

Membership Information sheets

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**Developing
your group**



1 Getting started

Forming a group

Forming a group is never easy. In order to work, a group or organisation must share a common cause, concern or passion. When forming a group it is important to take the following points into consideration.

Know your community

Before starting, it would help to have a knowledge of the resources that already exist where you are. There may be an existing organisation that has a similar goal to yours.

Gather support

It may be useful to become acquainted with influential members of your community, for example civic leaders, large individual donors, principals of local businesses, and other well-known community members.

Take the lead

As the founder(s) of your group, you should possess a mix of drive and willingness to share throughout the process. After all, only by letting other people make their own valuable contribution toward the cause will they become fully committed to the goals you share.

After you get through these initial stages, the group should have a good idea of whether you have the support to make your idea work. If the group conclude that things look favourable for going forward, then it's time to decide on the next step.

What kind of group?

The purpose of your group might be for example to improve access at your local shop or community centre. In this instance forming a fully fledged charity may not be the best way to achieve your aims. You could become a less formal campaign

group that could easily cease to exist once your goals have been achieved.

However, in order to access many sources of funding, collect charitable donations, be exempt from tax, gain recognition and employ staff, your group may need some kind of legal structure, such as:

A club or society usually has a common aim or purpose, for example, the Mid Wales Disabled People's Archery Club. It usually seeks to serve its members rather than the wider community.

A voluntary trust usually protects or preserves something, for example, the North Wales Disabled People's Nature Reserve. It will work to administer and upkeep existing resources for the use of a specific community.

A foundation usually provides financial and other support or encouragement for a group of people, for example, the Dury Foundation for Disabled Musicians.

A co-operative and a company limited by guarantee are both examples of legal business structures that can limit the financial liability of those who run it.

A charitable incorporated company combines the advantages of a corporate structure such as reduced personal liability without the burden of dual regulation by the Registrar of Companies at Companies House and the Charity Commission.

A registered charity might also have the legal structure mentioned above but would have more complex and wide reaching aims that seek to serve a larger community. In order to become a registered charity your group would have to comply with the rules and regulations laid down by The Charity Commission.

Most groups require different structures at different times, so finding out what suits you best is an important part of developing your group.

1 Getting started

Recruiting and developing volunteers, trustees and group members

Don't go it alone

Once you've decided that you have enough support, get other people involved. Starting a group has a lot of things in common with starting your own business for profit, but there's at least one crucial difference: because the rewards of your efforts are not monetary, there's no reason to exclude anyone who wants to help you.

On the contrary, having a wide variety of people in different occupations brings a diverse and extremely helpful set of skills to your organisation.

Value diversity

Prospective volunteers, trustees and group members can help in a number of ways. Perhaps the most important thing to find first is a group of motivated people who will agree to volunteer for the organisation's board of directors or committee.

Because your group is likely to have extremely limited financial resources, you'll want to find volunteers who can take care of the business aspects of running a non-profit organisation.

As a group led by disabled people, you will want most if not all of your board to self-identify as disabled people. However, that doesn't mean that you should exclude others unnecessarily.

As a minority group it is important to recognise that you may have to look outside of your immediate circle in order to access the advice, expertise and information that you will need in order to make your group a success.

Working on a charitable board of directors can involve a significant commitment of time and energy, so many people who are interested in helping you will be unable to volunteer as board members. However, that doesn't mean there's no place for these people.

As you work with your board members to plan how to reach the group's goals, certain needs will arise that require large amounts of

volunteer time. Having volunteers ready and willing to help out in these key support roles is crucial to achieving success.

Of special importance are people who are good at raising funds, whether by gaining donations or by applying for grant aid.

In addition, volunteers who have ties throughout the community may be useful when you need to get your message out to the public.

There are many ways to recruit volunteers, trustees or group members.

Word of mouth

Letting the message spread naturally and encouraging people to put themselves forward will often provide you with committed and energetic volunteers. However, the majority of volunteers say they started volunteering only because someone asked them to!

Advertising

You can advertise in the local press, online, or via the media such as local radio. This has the advantage of reaching a lot of people but may incur a cost.

Local volunteer bureau

Your local bureau will know of people looking for voluntary positions and may be able to find a match for you.

Existing networks

Other disabled people and disability organisations will have existing networks of people who may well be right for your organisation. Use these to find people to help you.

1 Getting started

Writing your rules

Your rules or constitution will govern the way in which your organisation is run. If you are a short-term campaign group, simple rules or constitution may be all that is required. However, if you are a trust or charity then the rules and constitution will form part of your legal structure and may have a far reaching impact on what you can and cannot do.

Have a mission

Once you have a committed group of individuals on your team, you need to work with them to establish exactly what your group's mission or purpose will be. This may seem to be a simple task, but in reality, working out a precise mission for your group can be one of the most difficult exercises you will face in establishing the organisation.

This mission will be the starting point for your group's rules or constitution.

A constitution, known as an organisation's governing document, sets out how an organisation operates and runs. It contains information on an organisation's aims, structures and procedures. A constitution is also a useful reference tool to help sort out problems and disagreements on what the organisation can or can't do. As well as varying in size and length, some constitutions are written in easy to follow language whilst others are very legal documents. Asking questions will help produce a document that fits the needs of your organisation:

- What is the organisation called?
- What are the organisation's aims?
- Who will be members and how do they join?
- What types of meetings will it hold?
- Will it have any committees? If so, what will they do?
- How will such meetings or committees operate?
- What about finances?
- How can changes be made to the constitution?

All organisations have an Annual General Meeting, where a report on the year's activities is presented, the budget approved and the accounts received.

Organisations may also have other types of meetings such as committee meetings, members meetings or public meetings. If that is the case, the other types of meetings should be listed in the constitution.

Changing your rules

Nothing stays the same, and as circumstances change an organisation may feel that their constitution needs to reflect that. It is important to ensure that a procedure has been agreed for doing this. This should be included in the document itself.

Once all the sections have been written, it is important that as many people as possible who are involved in the organisation have the opportunity to read the proposed document before it is approved. This will ensure that people have the opportunity to check that things are not missing.

Constitutions are time-consuming to write and need to be agreed by a collective rather than an individual. It is often useful to look at similar organisations' rules, constitution or articles and memorandum and see if they can be adapted to meet your needs. However, this should not stop you from identifying and writing your organisation's unique mission statement.

Your local County Voluntary Council or Disability Wales might be able to help you put together your governing document.

Five top tips to writing a constitution

1. Base it on a set of questions about what you want the organisation to do and how it will operate.
2. Involve as many people as possible in obtaining ideas and writing sections.
3. Write it in stages, don't attempt to get it done all in one go.
4. Gain approval of the document from a large group rather than a small group of people.
5. Regularly review the constitution to ensure it is relevant and up-to-date.

2 Running your organisation

Organising and running meetings

The success of your group will largely depend on the governing body's ability to achieve results through well thought-out and productive meetings.

Organising a meeting

- Who is responsible for organising the meeting? This should either be one person, such as the group Secretary or, if the responsibility is shared, the person responsible for organising the next meeting must be clearly identified.
- Notice of meetings: it is good practice to let those invited to the meeting know in good time with at least a week's notice. You may, however, want to carry out a reminder and check who's coming a day or so before the meeting itself. It's not enough to meet on the second Monday of the month and assume people will automatically turn up. Don't just rely on one method of communication; some people like letters, others prefer email or telephone. As a disabled people's organisation, knowing your members' access needs will be important when choosing the method by which you communicate with them.
- Venues: the venue should be accessible and ideally central, warm and comfortable. Provide light refreshments. If it's not possible to have a central location, then varying the venue may be a good idea. Some organisations choose to hold meetings in new and exciting environments to encourage and inspire their trustees.
- Ensure any documents needed to be read for the meeting are circulated in good time, especially if there is a lot of information for people to grasp. Provide extra copies at the meeting for people who forget to bring theirs.

Running a successful meeting

- **Time is a very important factor.** Cultivate the habit of starting on time and of telling people how long the meeting is likely to last. Don't over-run unless it is absolutely necessary. Remember that

people are volunteering their time to come and that they have other important commitments.

- **Chairing the meeting:** someone needs to control how the meeting is run. This may always be the same person, usually the Chair of the organisation, or it may be more useful to have a roving Chair. This will allow others to experience what it is like to control a meeting and enable the group to have different styles of meeting.
- **Agenda:** an agenda is simply a list of things that you wish to discuss at the meeting in the order you wish to discuss them. The agenda should be sent out in advance so that everybody knows what is to be discussed. It is useful to ask people at the beginning of the meeting if there are other items they wish to discuss under Any Other Business so that enough time can be allocated to these extra issues. It is also important to ratify the minutes of the last meeting and set dates for future meetings as part of the agenda – this way you will continue to meet your legal obligations.
- **Minutes:** good minutes are an accurate account of the important points of the meeting, the decisions taken and include clear action points of what action is to be taken by whom and by when. Try and avoid involved or rambling minutes as these can be confusing. The minutes are usually taken by the group's Secretary, but again this is a role that can be shared.
- **Good practice:** a good Chair will exercise a firm yet flexible approach to the meeting. This means on the one hand not dominating the meeting and making sure everybody has a chance to contribute and participate, yet also moving the agenda on and preventing individuals from monopolising the conversation. A good Chair will also mediate and resolve debates and disagreements and know when an agenda item needs more time and should be rescheduled for a future meeting.
- **Sub Committees:** it's not appropriate that the full committee carries out all the work of the organisation. Form appropriate small groups or sub committees to carry out specific tasks then have them report back to the main group.
- **Guest speakers / advisers:** it is often a good idea to invite guest speakers or advisers to participate in meetings. They can enliven and add interest to meetings and provide a useful, fresh perspective when solving problems.

2 Running your organisation

Making your meetings accessible to all

Your group will want to make sure that its meetings are made accessible to all and this could mean taking into account a wide variety of different access requirements.

Venue

The most important access requirement for many people will be the location and layout of the venue. Whatever venue you choose will probably have to meet some or all of the following criteria:

- It will need to be centrally located or easy to reach.
- It will have to have a high standard of physical access with level or ramped access and wide doorways.
- The interior of the building should be warm, comfortable and easy to negotiate for those with mobility impairments.
- The venue should have clear, easy to understand signage, ideally in a variety of formats.
- Toilets: the building will need to have a high standard of accessibility when it comes to toilet facilities, ideally including a room with full size changing facilities.
- Any staff at the venue should be friendly, welcoming and have had disability equality training.
- Catering: if your meeting is of any significant length then appropriate catering will either need to be provided by the venue or if self-catering, the kitchen or other facilities must meet the highest physical access requirements, with low-level work tops, adapted switches and fittings and the like.
- Personal Assistants: it is likely that some people attending the meeting may use PAs. The venue should have a separate room where PAs can wait/relax during the meeting.

Parking and transport

- An accessible venue needs to have an appropriate number of free accessible parking spaces very near to the entrance.
- Some people may be using public transport or taxis to attend your meeting so it is important to consider bus and rail timetables and the availability of taxis. You should also take into account how

people will get from the bus or rail terminal to the meeting.

- As finance may be an issue for some people your group should considering reimbursing members for parking and transport costs.

Time

- Time can be the most important and easily overlooked access requirement. When setting the time and duration of your meeting, consider the time of day: some people will experience difficulty in arriving early in the morning or may not be able to book PAs or other transport late at night.
- Check that your meeting fits with public transport timetables.
- Let people know how long your meeting is intended to last. Very long meetings will be an access barrier for many, but it is also worth remembering that some people, perhaps those with communication impairments or learning difficulties, may need more time to discuss matters so very short or brisk meetings can also be an access barrier.
- It is important to take regular structured comfort breaks and to let people know when these will happen.

Information

The way in which you inform people of any prospective meeting and provide them with details of previous meetings or any relevant documents / information should be carefully considered. The most effective way of ensuring that people's access needs are met is to consult with individuals and provide information in their preferred format. This should include:

Clear print (Arial 14pt or larger) which could be available in larger print, electronic or audio formats, Braille and Easy Read.

When using email use simple text documents, avoiding colour, graphics, lines, boxes and PDF or other formats. This will help those with Screen Readers, Brailers and other interface access software. Information should be available well in advance so that members have a chance to go through it thoroughly.

During the meeting

It is important to consider the style of meeting and usually good practice to avoid jargon or needlessly complicated language. It is also important to provide communication support such as BSL Interpreters, Lip Speakers, Palantypists, Readers, Audio Describers or other appropriate support should people need this.

2 Running your organisation

Roles and responsibilities

Roles and responsibilities of volunteers, trustees or group members

Trustees are the people who form the governing body of a Charity or voluntary group. They may be known as trustees, directors, board members, governors or committee members. Trustees are responsible for controlling the management and administration of an organisation. The great majority of trustees serve as volunteers, and receive no payment (other than to repay necessary out-of-pocket expenses incurred). Trustees should work together as a team, and have collective responsibility for their charity. Being a trustee can be hard work, but by contributing you should also gain. Trusteeship should be rewarding, providing opportunities for personal development.

Who are charity trustees?

Trustees have, and must accept, ultimate responsibility for directing the affairs of their charity, ensuring that it is solvent and well-run, and delivering the charitable outcomes for the benefit of the public for which it was set up. You need to keep in mind the following areas of responsibility.

What are the duties of trustees?

Ensuring compliance – Trustees must ensure that their organisation complies with:

- Charity law, and the requirements of the Charity Commission as regulator; in particular you must ensure that the charity prepares reports on its work, and submits Annual Returns and accounts as required by law.
- The requirements or rules, and the charitable purpose and objects, set out in your group's own governing document. All trustees should have a copy of this document, be familiar with it and make it available to members on request.
- The requirements of other legislation and other regulators (if any) which govern the activities of your group; these will vary according

to the type of work your group carries out, and whether it employs staff or volunteers.

- The requirement for trustees to act with integrity, and avoid any personal conflicts of interest or misuse of charity funds or assets.

You should check the charity's governing document for provisions relating to conflicts of interest.

Duty of prudence – Trustees must:

- Ensure that the organisation is and will remain solvent; this means that you need to keep yourself informed of the organisation's activities and financial position.
- Use charitable funds and assets wisely, and only to further the purposes and interests of the charity.
- Avoid undertaking activities that might place the organisation's property, funds, assets or reputation at undue risk.
- Take special care when investing the funds of the charity, or borrowing funds for the charity to use.

Duty of care – Trustees must:

- Exercise reasonable care and skill as trustees, using personal knowledge and experience to ensure that your group is well run and efficient.
- Consider getting external professional advice on all matters where there may be material risk to the charity, or where the trustees may be in breach of their duties.

To fulfil these responsibilities properly, trustees should make sure that they keep up to date with what the organisation is doing. You should give enough time and energy to the business of the organisation, and meet regularly enough to make the decisions needed. How this is done will vary between different types and sizes of organisation.

What is the Charity Commission?

The Charity Commission is the independent charity regulator for England and Wales. Its job is to work with charities to ensure that they are accountable, well run and meet their legal obligations. You can contact them on 0845 300 0218 or visit www.charitycommission.gov.uk where you can get all sorts of useful help and advice.

3 Funding and fundraising

What funders want

There are many different sources of funding: national organisations like The Lottery, public sector bodies and a whole host of voluntary, charitable and commercial organisations. Even though their motives and methods for distributing funds may vary greatly, they will all look at your application in the same way.

Funders will want to reassure themselves that:

- Nobody else is doing what you want the funds for
- That you can show them there is a real need or demand for what they will be funding
- That your group is best placed, efficient and competent in making sure the funds are well managed and well spent
- That other funders value and support your group or project as well
- That your cause matches what they want to fund
- That your project won't cost more than they want to give (taking into account any match funding)
- That your project will operate in the geographical area they want to work in
- That you can provide proof of how their funds have been used and what has been achieved
- What the future holds: will this project come to an end when the funding runs out? Will you be returning time and time again to the same funder?

They may also appreciate recognition that they have supported your group or project.

Finding a funder

There are many funders out there and choosing one that is relevant to your group or project is an art in itself. You can waste a lot of time and effort unless you research your potential funders thoroughly.

There are many ways to find a funder. These include:

- computer software such as Funder Finder that matches your group and its project to a huge directory of funders. This is expensive to own but your local association of voluntary organisations usually provides access to this for charities or good causes free of charge. Groups can use Funder Finder through their County Voluntary Council if a member.
- the Library: the library will have directories listing charitable trusts and other benevolent organisations.
- the Internet: has a whole host of sites that aim to put you in touch with funders and help you write your application. Some good ones to start with are:
 - www.trustfunding.org.uk
 - www.guidestar.org.uk
 - www.funderfinder.org.uk
- networking: other groups and like-minded organisations can provide you with information about funders they have used and funding opportunities they have identified.

3 Funding and fundraising

Writing a project proposal

Be clear and relevant about what you want the money for. Funders like to fund specific areas of work or projects rather than just generally adding funds to the running of the organisation. Use plain English in your applications and make budgets clear and easy to understand. Avoid inconsistencies in facts or figures. Nothing scares a funder off more quickly than if your proposal looks as if you don't know what you're talking about.

There is no magic formula. What you say will depend on:

- who you are
- who the funder is
- how much you want
- what you want the money for

Funders will want to know what the problem or issue is that your group wants to address. How can its money help solve this? Is this a real problem that needs addressing? For example, your group is applying for funds to buy an accessible minibus. It is not enough simply to say that the group would like the minibus to take its members out. Funders will want to know:

- that the group is comprised of disabled people
- that the geography of Wales means that disabled people are often isolated
- that public transport is often non-existent and much of it is not accessible for disabled people

If you do this well, funders will know that by providing the funds for the minibus disabled people will enjoy better access to local goods and services and have a better quality of life.

Your funder will want to feel that the problem is:

- the result of a demand by real people, not invented to suit the money available
- to do with people's needs, not just lack of something

- urgent
- solvable

Your funder will want to know how you will go about using the funds. These are your objectives and your methods. Your proposal should include a step-by-step guide to how you will achieve your objectives. Take the minibus example, these might be:

- identifying how many people want to use the bus and where they live
- what sort of bus would be best
- how the bus would operate on a day-to-day basis
- how the bus would be operated, maintained and kept road worthy
- how you would train the people involved
- how you would keep records to monitor and evaluate the service, for example, that the bus is being used effectively

Value for money

Funders like to feel that they will get value for money. They like to see what is called the 'multiplier effect'. This is that the effect of their grant is greater than the actual sum of money suggests. For example, improving the quality of life of the users of your minibus will lessen the effects caused by isolation such as depression or limited (and often more costly) access to goods and services. This will have the added effect of improving your users standard of living, reducing pressure on friends and family and lead to a drop in local health care costs. The accumulative monetary value of all this would far exceed the funder's original donation.

Looking to the future

It will be important to funders that you demonstrate how their funds will work in relation to the long-term future of your group and its project. Will the project become self-sustaining? What are the group doing to develop other sources of funding or will the group just return time and time again to the same funders? (In most cases this is not acceptable to the majority of funding bodies.)

3 Funding and fundraising

Writing a funding application

Funders are usually over subscribed and have to read a lot of applications, sometimes in a short space of time. So clear, concise and focused applications that make it easy to understand who the group is, what they want the funds for and how they are going to use that funding will do better than long, complicated applications full of statistics and technical jargon.

A clear summary early on gives the impression you know what you're doing, you're business-like and you will be able to achieve what you set out to do. Funders will want to know:

- how long your group has been going
- briefly what your group has managed to achieve so far
- what kind of legal structure you have
- how many members, volunteers and staff you have

If the funder is not local they will also appreciate a brief summary of the area in which you work, its particular issues and any other facts that affect the way in which the funds will be used.

Funders need to have confidence in your group, to feel that your group has credibility – with users of your services, with other funders and perhaps with other agencies in the area.

Monitoring and evaluation

Funders will want to know that you can demonstrate how you have achieved your objectives. How will you know that the money has been well spent?

The budget

Funders will care about the efficient use of money. They will question whether your group will waste their money. You will need to show that your group is competent in handling funds. This means providing a relevant and well thought-out budget.

Your budget should be:

- clear
- comprehensive
- it should add up
- it should be realistic
- it should not be over-inflated
- it should show any other funders involved
- it should show volunteer or support in kind

As a check you might use the SMART objectives system to make sure that your proposed project merits support. You need to ask yourself if you've shown that your project is

S	Specific
M	Measurable
A	Achievable
R	Realistic
T	Time-related

Presentation

Good presentation is vital, not only to make your application stand out from the crowd but also to make it easier to read, understand and evaluate. You should:

- use clear print in 14 pt in a sans serif font (Arial or Helvetica, for example)
- white space is your best friend, don't crowd things together
- give the funders what they want in the order they ask for it
- use plain English, avoid jargon
- bind your application in a form that makes it look good but is easy to use
- provide your application in alternative formats, email, larger print, disc if asked for

Finally, be positive. **Good luck with your application!**

3 Funding and fundraising

Top tips for raising funds

Think, “who do I know?”

Successful fundraising costs little and reaches a wide audience. Think: “who can help me?” Does a member of the family work in a large company that could sponsor you? Is there a friend who could provide a venue for a fundraising event? Build your ideas around what you already have.

Keep your reasons for fundraising in mind

A passionate desire to make things happen will bring in donations – particularly when 'face-to face' fundraising.

Use marketing

Get your message across. Explore ways of giving people the information they need in order to want to support your cause.

Have a goal

Know how much you need to raise and for every fundraising activity, assess how much you expected to raise against what you actually do. Some ideas work, others might not, but you won't repeat mistakes.

Ask for specific donations

But don't stand by them. Asking for a specific amount will give your donors a benchmark and allow you to calculate how much you need to raise from each person/organisation to achieve your target. If you're asking for sponsorship, it may be an idea to go to your biggest benefactor first – people often follow the leader.

Write well-targeted letters

To individuals, and individuals within companies, asking for support.

Hold an (inexpensive!) event

And make it unusual and exciting, something that people can join in

with or relate to. The *Santa Fun Run* in Newtown, Powys every year is a good example. Draw attention to your goals, get sponsorship and give publicity to any companies who have already donated to your cause. Local press coverage can also be useful.

Always offer something in return

To every sponsor who makes a donation. This could be as simple as sending them an online diary, acknowledging their support in your publicity and press releases or providing a speaker at one of their organisation's events.

Commercial funders

Commercial funders such as local businesses can be very useful sources, particularly when a group is starting out. They are usually more inclined to give donations in kind rather than in cash. For example, a local supplier might donate you a computer or chairs for the office. They may see this as a good way to raise their company's profile or even as free advertising.

Protect your integrity

If your group is promoting the rights for equality for disabled people via the social model of disability you may have to address the fact that local businesses giving donations may publicise this as helping people less fortunate than themselves and use other old-fashioned, deserving charity sentiments.

Plan ahead

To avoid missing your targets.

Use your time wisely

Fundraisers generally use as much time as they have to achieve their goals. If you are on a tight deadline, you will just be working that bit harder!

4 Vision and planning

Writing a business plan

Drawing up a business plan is one of the things most groups dread doing. However, you will probably need one at some stage in your development and a well thought-out business plan can give you confidence and security that you're heading in the right direction and a way of measuring how fast your organisation is developing and whether it's on track.

As you develop your business plan, it's easy to make mistakes or leave out important elements. So do things step by step.

Step 1: Have a vision

Before plunging into technical details, it's important to outline a clear vision and a consistent set of values for your group. Develop a mission statement and use it to define short-term goals and priorities. Once you have a clear road map for your group, you can plan your journey with more confidence.

Step 2: Be creative

People can often get bogged down in jargon and the best words to use. So try using images. Ask yourself questions like if our group were an animal, what kind of animal would it be? What type of transport? What sort of food? The answers you get from your group members will help shape a shared understanding of what your group is, how it wishes to operate and be seen by others and at what speed it wants to grow.

Step 3: Look to the future

Next, imagine your group in, say, five years time. Where do you want to be? What does the group look like now? Then look at things as they are and see what has to happen in order to get five years into the future. What skills do we have that we can build on? What skills do we need to develop? Who and what else do we need to involve to get us there? This process will help you achieve a forward-thinking vision and make you aware of things you need to build into your business plan in order to achieve your goals.

The components of a business plan

A business plan is often an involved and complicated piece of work. Most business plans would contain the following:

- **Background / business history:** where does your organisation come from? What stage is it at?
- **Products / services:** what is your organisation doing already and what else does it want to do?
- **The market and marketing:** who's the competition? Who will use your products or services? How are you going to tell them who you are and what you are going to do?
- **Premises:** where you operate from now and in the future?
- **Capital expenditure:** what are the costs of your organisation? How will they grow?
- **Staffing requirements:** do you have staff now? Will you in the future? What are the implications and costs?
- **Legal aspects:** your group structure, now and in the future? What other legislation do you have to comply with?
- **Insurance:** are you adequately covered to protect your group, your members and the public?
- **Financial information:** You will need to make financial forecasts, predicting what money the organisation will pull in and spend. You will need to construct budgets that show exactly how you intend to spend it and compare these with how it's actually spent. You will need to manage the cash flow of your group in order to make sure these forecasts and budgets can actually be put into practice.

Other information

Disability Wales has a comprehensive guide on how to write a business plan with a useful template. Get in touch for more in-depth information and help.

4 Vision and planning

Writing an Action Plan

Irrespective of the size, structure and scope of your group and its work, an action plan is an invaluable tool for helping your group achieve its goals. It is a statement of what you want to achieve over a given period of time. An effective action plan should give you a concrete timetable and set of clearly defined steps to help you reach your objective.

It's OK to have several objectives, but you will need to make a separate action plan for each, otherwise things get confused.

Action Planning Model

There are many different models of action planning, some simple, some complicated. It is best to start with simple action plans then allow them to grow naturally as your group's confidence increases.

Action planning is a circular process, and once you have been through one cycle, you can start again at the beginning. Of course, in real life it's not quite as simple as this. The process is more organic and stages will overlap, or your group's goals may change, and you must be prepared to revise your plan as circumstances dictate. The stages are:

- Where are we now? This is where you review your group's achievements and progress, and undertake self-assessment.
- Where do we want to be? This is where you decide your goals.
- How do we get there? This is where you define the strategy you will use to achieve your goals and to break down your goals into the smaller discreet steps you will need to take to achieve your target.
- Taking Action. This is where you implement the plan!
- Where are we now? The cycle begins again with a redefinition of your group's goals.

Remember your action plan is a tool to help your organisation, not a millstone around its neck. It is important to live in the real world and constantly check and re-evaluate your action plan, changing it when necessary. There may be good reasons why things are not progressing as fast as you hoped, or why events have taken an unforeseen turn. Stay calm and adjust your action plan to include the situation as it develops. (A sample Action Plan appears overleaf)

Action Plan

Make it Specific, Measurable, Achievable, Realistic and Time bound

Subject for action (What are you aiming to achieve?)	Action needed (What will you actually have to do?)	Target dates
Making the library accessible	1. Plan campaign	Now
	2. Publicise campaign to network groups, press and media	Next week on-going
	3. Make arrangements to launch campaign at public event outside library, invite radio, TV and press, make sure people turn up, invite local councillors, AMs etc.	Over next four weeks
	4. Hold public launch event	1 month from now
	5. Lobby councillors, AMs etc	Months 2-3
	6. Help library staff / builders install access features	Months 4-7
	7. Hold launch celebration of new accessible library	Month 8

5 Working with others

Networking

There are bound to be groups and individuals with which you share interests in one way or another. They may be local or further afield, possibly abroad. Even if you think of them as competitors it is wise to maintain contact.

Why network?

Friendly relationships can be beneficial. Supporting other groups helps to keep you informed, gets your work better known and respected, and may encourage others to support you in return.

What is a network?

A network refers to the relationships between people, which create mutual benefit. It is the list of people who have a common interest in your group and who know it well enough that you can call on them and they on you.

To network is to take deliberate action to maintain and grow your network by establishing a series of contacts for mutual benefit.

The art of networking

For your group to work well, it needs to connect well. Mastering the art of networking allows you to:

- Generate awareness about your group's activities
- Avoid clashes, waste and duplication
- Gather feedback on ideas to ensure community involvement and support
- Stay abreast of opportunities and threats
- Pick up on emerging needs and generate creative solutions by combining different people and approaches
- Develop work that needs more than one group behind it to be effective, such as campaigns
- Swap skills and learning so that you always know people who have the skills or knowledge you need to work well
- Widen your sphere of influence

Effective networking

In order to network effectively you will need to develop:

- Good interpersonal skills on a one to one and group to group basis
- A range of communication skills from getting your voice heard at meetings, contributing to formal and informal gatherings and making speeches and presentations
- A clear understanding and image of who your group is, what it does now and what it wants to do in the future
- An awareness of and understanding of other like-minded individuals and organisations at work in your area and their relevance to your work
- Decision making skills about which meetings and events help your group, otherwise you may waste valuable time
- Ways of letting others know what your group is doing (newsletters, emails, press releases, information fairs)

A final caution

While the rewards of effective networking are clear to see, you should remember that ineffective or misdirected networking can have the opposite effect. People or presentations that do not show off your organisation in the way you intend can often do more harm than good.

5 Working with others

Partnership working

The benefit of working in partnership is that in working together organisations can achieve greater and better results than either could alone.

Each organisation will have different strengths and weaknesses, areas of expertise and experience. By pooling your resources and working together effectively you can maximise the strengths, minimise weaknesses and learn new skills and ways of working that will enrich your own organisation for the future.

Partnership working can range from informal networks and alliances to joint delivery of projects.

Informal partnership working

Informal partnership working might be when you ring up someone from a different but similar organisation and ask for advice and guidance about a certain situation. For example, you may be thinking of holding your AGM at the town's new hotel so you ring another group you know used it last month to check whether they found the access okay.

Partnerships for project delivery

You may want to join forces in order to harness another organisation's particular field of expertise. Disability Wales has worked with Disability Arts Cymru in order to introduce disability arts into some of its meetings and seminars. This form of partnership often involves a series of meetings and a set of written project documents setting out what each organisation will bring to the project.

If you plan to deliver a project in partnership with another organisation or organisations it is important to plan.

Partnership planning

- You will need planning meetings to decide how the groups will work together and how to achieve shared goals.
- Each group should be clear about what they are expected to achieve in delivering the project.
- It is usual to have one organisation as the project leader with the other or others contributing specific areas of expertise. If this is not clear from the beginning the groups concerned should elect a lead organisation or project leader.
- Responsibility: give named people specific things to do and make sure people know when they have to do things by. This helps things run smoothly and avoids duplication.
- Make sure everybody is clear about who will get the credit for the project. This should include whose logo appears on any publicity and how prominently each organisation appears.
- Communication: lines of communication need to be agreed and adhered to. This will avoid confusion and mistakes.

Debrief

It is a good idea to have a debrief and evaluation meeting when your partnership has achieved its goals. This helps celebrate shared achievement, resolves any difficulties encountered along the way and helps both groups feel satisfied with their roles and happy to consider further partnerships in the future.

Partnerships can last for a fixed length of time or can form a permanent arrangement. There are those who have had a bad experience and swear they'll never work in partnership again, but equally persuasive are those who have achieved far more than they ever believed possible by partnering with other organisations.

Particularly when people are volunteering the time they give, partnership working can lighten the load, teach one another new things and generally make projects more interesting, exciting and rewarding.

6 Promoting your organisation

Writing a Press Release

A good press release is one of the best ways to tell people about your group, raise your profile, encourage people to get in touch or to campaign. However, many press releases don't get printed because they are confusing or badly written.

How to write a Press Release

Headlines

A good headline covers the story and attracts the reader. Don't fall into the trap of just stating the subject matter. Professional journalists use strong verbs and specific information to draw the reader into the story. Here are some examples:

- "Bitter Future as Disability Group Goes It Alone"
- "Marketing Means More Than Just A Brochure"
- "Disability Wales Pack Gets Enthusiastic Response"

Good headlines use strong verbs, questions, quotations or thought provoking ideas. They are usually under eight words long and put over the idea or the theme of the article. Humour can also be used to help attract the reader's attention.

Opening paragraph

This is the most important part of every press release. It should grab your reader's attention and make them want to read on. You can do this by using:

- A summary sentence
- The Five-W lead paragraph: who, what, where, when, why
- A quotation
- A question
- A local story angle
- Humour

The Five-W lead

Journalists use a technique called the Five-W lead to give the reader information quickly. The opening paragraph covers who, what, where, when and why. For example

Who: Disability Wales

What: Launches New Membership Information Pack

Why: To Keep Its Members Right Up To Date

Where: Throughout Wales

When: Today

Opening paragraph

Today Disability Wales launched its exciting new Membership Information Pack. The pack, available to members throughout Wales, is available in a variety of accessible formats. Chief Executive Rhian Davies said, "We want to make sure our members are kept right up to date."

This technique makes sure you write your opening paragraph concisely, concentrating on the news and highlighting the facts. It also helps you adopt a good news reporting style. Note: the sixth key word is How. Sometimes you need to explain how something works or happens in your opening paragraph. For example, "The pack has been developed after a Focus Group identified what members up and down the country really wanted to know".

Developing your Press Release

To develop your story, you should draw on the key information in the lead paragraph, expanding and explaining its significance in each successive paragraph. Place the most important information in the lead paragraph and then add the next most important information in the second paragraph and so on. This has the advantage of giving a reader who only reads one or two paragraphs the key information.

In second and later paragraphs add information about names, descriptions, quotations, explanations, background information, previous news, conflicting views etc. When developing your story make sure you use words and phrases to link your paragraphs and also that you use specific and relevant information.

6 Promoting your organisation

Promoting what you do

Although the press is often the easiest way to provide your community with information, there are many others. Each method has its strengths and weaknesses.

Networking and word of mouth

One of the most effective, yet often overlooked ways of promoting your group. Networking is an umbrella term that covers many different areas. These include:

- **Having a presence at other people's meetings and events:** this can be an easy and informal way of letting people know what your group is and what it does. You need to be clear about which meetings, networks and groups will be most useful, however, otherwise networking can become an exhausting and full-time occupation!
- **Having a stand at organisations' fairs, information drives, and charity and other events:** this can be useful but make sure your group actually has something it wants to tell people or something it wishes people to become involved in. It is useful to have a gimmick to get people to come to your stall and find out more. *Note:* a boring or pointless trade stand often has the effect of putting people off!
- **Providing a guest speaker:** many local groups from the WI to The Assembly use guest speakers to keep them informed. This can be an excellent way of promoting your work and widening your sphere of influence. Be sure you have a well-prepared, informative and entertaining speaker, as bad speakers can often do more harm than good.
- **Social networking:** It can also be very good to talk about your group and what they do when you're out and about at work or socially. This can keep you better informed, invite differing views and opinions and get your group talked about in new places.

Campaigning and direct action

A campaign or direct action can be an excellent way to promote your group. Campaigns could be through press and media, lobbying local government or parliament or a direct action involving a march, picket, protest or other public event.

Media: radio, TV, Internet

Radio: local radio is the most overlooked form of promotion and can be one of the most effective. Both local, commercial stations and BBC Wales are always looking for local stories to fill up their airtime. Be clear and specific about what you want to get over and develop an interesting angle. Have members who are prepared to appear live or over the telephone. This can often be at very short notice.

TV is much harder to get on as many people compete for the exposure that television brings. On both radio and TV it is important to be clear, specific and brief.

Internet: the Internet can be an effective tool in promotion and it's certainly the most cost effective way of getting your message across. The Internet is a particularly effective tool for reaching disabled people for who other media may not be accessible. Tap into other organisational networks.

Website: can be extremely effective but you need to make sure that it works, has a range of access features and is kept relevant and up to date. Think carefully before spending precious funds on creating a high tech website. Email can often be just as effective and virtually free.

Print: leaflets, brochures and posters

Leaflets, brochures and posters are usually the first form of publicity that groups invest in. However, they can often prove to be the least effective and are increasingly the most expensive option. You will need to provide your print in a range of formats to ensure that it is accessible to as many different people as possible. Take advice about clear print, plain English, good layouts and colour schemes before you start. Also take advice about how many to have in a print run and whether to invest in separate runs in larger print, Braille, or other languages. When preparing print it is important to use people who know what they are doing to write the text, choose and layout the images and design the whole 'look'. Nothing puts people off more than badly produced print.

Monitoring and evaluation

What is monitoring and evaluation?

What is monitoring and evaluation? Monitoring is gathering information about your project or organisation as you go along.

Evaluation consists of reviewing the information you have gathered so you can check progress against your set goals.

Why monitor and evaluate?

Monitoring and evaluation will help your organisation develop, and more effectively meet your mission. It also helps you demonstrate the value of your work to funders and others.

Evaluation shows you what is working well. This can be very motivating for staff, volunteers and funders, reminding them why the organisation's work is important and the difference it is making. It also shows whether your work is producing any unexpected effects or outcomes, whether positive or negative.

What information can be monitored and evaluated?

A wide range of information can be monitored and evaluated, but think carefully about what information you will need and how you will use it. This could include:

Inputs: these are the resources you put into a project or activity such as staff or volunteer time, funding or any other provisions you use to take a project forward. For example, you might want to check how much time you spend on a particular activity and then assess this against your expectations.

Outputs: these are the activities, services or products you deliver. You might want to assess their quality and who is using them.

Outcomes: these are the changes, benefits or effects that your organisation makes happen.

Impact: can be used to describe broad, long-term changes or more immediate effects. Any action you take will have an impact on the group, its goals and other affected people. For example, in campaigning for an accessible library, you might decide to use an

aggressive, militant style. This may effectively achieve the desired changes, but might have an adverse impact in reinforcing a widely held view that disabled people are 'troublemakers'.

Using the information

Assess your information carefully. Avoid generalising and making untested assumptions. Remember most information can be interpreted in a number of different ways. So inviting the views of others can be a good way of checking your conclusions.

Making recommendations

Once you have pulled together your conclusions you can start to decide if they are evidence-based, prioritised and realistic recommendations for change or improvement.

Communicate your findings

Your group will have discovered what is working well, what needs improving and how to develop.

Funders will welcome your information about activities and outcomes. You should be in a stronger position to win further funding, especially as you can show how you will put what you have learnt to good effect.

Monitoring and evaluation tips

- Make targets and aims clear and measurable. You won't get useful results if no one understands the point of the exercise.
- Make sure everybody understands that the monitoring and evaluation is being carried out for good reasons, that they are not being policed or judged and that the process isn't just for the sake of keeping records.
- Make sure you set aside enough time for monitoring and evaluation.
- Build monitoring and evaluation into planning cycles, job descriptions and budgets.
- Share the results so that everyone can benefit from them.