



Bournemouth CVS

Planning to Get Ahead With Funding- Session 1

June 2015

1. Introductions and Learning Outcomes

This is Day 1 of a programme of free support for voluntary and community groups across Bournemouth, Dorset and Poole to help you identify how:

- strategic planning can help you be more sustainable
- you can evidence need and the difference you make
- to improve your funding bids.

Support will be provided by

- Attending 2 courses
- Surgeries and 1-2-1 support
- Access to ongoing support from Bournemouth CVS or Dorset Community Action.

Who are you and what would you like to get out of the course?

What I want:

By the end of this half day training workshop you will be able to:

- Explain why strategic planning can help your organisation be more sustainable
- Describe what should be in a business plan
- Clearly identify, and evidence, the needs your organisation wishes to meet
- Clearly describe the link between activities, needs and outcomes
- Analyse the current and potential sources of income for your organisation
- Know what other support is available

We live in a changing world; change can be an opportunity or a threat. What are the immediate and longer term changes (internal and external) for your organisation?

Changes we face in the next 12 months:

Changes we face in the future:

Changes can be:

- Internal (e.g. change of Chair)
- External (e.g. end of specific funding stream)
- Certain
- Uncertain
- Unforeseen
- Significant
- Important
- Moderate
- Insignificant

Whatever else we can say about change is that change is **inevitable!**

2. Why plan?

'Would you tell me, please, which way I ought to go from here?'

'That depends a good deal on where you want to get to' said the Cat.

'I don't much care where – ' said Alice

'Then it doesn't much matter which way you go' said the Cat.

'- so long as I get somewhere,' Alice added as an explanation.

'Oh, you're sure to do that' said the Cat, 'if only you walk long enough.'

Lewis Carroll, Alice in Wonderland

There are two types of planning:

- Strategic: Answers the questions like 'What are we trying to achieve?', 'Are we making a difference and how much?', 'What will we be like in 5 or 10 years' time?'
- Operational: Answers questions like 'What will we be doing in the next 12 months?', 'Who will do it, with what resources and how will we know we have achieved it?'

If change is pretty constant and mostly unpredictable then why bother to look at strategic planning?

Reasons to plan:

Last year the ICAEW carried out a joint project with the Charity Commission on strategy development, implementation and review in charities. The main findings were:

- Those charities with strategies appear more able to deal with fluctuating economic conditions
- Few charities considered mergers in their strategies
- Many trustee boards lacked both financial and general experience, particularly in developing strategies

Trustees have a legal duty to ensure that their charity remains solvent and continues to deliver public benefit. Planning is a **better** way to ensure that your organisation

continues to meet the needs of those you were set up to benefit and to have the resources to do so than a 'we'll deal with it as it happens' approach.

All organisations will have a strategic plan even if it is not explicit or written down and is simply to live from day to day or to stay as you are! Many voluntary/community groups do not have a written strategic plan. Do you have one? If you do is it:

- Up to date?
- Lying on a shelf?
- Written for a specific funding bid?
- Written without engaging across or outside your organisation?
- Understood by the trustees/committee?

If you do not have a strategic plan, why not?

A strategic plan does not have to be 30 pages of dense text and full of tables and figures. It could be a one page summary of

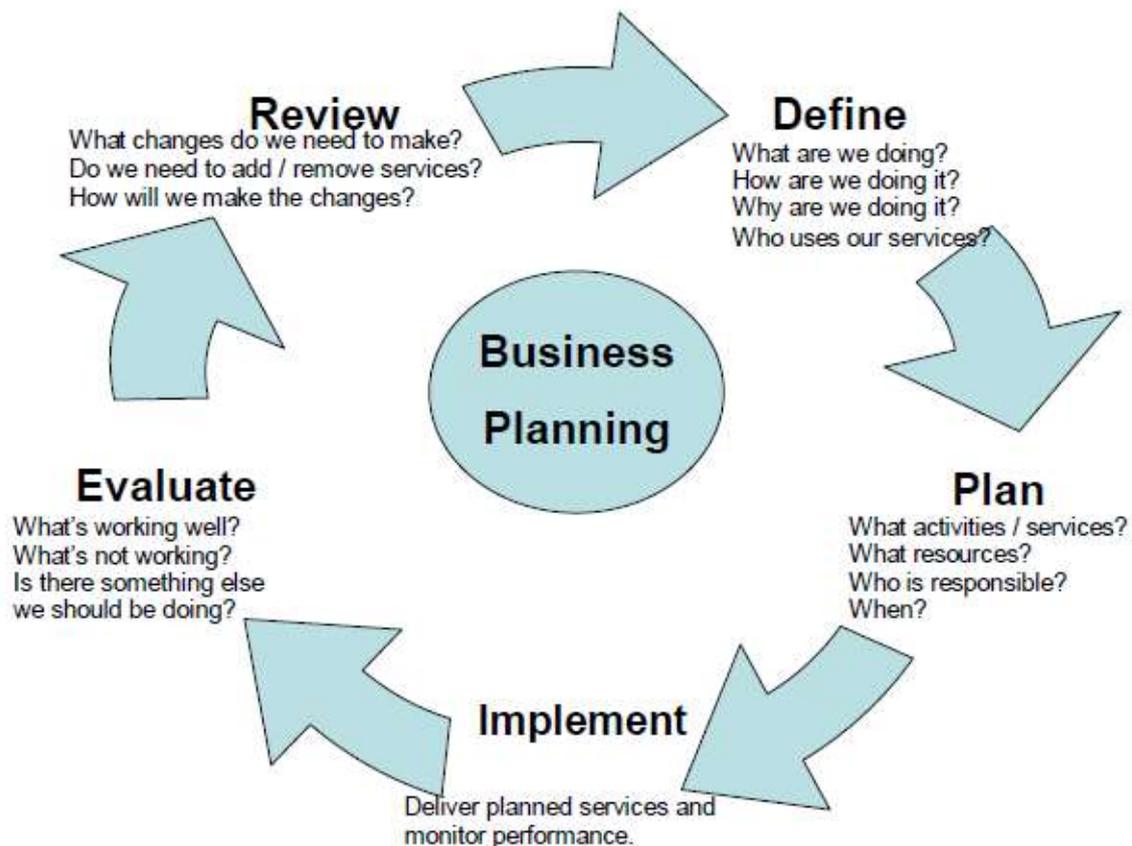
- who you are,
- what is the urgent need you want to meet,
- what you are trying to change,
- how you will make these changes come about, and
- how you will know when the changes have happened.

3. Using a Business Plan

A strategic plan is often called a business plan, however if your organisation is put off by this term then call it a 'strategic plan'. Business planning means taking some time out from day to day work to look at your organisation to see:

- What it does.
- How it works.
- Who is involved in providing your activities
- Who uses your activities
- Why people use your activities.
- What resources you need.
- How you will pay for it all.
- What else is happening around you

When you have done all this work, you need to explain it all to the other people who have an interest in your organisation, your stakeholders. This is where your written business plan comes in. However a business plan should not be a one off activity every 3 or 5 years but a process or cycle (who knows with certainty what will happen next year or even tomorrow!):



Developing a business plan will take time and energy but think about it as spending time to save time. Also it can be a useful tool to help bring an organisation together by agreeing on what the focus and priorities for your organisation are, now and in the future. Some key tips are:

- Involve everyone who needs to be involved (inside and outside your organisation)
- Try to get the views of your users
- Decide who will need to read it, then write for those audiences (in some cases you might need different versions)
- Keep it as short and succinct as possible
- Make sure any figures add up
- Get someone who does not know your organisation very well to read a draft
- If you use a consultant to draft it make sure you agree with it!
- Make sure your trustees/committee members understand and agree with it before signing it off.
- Produce a short summary after the main document is agreed

Page 28-29 of DCA's Robust Business Planning handbook has a useful template.

4. What is the urgent need?

Many applications for grants fail because they lack sufficient evidence:

- of need
- that the proposed activity will meet the need
- of the capability of the organisation to deliver

Chesterton CAB.

People in this rural area find it difficult to obtain advice about their rights, particularly people on low incomes. This is for a number of reasons including: confidence levels, literacy levels, poor levels of understanding about rights before a crisis point, lack of affordable transport to local services, a lack of time or childcare when doing two jobs, mental health issues related to joblessness. Money and debt problems are a source of stress that affects beneficiaries' quality of life and mental health.

What is the urgent need?

What evidence might Chesterton CAB have to prove the urgent need above? Think about evidence they may have but also what others may have.

Evidence of the urgent need:

Look at a list of evidence that Chesterton CAB have collected. Do any of these have relative weaknesses or strengths? Can you think of any other sources?

Think about your own organisation. What is its urgent need? What evidence do you already have? What other evidence could you possibly gather?

What is your urgent need?

What evidence do you all already have?

What other evidence do you need?

What ways can be used to collect evidence of need?

Places to look for evidence include:

- Local authority websites (including census, economic, social, public health)
Dorset: www.dorsetforyou.com/statistics, Bournemouth:
www.bournemouth.gov.uk/CouncilDemocratic/Statistics/Statistics.aspx ,
Poole: www.poole.gov.uk/your-council/how-the-council-works/research/
- Crime statistics <http://data.police.uk/>, <http://ukcrimestats.com/>
- NHS statistics www.england.nhs.uk/statistics/,
www.apho.org.uk/default.aspx?RID=49802
- Census and other government statistics www.ons.gov.uk and
<http://neighbourhood.statistics.gov.uk>

5. Planning to meet needs

We in the not for profit/voluntary and community sector are here because we chose to make a positive difference, to meet an 'urgent need'. It is what makes us different from the private sector (whose fundamental aim is to make money) and even the statutory sector who have to meet social/environmental/financial needs because parliament says they must (we in the sector **chose** to do so).

However we sometimes lose sight of why we exist, how we should best meet the need and many times find it difficult to explain to others (sometimes even ourselves) why we do what we do. Theory of change has become a recognised tool within the sector for planning and evaluation to help:

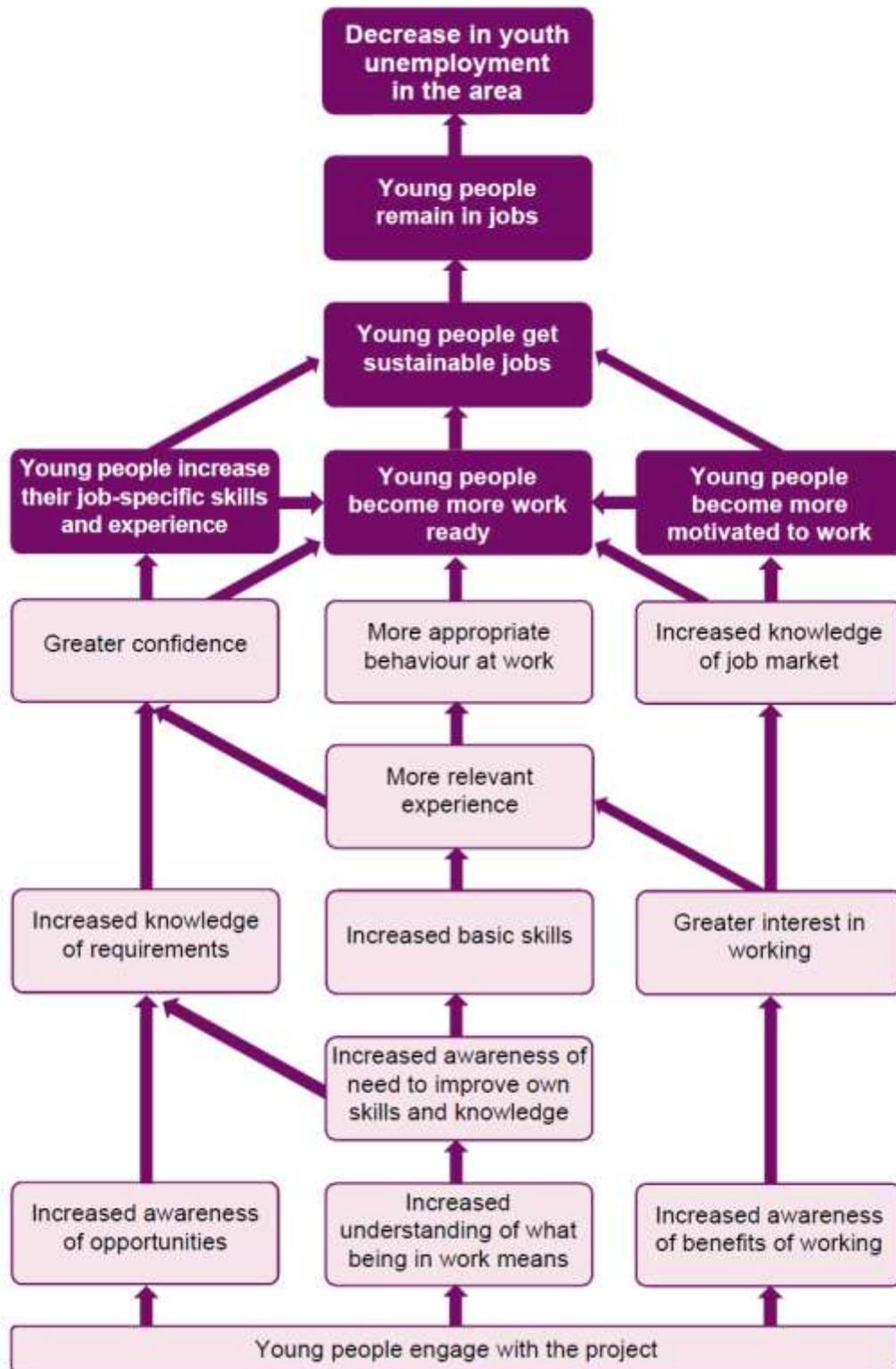
- Describe how what you do meets the urgent need in a diagrammatic way
- Reveal what activities should work and what won't work by showing a causal link (perhaps including activities you have carried out for years!)
- Examine any assumptions you have about how your activities bring about change
- You prioritise what you do
- You decide on how to measure the difference and impact your work has.

It links an identified need to activities that will meet that need and the difference they will bring about, both immediate and long term. Some funders, particularly BIG, like to see a theory of change model.

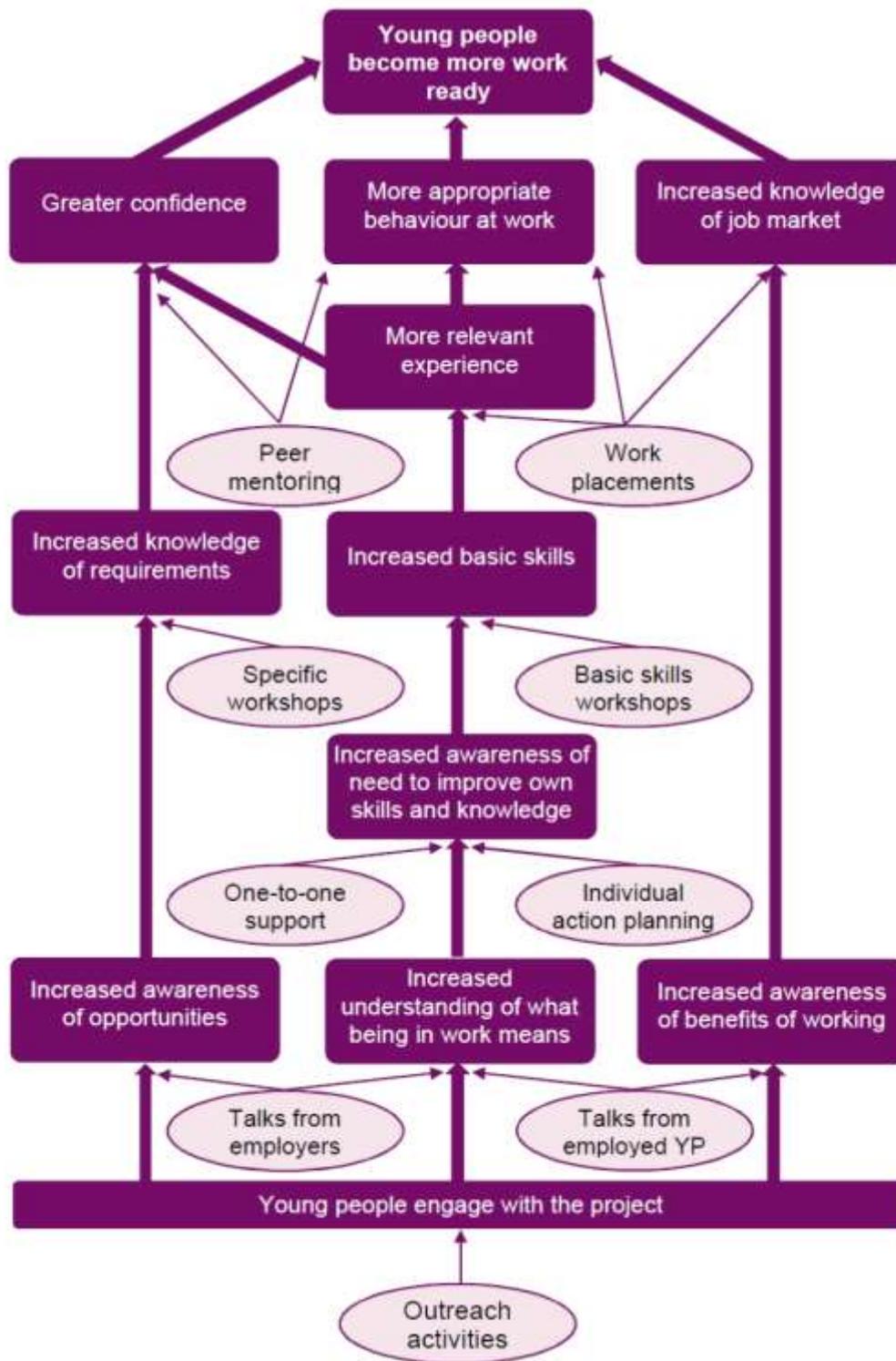
They can be simple or very complicated with multiple layers (sometimes too complex!). Examples from Charities Evaluation Services (Making Connections, 2011) of a project addressing youth unemployment:



If you look at the changes in the young people then you can add the following:



It can then be used to plan appropriate activities to bring about the changes:



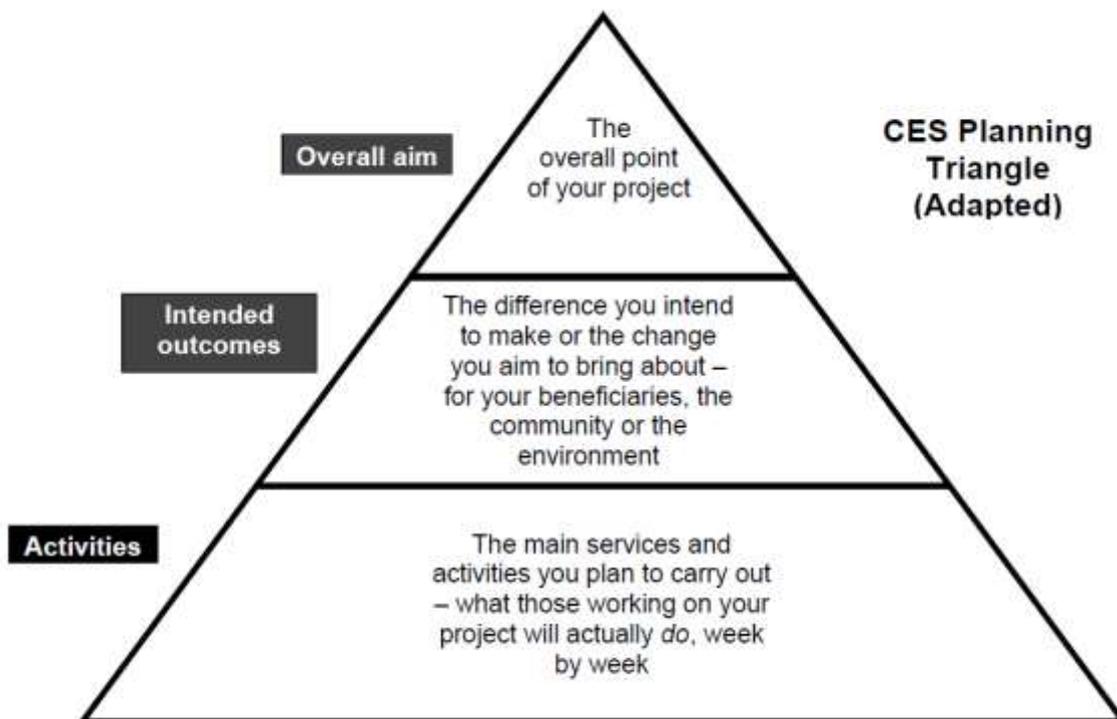
To find out more about Theory of Change look at:
www.ces-vol.org.uk/tools-and-resources/Evaluation-methods/making-connections-tools
www.theoryofchange.org
www.thinknpc.org/publications/theory-of-change/

CES also use a simpler diagram, The Planning Triangle:



Describe the difference your work makes: Build your framework for evaluation (CES, 2013).

This has been adapted by BIG Lottery Fund in its guidance on planning:



Have a look at some of their worked examples

Go back to page 8 and Chesterton CAB and in 3s try to draft a planning triangle. Try using the following hints:

1. What is their overall aim?

Start by thinking about:

- Who is their target group?
- Where are they based?
- What issue/issues do they face?
- What is the positive change they want to see?

Draft an overall aim but then ask:

- Is it realistic?
- Is it clearly expressed?
- Does it contain one big idea?

2. Intended outcomes.

These are the changes that will have to take place to bring about the overall aim:

- Think about the barriers to the overall aim?
- Then turn these into positive statements of change

Check:

- Used the language of change: To increase/improve/enhance/reduce/prevent
- Clear and concise
- Clear logical link between aim and outcomes that you can easily explain

3. Identify the activities that will bring about the required changes. Check:

- Use the language of doing: to provide/run/offer/deliver/organise/facilitate
- Clear and concise
- Logical link that can be easily explained
- Internal activities have not crept in:
fundraising/research/evaluation/marketing/etc.

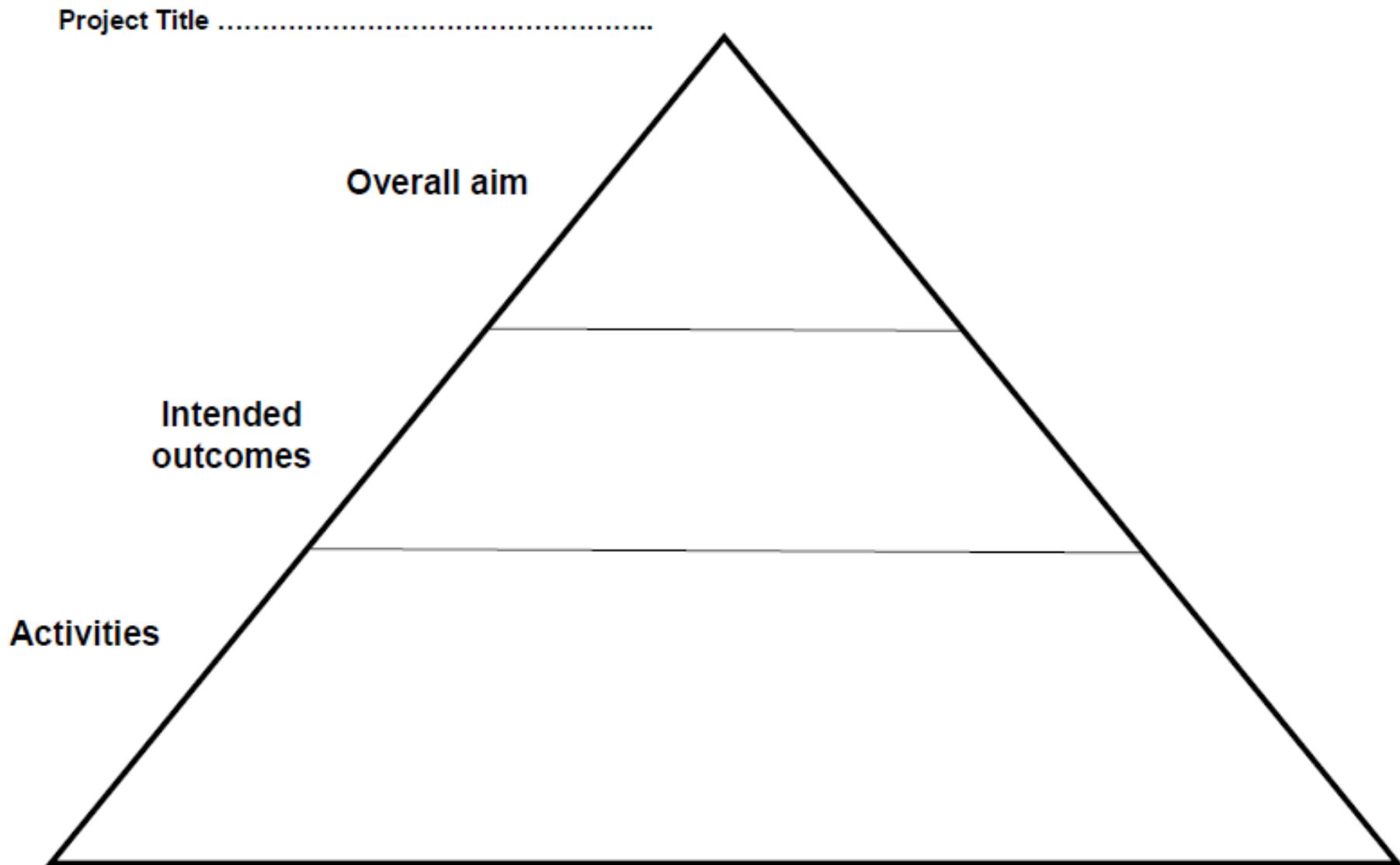
After sharing each other's planning triangle any learning points?

A theory of change model can also help you to develop a monitoring and evaluation system.

CES have published an example Planning Triangle for a community advice centre.

ACTION

Before the second day try constructing a Planning Triangle for your own organisation/project



6. Diversifying your income.

Your income can come from a variety of sources. Think about where your own organisation gets its funding. Are there other sources of funding your organisation does not use?

Our current income comes from?

What other sources are there?

It can be useful to classify sources of funding into 4 categories, the Income Spectrum (NCVO, page 17).

Donations

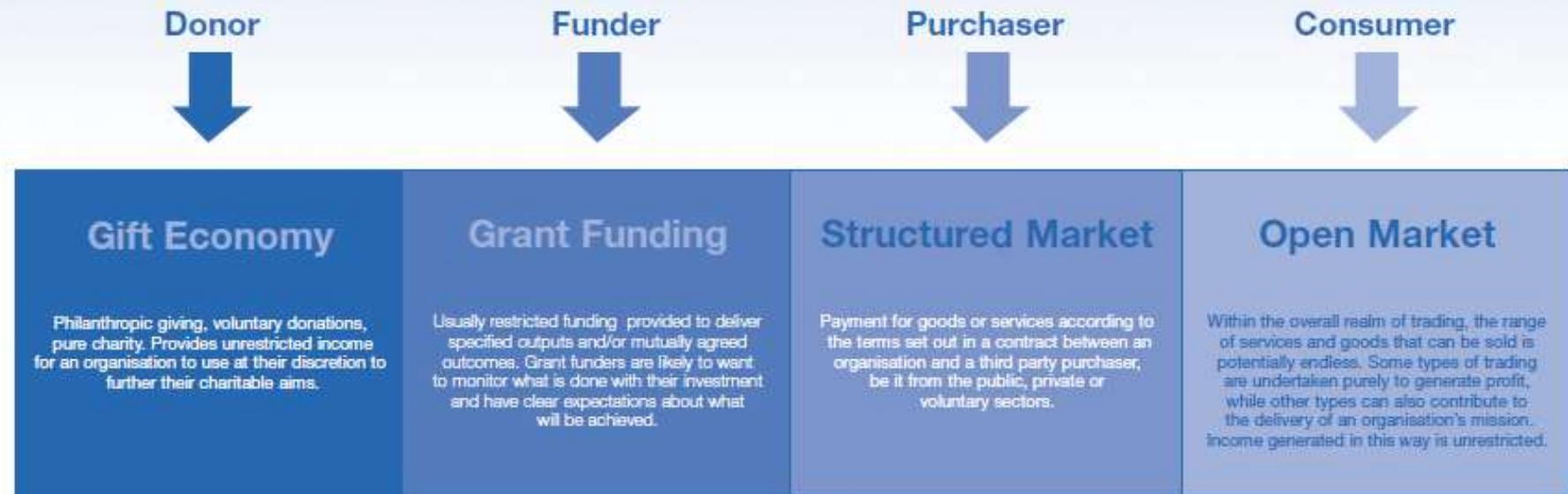
Overview

Fundraising from members of the public is a significant source of income for charities. It can take a number of forms:

- **Major gifts and legacies** (money left by individuals in their will) – both can lead to potentially significant sources of income but generally require long-term engagement and investment (for example, major gifts tend to come from established supporters).
- **Small-scale giving** by individuals can include collecting small change, one off gifts or regular donations and can be attracted via a range of methods (for example, house-to-house or on the street collections, using the press or media, by telephone or use of post, internet or email).
- **Competitions, raffles or lotteries** can be an interesting and attractive way of involving potential donors.
- **Membership/Friends schemes** can be a good way of encouraging repeat giving at a relatively low level, offering sustainability and an opportunity to engage donors with the charity's achievements (for example, via newsletters, bulletins or membership events). However, schemes require sufficient resources to be run and managed effectively.
- **Organised events or activities** might include sponsored events, challenge events, entertainment or involving schools or local clubs and societies.

Sustainable Funding: Across the Income Spectrum

Income options available to voluntary and community organisations



Different income types are accessed and managed in different ways and involve different relationships with the individual or organisation supplying the funds. As you move across the spectrum from left to right – from asking to earning – the level of expectation regarding what is received in return for the income increases.

Within the range of options there is enormous variety and possibility. Sustainable funding can involve all these income streams, or a more limited range – diversification across the spectrum, or if that is not possible or appropriate, within a particular stream.

The key to sustainability is knowing which streams are the right ones for your organisation to explore and how you can develop the capacity to be able to secure and manage them.

Issues to consider

- **Evaluating different approaches**
How often are different methods of giving compared – for example, comparing the cost of a mailing with the donations generated or analysing the giving habits of a charity's donor list?
- **Reputational risks**
Trustees should be aware of the possible impact of fundraising activities designed to attract individual donors. Codes of practice exist to guide charities in fundraising techniques.
- **Financial risks**
Trustees should ensure that the charity's funds are not subject to excessive risk when used to establish a public fundraising activity. Trustees should take advice if they are organising a large fundraising event: fundraising events with significant risk must be carried out via a trading subsidiary (see below).
- **Legal and regulatory implications**
A number of specific laws, standards and codes of practice cover different types of public fundraising. Legislation not specifically related to fundraising might also be relevant: for example, data protection in relation to holding information about donors. Trustees should take appropriate advice to ensure they comply with the law.
- **Tax and trading implications**
Some fundraising events qualify for VAT and corporation/income tax exemption: there are detailed rules which must be followed. Some public fundraising activity is classed as trading (for example, fundraising events and lotteries) and is subject to restrictions (see Trading, below).
- **Tax-effective giving**
A number of schemes allow charities to reclaim the tax already paid, by UK taxpayers, on money donated to a charity (including Gift Aid, share giving, payroll giving and others).

Grant funding

Overview

Grant funding is mainly distributed by public sector bodies and charitable trusts and foundations:

- **Trusts and foundations** are independent grant making organisations. Over 8,000 exist with a wide diversity of size and approaches: some have multi-million pound annual grant-giving budgets; others have small funds limited to specific activities or geographical areas.
- **Statutory funders** include a range of bodies such as central government departments or agencies, local authorities, NHS trusts, local enterprise partnerships and European funding.

The nature of grant funding varies significantly. Some funders openly encourage applications; others only give to organisations they know. Some offer grants with few 'strings' attached; others require extensive reporting and monitoring. Some provide one-off grants or for specific items of expenditure; others offer grants covering several years.

Issues to consider

- **Terms and conditions.** Trustees must ensure that the charity understands and complies with the terms and conditions of a grant – for example, in relation to requirements for monitoring and evaluation and the recording of the grant in the charity's accounts.
- **Restricted funds.** If a grant is given as a restricted fund (restricted to a specific purpose such as a project or item of expenditure), trustees must ensure the funds are spent only on that purpose and should account for the use of the funds separately. Failure to do so could constitute a breach of trust.
- **Sustainability.** Although many grants are time-limited to specific projects, they can form an important part of a charity's sustainable funding mix. Trustees should be fully aware of the extent to which grants cover the full costs of activities: do funds cover all costs or only direct project costs?

Corporate fundraising

Overview

Income from commercial organisations takes a variety of forms, including:

- **Sponsorship** – where a company pays to have its name associated with a charity's programme or activities and expects commercial benefits as a result (for example market exposure, press editorial, increased footfall).
- **Cause Related Marketing (CRM)** – where a charity endorses a product or company, with a benefit in return (for example, payment to the charity each time a product is purchased or used).
- **Payroll giving** – where employees of a company give directly to a charity from their payroll.
- **Corporate philanthropy** – where companies give cash or in-kind donations (for example, training or staff time). Corporate philanthropy is often linked to the Corporate Social Responsibility agenda of commercial organisations.

Companies deal with charitable support in many different ways. For example, the directors or owners of some companies might make all charity support decisions, whereas others might have a staffed philanthropy or corporate social responsibility department. Some companies operate organised schemes: for example, asking employees or customers to nominate charities to support. Corporate support only accounts for a **very small** proportion of the charity sector's total income.

Issues to consider

- **Managing relationships**, Corporate support can be a significant source of funding, as many companies prefer to work with charities over a prolonged period. However, corporate relationships take time to develop. Care should be taken to avoid losing a company's support: for example, because of an arrangement with one of its competitors.
- **Link with the charity's objects.** Significant corporate sponsorship or support almost always depends on a discernible fit between the company's aims and activities and those of the charity. Trustees must ensure any arrangement with a company (such as endorsing a product) is compatible with the charity's objects purposes and its values.
- **Legal and tax implications**, If a corporate partner is classed as a 'commercial participator', the charity must comply with specific legal requirements. Arrangements with corporate organisations might also have tax, VAT and trading implications.

Contracting

Overview

A contract is a legally enforceable agreement between two or more parties. A contract exists (regardless of what it is called) when both parties have offered and accepted something; there is an exchange of consideration (anything of material value); and an intention to create a legally binding relationship.

Contracting is becoming an increasingly significant source of income for charities, mainly due to the increasing trend for public sector bodies to fund services via contract rather than the provision of grants.

In some cases the agreement between the charity and a public sector organisation might be via a Service Level Agreement. A Service Level Agreement may or may not be a contract, depending on its content.

Issues to consider

As a legally-binding relationship, contracting is a significant step for a charity and involves a number of implications and risks to consider. Trustees must understand the precise nature of the contractual relationship – particularly if the relationship has changed from a grant to a contract.

- **Reputation and independence.** In signing a contract, trustees must ensure the charity maintains its independence and does not stray from its overall purposes. Will the delivery of the contract be compatible with the charity's aims, priorities and values?
- **Governing document.** The charity's governing document must permit the charity to deliver the contract. The contract must be consistent with the charity's objects or either be carried out via a trading subsidiary or classified as small-scale trading
- **Taking advice.** Trustees should take appropriate advice in relation to a contract. Professional advice might also be necessary because of aspects relating to the contract: for example, the purchase of property or entering into a lease.
- **Contractual.** Trustees should ensure that contract negotiations are in the interests of the charity and understand the contract terms and conditions: for example, how any contract underperformance will be dealt, requirements to purchase insurance, monitoring and reporting and termination. Terms for terminating the contract by either party should offer an adequate level of tension between security and flexibility for the charity.
- **Financial.** Will the contract value cover the full costs of delivering the service, including indirect costs and overheads? If the contract is paid in arrears (after a service has been provided) will the charity have sufficient cashflow? Have VAT implications been considered? Will the charity need to register for VAT? Should the contract be delivered via a trading subsidiary to manage risks to the charity or because of the nature of trading?
- **Skills and capacity.** Does the charity have the capacity and skills to tender for the contract, negotiate the agreement, manage and report on the contract (particularly if the charity is new to contracting?)
- **Governance.** Trustees must follow their duty of care and prudence, and act in the best interests of the charity and its beneficiaries. For example, have conflicts of interest been considered if a member of the trustee board is also involved with the contracting organisation?

- **Trustee liability** Do trustees understand the degree of risk and potential personal liability arising from a contract?

Trading

Overview

Earned income is sometimes referred to as trading or 'social enterprise', meaning a business activity that has social aims. 'Social enterprise' can apply not only to a type of organisation but also to an activity. Trading forms a growing part of the charity sector's income. Trading can take a variety of forms. It might directly further a charity's purposes or take place primarily to generate income or profit. Each type of trading is affected by restrictions in charity and tax law.

Categories of trading

Charity trading is classified into a number of categories:

- **Primary purpose trading** directly furthers a charity's objects: for example, an educational charity charging for its courses or publications.
- **Ancillary trading** contributes indirectly to a charity's objects: for example, an educational charity serving meals to students at lunchtime.
- **Non-primary purpose trading** raises funds for a charity and is not related to its objects: for example, the sale of Christmas cards or merchandise unrelated to a charity's objects.

The sale of donated assets (for example, goods, land, buildings and investments) is not regarded as 'trading' provided donations have been given specifically to raise funds for the charity and have not been significantly altered.

Charities can only undertake non-primary purpose trading within the charity and free of income or corporation tax if it falls under specific exemptions: these relate to small-scale trading (where non-primary purpose trading is below a certain threshold), specific types of lotteries and certain fundraising events. Strict conditions apply. Otherwise, the trading will need to be undertaken via a subsidiary.

Issues to consider

- **Financial risk** Trading carries a risk because it usually involves the investment of charitable funds in a venture that is expected to bring a return. Trustees must **be** satisfied that any investment of charitable funds is in the interests of the charity and does not subject the charity to excessive risk. Trustees should also be satisfied that the charity will have sufficient cashflow to sustain the activity until income is generated.
- **Skills and capacity** Does the charity have the skills, staff time and resources to establish what might be new, complicated commercial activities? Where will the skills be found – from existing staff, recruiting new staff or from a member of the trustee board, who might need to take on an operational role for a period of time?
- **Charity law and tax implications** The form of trading must be correctly classified to ensure compliance with restrictions over charity trading and tax laws and must be permitted in the charity's governing document. A trading subsidiary be required. Charities must also ensure they follow regulations in the SORP regarding the declaration of income, expenditure and profits arising from trading activity. VAT implications must also be considered.

- **Other implications** – the form of trading might bring other legal or practical implications: for example, the production of craft items might have health and safety implications; insurance might need to be amended; or the charity's lease or mortgage might restrict activities carried out on its premises.

Loan finance

Overview

Loan finance is not an income stream, but a financial enabler. Loans might be an option, for example, where investment is needed to buy a building, provide new equipment, start a trading activity or cover periods of low cashflow, and where the charity has a reasonably assured of repaying the loan but does not have funds of its own to invest.

Loans are not suitable for all charities and differ from other income streams. They are usually less competitive than other forms of income, often quicker to set up, not usually restricted to any purpose, and often involve less reporting – and are paid in advance. However, loans require repayment, usually with interest; arrangement fees may apply and security might be required in the form of a charge on the charity's assets.

Issues to consider

- **Financial risks** Trustees must ensure that the loan is in the interests of the charity and will not put its assets at risk. There should be a clear plan setting out how the charity plans to repay the loan. Failure to do so could put the charity's assets at risk and even risk the charity becoming bankrupt or insolvent. Do trustees understand the degree of risk and potential personal liability arising from a loan agreement?
- **Governing document** Trustees must ensure they have the power to take out a loan in the charity's governing document and, if necessary, pledge assets as security.
- **Terms and conditions.** The terms and conditions of the loan should be clearly understood, including procedures for repayment and default.

Do you need to diversify?

It is very risky to be dependent on one or a few funding sources be it a grant, donor or contract. Therefore to be sustainable funding needs to be:

- **Stable**-have a mix of income streams so if one diminishes it does not threaten your overall viability
- **Suitable**-each type of income has pros and cons and you need to make sure they are compatible with your objectives
- **Sufficient**-there's never enough money but understanding your costs allows you to make informed decisions.

NCVO have a useful diversification tool:

Income Stream	No. of providers	Funding length	£	Current proportion			Growth		
				Low <10%	Medium <50%	High >50%	Low	Medium	High
Donations									
Individuals									
Private Sector									
Grants									
Trusts and Foundations									
Public Sector									
Private sector									
Contracts									
Voluntary sector									
Public sector									
Private sector									
Trading									
Individuals									
Voluntary sector									
Public sector									
Private sector									

Below is where the funding comes from for Chesterton CAB. Try to fill in the table above and speculate about any potential for growth.

Chesterton CAB's funding.

CCAB has an annual income target of £173,000 a year. Currently it has a significant grant of £60,000 a year from the Lottery (in year 2 of a 3 year grant). This matched by the county council (£30,000) and the 4 district councils. 5 other grant making trusts bring in a total of £6,000 on an annual basis. It also have an annual contract with 6 GP practices of £3,000 a year each to supply advice sessions to their patients, and a 3 year £10,000 contract with one housing association to provide a telephone advice line to its tenants. CCAB run a number of fundraising events including an annual fun day that brings in a total of £2,500 ,and it currently is the local charity for the year for an insurance company that it is hoped will raise £8,000. It has recently developed a successful introduction to welfare benefits training course for front line staff which last year was attended by 32 members of staff from the voluntary (25%) and statutory sector (75%) at £150 a head.

ACTION

Before the second day try filling in a table for your own organisation/project

Income Stream	No. of providers	Funding length	£	Current proportion			Growth		
				Low <10%	Medium <50%	High >50%	Low	Medium	High
Donations									
Individuals									
Private Sector									
Grants									
Trusts and Foundations									
Public Sector									
Private sector									
Contracts									
Voluntary sector									
Public sector									
Private sector									
Trading									
Individuals									
Voluntary sector									
Public sector									
Private sector									

NCVO have a range of useful tools to help you look at sustainable funding including its 'sun tool'.

7. Other sources of help

FREE Training:

The Connecting Advice in Dorset project are developing and delivering a programme of training for advice providing organisations, and organisations who are in touch with people needing advice. This training is provided free of charge to end November 2015.

If you would like more information or would like to book a place on any of the courses please contact Jane Hunt at caid@shelter.org.uk. Places are limited so please register your interest as soon as possible.

Quality guidelines:

The Connecting Advice in Dorset project has published a 'Guide to Quality Standards for voluntary sector organisations with an advice remit'. This is a really useful checklist for advice providers to use to assess the quality of the services they provide. The guide is available on request, or can be downloaded from our website www.advisedorset.org.uk. If you would like support to work on any aspect of quality within this guide, please contact Bryony Brown at bryony@caidorset.org.uk.

FREE Equality Healthcheck

Would you like an independent, non-judgemental, outside view of the equalities policies in your organisation? The Dorset Race Equality Council are offering this free service through the Connecting Advice in Dorset project for a limited time only. Contact Adnan Chaudry at adnan.chaudry@dorsetrec.org.uk if you are interested.

Bournemouth CVS

Provides a range of services and facilities (mostly free) including:- equipment loan and photocopying, organisation set up and help, help with volunteering, training and events to voluntary and community groups working in Bournemouth. It provides this through its website, www.bournemouthcvs.org.uk, e-alerts (including BPF0G regarding grant funding), e-mail, telephone and face to face work. With Poole CVS we run a training programme with a sliding scale of charges to meet the needs of local groups. For more information visit the web site or phone 01202 466130.

Poole CVS

Poole CVS exists to support local voluntary sector organisations. We are a registered charity; therefore part of the sector, so we understand the issues faced by many of our colleagues.

We offer a range of services to groups and charities in Poole from free one-to-one advice, group advice sessions and training all of which teach best practise and help the committees to manage and fund their organisations more effectively. The advice we provide is very individual and tailored to the organisations' specific needs. We also organise a range of specialist forums, hold network meetings and produce a quarterly newsletter with which to distribute information. We run a Volunteer Centre, which brings together people seeking volunteering opportunities with charities, voluntary and statutory organisations which are seeking help. For more information please look at our website www.poolecvs.org.uk or ring 01202 682046.

Dorset Community Action: Funding Advice further support

Depending on your needs, as assessed after completion of our referral form, DCA can provide you with 3 levels of service:

Service description & service level	Numbers	Duration	£ Rate
Level 1: Information Services			
One hour assessment session	1	1 hrs	FREE
Taster training: <ul style="list-style-type: none"> ✓ developing a successful project ✓ good governance ✓ recruiting staff, volunteers & trustees ✓ getting money & managing it ✓ managing relationships & communications 	Up to 12 people	45 minutes	FREE
Grantfinder funding searches	1	1 hrs	FREE
Access to our Community Lunches	n/a	4 hrs	FREE (food costs may apply)
Factsheets	n/a	n/a	FREE
DCA e-bulletins subscription	n/a	n/a	FREE
DCA funding bulletin subscription	n/a	n/a	FREE
'find a group' listing service	n/a	n/a	FREE
Access to DCA web pages & resources	n/a	n/a	FREE
Level 2: Training, Advice, Guidance Services			
One to one training using a toolkit, or course outline	1 person	1 hrs	£40
Small group training using a toolkit, or course outline	2-3 people	1 hrs	£100
Medium group training using a toolkit, or course outline	4-8 people	2 hrs	£240
Large group training using a toolkit, or course outline	9-14 people	5 hrs	£460
Timetabled 'introduction to' training courses	6-14 people	5 hrs	£30 per head for VCSE orgs £60 per head for statutory orgs
LEVEL 3: Consultancy & Support Services			
One to one tailored support, e.g.: <ul style="list-style-type: none"> ✓ Undertaking a feasibility study, community consultation or collecting evidence of need. ✓ Developing a project or business plan. ✓ Supporting set up of a Charitable Incorporated Organisation or other legal structure ✓ Support to developing policies and procedures ✓ Undertaking a skills audit ✓ Preparing and/or checking a funding bid 	1 person	1 hrs ½ day 1 day	£40 per hour + VAT £140 + VAT £280 + VAT
Large group bespoke training	9-14 people	5 hrs	Price on application
Other: Mentoring			
Mentoring support	1 person	1 hrs	£40 per hour + VAT

How can I access the support services provided by DCA?

You can access support from DCA by filing in one of our referral forms, which helps us to identify what your support needs are. These can be obtained directly on our website <http://www.dorsetcommunityaction.org.uk/support-for-communities> or by contacting us by email or phone, or you can pick one up at one of our community lunches or events. We will then contact you to discuss which services are best for your needs.

You can contact DCA by phoning our administrator, Fred Wild, in Dorchester on: 01305 250921. You can also contact us by email: info@dorsetcommunityaction.org.uk or via our website www.dorsetcommunityaction.org.uk