

New Groups' Guide To Starting Up



This Project Planning guide will assist your voluntary or community group through the project planning process.

Introduction

This toolkit is the second part of the New Groups' Guide to Starting-Up. The journey for new groups has been likened to scaling Everest from Base Camp to the top. The first toolkit took groups from Base Camp covering Start-up, Getting a Committee Together and Legal Status.

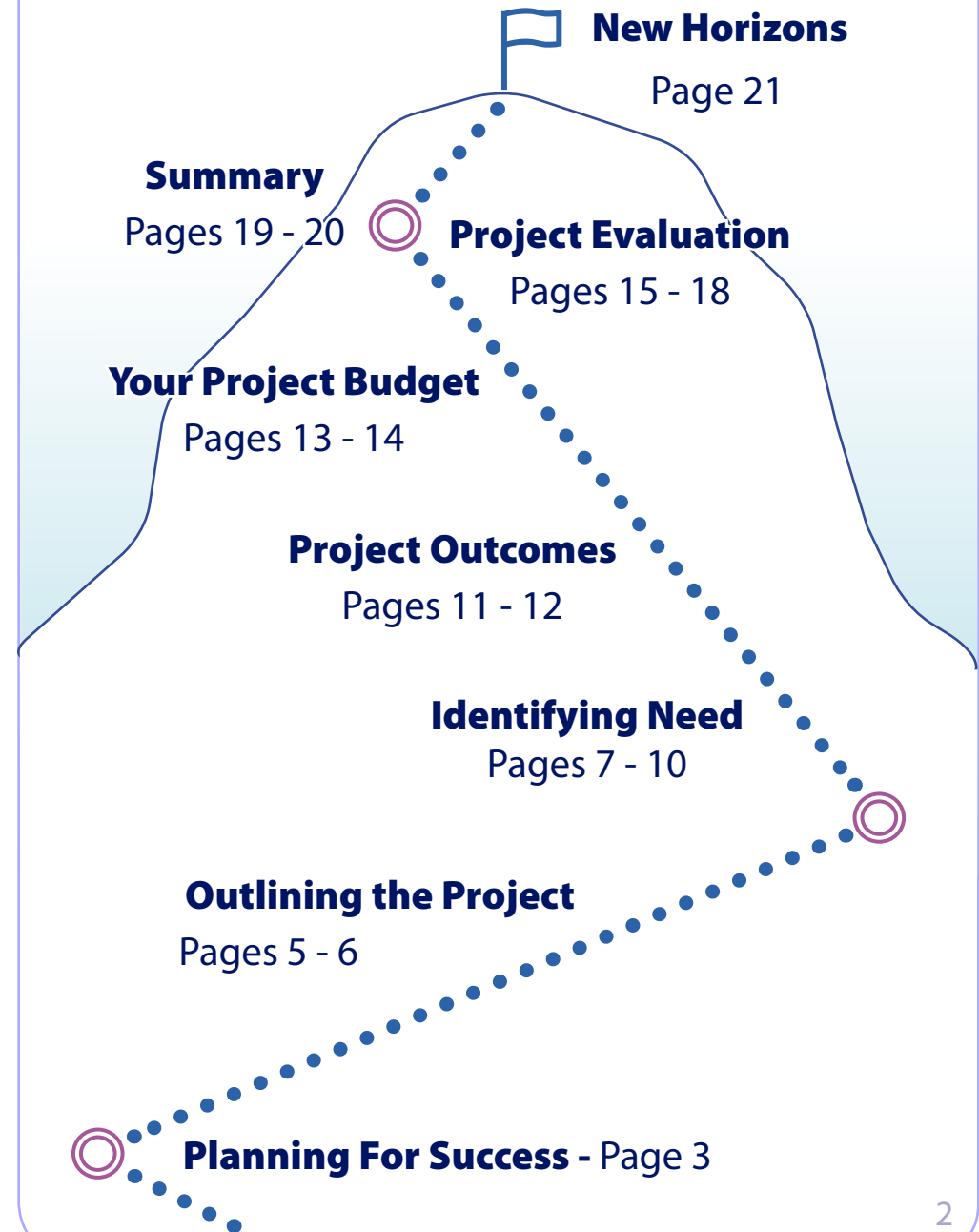
This project planning toolkit takes us nearer the summit as we trek the final stages to the top!

The Project Planning toolkit will cover:

- Planning for success
- Outlining the project
- Identifying the need
- Project outcomes
- Your project budget
- Evaluating your project
- Summary checklist
- New horizons – information about other Toolkits
- Contacts



Route Plan



Planning For Success

These are some of the factors which help you to make your project planning more effective. Projects are more likely to be successful when:

- ✓ The group has a shared vision and a shared sense of commitment
- ✓ The group allows time to involve a wide range of people in the planning stages
- ✓ The project you are planning builds on past achievements and efforts
- ✓ The group has a realistic picture of the current situation including what is already on offer locally and what funding opportunities are available
- ✓ The project is supported by the local community, local councillors and your local Member of Parliament
- ✓ The whole process, from start to finish, includes others and there is a sense of team work
- ✓ There are enough resources – people, time, funds, equipment, and other support to ensure the project is delivered well
- ✓ Ways of evaluating and monitoring the work have been considered before the project begins.



Outlining the Project

This project planning guide will look at how to plan a specific project and what you need to include.

Planning is a key part of any project or activity. Good community-based planning creates projects and activities that benefit the whole community.

Think about a project in your community that stands out, and ask why this is? Why is it important and what makes it successful? How could the project have been different or made better?

Identifying what you like about a project and how you think it could have been improved will help your management committee plan your project.

It is important to include as many people as you can at the beginning of the planning process. Consider how to make best use of community strengths and resources and respond to local needs and interests. Before your group starts planning, look at projects that might already be active in your area because what you want to plan may already be operating in your community. By finding out what is there already you can avoid duplication (remember a funder would not want to fund duplication of services or activities).

What to include in your project outline

Project background: what is the background to your project and what are you actually going to do?

Timescale: when will it take place, how long will the project run (start and finish dates) or is it a one off event or activity?

Method: How will you deliver the project or what form will it take?

Geography: Where will it take place? (Does it fit with your group's chosen area of benefit).

Beneficiaries: Who will benefit? Who are your target audience? You may need to include an age range e.g. 'Play Project for Children aged 5 to 10 yrs'.

Management: Who will manage on a day to day basis and who has overall responsibility? Include who will supervise volunteers and, if applicable, who will manage paid staff.

Resources: What will you need to deliver the project in terms of finances, equipment, staff and volunteers?

Outcomes and Evaluation: How will you evaluate the project – will it be internally or externally evaluated? How will you measure if the project is successful and how will you demonstrate the outcomes to show what difference your project has made?

Identifying Need

How do you know there is a need for your project?

It is important to think right from the beginning about the actual need for your project idea. Any funding application will ask for information about how your group has identified the need for your project. You will need to think broadly about how you know that there is a need.

If you can't provide evidence that the project is needed you are unlikely to receive funding. You need to be able to demonstrate that the funding will be put to good use by funding a project or activity that is needed by local people and communities.

There are a number of things that you can do to assess the need for your project.

Things to think about:

- You could visit a number of local projects in your area to talk about your project and involve existing groups
- Do you need to hold an informal community meeting to explain your project idea and ask the community's view on it? You could ask about times, suitable locations, how regularly a service might run and charges

- What about a Needs Survey? You could carry out a 'question and answer' survey with local residents. Responses from the survey would provide supporting evidence to back up your project. You could then hold a meeting to feedback the information from your survey to keep your target audience informed
- Have you researched statistics to back-up need in this area of work? You can look at the local Household Survey. The Primary Care Trust or NHS have a range of statistics and the Local Authority can also provide statistics that could be useful
- There may be recent research e.g. incidence records or levels of crime data that would be useful if you are planning a project to counteract anti-social behaviour
- You can use case studies from other areas to show how similar projects have benefited their communities
- Is a current service over-stretched and unable to cope with the demand? If you are planning an expansion you will still need to be able to demonstrate the need. Include the group's own statistics from existing or previous projects to validate the work you do and the service you offer
- Have you asked for letters of support from users, carers, supporters and also from partner agencies? Does your local councillor know about the project? Any support they could give would help
- Community mapping is another useful method to help you demonstrate the need for your project and help identify what services are already available locally and what the current gaps are.

What is Community Mapping?

Community mapping is a process that literally 'maps' or lists what is currently operating or available in your local area. It helps to identify services, businesses, schools, colleges, recreational or leisure services, community buildings, religious buildings and community groups that already exist. From this list or map your group can identify potential partners, linkages, groups and services that might be useful to the delivery of your project.

This mapping exercise helps to build up a portrait of your community and should give an idea of any gaps and generate ideas about future projects.

Your group could hold an open meeting for all the community to work on a 'Community Map'.



People

Predominantly White British
Small % of Chinese
High % of older people and families

Community Activity

Drama Group
Mencap Group
(Disability Group)
Other Community
Associations

Health

4 G.P.s
2 Dentists
Family Planning Clinic

Agriculture

Farms
Nurseries

Town Council

Town Councillors
Parish Councillors

Place e.g.
Pocklington,
East Riding

Business

Small Shops
Clothes Shops
Second Hand /
Antique Shops
Butchers x 3
Bakers x 4

Religion

Buddhist Centre
Methodist
Church of England

Services

Clinic
Library
Local Authority Rent
Office
CVS

Debt Advice
Befriending

Sport

Rugby Club
Cricket
Football
Netball
Squash
Cycling Lanes
Running Club
Dance Clubs

Culture and Recreation

Stately Home (Buddhist Centre)
Community Centre
Swimming Pool / Leisure Centre
Arts Centre / Cinema

Education

2 Primary Schools
1 Public School
1 High School
1 College

Project Outcomes

At the start of the project planning process your group will need to think about the outcomes of your project. Outcomes relate to the difference that your project will make and the benefits there will be for the people who access your project. Outcomes relate specifically to the aims and objectives of your project.

The Charities Evaluation Service defines 'outcomes' as "the changes, benefits or learning that actually occur as a result of your activities". Outcomes may be intended or unintended, positive or negative.

Your group will need to think through how you will identify and monitor outcomes. Outcomes are important to funders and to your group because outcomes show the results of your project and relate to the changes that occur.



Some examples of outcomes are:

- (50) young people have increased their physical activity levels
- (20) people have improved access to job search facilities
- Increased awareness of benefit entitlements and housing rights.

There are a few things to consider that will help your organisation identify outcomes:

- Outcomes should be based on the specific aims of the organisation
- Outcomes must be realistic
- Choose outcomes that reveal most about your progress
- Choose outcomes that are important to your client group, staff and funders
- Outcomes need to be assessed, so make sure you can find a way to monitor them.



Your Project Budget

Your project will need a budget and you will need to think carefully about your budget before applying for funding. Your budget needs to be realistic – don't over or under price your project. Make sure that your figures add up!

In a funding application you are likely to be asked whether you have received money from other sources and if you are applying for funding from anywhere else.

The budget for your project will depend entirely on what you are planning, whether it is a one-off project or current, on-going work. Working out your budget will be specific to your project, but below are a few things that you should remember to include:

- Office costs including rent, telephone, utility bills (heating, water etc), equipment and IT costs (see below)
- Office running costs including postage, printing, photocopying and internet
- Publicity and marketing
- Staff and volunteer expenses including travel and training fees
- Beneficiary costs

- Staff salaries (including cost of living increments if appropriate)
- Contingencies
- In-kind contributions e.g. free room hire
- Calculate your volunteer time for example £7 per hour x 4hrs per week x 8 volunteers x 50 wks per year = £11,200. This can be put towards the budget as in-kind payment
- Also state if you intend to contribute some of the group fund towards the project.

ICT support costs should include:

- Cost of computers, printers, internet connection (installation and rental), additional software (word processing, accounting package, anti virus protection), computer troubleshooting support, data backup facilities and networking costs to link two or more PC's together
- You may also need to consider website design and hosting costs, and possibly 3G mobile internet connection for laptops. You can contact Anthem ICT for free information and for help with your ICT budget to work out what you will need (see page 22).

You can also contact West Yorkshire Community Accounting Service (WYCAS) for more general information about your project finances (see page 22).

Voluntary Action Wakefield District works closely with WYCAS and Anthem ICT who provide specialist support to voluntary and community sector groups.

Project Evaluation

Project evaluation is important because evaluation helps to provide answers to question such as:

What progress has been made? Were the outcomes achieved? Are there ways that the project could be refined in order to achieve better outcomes? Do the project results justify the inputs?

Evaluation, outcomes and monitoring can be confusing and can cause concern for groups. This section should de-mystify some of the terms and help your group to find the best way to evaluate your project.

Here are some definitions:-

Evaluation: Evaluation identifies how the project has achieved its aims. Evaluation also informs decisions about what to do next and how best to develop the project.

Outcomes: Outcomes are the changes, benefits or learning that actually occur as a result of your activities.

Monitoring: Monitoring tracks where you are up to in the project to ensure that targets and outcomes are being met at appropriate stages of the project.

Aims: These are the overall goals you want to achieve.

Objectives: These are the activities that you plan to deliver to achieve your aims.

Input: These are things that you put into your project, e.g. funding, use of a building, equipment, staff and volunteer time.

Output: These are the actual activities or 'things' you deliver, e.g. 20 advice sessions, 10 learning aids, 3 information packs, 2 events, 3 cooking workshops.

Impact: This is the overall effect the project or activity has had on a client group or wider community.

This example 'Community Learning Project' should help to make the definitions clearer:-

Aim: To increase the employment prospects of lone parents.

Objectives: To provide training courses and one to one support sessions.

Input: Staff time, training materials, financial resources, venue and advertising.

Output: Five 6 week training courses to 60 learners and 50 lone parents provided with individual advice and support re: work / training / further education opportunities.

Outcomes: Lone parents have increased confidence to seek opportunities; increased motivation to access further learning and training and improved health and wellbeing for parents and their children.

Impact: Reduced social isolation of lone parents and positive role models for other lone parents.

Evaluation and Monitoring Methods

You need to choose the right monitoring and evaluation method that will suit your group and the project you are planning.

You will need to think about how much time to dedicate to monitoring and evaluation.

Particular funders may have particular requirements - try to find out beforehand their preferred method of monitoring and evaluation. If you apply for a large sum e.g. £250,000 then this will require substantial monitoring but if the amount was smaller, such as £2000, it is generally accepted that the monitoring requirement would be less.

You might need Qualitative Evaluation: this is an assessment method which asks the question 'How well did we do and how satisfied are people with the project?' Or it could be a Quantitative Evaluation which asks the question 'How much did we do, what did we produce and how many people attended?'

Evaluation can be done in different ways - you can choose from self completion questionnaires, observation, interviews, keeping records, feedback, attendance records, follow up reviews, focus groups, analysis of data or satisfaction surveys. All these methods have good and bad points - you will need to decide what is appropriate for your project and client group.

Monitoring and evaluation has to be fit for purpose. For any project you will need to know the basics:

- Who needs to know the monitoring information?
- What information or evidence do they need?
- When do they need it and how should it be presented?
- Who will collect and evaluate the information? For smaller groups, members of the management committee might want to form a subgroup, for larger organisations it may be the person who manages the project on a daily basis.
- What existing monitoring information do you gather?
- What new information will you need and how will you gather it?



Summary

To help you clarify the stages we have covered in the project planning toolkit it could be useful to think about 'what funders will be looking for'?

- You will need to have a clear project proposal with specific aims and objectives
- Decide on appropriate outcomes for your project, be clear from the start about what changes you are trying to achieve for your client group
- You will need to be able to explain why the project is necessary and be able to demonstrate the need for your project – what research and statistics could you use?
- Be aware of other groups or organisations in the area that you could link with – is there scope for partnership working?
- Be sure you can demonstrate why the project should be based with you – emphasise your strengths as an organisation and outline the skills, expertise and experience that your organisation has
- Use examples of other projects which you have run and use these to highlight your organisation's track record

- Formulate a realistic and detailed budget
- Show that you have carried out a Strengths, Weaknesses, Opportunities and Threats analysis. Show that you have thought about risks and include a contingency plan as back-up
- Use your project outcomes to help you evaluate the project – be clear about how you will monitor and evaluate.



New Horizons

Now that you have worked your way through the Project Planning guide you may be interested in other toolkits from Voluntary Action Wakefield District:

New Groups' Guide to Starting Up - First Steps

Do it Yourself Fundraising

Involving Volunteers in Your Organisation

Safeguarding Children and Vulnerable Adults (*Spring 2009*)

Changes in Charity Law (*Spring 2009*)



Contacts

Voluntary Action Wakefield District (VAWD)

Tel 01924 367418

Web www.vawd.org.uk

Anthem ICT

Tel 01924 367418

Web www.anthemict.org.uk

Pay & Employment Rights Service (PERS)

Tel 01924 428033

Advice Line 01924 428030

Web www.pers.org.uk

West Yorkshire Community Accounting Service (WYCAS)

Tel 0113 270 6269

Web www.wycas.org.uk

fit4funding

Tel 01924 239063

Web www.fit4funding.org.uk

Charities Evaluation Service

Tel 020 7713 5722

Web www.ces-vol.org.uk





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