancement of education;
3. the advancement of religion;
4. the advancement of health or the saving of lives;
5. the advancement of citizenship or community development;
6. the advancement of the arts, culture, heritage or science;
7. the advancement of amateur sport;
8. the advancement of human rights, conflict resolution or reconciliation or the promotion of religious harmony or equality and diversity;

9. the advancement of environmental protection or improvement;
10. the relief of those in need, by reason of their youth, age, ill-health, disability, financial hardship or other disadvantage;
11. the advancement of animal welfare;
12. the promotion of the efficiency of the armed forces of the Crown or of the police, fire and rescue services or ambulance services; and
13. the other purposes currently recognised as charitable and any new charitable purposes which are similar to another charitable purpose.

Responsibilities of Charity Registration

- informing the Charity Commission of changes you make to your constitution (in some cases, you must get their prior approval to make these changes).
- sending an annual return to the Charity Commission and
- accounting for your funds in a way specified by the Charity Commission's Statement of Recommended Practice (SORP).

Benefits of Charity Registration:

- greatly increases the number of potential funders for your group, as many grant-giving trusts only fund registered charities
- improves your public image
- provides some financial benefits in terms of tax and VAT.

In summary, currently to register as a charity a group must:

- exist for the public benefit;
- have objects which can be defined as charitable and have activities which further those objects;
- have a constitution which contains procedures which are recognised and approved by the charity commission;

and either have:

- income in excess of £5,000 per year, or
- a permanent endowment, or
- use of land or buildings.

Committees

A new group needs people who will take responsibility for:

- making decisions on behalf of the group
- overseeing the running of the group
- looking after the group's finances

- ensuring the group acts in accordance with its constitution and any laws that apply.

Generally, a group will delegate these responsibilities to a committee which can be between 3 and 15 people, though between 6 and 10 is usually most effective.

The committee's responsibilities

The committee's main responsibility is to manage the group's affairs on behalf of the members, users or supporters of the group. In particular the committee ensures that the group:

- acts in the interests of its beneficiaries, as defined in the constitution.
- keeps to its rules as set out in the constitution.
- has sufficient resources to carry out its work and manages those resources properly.
- meets regularly and takes necessary decisions in a democratic way.
- oversees and monitors the services provided by the group.
- produces an annual report and accounts, and provides returns to the relevant regulatory bodies (e.g. Charity Commission).
- holds an Annual General Meeting (AGM). This is the meeting at which the committee reports back to the membership on how it has managed the group and its finances over the previous year.

It makes sense, wherever possible, to have people on your committee with specific skills in different areas such as finance, administration, publicity etc.

The Committee is unpaid and, apart from a few exceptions for the provision of professional services to the group, committee members should get no benefit from membership other than repayment of out-of-pocket expenses.

Legal responsibilities

The committee is responsible, by law, for the way the group functions and each committee member could be held personally liable if the group experiences problems or loses money. Whilst there are various ways in which a committee can limit the liability of members, it is important to remember that there is no protection or insurance against mismanagement by the committee.

Furthermore, although some committee members may take on specific tasks (e.g. the Treasurer), overall responsibility still rests with the whole committee. Similarly, when staff are employed to carry out the day to day running of the group, responsibility for the group remains with each of the committee members, both individually and collectively.

Membership of the committee

Your constitution will set out who can be committee members and how they will be chosen. However there are generally two ways in which people become committee members:

- Election: Typically, committee members are elected at the group's AGM. This meeting can also elect the honorary officers (see below)
- Co-option: This allows a committee to bring on additional committee members between AGMs. The constitution will specify how many members can be co-opted at any one time.

Some groups also allocate places on the committee to representatives of other organisations, or to user's representatives or volunteers. In each case, procedures for the involvement of others will have been set out in your constitution.

The group may invite people to attend committee meetings in an advisory role (e.g. staff members, service-user representatives, representatives from other organisations).

Roles of committee members

Typically, a management committee will have three people with specific tasks: a *Chair*, *Treasurer* and *Secretary*. Click on these for the main tasks of each position. The roles of each officer can vary from group to group and some groups have paid staff who can assist with some tasks.

All the other committee members should take an active role in managing the group by keeping aware of all aspects of the group's work and contributing to decision making.

Sub-committees

Sub-committees can provide an opportunity for committee members with specific skills to work in-depth on a particular area of the group's activities (e.g. fund-raising, publicity, finance etc.). Terms of reference need to be drawn up carefully and sub-committees should always report back to the full committee and refer important decisions to it.

Summary of typical roles for Honorary Officers

- Chair: involved in the management of the organisation (including supervising the senior member of staff); chairs committee meetings; acts as a figurehead for the group and represents the group in dealings with outside world. In some organisations, there is a Vice-Chair to assist in these tasks.
- Treasurer: oversees the management of the group's finances, prepares budgets, oversees ordering and payments processes, and provides regular information to the rest of the committee on financial matters.
- Secretary: distributes papers to committee members, takes minutes at meetings, handles correspondence, maintains membership records.

Communications

This factsheet looks at how to let people know about the work that you do and how it can help them. Communication is just as important for established groups as for new ones, if they are to ensure that they reach everyone that could benefit from their services.

Identify your audience

The methods, style and content of publicity used by groups will vary considerably depending on who your target audience is and what you want to tell them: Key audiences, and the type of information they need, include:

- users, both potential and existing, e.g. practical information about the service;
- funders or potential donors, e.g. numbers of users and management information;
- other related organisations, professional staff, etc., e.g., referral routes;
- potential volunteers, committee members or paid staff, e.g. training provided, time commitment.

You need a clear idea of whom you are aiming the material at before you start preparing it. You should also think about how you will publicise your services amongst people who cannot access information easily, e.g. people whose first language is not English, or people who are blind or partially sighted. Your publicity materials should also demonstrate how your group welcomes people from minority ethnic communities, or people with disabilities. By doing this, you will be more able to achieve your aim of promoting the widest possible access to your services.

What methods work best?

Different publicity methods work for different groups in different circumstances. The range of methods is huge, but a small selection of the ones used often by small groups could include:

- Publicity leaflets: useful for providing basic information on your group or service (e.g. who we are, what we do, where to find us, etc.);
- Emails and letters: to target information at people who might be interested in your group;
- Social media: Facebook, Twitter and other social media are useful for promoting interaction with members and users;
- Posters/ Flyers: useful for putting across a fairly short message, e.g. a request for volunteers or publicity for an event. They need to be eye-catching, with a limited number of words in a fairly large font size;
- Website: useful for giving information on your group and its activities which can be easily up-dated.
- Newsletters/e-bulletins: many groups produce a regular newsletter which can publicise issues of interest to its users or members and let people know about forthcoming events. These can be printed or distributed electronically;
- Directories: MVSC produces a directory of local voluntary and community groups which is a useful way of getting the name and work of your group publicised within the local voluntary and statutory sectors. Various other directories are available;
- Local press: useful for advertising a specific event or raising awareness of a particular issue connected with your group.

Keep it short and simple

Whichever method you use, you need to:

- keep the content relevant; think about what your audience needs to know;
- make it easy to read; try keeping to short sentences, use simple language and break up the text by using bullet points or including pictures.

- get someone (preferably from outside your group) to look over the materials before you use them. MVSC's small groups service would be able to help with this.
- think about who you want to send them to, e.g. your members, service users, GPs and health professionals, council officers, other voluntary groups, etc. In some cases, MVSC can provide labels for local mailings.
- make a note to review them in the not too distant future (out of date publicity materials can give a poor impression of your group).

Conducting committee meetings

Committees need to hold regular meetings to discuss the work of the group, decide on future actions and identify and deal with problems. It is important that discussion at these meetings is relevant and constructive, that necessary decisions are taken and not ducked and that a clear record is kept of what was agreed at the meeting.

This page covers three key areas connected with committee meetings:

- [the agenda](#), which sets out what issues are to be considered;
- [the role of the chair](#) in ensuring the meeting runs smoothly and keeping the meeting on track; and
- [the minutes](#), which will provide a permanent record of the meeting.

The agenda

An agenda is necessary to ensure that everyone knows beforehand what is to be discussed and to make sure nothing gets missed. It is important that there is broad consensus about how the agenda is set and that all members are able to submit items for inclusion. It also helps if the agenda, minutes of the previous meeting and any background papers are prepared and circulated some time in advance of the meeting. Background papers are especially useful to enable members to make informed decisions at the meetings. It is up to you how you set out your agenda, but the following may be useful as a basic model for groups.

1. Opening: apologies for absence given and any new people introduced.
2. Minutes of the previous meeting: those who attended the meeting are asked to confirm that the minutes are an accurate record of that meeting. If agreed, the chair signs a copy.
3. Matters arising: an update on any issues raised or actions decided at the previous meeting. This should be brief and only items not on the agenda elsewhere.
4. Officers/ staff report(s): an opportunity for specific people, e.g. Treasurer, paid worker, Chair etc. to provide relevant information to the rest of the group.
5. Reports from sub-committees (if any set up): to hear about and vote on any recommendations put forward at sub-committee meetings.
6. Business item(s): any specific issues which the committee need to discuss and come to decisions on.

7. Discussion item(s): having dealt with the main business, it can often be useful for the committee to have a discussion around a specific aspect of the work, or issue affecting the group.
8. Any other business: members can raise important issues which have not been covered elsewhere on the agenda. They should be quick and urgent.
9. Arrangements for next meeting: confirmation or setting of the date, time and venue for the next meeting. Try to set well in advance (e.g. for the whole year), rather than from one meeting to the next.

Chairing the meeting

Chairing meetings is a matter of style and different people will tend to chair meetings in different ways. However, the basic tasks of the chair during the meeting centre around the following:

- listening to all the views expressed and ensuring everyone has a chance to speak who wants to do so and that no-one unduly dominates;
- ensuring that a decision is reached, and making sure that everyone knows what has been decided;
- keeping order and keeping everyone to the agenda; and
- trying to finish the meeting on time.

Chairing a meeting is often a delicate balance between having sufficient authority to keep the meeting on track, whilst avoiding dominating the meeting or curtailing necessary discussion.

Taking minutes

Minutes are there to provide those who attended (and those who didn't) with a clear, concise and accurate record of what happened at the meeting and what decisions were taken. There is no hard and fast way of writing minutes but here are a few tips:

- Start with the key information about the meeting: Date, time, venue and who attended.
- Use the numbered agenda headings and under each item clearly record the key points of any discussion and any action that was agreed and who was to carry out the action. In most cases, capture a flavour of the discussion leading to the decision. It should not be necessary to record everything that everyone said. If, during the meeting, you are unclear on a particular point, ask for it to be repeated, or ask how it should be recorded in the minutes.
- Try and keep the language unambiguous and the minutes concise.
- Try and write the minutes up from your notes whilst it is still fresh in your mind.

A few more tips on conducting meetings

- Try and agree on when and where the meetings should be held. If people prefer different times of the day, it may be necessary to vary the times of meetings to suit everyone.
- Choose a venue that is accessible for everyone. Try and set the room out beforehand, especially if you have particular equipment you need for the meeting (e.g. induction loop).
- Make sure refreshments are available for the meeting.
- Set the length of the meeting beforehand and try not to over-run. A sensible maximum length for a committee meeting might be around 1½ hours. Any longer than 2 hours and concentration becomes more difficult.

Constitutions

Drawing up a constitution is an important part of the process of formalising your group. It is a document which sets out exactly what the group will do and for whom, along with some agreed procedures on how the group will be run.

What is a constitution?

A constitution (or governing document) clarifies:

- the people the group is aiming to help or work with;
- what exactly the group wants to achieve;
- the sorts of activities the group will carry out; and
- how the group will be run and managed.

This is written out and agreed by the members so that everyone concerned with the group understands how the group is to be run.

A constitution is necessary because it:

- defines your group,
- clarifies the way decisions can be made
- assists in resolving any disputes.
- enables outside bodies such as funders to have a clear understanding of how the group operates. (Funders will generally require any group they fund to have a constitution).

Preparing a constitution

A small group with a very low income which is unlikely to seek registration as a charity can have a short and simple governing document. However, if your group is likely to expand, fundraise, or seek registration as a charity, you will be better off with a constitution which follows a standard format. This would be more likely to meet the approval of the Charity Commission and would be understood by potential funders.

You can adapt one of many *model constitutions* that are available and have been prepared or approved by the Charity Commission. However it is important that everyone in the group understands the meaning behind all of the clauses. MVSC's *Development Worker* can help groups prepare a draft constitution.

What a constitution contains

A constitution will typically contain the following information:

- *Name*;
- *Objects*: the overall aims of your group, what it intends to achieve, and the geographical area your group will work in. If you intend to register with the Charity Commission, your objects will need to meet their specific *definition of 'charitable'*;
- *Powers*: what your group can legally do to achieve its objects or carry out its activities. E.g. to raise money or own or hire property.

- *Membership*: who is entitled to be a member of the group, how they can become members and how people can be disqualified from membership;
- *Committee*: who can be a member of the committee, how people can be elected or co-opted, how the honorary officers are elected, how people cease to be committee members, and the overall size of the committee;
- *Meetings*: procedures for committee meetings and meetings of the membership, including the annual general meeting;
- *Finances*: how the group will manage its money, hold any property or investments and prepare its accounts;
- *Alterations to the constitution*: when and how changes to clauses can be made;
- *Dissolution*: procedures for closing down the group;

To draw up and adopt a constitution, you will need to:

- make sure the group's objects are clearly set out and everyone connected with the group agrees with them;
- draw up necessary clauses (or get a copy of a model constitution for adaptation) and make sure that everyone connected with the group understands the meaning and purpose of each clause;
- meet to formally adopt the constitution;
- ensure committee members sign and date the constitution.
- destroy any early drafts of the constitution so that the document in circulation is the one that was formally adopted.

From this point on, your constitution becomes a legal document and your group must be managed according to its rules.

Developing a new project

There are a number of reasons why a small group might want to set up a new project or take on additional work.

- Growing awareness of the needs of users and of gaps in services.
- People connected to the group may have specific skills which could be put to greater use.
- Funding may become available for a new service or piece of work.

This page aims to deal with some of the issues connected with developing new services, in particular:

- the impact a new project might have on your existing organisation and services;
- how to plan and develop a new project.

Looking at your existing organisation

Many groups already find themselves stretched providing their current services. It is worth considering how (or even whether), a new project could be run without overstretching the group or affecting existing services. In particular, it is worth asking yourselves:

- Does your constitution allow you to undertake this new activity?
- How will the new project be managed?
- What additional work will the new project create?
- What additional resources (money, expertise, committee time, volunteers, staff, equipment etc.) will be required to run the new project and where might these be found?
- How will the new project fit with the existing work of the group?
- Is another organisation already doing this work?
- Is the new project too big for the size of the organisation? A small group applying for a very large grant might have difficulties in attracting the required funding.

Sometimes groups are asked to run a new project by a funder or public body such as the local council. However, the decision to take up such an offer must rest with the group and if it feels it cannot manage the project properly it can sometimes be best to turn down an offer of funding.

Researching your new project

Having decided to set up a new project, you need to be sure that there is a need for it. Some sources of information which could be useful include:

- service users, e.g. user feedback, questionnaires etc.;
- local statistics, such as the census and other local and national surveys;
- other organisations or professionals working in your field, who may be prepared to support your idea for a new service (they may also be able to tell you whether your planned service would unnecessarily duplicate one that already exists in the area); and
- volunteers, committee members, paid staff etc. whose own knowledge and experience can be invaluable.

In some circumstances, it may be appropriate to set up a pilot project which will run for a limited period of time. This can allow you to demonstrate that there is a genuine need for a service.

Clarifying how the project will work

Your group will need a clear understanding of how the project will work so that all concerned know what the project is supposed to achieve.

- Potential funders will need to know exactly what it is they are being asked to fund.
- Users will need to know what the project can do for them.
- Monitoring and evaluation of the project is only possible if you are clear about its aims

You will also need to prepare a budget setting out how much the project will cost. You must ensure that all of the costings are accurate and that there are no items missing.

Before setting up your new project, it helps to be clear about:

- your group and how the new project fits with your existing services;
- other organisations and the services they provide;
- how your group will manage the new service and any increase in funding;
- how you know there is a need for your project;
- what the project will do and for whom; and
- how much the project will cost.

Developing policies and procedures

Some written policies and procedures will inevitably be required by most, if not all, voluntary groups, whatever their size. Written policies & procedures can help your group to:

- be consistent in the way you carry out your work;
- be fair to users, members, employees and volunteers;
- ensure that you comply with the law

Why you need written policies and procedures

The main reasons for having written policies and procedures are:

- **The law:** Some written policies are required by law for some groups (e.g. Health and Safety). In other cases, such as recruitment of staff or managing your finances, you will need to meet certain legal obligations. An equal opportunities policy and a financial policy can help ensure you meet these obligations. Your constitution will set out certain procedures for holding meetings, keeping accounts etc. which your group must follow.
- **Best practice:** Over time, most groups find ways of working which best suit them. Written procedures can help to ensure that these are not forgotten and that new people know what these are.
- **Fairness:** Most groups would want to ensure they are open to all potential users or members who might benefit from their services. A written equal opportunities policy can demonstrate your commitment to others and provide a useful basis for considering how best to provide services.
- **Resolving disputes:** If necessary, written policies and procedures can be referred to if disputes arise over the way a particular function is carried out or responsibility exercised.

How to go about developing policies and procedures

The easiest place to start is to get copies of other documents (such as MVSC models) and adapt them. You will then need to:

- go through these in some detail, amending them to ensure they suit your group's needs.

- ensure everyone in your group understands and agrees them and they are formally approved by the Trustees.
- keep the final documents simple and fairly short as this will make them easier to use.

Some larger groups may have a long list of written policies and procedures to cover all aspects of their work. However, many smaller groups may not have the time or resources to prepare a large number of policy documents, at least not all at once. A bare minimum might therefore be:

- A health and safety policy
- An equal opportunities policy
- A financial controls policy
- A complaints procedure

Health and safety

Organisations with five or more paid staff are required by law to have a health and safety policy, although it is good practice for all groups to have one. The policy sets out your responsibilities to staff, volunteers and service users. The contents of a policy will vary from group to group, depending on the type of work the group does and the potential risks involved.

Equal opportunities

Your equal opportunities policy should cover issues of fairness, whether to service users, members, employees, volunteers, or committee members. Key areas are:

- Employment: all aspects of recruitment and selection of paid workers to ensure the process is fair and complies with the law. You would also want these principles to apply to the recruitment of volunteers and committee members.
- Service provision: how you will publicise and provide services so that that all people who might benefit are able to do so.

Financial procedure

Your financial procedure will set out your policies regarding the financial controls you have in place to enable you to manage your money. It would usually cover:

- day to day issues such as banking arrangements, procedures for ordering and paying for goods and services, use of petty cash, etc.
- financial management issues such as preparing an annual budget and reporting to the committee on the group's financial position.

Complaints procedure

Complaints, whether justified or not, are bound to happen from time to time. It helps to have a standard procedure in use which is seen to be fair by all concerned. Typically this would include:

- how service users can make a complaint and to whom it should be addressed
- the procedure for looking into the complaint
- how the matter can be reviewed if the complainant is not satisfied with the outcome.

Once you have developed and approved your written policies and procedures, you need to make sure:

- you use them (don't file them away and forget about them);
- everyone who needs to know about them is aware of their existence;
- you monitor their relevance and effectiveness (if they are proving unworkable, change them);
- you review and update them on a regular basis (say every two or three years) to take account of changes in the way your group works, or changes in legislation, or new and more effective ways of working.

Employing staff

Employing a first worker brings additional responsibilities for the Trustees: providing a safe environment to work in, organising payroll, support and supervision, etc. It can also mean a change of role for the Trustees: overseeing the work of the employee where once they might have carried out that work themselves. Potential difficulties can be minimised by careful planning. This page looks at the main areas that need to be considered before starting to employ someone.

Clarifying the post

Questions to be settled before employing a worker include:

- Why is the post needed?
- How will employing someone improve the services you provide to your users or members?
- What tasks will the worker do?
- What responsibilities will the worker have?
- How will the worker be managed?
- To whom is the worker accountable?
- Where do the boundaries lie between the worker and the Trustees?

Equal opportunities policy

The principles of equal opportunities make sure that the recruitment process is fair for all potential applicants and help the group get the best possible person by ensuring that suitable candidates are not discouraged or excluded from applying. Furthermore, most applicants have the right in law not to be discriminated against when applying for jobs. Groups should therefore have an equal opportunities policy which covers all aspects of the recruitment process.

Job description

A job description gives everyone a clear idea about what the worker will be expected to do. Typically, it includes:

- a brief statement about the overall purpose of the job;
- a list of tasks and areas of responsibility for the worker; and
- other important details such as the number of hours for the post, the salary scale, who manages the post, and details of any staff or volunteers supervised by the post-holder.

You will need to make a decision on what salary to employ the worker on. Many groups use NJC pay scales to decide how to grade the post and it is often worth asking around and looking at job adverts to determine what the appropriate grade for the post might be.

Person specification

The person specification contains a list of essential criteria which applicants need to meet to be suitable for the post. You are aiming to discourage applications from people who would be unable to do the job, whilst ensuring that anyone who would be suitable is not discouraged or excluded from applying. The contents of the person specification might include:

- experience needed. e.g working in a similar post for a certain length of time, or doing a specific task such as fundraising, staff management, etc.;
- skills and qualities required to do the post, e.g. someone who can type, or drive or be able to deal with challenging clients;
- any specific qualifications you would expect the person to have, e.g. bookkeeping certificate or a social work qualification.

Include all of the criteria, but only those, that are necessary for carrying out the post, otherwise you may exclude capable applicants.

Legal structures

This factsheet summarises the main legal structures in use by community groups. However, it is recommended that any group gets more detailed information on this subject and if necessary seeks advice from outside organisations to help make a decision.

The main structures for voluntary groups are summarised here. Each of these has different levels of external regulation and personal liability for management committee members.

Unincorporated associations

- The main advantage of this structure is its simplicity. Unincorporated associations can usually be set up without involving solicitors and without any particular costs. Administrative tasks for complying with outside regulations are kept to a minimum (for registered charities, they must comply with the

requirements of the Charity Commission). They are also fairly easy to wind up at the end of their existence, so long as their finances are in order.

- An unincorporated association is not a legal entity in its own right and its management committee members must instead take personal responsibility for all the activities of the group. Each committee member can be held individually liable for any debts that the group incurs.
- The group cannot enter into legal agreements (leases, contracts of employment, etc) or own property as a group. Instead, individual committee members must sign agreements or hold property on behalf of the group.

This structure might suit small organisations where there is likely to be little risk of the group going into debt, the group is unlikely to own substantial property or employ large numbers of people and there is no need to be burdened by administrative tasks and regulation.

Charitable trusts

- A charitable trust is another form of unincorporated association.
- Trusts share the advantages of unincorporated associations, in terms of simplicity.
- Each trustee is personally liable for any debts or contractual agreements
- All trusts must be registered with the Charity Commission.
- They can be run by a small board of trustees (as few as three people) who do not have to be elected

This structure tends to be used for groups which hold property or funds for the benefit of the public or a specific section of the public, rather than for groups with a large membership.

Incorporated organisations

- Incorporation enables an organisation to become a legal entity in its own right and involves the creation of a charitable company called a company limited by guarantee.
- The group can enter into contracts, own property, etc. in its own right, rather than requiring committee members as individuals to take responsibility for these.
- Typically the members of the management committee additionally become directors of the company.
- In most circumstances the liability of committee members (and the wider membership) is limited, usually to a maximum of £1 or £5. This means that in normal circumstances the individual committee members would not be liable for any debts incurred.
- The limit on individual liability could be removed if the debt is a result of fraud or mismanagement, or if the organisation continues to operate whilst insolvent.
- Setting up a company limited by guarantee tends to be more costly
- Incorporated organisations come under company law as well as charity law and are regulated by Companies House as well as the Charity Commission. This creates more administration and regulation. The company can be fined for not completing and returning paperwork on time, or not complying with company regulations.

This structure is likely to suit groups who intend to employ staff or own substantial property and feel that they need to give some protection to their committee members. A group can set up as an unincorporated association, then go through the process of incorporation at some future date, when required.

Charitable Incorporated Organisations

This new structure was launched in December 2012 and is being implemented in phases. It will provide the main advantages of a Charitable Company – a legal personality and limited liability – but it will be registered

with and regulated by the Charity Commission only. Requirements for reporting and for annual accounts should be simpler and much cheaper, in particular for a smaller CIO. The Commission has produced model forms of constitution for CIOs.

Brand new charities have been able to register as CIOs since January 2013. Unincorporated associations can transfer to become a CIO during 2013 (phased based on level of income) and during 2014 (subject to further legislative changes) incorporated organisations may transfer to become a CIO.

Community Interest Companies

Social enterprises can register as a Community Interest Company (CIC). These companies:

- need only have 1 or 2 Directors and these can be paid a salary out of the profit of the company.
- are expected to generate 50% or more of their income through trading.
- cannot be registered charities or undertake political activities
- are required to have a community interest statement setting out the section of the community whom they will benefit
- must produce an annual public benefit report on how their work has benefited their community

Co-operatives and other form

Another form of incorporation sometimes used by community groups is an Industrial and Provident Society (IPS).

- it provides similar benefits to being a company limited by guarantee (limited liability for committee members, existence as a legal entity etc.). This is the legal structure adopted by co-operatives—all the members own the society and profits made.
- setting up an IPS can be costly and currently they are subject to tighter regulation than CICs.
- IPSs cannot become registered charities which can be a disadvantage when seeking funds from many grant-giving trusts.

To decide which legal structure will be most suitable for your group, you might consider:

- whether your organisation is likely to have a large membership to which it should be accountable;
- the possible risks to management committee members and whether they need the protection of limited liability;
- the ability of the group to comply with regulations, handle paperwork and deal with administrative tasks associated with managing a company;
- whether the group is likely to hold substantial funds or property, or to employ staff;
- to what extent the group will be able to generate income through trading.

Monitoring and evaluation

All voluntary groups will have some targets they aim to achieve. These can be quite broad, such as who your group aims to benefit or what it aims to achieve (as set out in your constitution) or more detailed, such as numbers of users for a particular service (as might be included in a funding application).

Monitoring and evaluation are used to check whether you are meeting your aims.

Why do it?

A well-thought-out system of monitoring and evaluation can take relatively little amounts time to administer and potentially can bring considerable benefits. For example, it can:

- help you to be more effective in meeting the needs of your users and members;
- allow you to demonstrate to all concerned that what you do is a success, which is good for motivating volunteers, staff, users etc.;
- enable you to show that your group has learned from previous projects and that you have a track record of continuously improving the work you do;
- help your group attract funding: you will be able to demonstrate to potential funders how effective your current projects are and that you have effective procedures for measuring the success of projects;
- help prevent others from imposing their systems on your group: if you have your own system of monitoring and evaluation you may be able to use this rather than having to adopt one devised by a funder, which may or may not fit with the way you work.

Where to start

Monitoring and evaluation is about looking at how well you meet your overall aims and the specific aims for each activity that you do. Therefore a sensible starting point is to review your aims and activities and remind yourself of exactly why your group exists and why it does its activities.

Identifying relevant indicators

Indicators are those things which show how successful you are in the work that you do and in achieving your aims. These usually fall into two categories:

- *Outputs*: these refer to the immediate results of a piece of your work, e.g. the number of people who attended a training course, the number of telephone calls received, the production of a new information leaflet etc.
- *Outcomes*: these are more about the impact of your work in the longer term, the difference you made to the people who used your services, e.g. the increased confidence or skills of those people who attended a training course, telephoned your helpline or used your information leaflet.

Setting realistic targets

You need to come up with targets for both outputs and outcomes which, if met, would indicate that your work has been successful. In the case of outputs, this tends to be fairly straightforward, e.g. you set a target for the number of people who will use a particular service. Targets for outcomes tend to be more complicated, but would be about measuring the change on a particular community, area or individual as a result of the work of your group.

In the case of both outputs and outcomes, the targets you use should be SMART:

- Specific
- Measurable
- Achievable
- Realistic and
- Timed.

Collecting information

You will need to devise methods for collecting data on the indicators you are using. Some of this will be “hard” - numbers - and some will be “soft” - what people think and feel.

For outputs, they might simply involve record-keeping, e.g. how many people you worked with, the number of telephone calls received etc. For outcomes, they might involve sending questionnaires to service users, or interviewing them about the impact of your work or even collecting information about changes in the community at large.

You will need to analyse the data you have collected to evaluate your work and produce a report. This typically will include details of:

- the targets you originally set and whether you met them;
- some kind of explanation as to why you were unable to achieve any particular targets; and
- what you have learned as a result of the project and what you might do differently in the future. In this way, you are including ideas on how you could improve your work in the future.

Organising your finances

Getting started

Some of the things you need to think about are:

- *Keeping financial records* - At the very least, a cash book and a petty cash book are needed to keep track of day to day income and expenditure. Get a receipt for everything, number each one and file them in number order—this will save time and money later on when your accounts are examined or audited.
- *Opening a bank account* - Most banks operate special accounts for clubs and societies. The group will need to decide who can authorise payments and sign cheques. It is good practice to have two people to sign every cheque but more than two allowed to do so. If you are a registered charity, it should say so on your cheques and any invoices you send out.
- *Accounting rules for registered charity*- If your group is a registered charity you must comply with these accounting rules. All registered charities can get a free copy of the Statement of

Recommended Practice for charities (or Charities SORP) from the Charity Commissioners (www.charity-commission.gov.uk)

- *Employing staff* - If you have paid staff you will need to keep PAYE records. You can get a starter pack from HMRC. (www.hmrc.gov.uk)
- Make sure you keep all your accounting records in a safe place; legally, you must keep them for six years.

Where you can get help

AccountAbility is Merton's Community Accountancy Service. They provide a high quality, accessible and confidential service on all financial matters as they relate to the voluntary sector. They can help you with:

- setting up financial systems;
- one-to-one support for finance staff and treasurers;
- in-house training;
- telephone support;
- factsheets;
- undertaking an independent examination of your finances for submission to regulatory bodies.

Who is responsible for what?

You will probably want to elect a treasurer to take on the job of overseeing your organisation's finances. However, it's important to understand that all members of your management committee share responsibility for ensuring that your organisation's finances are properly managed.

The management committee as a whole needs to agree budgets and monitor income and expenditure. The treasurer has an important role to play in making sure that this information is provided to other committee members clearly, and supporting others to understand the organisation's financial position so that appropriate decisions can be taken.

The committee should get financial reports at least every three months. They should include:

- a comparison of budgeted income and expenditure and what the actual income and expenditure has been;
- details of money owed or owing;
- copies of bank reconciliations and bank statements; and
- a forecast of future income and expenditure.

It can be a big responsibility being the treasurer, and you might want to think about having a finance committee made up of three or four people.

It is a good idea to have written financial procedures to help everybody understand how your organisation manages its money.

At the very least, as a small community group you should make sure that:

- if registered as a charity you have got a copy of the Charities SORP;
- your management committee understands its financial responsibilities;

- your management committee gets regular reports on your organisation's financial position and understands them; and
- you keep proper accounting records.

Planning for small groups

Taking a regular look at your group and the direction in which it is going is an important part of managing it.

Why groups need to plan

- Planning improves everyone's understanding of the group and where it is going and helps everyone to pull in the same direction.
- A plan gives a group a common purpose, targets to aim for and a method of monitoring its success.
- A written plan demonstrates to funders and others that you know what that future of your organisation should be.
- Planning enables you to keep abreast of changes, such as the needs and expectations of users, the types of services provided by other groups, the interests and priorities of funders, etc. The people involved in your group can also change over time, bringing with them different skills and interests. The planning process enables groups to think about how to deal with these changes and have some control over them.
- Without planning, you end up having to react to events and managing from one crisis to the next, which takes more time than if you had planned how to deal with these events in advance.

Different types of plan

The contents of a plan can vary greatly according to its purpose. Typical descriptions of plans include:

- *Strategic plan*: An overall view of your group, its services and its needs.
- *Development or service plan(s)*: Focusing on specific services.
- *Business plan*: Concentrating more on finances, looking at how much activities will cost and when the funds will be required and spent.

In the case of a small group, it may well be feasible to combine all of these areas into one planning process, to give an overview of where your group is going, details on the services to be provided and relevant financial information.

A basic planning framework

A basic framework could follow three broad themes:

- **Where are we now?** What were we set up to do, and for whom? (refer to your constitution's objects or your mission statement if you have one). What are we doing at the moment? What do we do well and what less well? What do others around us do (e.g. other service providers, local authority etc.)? How do we manage what we do?

- **Where do we want to be in the future?** What should we be doing, and for whom? Why should we be doing this. What will we need to do as a result of others (e.g. changes in the law, or the priorities of funders)? What benefits will this bring for our users and our group?
- **How are we going to get there?** What tasks do we need to do? Who will do each task, and when? What resources do we need, in terms of people, equipment and money? Where are we going to get them from? How will we fit everything together?

In considering these issues, you are not just looking at the services your group provides, but also the way they are provided and managed. Planning will involve you looking closely at your group and how you could improve it. As a result, you may decide your priority is to improve the skills of your management committee, or seek to employ a worker to run your group on a day-to-day basis, rather than make any changes to the services you provide.

Typical contents of a small group's plan might be:

- a short summary;
- your current services and the way your organisation works;
- the likely need for your services in the future (what level of need? from whom?);
- the services you will provide in the future in response;
- what your group will need to provide these services (people, premises, equipment, funding, etc);
- how you will manage your group in the future; and
- your financial requirements for the future.

More than just a piece of paper

Planning is about more than just a written document. Planning is a process a group goes through which enables everyone to understand and be involved in the future of your group. To have any benefit, your plan must be a part of your organisation, something you all agree to and something that you use to develop your group.

Further information

For more detailed guidance click on the link below
www.ncvo-vol.org.uk/advice-support/future-planning

Premises

Deciding on premises is a complex area and groups intending to take on property are likely need legal advice.

What do you need?

- Some more established groups may need their own office space, perhaps with access to a meeting, training or interview room.
- Groups may share office space to reduce expenditure.
- Small groups with no staff may operate from the home of a committee member, perhaps booking a room at a local community centre or church hall when they need it.

What responsibilities can you take on?

The responsibilities and drawbacks of taking on premises can sometimes be overlooked. For example:

- A great deal of your time may be taken up with managing the building rather than running your activities
- Some parts of the building, such as meeting rooms, may only be used occasionally which would not be cost effective.

Sharing office space with other organisations means you can share responsibility for managing the building and it may be possible to find fully-serviced accommodation where management of the building is included in your rent leaving your organisation responsible just for the office space you use.

Some groups' needs might be much more basic, e.g use of a room for meetings, events, classes, etc. A list of community venues in Merton is available at the MVSC web site.

Different types of tenure

There are broadly three main types of tenure:

- *Buying a freehold or a long leasehold.* This can provide long-term security for a group, but is likely to be an expensive option. It may therefore be out of the reach of many small voluntary groups.
- *Renting on a lease.* A lease gives a group an exclusive right to occupy a property in return for payment of rent. Leases run for a set period of time and should include a break clause which would allow the group to surrender the lease early if required. Without a break clause the group (or individual trustees in the case of unincorporated associations) would be held liable for the costs for the whole duration of the lease, even if the group moves out.
- *Renting on a licence.* Licenses tend to be more temporary arrangements than leases and the licence will be a much simpler document. They tend to give less security to tenants, but can be more flexible in terms of allowing a tenant to surrender it.

What resources do you have?

A key factor in your choice is likely to be the funds you have available or are able to raise. Most local groups will find it easier to approach funders for a sum to cover rent, rather than for the considerably larger sum needed for purchase or renovation costs.

What is available?

It is worth asking around amongst other voluntary and community groups to see if they have some space available they could share. MVSC may also be able to put you in touch with people who have space available. Merton Council rents out some office space for voluntary groups in *Vestry Hall*, Mitcham and elsewhere. MVSC also provides office space in Vestry Hall for small new groups to rent for one or two sessions a week

If you do decide to take premises on a lease, legal advice is very important.

Recruiting committee members and trustees

Identifying the skills you need

Every member of a committee must be able to contribute to the efficient running of the group, and should bring with them relevant skills and experience. They should also genuinely want to be involved.

Consider what gaps there are in your current committee, e.g. finance, publicity, administration, employment etc. Then identify what you need from people to fill those gaps. It can be useful to draw up a person specification setting out exactly what you need.

Keeping to your constitution

Recruitment of new members needs to be done in accordance with the rules in your constitution. This sets out procedures for co-opting, appointing or electing new committee members (also known as Trustees). Your constitution may also include eligibility criteria for Trustees. There are also legal requirements covering who can or cannot be a trustee of a charity. These exclude:

- people who have convictions for dishonesty;
- undischarged bankrupts;
- people previously removed as a trustee by the court or charity commission;
- people disqualified from being company directors; and
- people under 18 years of age (unless registered as a company).

Recruitment methods

There are various places you can look for potential committee members, such as:

- *Within your own organisation:* every group has supporters, ex-staff members, volunteers, ex-users and their families etc. Their knowledge about the group and their interest make them a good source of committee members.
- *Local volunteer centre:* you can provide them with the person specification you have drawn up, plus background information about your group. Other agencies, such as REACH may be able to help.
- *Local businesses:* it may be worth approaching local businesses to see if they might put forward suitably qualified staff.
- *Word of mouth:* existing committee members may have personal contacts who could fit your needs.
- *Open meeting:* you could invite people to attend a meeting to give them the opportunity to find out more about the group.

Whatever methods you use, you should seek to recruit committee members in accordance with your equal opportunities policy. Most groups will want to promote membership amongst all sections of the community whilst ensuring that they attract people with the skills they need. In this respect, it should be treated as similar to recruiting an employee, so giving potential new trustees an information pack before they join may also be helpful.

Induction process for new members

An induction process should make new members feel welcome, valued and able to participate fully in decisions. It is worthwhile to put together an induction pack and you may wish to put on an induction meeting for the whole committee, especially if you have a number of new people at the same time, enabling them to meet other committee members, staff and volunteers and learn about the main aspects of the organisation.

A typical induction pack could include:

- the constitution and annual report and accounts;
- a summary about the group and its aims and objectives;
- job and role descriptions for paid staff and committee members;
- information on any sub-committees;
- the budget for the coming year;
- minutes of recent committee meetings;
- contact details for every member of the committee;
- leaflet CC3 from the Charity Commission on roles and responsibilities of trustees;
- key policies: equal opportunities, health and safety, etc.

A checklist is available from MVSC – but don't overload people.

Sources of funding

For many people, fundraising evokes images of flag days, jumble sales, stalls at fairs, and so on. While such events can be successful and can also be an enjoyable way of publicising your group and getting people involved, there are other sources of funding which can often provide larger sums of money to voluntary groups. These include:

- public bodies: local councils, government departments etc.;
- charitable trusts (including National Lottery);
- companies.

There are some distinct advantages in seeking funding from these sources rather than relying on donations from the public.

- They will expect to be asked for funds. Their aim is to fund well-managed projects that meet a definite need.
- They can provide far larger sums of money than would usually be raised through events such as jumble sales, raffles etc. The work involved in applying for a grant can be a far more productive use of time than organising fundraising events.
- A number of trusts and other bodies that run small grants programmes aimed specifically at small voluntary and community groups

Public bodies (local and national)

Merton Council, local health services and other public bodies, either on their own or in partnership, provide a range of funding opportunities. These can be one-off grants for a specific purpose or longer term (up to 3 years). You can find details on current public sector grants programmes by looking on www.mvsc.co.uk or registering to receive the MVSC e-bulletin.

From time to time, central government departments run funding programmes which can be accessed by voluntary groups. Information on these will also be put on www.mvsc.co.uk.

MVSC's *Development Worker* can help you find out about any funding opportunities that may be appropriate for your group.

Charitable trusts (including Lottery)

There are thousands of charitable trusts which exist to give grants to voluntary organisations. However you will need to identify the best trusts to approach to avoid submitting applications which have no chance of funding. You need to check:

- *Eligibility criteria:* Trusts may only fund certain types of organisation (e.g. many trusts will only fund registered charities), or organisations based in or working in particular geographical areas, or organisations of a particular size.
- *Funding priorities:* Trusts may wish to fund projects or groups who work with certain sections of the community, or fund specific types of work.
- *Size of grant:* Trusts may have minimum or maximum amounts for grants, or a typical size of grant, which may or may not fit with your project.

- *Deadline for applications:* There may be a closing date for applications which will need to fit with your own timetable for the project. It is worth remembering that, even if you are successful, the gap between submitting an application and receiving a grant is likely to be many months.

There are a number of ways to help you find this information:

- *Funding databases*, such as www.trustfunding.org.uk, will search through the details of thousands of funders to identify ones which may be appropriate for you and your project. You can access this at MVSC.
- *Funding directories* provide more detailed information on each potential trust.
- *Application packs* produced by the funders themselves set out their priorities in detail.
- *Grants officers.* Some of the larger funders have people who you can talk to before applying.

Companies

Support from companies to the voluntary sector comes in a variety of ways.

- Larger, national companies may have their own grants programmes which work in a similar way to charitable trusts.
- Local companies or local branches of national companies provide support not just through funding but through volunteering, donation of equipment etc.
- A local company may sponsor a particular event or project.

It makes sense to approach companies where there is something that connects the company and your group. Approaches to companies are likely to have greater success where there is already some kind of personal contact between the voluntary group and the company.

Approaching several funders

If you are looking for a small amount for one specific project you would probably approach one source for all the funding. Larger projects or funding for several projects may require you to approach several different sources. Whilst this can appear daunting, with more work and more potential problems, it can also attract funders, as each successful application can help to draw in other funders.

