

DEVELOPING COMMUNITY FACILITIES



Introduction

Welcome to the 'Developing Community Facilities' toolkit which has been compiled by the Devon Reinvestment Service to highlight the key activities needed to develop facilities such as community centres.

Many of the tools and guidance notes have been developed by the Devon Reinvestment Service, based on our own experience of the projects we've been working on. We've also drawn on other expertise in Devon or elsewhere in the UK and included links which take you straight to the best source of information.

The toolkit isn't intended to be used in isolation and we don't claim to have covered absolutely everything you need to do, but there is a range of support for people developing projects in Devon so please get in touch and ask for help.

Devon Reinvestment Service - reinvest@devon.gov.uk

Finding your way around the toolkit

Colour coded sections

The toolkit is divided into sections representing the key areas of activity involved in developing a community project. Each section is colour coded for ease of reference - refer to the index for the section you need.

Case studies

You will find a selection of case studies to highlight how the different issues covered in the toolkit have been addressed by local groups.

Appendices A-B-C-D-E

Many issues will need to be considered at every stage during the development of your project - there are links to these sections throughout the toolkit.

Templates and guidance notes

We have produced a range of templates to help you with key areas of project development: links are included in the relevant sections of the toolkit and the templates can also be downloaded separately from the index on page 4.

£ Your financial plan

The financial planning section is supported by a series of spreadsheets which can be downloaded to help you develop your financial plan. Download a copy of '£ Your financial plan'.

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1. PLANNING

This involves being clear about what you want to do: having a vision and being able to communicate it. It is important to consider how your project will relate to other activities and initiatives in your local area.

What you need to do

- ✓ **Explain your vision - let others in the community know about your aspirations and goals**

[Project Background Information](#) - a template for setting out your ideas

- ✓ **Write a summary of your project idea and what you hope it will achieve**

[Project Summary Template](#) - this provides a helpful structure for developing and clarifying your ideas. You may not be able to cover all the points straight away but be aware that you will need to be able to answer these questions at a later stage

- ✓ **Make contact with agencies and networks to find out what's going on in your local area and for help with getting your ideas heard**

[Devon Communities in Action](#) - find out what community action is happening in your area

2. PROGRAMMING

This is about making sure that the project is realistic and seeing what really needs to be done to make it happen. It is a good idea to develop a detailed project plan which can be continually reviewed and updated as the project progresses.

WHAT YOU NEED TO DO

✓ **Justify the need for the project**

A brief report which addresses the following series of questions will help you to test the need for the project. You are likely to be asked this type of question when asking for support - and funding - from other organisations:

Need

- Why does the location or community need the project?

Describe the lack of provision and why other facilities cannot meet the need. Provide quantifiable evidence to back up your statements - for example, community responses to a parish or town plan, statistics etc: this must be confined to the most compelling hard evidence; not merely a 'hunch'.

Issues

- What particular issues need addressing for the area or community?
- Is the area deprived, suffer from rural isolation, high unemployment, or other specific problems which your project is aiming to address

Opportunities

- What opportunities is your project aiming to maximise?
- Will it add value to another complementary project?
- Is an established event or activity already happening in the locality which the project will link with or improve?

Strategic Context

- How will the project contribute to strategies and action plans which are already in existence and cover the geographical area or specific subject relevant to your project?

*Start with national policy eg UK white paper on rural affairs
Regional strategies, eg. Regional Economic Strategy, RDA policy, DCC policy
Local strategies eg. town plan, MCTi, parish appraisal*

These should be very short summaries; there is no need to 'cut & paste' whole strategies, just the salient points

This report should be no more than 2 sides of A4: less if possible.

✓ **Collect statistical data to back up your case**

[INDevon](#) - the Devon Intelligence Network

[South WestID](#) - an online library of information about South West England

[Neighbourhood Statistics](#) - for local information, charts & maps

[Parish Plans](#) - the Community Council of Devon can help communities to develop parish plans and have developed a [Community Planning Toolkit](#)

Local Development Frameworks - a portfolio of development documents which planning authorities are required to draw up for their area and upon which planning decisions will be based - contact your local planning authority

[SW Market & Coastal Towns Network](#) - for towns which are part of the MCTi process, it is important to be clear about how your project relates to the overall plan for the area

✓ **Prepare a detailed project plan & timetable**

[DRS Project Planning Event: an overview](#)



In some instances, Devon Reinvestment Service can facilitate a Project Planning Event to help map out all the key objectives of a project and make sure everyone involved understands what they have to do.

Contact DRS for details: reinvest@devon.gov.uk

✓ **Draft a brief for a feasibility study**

[Draft proposal for a feasibility brief](#)

✓ **Make a start on the business plan**

B. BUSINESS PLAN

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✓ **Assess the potential risks involved**

D. DANGER! - ASSESSING THE RISKS

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Case study 1: 'Establishing the need for a community building' Princetown Village Centre

A market study was commissioned to investigate the potential business opportunities for the new centre in Princetown. [Find out more](#)

3. PEOPLE

It is important to make sure you have the right team for the job. As well as having a good mix of skills and experience, everyone will need to commit sufficient time to drive the project forward.

And, consider how other people might be affected by your project. A successful project will need to appeal to, and be accessible to, the whole spectrum of people in the community: don't underestimate the amount of time it takes to share views and ideas and get everyone on board.

What you need to do

- ✓ **Think about whether your group works well or whether there's room for improvement**

[Governance and Leadership](#) - advice and guidance on good practice in managing charities and voluntary organisations is available from the NCVO

- ✓ **Find out what skills everyone can contribute**

Assessing the skills of your group will help you to agree roles and responsibilities.

[Skills Audit Proforma](#) - for recording skills and experience relevant to managing a project

[Skills Audit Summary](#) - an easy system for collating the results of a Skills Audit

- ✓ **Consider what professional support you are likely to need**

[BITC ProHelp](#) - find out if you can get any free assistance from local professionals

- ✓ **You may need to appoint staff**

Your local Council for Voluntary Service (CVS) will be able to assist with a range of support and advice on developing your organisation, including appointing staff.

[Devon Association of Councils for Voluntary Service](#) - for links to the local CVSs in Devon

- ✓ **Find out about local training courses and advice on developing your skills**

[Community Council of Devon](#) - an ongoing programme of training and development through the Devon Rural Training Unit

[Devon Towns Forum](#) - free seminars and conferences for community partnerships working in Devon

[South West Forum](#) - includes events for the community and voluntary sector

✓ **Make sure that your project is fair and open to all**

[Equality policy template](#)

[Equality Matters Guide](#) - a good practice guide from the Big Lottery Fund on equality issues for small and medium sized voluntary or community sector organisations

[Equality South West](#) - regional network with events, training and guidance

✓ **Ensure accessibility and provision for people with disabilities**

[Living Options Devon](#) - improving services for disabled people in Devon, including disability training and access audits

[Community Council of Devon](#) - projects include the Access & Awareness Project to support village halls with the requirements of the Disability Discrimination Act

✓ **Make sure that people in the local community have an opportunity to express their views**

C. CONSULTING THE COMMUNITY

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***Case study 2: 'Getting the right team for the job'
Duchy Square, Princetown***

Find out how new board members were recruited to develop the new centre for creativity on Dartmoor.

[More information](#)

4. PARTNERSHIP

There are lots of legal issues about which types of organisations can undertake different activities. You will need to find out at an early stage whether your group is the right one to run the project or whether you need to start a new organisation from scratch.

Some of the most successful projects are developed by several agencies working in partnership. Find out if there are other local groups and organisations which can contribute their ideas and expertise and make sure that there are some clear ground-rules so that everyone knows their roles and responsibilities.

What you need to do

- ✓ **Seek advice on which legal structure is most appropriate for your group**

[Choosing a legal structure](#) - a quick comparator table explaining the key features and pros and cons of the different legal structures
(This table should not be considered as a replacement for proper legal advice)

[BITC ProHelp](#) - find out if you can get any free legal assistance

- ✓ **Draw up terms of reference or a constitution**

Terms of reference describe the structure and purpose of a project.

Draft terms of reference

[Model governing documents for charities](#) - available from the Charity Commission

- ✓ **Adopt a code of good practice for the overall management of your group**

[Codes of practice for the voluntary sector](#) - guidance from the Joseph Rowntree Foundation

- ✓ **Establish a partnership agreement**

It is essential to ensure that all organisations involved in running the project are clear about their roles and responsibilities. A partnership agreement will help to avoid any misunderstanding about who is doing what and is particularly important where more than one organisation is providing funding towards a project.

It is a good idea to seek legal advice when drawing up a partnership agreement.

[BITC ProHelp](#) - find out if you can get any free legal assistance

- ✓ **You will need to develop your business plan on the basis of what type of organisation is proposed and who else is involved**

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- ✓ **It is important to review the risks involved at this stage, especially if working in partnership**

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***Case study 3: 'Working together'
The Watermark, Ivybridge***

This inspirational new building in Ivybridge could only be achieved through a strong partnership of local organisations. [Find out more](#)

5. PROPERTY

This is an extremely complex area with a wide range of factors to take into consideration. The notes and guidance here are designed to help with some of the key issues but it is a good idea to contact the Devon Reinvestment Service for advice before embarking on these activities.

What you need to do

- ✓ **Contact the Devon Reinvestment Service for advice**

A. ADVICE

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- ✓ **Identify the project site and investigate leasing or ownership options**

Find out about Community Land Trusts
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- ✓ **Meet with the planning authority at an early stage to discuss your project**

Planning in Devon - guidance on the planning system and who to contact in Devon

Local planning authorities - contact your local planning authority for advice on getting planning permission and details of your Local Development Framework
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Planning Portal - the UK government's online planning and building resource

- ✓ **Produce a site feasibility**

DRS 5.1 Site feasibility guidance

- ✓ **Produce a building design brief**

DRS 5.2 Building design brief

Building regulations - guidance from the Planning Portal
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Design South West - part of the South West 'Creating:Excellence' regeneration centre
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The Glass House - design advice, training and project support for community-led regeneration initiatives
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- ✓ **Appoint an architect to do initial design work and work with them on the design of the building**

DRS 5.3 Draft invitation to tender for architects

[BITC ProHelp](#) - find out if you can get any free assistance from local professionals

✓ **Seek the views of the community**

C. CONSULTING THE COMMUNITY

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✓ **Agree space requirements of all users**

This can be done as a "brainstorming" exercise with all key users of a new facility.

You could start with the different categories of space that will be created eg.

- multi-use (main hall)
- dedicated space for specific users (eg. playgroup, historical archive)
- meeting space
- catering
- storage

Ask everyone to write down their requirements - how many users, how often, what usage for each type of space. It is important to ensure that there is sufficient storage space, quiet areas, dedicated space and shared space.

Other factors to take into account are:

- Lighting - do some activities require natural light?
- Access to the outside
- Noise - will some groups create a disturbance for other users?
- Internet & IT - which users will need access?

Work closely with the architect: it is important to be realistic about your needs - and your budget! - and flexible enough to accommodate the needs of others and the constraints of the site. The architect will be able to advise you on what is possible.

✓ **Submit planning application (outline or full as advised by planning officer)**

[Local planning authorities](#) - contact your local planning authority for advice on getting planning permission and details of your Local Development Framework

✓ **Ensure accessibility and provision for people with disabilities**

[Living Options Devon](#) - improving services for disabled people in Devon, including disability training and access audits

[Community Council of Devon](#) - projects include the Access & Awareness Project to support village halls with the requirements of the Disability Discrimination Act

✓ **Ensure compliance with building regulations**

[Building regulations](#) - guidance from the Planning Portal

✓ **Environmental considerations**

E. ENVIRONMENT & SUSTAINABILITY

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✓ **Decide who will oversee the construction of the building**

This is a major task! Unless you have an experienced project manager on your group you may want to consider employing someone to oversee the building work. Seek advice on which is the best approach for your project.

✓ **Make arrangements for an opening event**

It is easy to underestimate the amount of work involved in putting on an opening or launch event so make sure you allow plenty of time to plan it. Things to consider include:

- When do you want the event? Timing is crucial as you need to be sure that the building is on schedule for completion. It may be best to hold an official opening event several months after the building is due to be completed, in case of delays.
- Who? Will the event be just for the local community or does it have a wider significance? Do you want a local celebrity to attend?
- Is catering required?
- Do you want to organise specific activities or events?
- How will you publicise it?

✓ **Organise systems and procedures for the ongoing management of the building**

For this stage of the project you may find it helpful to have a separate project planning event to ensure that all the necessary arrangements are put in place. There will be some issues that are unique to your project but consideration also needs to be given to more general management issues such as:

- Ongoing financial management & fundraising
- Recruitment & staffing
- Security
- Health & Safety
- Cleaning & Maintenance

6. £ - POUNDS/ FINANCIAL PLANNING

Sound financial planning is essential and this guidance is intended to help you build a realistic picture of how much your project is going to cost and how you are going to pay for it.

A financial plan is made up of various elements and you will need to develop each of these as your project evolves: don't attempt to do your whole financial plan in one go!

The chart below sets out the series of elements which make up a financial plan and shows how far advanced each element should be at each stage of a typical project.

Elements of a financial plan	Project development budget	Capital budget		Capital cash flow	Start-up budget	Operational budget		Revenue cash flow	Reserves
		Sources of income	Expenditure			Sources of income	Expenditure		
Project idea									
Project outline									
Project development plan									
Business plan									
Project funding secured									
Capital work priced									
Complete: starting up									
Up and running									

	You know what the project aims to do; where the funds might come from if it will involve capital spending; and how it would meet its costs once up and running
	You have broadly worked out the numbers and can answer questions about how the project will work
	You have prepared a forecast based on evidence or professional advice
	You have figures which you are confident can be achieved
	Your financial plan is in operation: real costs replace estimates

£ Your financial plan

This section provides guidance and templates for each element of your financial plan: you will need to refer to the chart above to see how far you need to develop each element as your project progresses. For example, at the project idea stage you will need to make a start on your project development budget, capital budget and operational budget but the other elements can wait till later.

The templates which accompany this section of the toolkit are available to download as a series of spreadsheets in an Excel file: £ Your financial plan

What you need to do

✓ **Prepare an outline financial plan**

As a starting point, it is a good idea to do some rough calculations to see what would have to be achieved to make the project work. These can be 'back-of-an-envelope' figures and should be based on estimates of:

- what, in general terms, the building will cost?
- where might grants come from?
- where might loans come from? and how much could be borrowed?
- what revenue will be generated?
- how much will it cost to run it?
- what other costs will there be?

✓ **Prepare a project development budget**

You will need to think about all the costs associated with getting the project to a stage when building can begin, for example, feasibility studies, legal costs, surveys, professional fees etc. Your project development budget therefore helps you plan how you are going to get to the construction stage.

£ Your financial plan - project development template

✓ **Work out your capital budget**

You will need to look at capital costs and consider how you will pay for them. At the project idea stage these will be estimates but you will gradually be able to include real costs as your project develops.

You will therefore need to revisit your capital budget regularly so that it is as accurate as possible at each stage of your project.

£ Your financial plan - capital budget guidance

✓ **Draw up a capital cash flow**

It is important to produce an accurate picture of your capital cash flow - this will ensure that you don't come unstuck part way through the construction phase with a large bill to pay and no means of paying it: you may have worked out that you will have sufficient income overall to cover all your expenses but you will probably need to pay many of your bills before you can claim grant funding. A capital cash flow will show you where you have any mismatches between expenditure and income and will help you work out how you will cover the costs, until you can claim your grants. For example, do you need a short-term or bridging loan?

£ Your financial plan - capital cash flow guidance

Loans - Charity Bank, Venturesome etc

✓ **Produce a start-up budget**

To produce a start-up budget you will need to think about what you need to have in place on the very first day your building opens. Many of your costs will be supplies and materials that you need to purchase regularly throughout the life of the organisation - the difference is that when you're starting up you will need to buy everything at once!

£ Your financial plan - start-up budget guidance

✓ **Draw up an operational budget for the project**

Your operational or revenue budget will need to show how the costs of running the project can be offset by the income it generates. The difficulty is making realistic predictions about what your costs and income are likely to be in, say, three years' time.

More needed on: doing research; seeing what's been done in other areas - similar projects

Costs might include:

- Staffing
- Administration & IT incl. printing, postage, stationery, finance support, telephones
- Insurance
- Cleaning incl. staff, equipment, materials, window cleaning
- Heating, lighting, power
- Rates, water rates
- Repairs and maintenance
- Loan charges

Income might include:

- Room lettings
- Events
- Training courses
- Hire of IT facilities
- Catering
- Fundraising

There is a far higher chance of success if a project can generate enough income to sustain itself. It is still likely that grants and/or loans will be needed in the short term and accessing them can be difficult and time-consuming.

£ Your financial plan - operational budget guidance

✓ **Get a clear picture of your revenue cash flow**

A revenue cash flow helps you to stay on top of your operational budget by monitoring how much money is coming in and going out each month. It enables you to plan for times when outgoings exceed your income and ensure that you can still meet all your financial commitments. For example, some things such as salaries and loan repayments will need to be paid on fixed dates even if you are awaiting income from other sources.

If you have an accurate cash flow forecast you will be able to make plans for potentially difficult times. This might include increasing a bank overdraft facility, recovering late payments and ensuring you have sufficient reserves.

[Business Link](#) has some helpful information on cash flow management.

£ Your financial plan - revenue cash flow template

✓ **Make sure you keep a sensible amount in reserves**

You will need to have a certain amount of cash in reserves in order to make payments.

✓ **Identify potential sources of funding**

In the short term it is likely that your project will be unable to generate enough income to sustain itself. You will probably need to find grants and/or loans to cover the shortfall until you have a sustainable income.

[Devon Funding News](#) - keep up to date with the latest sources of funding: information and guidance is available in the monthly newsletter - Devon Funding News.

[Community Council of Devon](#) - administers the County Grants Scheme for village halls

[Defra](#) - information on sources of funding for rural community buildings

[District Councils](#) - support with accessing funding and, in some cases, a small grants scheme for community projects

A. Funding Advice

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✓ **Ensure that all your costs are covered - including overheads**

It is now widely accepted that voluntary organisations need to be able to raise money to cover the true cost of delivering all their projects, including a proportion of overheads. This is often referred to as full cost recovery. The Esmee Fairbairn

Foundation has produced guidance on [Costing projects and programmes in the voluntary sector](#).

[Big Lottery Fund](#) - BIG has produced a spreadsheet to assist applicants to cover the full costs of their project, including any overheads. [Guidance notes](#)

✓ **Establish who will be the accountable body and how the money will be managed**

As well as ensuring there is sufficient money available to run the project it is vital to set up a good system for managing funds effectively.

✓ **Assess the potential risks involved**

D. DANGER! - ASSESSING THE RISKS

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7. PROMOTION

It's easy to forget to promote your project when you're busy working on it but it's important to be open about what you're doing and raise awareness of your activities - it all helps to keep people on board, create good relationships with other local organisations, increase local support and, vitally, ensure that facilities are well used.

Remember that funders will often want to see evidence that their money is being put to good use with examples of press coverage, photographs, etc. And, after all, you've put in a lot of hard work, why not shout about it?

What you need to do

✓ **Decide who will take a lead on marketing and publicity**

You may have an obvious candidate on your committee or you can use a skills audit to help identify someone to take on the role.

[Skills Audit Proforma](#) - for recording skills and experience relevant to managing a project

[Skills Audit Summary](#) - an easy system for collating the results of a Skills Audit

✓ **Develop a marketing plan**

The Marketing Plan is one of the key stages in the process of successful project management.

In a community context, marketing is about understanding the needs of the community, matching your activities with those needs and expressing the benefits of your project to show how it meets that need. It encompasses all the decisions on anticipating and satisfying the requirements of the users - what services will be offered? when will they be made available? how will they be priced? Promotion and publicity are part of the process, but marketing is a much broader activity.

It is essential to have a good understanding of your area and the people who live there. As part of the overall development of your project you will need to collect statistical data to back up your case and to consult the community about your ideas - this market research will be key evidence to help you shape your marketing plan. Think about what questions you need to ask in order to ensure that you get the information you need about numbers of potential users, what activities should be offered etc. This will all help you to develop the project to fit the needs of the area and to help you make decisions on how you market it.

And remember - people's demands change so it's important to keep track of how you're doing with questionnaires, customer satisfaction surveys etc. and to take comments on board so that you keep up with demand by changing what you offer and/or how you offer it.

Your marketing plan should be flexible, short and to the point. It doesn't need to be more than two or three pages long but it's important that you use it as a working document: it should allow you to continually monitor and evaluate whether or not you are achieving your aims. Think about including the following points in your marketing plan:

Introduction

Mission Statement

Market Position - show your understanding of your customers' needs...what else is on offer in the area? how does your project compare? what are your strengths? do you have a Unique Selling Point (USP)?

Market Overview - it is important to set out who your potential customers are... is the project just for the local area or will it have broader appeal? different age groups? existing community groups? new users for existing activities? new activities?

SWOT analysis - set out the Strengths; Weaknesses; Opportunities; Threats - this will help to identify key issues and key opportunities

Objectives - summarise your marketing objectives based on the issues and opportunities identified in your SWOT analysis eg. getting new groups to use the facility; increasing the number of volunteers involved; more community events held.

These objectives should be SMART:

Specific

Measurable

Achievable

Realistic

Time-bound

Activities - set out what activities you will carry out to help you achieve your marketing objectives. This could include working with local groups to find out how you can meet their needs, offering taster sessions, exhibitions, events, open days, advertising, leaflets, website, appointing a 'customer services' contact, sharing information with partner organisations, getting coverage in the local press - anything that will help you find out what people want and let them know that you can offer it

Resource requirements and budgets - it is important to allocate a cost for each area of activity, this will give you an overall picture of what your marketing budget should be.

You may find it helpful to set out your objectives, activities and budget in table format, with an indication of who the target market is:

Objective	Target	Activities	Budget estimate
Encourage two community groups to use our hall instead of other premises in the first year	Existing groups which are currently using other facilities	Two 'open evenings' - one for sports; one for other activities. Press coverage Leaflets	Volunteer time £100 refreshments £300 printing costs
Increase the involvement of the over 60s in community activities by 30% in the first year	Over 60s	Produce a special leaflet setting out all the activities which will appeal to older people Liaise with GPs surgeries to promote activities	£300 printing costs Volunteer time

✓ **Draw up a communications strategy**

As well as making sure that the local community knows what's going on, a communications strategy will help to raise the profile of your project further afield.

A communications strategy might include information about how you will promote various aspects of your project and your organisation:

Activities, services and facilities available

Success stories

Information about who to contact

Good practice and lessons learned - can you share your experience with other groups?

✓ **Hold an opening event**

It is easy to underestimate the amount of work involved in putting on an opening or launch event so make sure you allow plenty of time to plan it. Things to consider include:

- When do you want the event? Timing is crucial as you need to be sure that the building is on schedule for completion. It may be best to hold an official opening event several months after the building is due to be completed, in case of delays.
- Who? Will the event be just for the local community or does it have a wider significance? Do you want a local celebrity to attend?
- Is catering required?
- Do you want to organise specific activities or events?
- How will you publicise it?

✓ **Keep up momentum with an ongoing PR schedule**

Again, it's a good idea for a member of your committee to have particular responsibility for PR and to have this as an item on the agenda for each committee meeting. The PR schedule will be the main way of making sure that the communications strategy is implemented.

- local press
- website
- open days
- special events

Think about how different groups of people will find out about the services and facilities that might benefit them. Posters and leaflets in doctors' surgeries, pubs and on buses will help to get information to hard-to-reach groups; and consider producing some large-print materials.

8. PERFORMANCE REVIEW

It is important to assess the full impact of your project on the community so you will need to consider how you will measure its success. This should take into account social, environmental and ethical factors as well as the economic outcomes. Evaluation of your project should be an ongoing process so start planning how you will review its performance at every stage - from project development through to completion.

What you need to do

✓ **Decide on the indicators against which progress can be assessed**

Indicators help you to track progress against your objectives: if you are intending to improve opportunities for a range of sectors of the community, how will you know if you have been successful?

A general feeling that things have improved is unlikely to be sufficient, especially if you need to report to funders on your progress. It is important to be able to measure your progress and so, by agreeing a set of indicators, you have a clear set of things to measure. Your indicators could be about take-up or impact of new services, they may relate to the whole community or to specific groups of people, depending on what you are setting out to achieve.

For example, if one of your objectives is to improve the wellbeing of people in the community and your project involves a mixture of new facilities and services, your indicators might include some of the following:

Health provision

- Increase in the provision of health information
- Increase in range of health provision

Sports provision

- New space created for sporting activities
- Number of new sports sessions
- Increase in range of sports provision
- Number of young people joining sports clubs

Improvement in quality of environment

- Amount of community public space created
- Number of safe places for children to play
- Number of trees planted

General wellbeing

- Number of people taking more exercise
- Number of people eating more healthy food
- Increase in pride in the community

There are different types of indicators: performance indicators reflect improvements in service provision; quality of life indicators show how things have improved in the

community. It's usually a good idea to have a balance, but care needs to be taken to ensure that your indicators are appropriate.

Inappropriate indicators include:

- indicators for which there is no accurate measure
- indicators which you cannot control or influence
- indicators which are used just because they are easy to collect

It is important to record the baseline for your indicators - this is the starting point against which you can monitor your progress and improvement.

✓ **Set targets for the different indicators**

Once you have agreed what you are going to measure, you need to be clear about the exact information you need to record.

Your targets need to be SMART!...

Specific
Measurable
Achievable
Realistic
Time-bound

Based on the indicators already agreed, you might start setting SMART targets as follows:

- 1 new health information board installed in the village hall by the end of 2008
- 2 healthy-eating workshops held in our village hall each year from 2009
- 16 people attend a new exercise class for the over 50s each week by March 2009
- 1 new multi-use games area created by January 2009
- 2 hectares of land improved for community use by June 2009

✓ **Decide what methods you will use for measuring your progress**

It's a good idea to set up systems for measuring your progress as soon as you can. This is particularly important if you need to record the numbers of people benefiting from your project.

Attendance count - useful for large events

Signing-in sheet - for recording attendance at smaller events, workshops and classes. By keeping a record of names and contact details you will be able to go back to people for more in-depth information.

Feedback form - this is a good idea for one-off events: all attendees should be given a simple form to record their views about how the event was run and how useful they found it.

Surveys - this could take the form of a questionnaire delivered to each household in the community but you are likely to get a better response by arranging to visit people and collect their views face-to-face.

The 'quality of life' indicators are more difficult to measure because you are often dealing with how people feel about their community. Try to think of different ways to get people to express their views, for example, you might ask people to give a score between -5 and +5 for how secure/happy they feel in the community. This exercise could be carried out at the start and end of the project to see any change in the average score.

A good record-keeping system is essential. Agree who will take responsibility for recording and monitoring progress.

✓ **Agree a regular timetable for reviewing progress**

By keeping a regular check on your progress you will know whether you are on track to meet your targets. You may wish to have an annual review where you check the progress of all your targets or you could decide on a set of milestones for each target.

For example:

Target - 2 hectares of land improved for community use by June 2009

Milestones:

- Funding secured for children's play area by August 2008
- Planning permission for new nature reserve by October 2008
- 15 trees planted in village hall grounds by December 2008
- Children's play area completed by February 2009
- Nature reserve official opening June 2009

A. ADVICE

This toolkit contains numerous links to organisations and agencies that can advise on the various aspects of developing a community asset. The contacts listed in this section are based in Devon and have a specific role to play in assisting local groups to make the most of their communities.

WHO TO CONTACT FOR HELP

A.1 Support for Devon communities

[Devon Reinvestment Service](#)

Access to professional skills in property development, financial management and community enterprise to local action groups and people engaged in community regeneration projects and programmes.

Devon Reinvestment Service
Karen Bridgford, DRS Manager
Tel: 01392 382311

Devon Funding Information:
Jasmine Jones, Funding Officer
Tel: 01392 383535

Wessex Reinvestment Society Ltd:
Annie Popham, Business Manager
Tel: 01409 549139

Business in the Community:
Ann Davies, Business Development Manager
Tel: 01752 510410

[Community Council of Devon](#)

Advice for village hall committees, Access & Awareness, Parish Plans and Training.

School Huts
County Hall
Exeter EX2 4QB
tel: 01392 383443
email: info@devonrcc.org.uk

[Devon Rural Network](#)

Advice and information on rural issues, support for partnerships and project development in rural areas.

c/o County Hall
Topsham Road
Exeter EX2 4QD
tel: 01392 383145

[Devon Towns Forum](#)

Advice, training and support for community partnerships in Devon's market and coastal towns.

Paul Delahoy, Facilitator
Tel: 01805 624874
Email: info@devontownsforum.org.uk

A.2 Support for the voluntary sector

'Guide to sources of support for small voluntary & community organisations in Devon'
<http://www.eci.org.uk/downloads/Guidetosources.pdf>

A.3 Planning authorities in Devon

District Councils & National Park Authorities (local planning authorities)
<http://www.devon.gov.uk/index/environment/planning-system.htm>

A.4 Funding Advice

Devon Funding Advisers' Network (DEFAN) brings together funding specialists from across the county. For details of your local adviser(s), contact Devon County Council on 01392 383535 or see <http://www.creatingexcellence.org.uk/regeneration-renewal-article226-p1.html>

B. BUSINESS PLAN

When your project idea is starting to take shape, it will help to set the big picture down on paper. There are various approaches to writing a business plan but the general aim should be to set out a proposal to those whose support, financial or otherwise, you need. This does not need to be a lengthy document but if you break it down into manageable sections you should cover all the necessary information.

You will find that all the various elements of developing your project covered in this toolkit will, in turn, form a key part of the business plan. It is therefore a question of pulling it all together to give a coherent picture of your project:

WHAT TO INCLUDE IN YOUR BUSINESS PLAN

✓ **Project Summary**

It is a good idea to include a summary at the start of your business plan. This will need to cover the main points from the rest of the document so you may want to leave it till last.

✓ **Details about your organisation and other partners involved**

You should include information about the purpose of your organisation, its legal status, structure, staffing and experience with this type of project. Perhaps include your constitution/ terms of reference in an appendix as supporting information.

✓ **Aims, outcomes & activities**

Aims will outline what you intend to achieve through your project: what difference do you want to make overall? You may have just one aim.

Outcomes are about expressing where you want your group - or those you wish to assist - to be at the end of the project period. There may be a range of social, environmental or economic outcomes but try to set out a small number of specific outcomes that you can achieve as a direct result of your project.

It is important to set out your planned activities and/or services and show how they will help to achieve your intended outcomes.

Guidance on ['Explaining the difference your project makes'](#) is available from the Big Lottery Fund

✓ **Need for the project**

Here you should provide evidence, through reliable research where possible, that your project will offer something new or additional to the area or to a certain group of people.

✓ **Context for the project**

It is a good idea to explain how the project fits in with other projects, schemes or strategies, especially those of the organisations from which you are seeking support.

✓ **Management & delivery**

All the details of how you will implement the project need to be explained. This includes:

- who will manage the project?
- how will the project be managed? eg staffing structure, roles, skills, reporting mechanisms etc
- how will additional technical support be provided?
- details of systems and procedures
- legal requirements
- financial controls

✓ **Financial plan**

The elements of a financial plan are set out in section 6 and form an essential part of your overall business plan. As you prepare your business plan, you should figures which you are confident can be achieved for each element of your financial plan.

✓ **Monitoring & evaluation**

You will need to include information in your business plan about how you will monitor and evaluate your project. This needs to be clear and precise - rather than lengthy - and should relate directly to your 'Aims, outcomes & activities'.

✓ **Forward strategy**

It is important to explain how you see the long-term future for your project and the people you aim to assist:

- Will the project be self-financing?
- Can you include additional projections about how the project might generate income in the future?
- Is there scope for developing new initiatives or extra activities?
- Are there any other ways of demonstrating that your project will have a lasting impact?

✓ **Supporting Information**

Do include any additional information that helps to give a clear picture of what your project is all about. This could include:

- Photographs
- Maps & plans
- Legal agreements, terms of leases, planning consents, partnership agreements
- Quotes for building works, valuations
- Policy statements eg. equal opportunities, child protection
- Constitutions, terms of reference
- Job descriptions
- Marketing & communication plan, risk assessment
- Questionnaires, surveys
- Letters of support

C. CONSULTING THE COMMUNITY

A project has little chance of success if it doesn't have the full backing of the community it aims to serve. It is therefore very important to ensure that the majority of the community is on board as early as possible in a project's development.

The purpose of carrying out consultation is (a) to inform the community about your plans and (b) to gather information and views from the community. You will need to be careful not to raise expectations and so it is best to be very clear about what work has been done so far and what remains to be done.

✓ **Think about why you want to consult and what you hope to achieve**

- Getting people on side early on - without this vital stage people will feel sidelined and may be predisposed against the project, even if it's a good idea.
- Bringing a wider range of skills to the project - other people in the community may be able to contribute their knowledge and expertise
- Making sure you have as broad a client base as possible by addressing the needs of a wide range of people in the community
- Demonstrating the support for the project to other organisations. This might include planners, other agencies and funders.
- Creating long-term sustainability: if there is a sense of community ownership for the project it's more likely that others will be keen to take it on and make it work in the future.

✓ **Work out the best way of consulting different groups in the community**

You must take into consideration who you are consulting. Think of the best approach for each group and adapt your consultation accordingly. For example, larger print for older people; different languages; symbols for people with learning difficulties; young people don't like filling in forms.

Methods of consultation include:

- Surveys - electronic, face to face, postal, door to door
- Face-to-face meetings - for views from specific members of the community; arrange to attend a parish council meeting
- Open meetings
- Focus groups
- Online consultation
- Events - for the whole community and parts of the community
- Exhibitions

✓ **Think about what will help to get the best response**

If you're using a questionnaire, keep it clear and concise - as short as possible - no one wants to spend hours filling in a form and its more likely to be filled in if it's short and to the point.

Make it fun and interesting - using pictures, speech bubbles... and plain English!

Use local amenities - local shops, pubs, sports centres, doctors' surgeries, schools, playgroups, WIs, community centres, housing associations. And it helps to get the backing of a well-respected local person.

Make sure the people carrying out the survey are 'on message' and enthusiastic.

Use the local free press and village/church magazines.

✓ **Make sure you are well prepared**

Once you are clear what evidence you need to produce, it's a good idea to carry out your consultation as soon as possible. Remember to allow enough time to prepare - organising consultations takes time and evaluating them even longer.

It is important that your consultation asks the right questions. It will be difficult to do it again so make sure it's really what you need.

Find out if any other consultation exercises are being planned: it may be appropriate to join forces rather than risk bombarding the community with questionnaires!

D. DANGER! - ASSESSING THE RISKS

It is essential to consider the probability of a risk/setback occurring and the potential impact of that risk on the project. Proper risk management will ensure that any risks are understood and that systems are in place to minimise them. There could still be unexpected events that threaten your organisation or project but a proper system for minimising risks and dealing with any that do arise will help to focus resources and give a much better chance of ultimate success. It's generally much more costly to put something right than to get it right in the first place!

To manage risk effectively, the risks associated with each aspect of your project need to be systematically identified, assessed, controlled and monitored.

✓ Identify the risks

There are a number of risks facing any group developing a community project. These are the sorts of questions that need to be considered:

- Viability of the project not researched properly
- How realistic is the timescale of the project?
- Where could delays occur?
- Incorrect information
- Inadequate resources
- Rising costs
- Unforeseen costs
- Failure to achieve objectives
- Poor response from intended recipients
- Withdrawal from project by partners
- All or part of funding fails to materialise
- Poor financial control
- Poor record keeping

✓ Assess the risks

There are lots of ways of assessing risks but you need to have a system which your group is comfortable with and which you will use. You may wish to nominate a member of your group to co-ordinate and oversee your risk assessment but it's important that everyone takes responsibility for recognising and highlighting any risks. The risk assessment process can be broken down into stages:

- Identify all the potential risks and threats
- Identify the stages or parts of the project most vulnerable to those risks and threats
- Assess the impact of those threats on the success of the project (eg. objectives not achieved, matched funding does not materialise)
- Prioritise risks eg. high, medium, low
- Plan a course of action to reduce the impact of the risks

✓ Control the risks

Each threat needs to be analysed taking into account the severity or impact of any risk and its likelihood of occurrence. By drawing this information together into a risk log or risk register, you will create a tool which you can use to manage and monitor

the various risks facing your project. The following steps will help you to create a risk register which can be used to keep an ongoing record of the potential risks to your project:

Step 1. Assess the impact/ severity

You will need to establish some clear criteria to help you decide how to rate the impact of each risk you have identified. A scoring system can assist with this and will need to take account of financial consequences, the impact on health and safety, any adverse publicity, delays to the project and implications for achieving your objectives. For example, each risk could be scored as follows:

- 1 - negligible (eg. no financial risk, very slight delay to project)
- 2 - minor
- 3 - moderate
- 4 - major
- 5 - severe (eg. significant financial risk, future of the organisation in jeopardy, would result in legal action)

Step 2. Assess the likelihood

A similar scoring system can help in assessing the likelihood of any risk:

- 1 - very unlikely (unlikely to occur but not impossible)
- 2 - possible (less likely to occur than not to occur)
- 3 - possible/probable (equally as likely to occur as not to occur)
- 4 - probable (more likely to occur than not to occur)
- 5 - very likely (very likely though not certain to occur)

Step 3. Give an overall score for each risk

Multiplying the scores for likelihood and impact will give the overall score for each risk, which will enable you to prioritise them.

Step 4. Draw up a risk register

This is a key tool which you can use for keeping an ongoing record of the potential risks to your project.

There are various ways of recording the information, you may wish to adapt the following for your use:

[DRS D.1 Risk Register Template](#)

✓ **Review the risks**

It is essential that your risk register is a living document and it should be reviewed and updated regularly. As things change in your organisation, so the potential risks change and so it is important that you make risk management part of your everyday management. It's a good idea to have risk review as a standing item on the agenda for any management meetings.

E. ENVIRONMENT & SUSTAINABILITY

One of the key considerations for any project, and for capital projects in particular, is the impact it has on the environment. Hand in hand with this is the overall sustainability of the project - will it last? While some projects set out to achieve a particular aim then finish when the job is done, a successful community project is likely to be one which can keep going in the long term without the need for a constant stream of grant funding. A sustainable project is also likely to be one which has a balance of positive social, economic and environmental outcomes.

- ✓ **Consider the social, economic and environmental impacts of your project**

<p>Sustainability checklist - provided by Devon Renaissance to assist project development</p>

- ✓ **Find out about sustainable building techniques and environmental technologies**

<p>The Devon Sustainable Building Initiative - http://www.sustainablebuild.org/ - can provide information and advice on all stages of designing and constructing sustainable buildings</p>

<p>Renewable Energy 4 Devon (RE4D) - http://www.re4d.org/ - provides advice on renewable energy options and planning issues as well as information on installers and grants. RE4D currently covers West Devon, South Hams, Torridge, North Devon and part of Mid Devon.</p>
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- ✓ **See if you can obtain additional funding to support environmental aspects of your project**

A.4 Funding Advice	p.
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- ✓ **Find out about getting your building BREEAM assessed**

<p>The Building Research Establishment Environmental Assessment Method (BREEAM) is designed to help understand and reduce the environmental impact of new buildings. Find out about BREEAM at http://www.breeam.org/index.jsp</p>

- ✓ **Can your project make a healthy income to keep going in the long term?**

You will need to be realistic about how much income you can generate so that you can be confident that your project will be sustainable. Again, it comes down to thorough research - Is there a market for the services you'll be providing? Do you know how much to charge? What is the competition?

You may find it helpful to get in touch with similar projects elsewhere to find out the going rate for the services you intend to offer.

✓ **Look at ways in which you can make your project 'greener'**

Future Foundations - <http://www.futurefoundations.co.uk/charter.php> - has published a series of charter documents which can assist with creating sustainable buildings.