

Club Development Toolkit



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Introduction

Introduction

Who is this Toolkit for?

- If you are considering setting up a community group or if you have identified a gap or need for a service which is currently not provided refer to Section 1
- If you are already a well established group but want to review your governance, policy or practice then please consider any section from Section 2 onwards.

How to use this Toolkit:

- Each section of this Toolkit may refer to other organisations who can provide advice, support and/or training. Contact information can be found in Section 11
- Several sections of the Toolkit include example templates which we would encourage you to use and adapt to suit your own needs. Some sections also contain electronic links to online versions. Where possible use the online version as they are more likely to be up to date
- Lastly, the aim of this Toolkit is to provide you with a comprehensive framework which will help your community group grow and develop. Should you find any aspect of your work or any guidance not covered in this document we would like to hear from you
- In order to gauge how useful this toolkit is we have included an evaluation form. Please complete and return this form to:
 - health.development@setrust.hscni.net or
 - **Health Development Department
Linenhall Street
Lisburn
BT28 1LU**

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Setting up a Community Group

1

1 Setting up a Community Group

This simple step guide offers an overview of the stages involved, and the things you need to consider when setting up a community group or project. These stages do not always follow a logical step by step process. Very often you will need to make several decisions all at once and some of the 'stages' will need to happen simultaneously.

1.1 Identifying the Need

Before you set up a community group you will need to establish what your group wants to do, identify if there is a requirement and ensure there are no other groups in your area doing the same thing.

You will need to consider things such as:

1. Who is the group for - will the group offer a service to the community or will it be for members only?
2. What are the aims of the group and what do you want to achieve?
3. Where will the group operate and what is its geographical area?

A community project or activity is never going to get off the ground or work successfully if there are only two or three people in the community talking about it. The initial stages should include research - establishing public opinion and assessing people's needs.

You may think that your idea is the answer to the community's problems - but does the community share your view? Involve the rest of the community. Do your homework - it will only be worth taking your idea forward if there really is a need for it.

The information in this section will also be applicable to existing groups considering a new project or service.

1.2 Holding an Initial Public Meeting

Holding an initial public meeting is a good way to start. No community service or activity is ever going to be successful if there are just a couple of people talking about it. It is essential to do the ground-work and take time to ask what other people in the local area think.

Choose a venue which is accessible (the local hall or community centre may be an ideal choice). Make sure that you advertise it appropriately to encourage a good attendance. At the meeting set out the ideas clearly and encourage discussion. This will enable you to gauge public opinion and enthusiasm - are they for or against your ideas? If the majority of attendees consider the ideas to be sound and worth investigating further, thank them for their participation and invite volunteers to form a steering group.

To keep the momentum going, the volunteers who put themselves forward for the steering group should aim to meet as soon as possible after the public meeting.

1.3 Setting up a Steering Group

A steering group is the first 'informal' stage of a community group or project. The steering group will usually be made up of volunteers who have put themselves forward (or been nominated) from an initial public meeting. They should share the enthusiasm and commitment for the ideas that the community want them to take forward and explore further. They will also need the time, energy, skills and knowledge to 'steer' things forward to the next stage.

1.4 The Next Stage – Tasks for the Steering Group

The steering group needs to work together as a team and to be in agreement about what it is trying to achieve, why it exists, who is going to benefit and how it intends to conduct itself. To form the framework for the operation of the community group, the steering group should have a clear vision, mission statement and shared belief and values.

It is helpful for the steering group to write a plan of action - the complexity of this will depend on the nature of what the steering group is trying to achieve. It is also a good idea to draw up a list of initial tasks. These may typically include:

- Deciding on how to organise the steering group itself. Very often the steering group members will need to be doing several things at once, and it may help to allocate specific tasks to individuals. It is also useful to nominate someone to act as 'chair'
- Identifying basic start-up costs and agreeing on how these are going to be paid for. Outlay for things such as postage, phone calls, photocopying, venue hire all add up and at this stage the group will not be able to open a bank account
- Speaking informally to local support agencies (find these via your local Third Sector Interface). They can offer valuable information and advice on all aspects of setting up a community group or project and they can help you identify possible funding sources - (Chapter 11)
- Identifying similar projects or groups that already offer activities and services in the local area. Talking to the volunteers (or staff) involved in the running of these, and asking about their experiences, will help avoid duplication of effort and highlight possible ways of working together.

Setting up a community group or project takes time. The steering group needs to keep talking to each other, to support agencies and to the wider community. All this will help to clarify the need, find the best means of finding a solution and to keep 'steering' the idea forward.

1.5 Listening to your Community

Consulting your local community to hear their views, ideas and feedback is vitally important to any community group.

Whether you are at the very beginning of your journey to becoming a fully formed community group (perhaps a member of a steering group) or an established group considering setting up a new project, listening and responding to the people who use your services, as well as gathering the views and suggestions of potential users, supporters and volunteers - should form the basis of everything you do.

There are a number of different methods your group can use to gather this feedback, including:

- Community consultation
- Community needs assessment
- Surveys and questionnaires
- Focus groups.

1.6 Learning about your Community

Knowing as much as possible about your community is very important for any community group. The community may be your neighbourhood area, but it could just as likely be a wider geographic area or even a group of people with shared interests. Knowing all you can about that community will enable your group to:

- Plan community consultation
- Plan services and activities
- Target potential volunteers or supporters
- Gather statistics to present to funders or other agencies
- Gather statistics to lobby councillors or politicians.

There are a number of research resources available to help you compile information on your community and to help you set your findings into a wider context. Your local Third Sector Interface organisation or the Planning and Development Department of your local Council will be good places to start. They may be able to advise your group on the existing sources of information.

Copies of your area's Local Plan will give information about service and facility development plans for your area.

1.7 Community Profile

To pull together any research on the community that your group carries out, you may want to consider compiling (or commissioning) a community profile. This would typically include statistical data on:

- People within the community - numbers within age ranges, gender
- Presence and types of existing facilities and service provision
- Demographic or environmental factors.

website:	www.ninis2.nisra.gov.uk/public/home.aspx
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1.8 Establishing your Committee

The Committee, Management Committee or Board (if you are a Company Ltd by Guarantee or Community Interest Company) is the governing body of a community group.

The volunteers that make up the committee are crucial to the running of any community group. They are the people responsible for taking care of the organisation on behalf of the members. They 'govern' the group. Everything they do is often referred to as 'governance'. Governance is about setting long term direction, making sure that things are in place to keep that forward motion going.

If your group is small and unincorporated, your committee will be very hands on. They may be involved in actually delivering the services or activities your group provides. They still need to govern the group – ensuring that it has the resources to continue to thrive.

The committee or board of directors on a larger, incorporated group may be less hands on, but they will still be the ones responsible for ensuring that everything is in place for the group to keep going. The day-to-day management and delivery of services/activities may be delegated to other volunteers or even paid staff but it will be the board (or committee) that has overall responsibility.

The members that make up the committee may be called:

- Committee members - if your group is unincorporated
- Directors - if you are a limited company (Company Ltd by Guarantee or Community Interest Company)
- Charity trustees - if your group is a registered charity.

When your group is in the process of getting started, it is often useful to have a steering group as the first 'informal' committee. They will do all the research and groundwork required to move things forward. Your group's inaugural general meeting will usually be the platform for the election of the first committee members. They should be willing volunteers and ideally people with the required skills and experience to take forward the long term aims of the group.

Your group's committee will usually be nominated or elected from your general members. This procedure will be set out in your group's constitution (or governing document). How long your committee members can serve before they are required to step down and/or stand for re-election should also be included in your group's constitution.

Ensuring your committee is up to the job

In theory, anyone can become a committee member, but it will be up to the members of your group to make sure that whoever they elect/appoint to be on the committee (or board) is competent and fit for the role.

Disqualified persons

If your group/organisation is incorporated (for example as a Company Ltd by Guarantee or a Community Interest Company) some types of people are legally disqualified from becoming directors on the board, they include:

- Anyone who is an undischarged bankrupt (except with leave of the court)
- Anyone already disqualified from being a Company Director subject to a disqualification order or disqualification undertaking, under the Company Directors Disqualification Act 1986(c.46) or the Company Directors Disqualification (Northern Ireland) Order 2002.

If your group is a charity (or is considering an application to become one) there are additional disqualifications for anyone being elected or appointed to act as a Charity Trustee.

It is a good idea to get new Directors/Charity Trustees to sign a declaration of eligibility prior to appointment and to ensure that these declarations are reviewed annually (for example after each Annual General Meeting).

Committee Skills

Ideally, your group should aim for a committee that has a good mix of skills and experience amongst the members. Good committee members are volunteers who:

- Share the beliefs and aims of what your group wants to achieve
- Have enthusiasm and commitment
- Are honest, fair and have an understanding of equality and diversity
- Have experience of book keeping and administrative work
- Are skillful at diplomacy
- Are good listeners - able to communicate effectively
- Are not legally disqualified.

Dividing up the job

To ensure that all the legal and management duties are carried out on time and efficiently, it is advisable for a committee to have designated roles. The four most common roles will be that of:

- Chairperson
- Vice chairperson
- Secretary
- Treasurer.



Management Committee and Governance

2 Management Committee and Governance

2.1 General Committee Roles and Responsibilities

Whether they sit on the Board of a Company Ltd by Guarantee or a small unincorporated association, and whether or not the group has charitable status, all committee members have collective general responsibilities that underpin any legal requirements.

Giving your group direction

The committee are appointed to manage the group on behalf of the members. They therefore need to be forward thinking and should plan your group's development. Monitoring and reviewing progress on the way is essential to this.

Keeping your group within the law

The committee is required to ensure that your group is compliant with all legal requirements.

Managing people

It will be the committee who has responsibility for the recruitment and development of the group's most important asset – its people. Your committee will have a role in managing everyone involved in the delivery of activities and services of your group - volunteers and/or paid staff. If your group is employing staff then the committee (or board) becomes the employer.

Being accountable

The committee needs to be accountable to the group's members, to funders, to regulatory bodies (where applicable), to the local community and to the general public. The committee may be handling public money (grants), receiving donations (if a registered charity) and welcoming support from a wide range of people. Committee members need to be seen to be managing the group effectively and reporting on its progress. They also need to have in place appropriate policies and procedures, which are regularly reviewed and updated.

Register your charity

An organisation must apply for registration as a charity in Northern Ireland, regardless of its income, size or whether or not it has received charitable tax status from HMRC, if:

- It has exclusively charitable purposes
- It is governed by the law of Northern Ireland
- It is an institution, that is, it is an organisation that is an independent body, the hallmarks of which include having control and direction over its governance and resources.

🌐 website: www.charitycommissionni.org.uk

2.2 Legal Responsibilities

Your committee is responsible for taking care of the organisation on behalf of the members. As such, it has a duty to ensure that it is treating people fairly, recognising that people are individuals, and ensuring their safety. Whatever the size or structure of your group (and irrespective of whether or not you have charitable status) there will be legislation that your committee will need to be aware of and comply with.

These will typically include:-

- Equality laws
- Data Protection
- Health and Safety
- Licensing Laws (if your group is holding events; serving alcohol; playing music or providing entertainment)
- Child Protection/Vulnerable Adult Protection (If your group has volunteers or staff who work with children or protected adults, the Safeguarding of Vulnerable Groups (NI) Order 2007 means that your group will need to register for Disclosures)
- Employment laws
- Food Hygiene regulations.

As well as general committee responsibilities, your group's committee members will also have specific legal duties and responsibilities. These will vary depending on your group's legal structure and whether or not you are registered as a charity.

It is the committee as a whole (and not just those acting as chair, vice-chair, treasurer or secretary) that has a legal obligation to make sure the group's legal duties are fulfilled.

2.3 Liability and Legal Structures

The Management Committee is responsible for the consequences of actions taken or not taken by the organisation, its staff, volunteers and other Management Committee members (referred to as liability). The distinction between types of legal structure for organisations in the Voluntary and Community Sector is significant, particularly because it affects the personal responsibility of individual Management Committee members if something goes wrong.

Unincorporated organisations do not have an independent legal identity. Therefore, if the Management Committee enters into any contractual or other arrangements they must do so by contracting in their capacity as Management Committee members. As a result, they are 'jointly and severally responsible' for the affairs of the organisation. It is therefore possible for them to be held personally responsible to settle any debts or other liabilities that may occur (eg. fees for professional services, rent under a lease, or damages for breach of contract). For this reason, many unincorporated organisations seek to become incorporated (eg. Company Limited by Guarantee) as their activities and legal relationships expand.

Incorporated organisations (eg. Company Limited by Guarantee) are set up as a separate legal entity (ie. recognised in law as an 'artificial person'). They can therefore enter into contracts and other legal relationships under the name of the

organisation, rather than under the name of individual committee members. This provides Management Committee members with some protection in law known as 'limited liability'.

If things go wrong, it is the organisation that is generally named in a legal action rather than individual Management Committee members. Even in the event of the organisation closing down with outstanding debts, they may only have to pay a nominal amount, usually £1.

However, Management Committee members of an incorporated organisation can still be personally liable for losses where they have failed to act responsibly, for example in relation to negligence, fraud, wrongful trading, or breach of statutory duties.

2.4 Roles of Office Bearers

• Role of Chairperson

Your chair person plays a key role in making the committee work together effectively. Most people assume that the chair is there simply to keep meetings in order, but the responsibilities of the chair person include much more than this.

Your group's chair person has a managerial role within your group and should be the one to:

- Liaise with the treasurer and secretary
- Consult with committee members as necessary
- Ensure that staff and volunteers are supervised and supported
- Take overall responsibility for legal, health and safety and insurance matters
- Act as representative and spokesperson for the group.

Your chair has a role to play before, during and in between meetings.

Role of the Chair - before a meeting

The chairperson should liaise with the secretary, treasurer, committee members and staff as appropriate, and with any member who has a specific issue to bring to the meeting. They should be informed about topics to be discussed and the decisions or actions needed.

The chairperson should also contact and brief new committee members on the aims and objectives of the organisation.

Role of the Chair - during a meeting

During meetings the role of the chair is all about making the meetings as effective as possible:

- Start the meeting on time and keep to time limits while allowing for adequate discussion
- Keep the meeting focused on the agenda. Allow extra items to be dealt with under AOCB (any other competent business) or deferred until another meeting
- Encourage all members to participate in a broad discussion and summarise

the discussion, bringing it to a close by reviewing the points made for inclusion in the minutes

- Should a vote be required, clarify the voting procedure and clearly state the proposals. In the event of an even split, the chairperson has the casting vote. State clearly the agreed outcome of any discussions and votes
- Arrange the date of the next meeting.

Role of the Chair - following a meeting

The chairperson should liaise with the secretary, treasurer, committee members and staff as appropriate over any action to be taken as a result of discussion.

Role of the Vice Chair

The role of the vice-chairperson is to deputise for the chairperson in their absence, adopting his or her responsibilities and authority, and to co-operate with the chairperson to encourage and promote the work of the organisation and management committee.

- **Role of Secretary**

The secretary is responsible for keeping people informed of the group's activities and their main duty is the day-to-day running of the group. The exact work and the amount of work they are required to do will depend on the size and nature of the organisation, on your group's legal structure and whether or not you are a registered charity.

Usually the Secretary will:

- Handle the group's correspondence and keep records
- Send any reports or publicity to the media (unless there is a publicity officer)
- Keep membership lists up to date
- Keep records of all correspondence for at least one year
- Ensure legal duties are carried out, including (where relevant) reporting to Companies, House and/or Charity Commission for Northern Ireland, however the committee is jointly responsible for legal duties and it should not be assumed that the secretary will take these duties.

Have a meeting and decide how to divide tasks up but do make sure that a named person, or persons, takes responsibility.

The Secretary also has a role to play before, during and after meetings.

Role of the Secretary - before each meeting

- Liaise with the chairperson, treasurer, committee members and staff as appropriate to draw up the agenda and check that all members have carried out any work they undertook to do
- Book the meeting venue, and arrange catering if required
- Distribute the agenda
- Give adequate notice calling the meeting (according to your group's governing document)

- Send out all relevant papers, for example, minutes of the last meeting, reports and correspondence etc. prior to the meeting, or make them available at the meeting
- Record apologies.

Role of the Secretary - during meetings

- Ensure that a quorum is present (refer to the number of people stated in your group's governing document as being the minimum required to vote or make a decision)
- Take minutes (unless there is a minute secretary). Advise the chairperson of any information which may be particularly relevant.

Role of the Secretary - after meetings

- Write up the minutes as soon as possible
- Copy draft minutes to the chair and to any persons not present at the meeting
- Make sure everyone knows what action points they have agreed to do, this should be recorded on the minutes
- Never destroy the minute book or file.

Role of Treasurer

Sound financial management makes an organisation more credible and the role of the treasurer is all the more important as the handling of a group's finances has a direct bearing on how it is perceived both by the public and by funders.

Keeping your group's finances in order is a legal duty for any incorporated group or groups with charitable status.

The main duties of the Treasurer are to:

- Keep accurate records of all financial transactions (income and expenditure)
- Manage petty cash, sign cheques and retain safe keeping of the cheque book
- Collecting membership subscriptions, unless there is a membership secretary
- The treasurer should not make decisions on spending, other than on small amounts, this is something for the committee to discuss and agree on.

Financial Reporting

The Treasurer is responsible for keeping the committee informed about the group's financial position in easily understood terms, so that they can make decisions in full knowledge of the implications.

Financial reporting includes:

- Informing the group about likely income and projected expenditure, prepare estimates, cash flows and budget plans
- Pulling together financial information from a day book (or ledger) and the petty cash into the annual accounts. The format of the Annual Accounts will depend on your group's legal structure and income.

The Treasurer and Fundraising

Fundraising is the responsibility of the whole group, and should not be left to the treasurer; however the treasurer is often the most obvious person to assist with fundraising and funding applications. This is something your whole committee should decide and review.

2.5 Forming Sub Committees

From time to time it may be appropriate for a committee to set up a sub group (or sub-committee) to develop and/or manage a specific project or activity. This will ensure that the full committee does not lose sight of its main aims and duties.

For example, a sub committee can be a good way of delegating fundraising tasks for a particular purpose.

Benefits of forming a sub committee

- The new activity will not take over the work of the committee, as this could result in a loss of identity or focus and result in a divergence from the aims and objectives as stated in the group's constitution
- A dedicated sub group can focus on the new project and achieve more as a result
- People with specific skills, expertise or interests can be focused on the specific project/task.

When you have identified the need for a sub group ensure that you prepare clear mandates for its work, allowing it the flexibility to explore new ideas and clarifying the roles and responsibilities of its members.

Your constitution may stipulate that one or more committee members must also sit on any sub committees.

The parent committee is ultimately responsible for the work the sub committee does and therefore the full committee must agree with any important decisions it makes, or significant developments that occur.

A sub group should therefore provide regular feedback to the full committee and brief it on all the issues.

2.6 Induction Checklist for New Committee Members

Checklist

A good practice checklist for organisations involving older people (50+) as volunteers. This checklist is based on research carried out with volunteers and non volunteers aged 50+ in Northern Ireland.

Attracting the Older Volunteer

- Directly target the older age group, rather than using non-specific advertising. Make sure older people feel like they are valued for the unique skills they can offer. Also recruitment campaigns are more likely to succeed if followed up by efforts to make personal contact
- Using multiple methods for promoting volunteering will maximise your reach - newspapers are the main way that older people source local information. Other commonly used mediums include word of mouth and the internet. Internet usage amongst the 50+ age group is growing and a powerful way of getting your message across
- Market volunteering to older people as something which can fit around their lifestyle and which they can make a real contribution to
- Make potential volunteers aware of both the benefits to themselves as well as to others ie. physical and mental health benefits, opportunity to make new friends, to learn new skills, to use or pass on existing skills, to have fun!
- Make sure that you communicate that age is not a barrier to volunteer involvement
- Keep paperwork to a minimum and ensure that you refrain from using formalised language ie. use 'Registration Form' rather than 'Application Form' informal chat rather than interview
- People aged 50+ prefer the terms older, more experienced, over 50, over 60. They have mixed feelings or dislike terms such as old people, senior or third ager
- Newer recruitment techniques, such as 'taster sessions', 'turn up and try' and 'come along with a friend' are effective ways of tempting people to experience volunteering without fearing that they are committing themselves before they are ready to
- Offering a range of roles with varied commitment levels will help to attract a more diverse range of people from the older age group ie. is there potential to offer regular and or occasional volunteering opportunities? What about volunteering which people can do from their own home or as a group?
- Recruitment drives and volunteering opportunities which are close to an individual's home/in their local area can often be more appealing for an older person. Consider offering roles which older people can do in their own homes ie. crafts, making phone calls and admin tasks like proofing documents, preparing information packs etc.

Checklist for New Members

History and background of the organisation	
Aims and objectives of the organisation	
Governing document	
Structure of the organisation (legal)	
Structure of the organisation (management and staff)	
Tour of building and any outside projects	
Introduction to staff and volunteers	
Roles of staff and job descriptions	
Role of volunteers and role descriptions	
Contract of employment and personnel procedures	
Annual reports	
Publicity leaflet or publications	
Funding arrangements and current finances	
Policy statements of the organisation	
Development and operational plans	

Induction for New Committee Members

Role and purpose of the committee	
Structure of the committee including sub-committees	
Introduction to all committee members including officer bearers	
Role of office bearers on committee	
Role of individual committee members	
Legal and financial responsibilities	
Frequency and format of meetings	
Minutes of previous meetings and summary of policy decisions	
Support system for committee members	
Availability of resources/training for committee members	



Governance

3 Governance

3.1 Governance Definitions

Governance is about leadership and ensuring that an organisation is effectively and properly run. It has been defined as 'the systems and processes concerned with ensuring the overall direction, effectiveness, supervision and accountability of an organisation'.

Voluntary and Community Sector is made up of organisations which are governed by voluntary committees/boards. These non-statutory, autonomous, not-for-profit organisations are usually constituted formally and may be charitable.

Compliance is the act of conforming to official requirements.

Prudence is care, caution and good judgement as well as wisdom in looking ahead.

Integrity is used to describe soundness of moral character, this is demonstrated through adherence to moral and ethical principles.

Probity is to behave with integrity, being open, transparent and honest.

Equity is used to mean fairness and impartiality.

Diversity is used to describe the quality of being different.

Effectiveness is being able to bring about the intended or expected result.

Autonomous is a self-governing, independent body which is free from external control and constraint.

Not-for-profit organisations may be better described as not-for-personal-profit as these organisations may make a profit in line with their objects but they don't distribute the profits among the members but rather use the profits to further the purposes of the organisation.

A Code for the Voluntary and Community Sector

Volunteering is defined as the commitment of time and energy, for the benefit of society and the community, the environment or individuals outside one's immediate family. It is undertaken freely and by choice, without concern for financial gain.

3.2 Your Governing Document

A constitution is a written framework of rules for your organisation. It is in effect your group's governing document, stating your aims, clarifying decision-making procedures and establishing a basis for good practice. It will be a basic requirement for your group to operate. You will need it to open a bank account, apply to funders, register for charitable status, become a company, hire staff or acquire premises.

Your group's governing document will reflect the type of structure you have chosen for your group and will be referred to as a:

- Constitution (for Unincorporated Associations)
- Trust Deed (for Charitable Trusts)
- Articles (for incorporated groups such as Company Ltd by Guarantee or Community Interest Companies)
- Rules or Model Rules (for Industrial and Provident Societies).

When you are setting up a community group for the first time, it is essential that the steering group takes time to discuss, clarify and agree the basic aims and purpose of the group. Why are you setting up in the first place? What are you aiming to do?

Think carefully not just about where you are now but where you want to be. Try not to limit your group and its activities in the future. Be sure you understand and agree on the essential questions about your purposes, membership, management, decision-making processes and finance.

3.3 Writing a Governing Document

Your group's structure and whether or not your group is seeking charitable status, will determine some of the elements that make up your governing document, but there are key elements or clauses which should be included in any constitution:

- The name of your group or organisation
- The geographic area of benefit
- The aims and objectives of your group (also called the purposes). If your group is considering charitable status the purposes of your group will need to reflect charitable purposes as set out in current charity legislation
- The powers that the organisation will have (for example, will the group be able to hire staff, raise funds, buy land etc)
- Your group's membership - how do people become members? Who is eligible?
- Membership subscription levels for the organisation
- How membership is to be terminated
- How any committee structure will work
- Details of officers such as chairperson, vice-chairperson, treasurer and secretary and their appointment terms of office
- Terms of any paid officers (if applicable)
- Procedures for general meetings
- Details of the rules of procedure, quorum and voting of all meetings
- How the group's finances are to be spent, accounted for and independently examined
- How the group will be dissolved in the event of winding up.

Once your group's committee (or steering group) has reached an agreement on the rules of how your group will be run, and has a clear purpose or aim, they can begin to draft a constitution. Model constitutions, with tried and tested templates, can be used as a basis but it is important not to lose sight of your group's own aims and rules and to include these in the draft.

It is a good idea to speak to other similar groups and perhaps look at their constitutions. The Northern Ireland Council for Voluntary Action will have assisted many voluntary groups over the years and will also be a good starting point.

3.4 Adopting a Governing Document

Once your group has a draft constitution, it is a good idea to show it to the Northern Ireland Council for Voluntary Action for comment. If your group is going to be registering for charitable status, you can also send your draft constitution to the Charity Commission for Northern Ireland to make sure that it complies with current charity legislation, before submitting your application and before formalising your constitution.

Once everyone is happy with the constitution it needs to be formally adopted. Depending on your group's membership structure, this can be done by:

- Holding a general meeting where the members of the organisation (not just the committee) can vote to adopt the constitution
- The committee can vote to adopt the constitution at a normal committee meeting
- Any other method or requirement of regulatory bodies such as OSCR or Companies House.

Once adopted the constitution should be signed and dated by the chairperson and a witness with a record of the committee members, the location, date and time of the meeting. The formal adoption of the constitution should also be recorded in the minutes of the meeting.

3.5 Making changes to a Governing Document

When you are drafting your group's constitution, give some thought to the future of the group and the inevitable changes you may encounter over the years. For example, you may want to give the members powers to hire, lease or purchase property in the future even if you are not intending to do so straight away.

However, it is inevitable that not all changes can be pre-empted and in some changes will mean that your constitution goes out of date, becomes irrelevant or even non-compliant with changing legislation. What happens if your group needs to change its rules?

Ideally your constitution will set out powers to enable you to make the changes you need. If this is not the case, what you do next will depend on:

- Your group's structure and whether or not you are incorporated
- Whether or not your group is a registered charity.

Incorporated Groups making changes to a Governing Document

- Changes to your Articles will require the agreement of the members - this is usually sought at either an AGM or an EGM
- If your group also has charitable status you need to also consider the formal legal requirement to seek consent and/or notify the Charity Commission for Northern Ireland.

Groups with charitable status making changes to your constitution (or Articles) Charities registered with the Charity Commission for Northern Ireland must seek its consent at least 42 days prior to making any of the following changes:

- Changing the name of the charity
- Changes to the charitable purposes of the charity as stated in the charity's governing document
- Winding-up or dissolution of the charity
- Amalgamating with another charity or body (in which case each charity needs to apply for consent and needs to remember that consent for this does not give any assurance that the new body will meet the charity test – the new body will need to consequently apply for charitable status)
- Changing the charity's legal structure (there is an 'all in one' consent process for this which will enable the charity to keep its charity registration number).

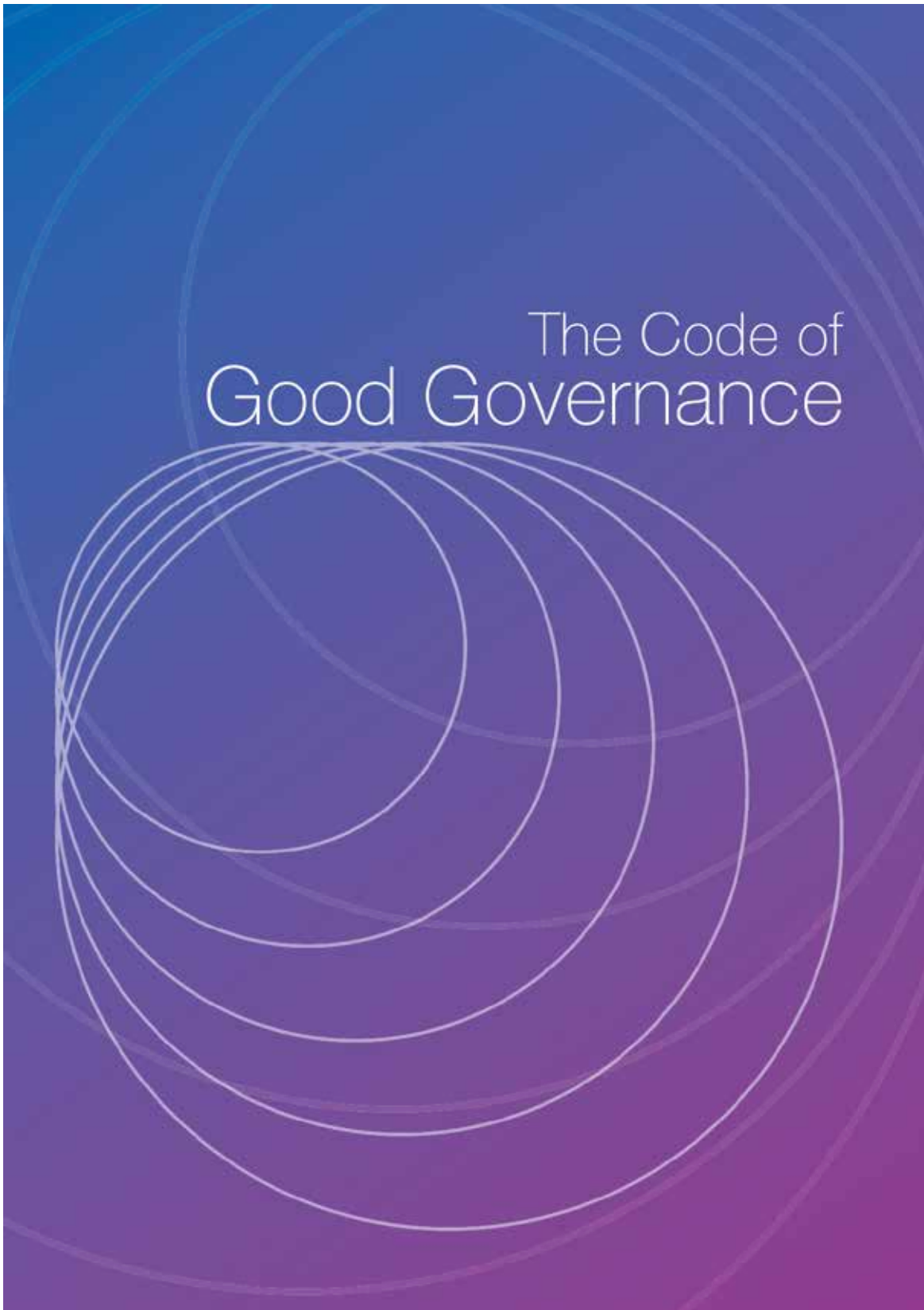
If you make changes to your constitution relating to any other aspect of your constitution (including changing your charity's financial year end) you need to inform (notify) the Charity Commission for within 3 months of the changes.

Changes will need to be agreed by the majority of the membership at a general meeting (this can be called as an Extraordinary General Meeting if timing does not coincide with the group's annual general meeting).

🔗 website:	www.charitycommissionni.org.uk
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3.6 Guidelines to Governance Best Practice

Good Governance Booklet



🌐 website:	www.diycommitteeguide.org
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Policy Requirements

4 Policy Requirements

4.1 Equal Opportunities

Having an Equal Opportunities policy sends out a clear message that your group is taking on board its responsibilities and legal obligations concerning anti-discrimination and equal opportunities. In some cases, an Equal Opportunities Policy will be required before your group can get funding, register for disclosures or enter into a service level agreement or contract to deliver services with your Local Authority or other agencies.

An Equal Opportunities Policy means that your group can expand on the basic rights given in equality legislation and extend particular attention to those groups of people who would usually be subjected to discrimination in society and/or who are under-represented in the organisation.

Your Equal Opportunities policy should consider all aspects of your activities. Equality legislation covers employment and training, the provision of goods and services, and facilities. Your policy should demonstrate that your group is complying with these legal requirements.

As with all types of policy, the most effective equal opportunities policies are those which you develop yourself. Do not be tempted to download and use a template policy as it is. Use it as a guide, but discuss and agree your own policy as a team. Equalities should be embedded in everything you do and it should involve everyone. Involve your committee members, users, clients, general members, volunteers and staff. They will be able to offer valuable suggestions and often first hand experiences which will inform your policy and make it much more relevant to their needs. Once the policy is agreed make sure that everyone has a copy and that you put in place an ongoing commitment to regular reviews.

What to include in your Equal Opportunities Policy

Declaration of Intent

Start your policy with a statement about your group's commitment to equal opportunities – your declaration of intent. This can be as little as one or two sentences or longer according to the size and activities of your group and whether or not you employ paid staff.

How you will implement your intentions

Continue with a clear indication of how your group will implement your intentions listed in the statement at the beginning of your policy. If your group is small and does not have employed staff this may be quite simple and fairly short. You might only need to think about recruitment of volunteers and the provision of goods, facilities or services.

If your group is a sizable organisation with paid staff then you might want to break this section down into areas such as, recruitment, staff development, working patterns, membership recruitment and the provision of services.

Monitoring and reviewing

Finally, your policy should include details on how you will monitor and review things and how you will deal with any complaints of discrimination.

Appendices

You might want to include as an appendix a list of definitions (call it a Jargon Buster if you like!) so that everyone understands the policy. For example you might want to include the legal definitions of what is meant by direct and indirect discrimination, harassment etc.

It is also good practice to include an appendix which lists the current Equality legislation to which your policy refers and which your group should be using as a legal framework. This should be updated as and when new laws are passed.

4.2 Health and Safety

Health and Safety Policy

A health and safety policy will set out how your community group or organisation has agreed to manage health and safety. It sends a clear message to your staff and volunteers that you are committed to making their working environment safe and healthy.

If you have five or more employees, your community group/organisation is legally required to adopt a written Health and Safety policy.

If your group has less than five staff, your committee (or board) members still have a legal responsibility to provide a safe and healthy working environment, and it is best practice to adopt a Health and Safety policy.

The daily experience of your staff and volunteers will be a valuable contribution to the policy. Involving them in your Risk Assessment and in the development of the policy will also help them to understand their role in health and safety issues.

What to include in your Health and Safety policy

Your Health and Safety policy should be set out in such a way that it makes it clear to everyone what is expected of them to comply with the requirements of the policy. If your group is small your policy can be a simple statement.

The aims of your policy should be linked to the level of risk which you have identified in your Risk Assessment.

The policy should also contain proactive measures to help build and maintain a healthy and positive workforce.

Further sources of information

website:	www.hseni.gov.uk
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4.3 Keeping Adults Safe

Vulnerable Adult Protection Policy

If your community group or organisation works with vulnerable adults, agreeing and adopting an Adult Protection policy demonstrates your group's commitment to ensuring the safety of 'protected' adults and adults who may be at risk of harm.

Your Adult Protection policy should outline clear procedures and ensure that everyone is clear about their responsibilities.

What to include:

- Start with the aim of the policy - a statement about your group's commitment to ensuring that vulnerable adults should be protected from abuse
- Include definitions of what is a protected adult; what constitutes abuse or serious harm
- Detail your group's responsibilities and those of staff working with protected adults and adults at risk
- Include information about the processes and reporting procedures that must be followed in the event of a complaint, allegation, expressions of concern or suspicion that a vulnerable adult is at risk of abuse, exploitation or neglect
- State your group's recruitment and training procedure for staff and volunteers including reference to Protection of Vulnerable Groups (PVG) Scheme Checks
- Add local contacts for police; social services and any other relevant body
- Include reference to any related policies, for example, recruitment and selection policy; recruitment of ex-offenders policy; data protection policy; induction policy; staff training and development policy.

Once your policy has been agreed it should be signed and dated on behalf of the management committee, and the next review date noted on the policy.

Do not put your policy in a drawer and forget about it - it will only be effective if everyone is aware of what is being asked of them and what they have agreed to do. Hold awareness sessions for your staff or volunteers on how to recognise signs of abuse.

Remember to evaluate and review your policy annually and to update it when required.

Adult Protection

All community groups working with vulnerable adults need to be aware of vulnerable adult protection issues and have a duty to ensure staff and volunteers are equipped with the necessary information and knowledge to be able to deal with potential situations and/or to offer guidance and support.

Legislation relating to Adult Protection

Safeguarding Vulnerable Groups (NI) Order 2007 includes measures in relation to adults who are at risk from harm.

This legislation is in place to help identify and support 'adults at risk' and to achieve an appropriate balance between the rights of individuals to live their lives as they wish, to provide support to them when they need it, and to provide the means to reduce the risk of harm to adults.

Adults at risk may be defined as individuals, aged 16 years or over, who:

- Are unable to safeguard themselves, their property, rights or other interests
- Are at risk of harm
- Are more vulnerable to being harmed, because they are affected by disability, mental disorder, illness or physical or mental infirmity.

What is Adult Abuse?

Adult abuse can be physical or psychological harm, neglect, sexual abuse or financial exploitation.

Your group's Responsibilities and Legal Obligations

- Your community group/organisation has a responsibility to promote the welfare of adults and to ensure that vulnerable adults are effectively safeguarded from abuse. You also have a statutory obligation to report suspected abuse
- All community groups working with vulnerable adults need to be aware of vulnerable adult protection issues and have a duty to ensure staff and volunteers are equipped with the necessary information and knowledge to be able to deal with potential situations and/or to offer guidance and support.

You should appoint one person on your committee to monitor these issues. They should be responsible for ensuring your policies are up to date, clearly displayed, read and understood by your staff and volunteers. They should also know who the social work contact is in your area and have the phone numbers handy for both social work and police.

By adopting an adult protection policy within your organisation you will provide those guidelines, and it will help your group to review its training needs.

4.4 Safeguarding Children

Child Protection Policy

Your community group or organisation has a responsibility to promote the welfare of children and ensure they are safe from abuse while in your care. Your organisation needs clear guidance, standards and procedures to ensure this happens and all staff need trained and supported to ensure full compliance.

The Department of Health published '*Co-operating to Safeguard Children and Young People*' in (March 2016) and this policy made it clear that safeguarding children and young people is everyone's business.

Safeguarding was intended to be used in its widest sense encompassing promotion, prevention and protection activity. So effective safeguarding in your organisation should promote the welfare of children and young people to prevent harm occurring through early identification of risk and appropriate, timely intervention to protect children and young people from harm when required.

Organisations can implement prevention measures by, for example having robust recruitment and selection procedures in place to screen out unsuitable people. They should also have code of behaviour for staff and volunteers to ensure they are clear about acceptable and unacceptable behaviours making sure they are all trained and this includes equipping, empowering and supporting young people to keep them safe.

'*Co-operating to Safeguard Children and Young People*' said all organisations working with young people must have policies and procedures in place and set out clear expectations required.

In 2017 Volunteer Now published 'Keeping Children Safe, Our Duty to Care' which clearly outlines seven minimum standards organisations should adhere too which will, if complied with, ensure these expectations are met.

These are available on publication page at: www.volunteernow.co.uk

Full training on all these standards is available free by contacting:

Keeping Safe Initiative
Hillsborough Community Services
29 Ballynahinch Street
Hillsborough
BT26 6AW

Tel: (028) 9268 0840 / (028) 9268 0830

email: ian.macpherson@setrust.hscni.net

4.5 Criminal Records Checking

Access NI information and who to contact

Access NI Disclosure Checks

Access NI is the body set up to provide Criminal Records Disclosure checks for organisations seeking to recruit employees and volunteers. Each group needs to register to use the Access NI service or can use an Umbrella Body (usually another voluntary organisation) to do so on their behalf.

Checks for volunteers are free except where the volunteering is:

- Directly for a statutory organisation or
- Where a non-profit organisation is delivering statutory services under contract or in a specific project for which that organisation has received funding from Government which includes provisions covering the costs of Standard and Enhanced disclosures for volunteers.

Under the Rehabilitation of Offenders (Northern Ireland) Order 1978 lesser convictions may be considered to be 'spent' if the subject is not convicted again by the end of a rehabilitation period. The Order states that in most circumstances recruiters can only ask questions regarding an applicant's unspent convictions.

However, for posts which involve working with children or vulnerable adults, there is an exemption and questions can be asked about applicants' criminal records including spent convictions. Therefore recruiters must make the applicant aware of this and also how they intend to deal with any disclosure of information through their recruitment policy.

There are three different levels of disclosures:

- **Basic disclosure** - An individual may apply for their own criminal record certificate which will show all unspent convictions recorded on police systems
- **Standard disclosure** - An employer seeking to employ a person in the occupations listed in the Exemptions Order to the 1978 Order is eligible for a standard disclosure. This will provide criminal record information including spent and unspent convictions and cautions. It will not provide soft intelligence information or barring information.
- **Enhanced disclosure** - This level of disclosure will provide criminal record information including unspent and spent convictions and cautions. It will indicate whether the applicant is on the Disclosure and Barring Service (DBS) Barred List for Children and/or Vulnerable Adults. It will also provide Soft Intelligence. All posts involving regulated activity with children or vulnerable adults (as defined by the Safeguarding Vulnerable Groups (NI) Order) will be subject to an Enhanced Disclosure.

The disclosure process:

- Applicant receives an **Access NI disclosure application** form from the organisation
- Applicant meets with the **organisation representative/counter-signatory**, who checks the form and ensures that the required identification has been seen
- Application is sent to **Access NI**

- **Access NI process the application** and send a copy of the disclosure certificate to the applicant and to organisation representative/counter-signatory
- If the disclosure has **no information** regarding convictions etc. then there is nothing preventing the applicant from taking up his/her chosen role
- A **disclosure could contain information regarding convictions, cautions** and, in some instances, information regarding a previous investigation or an ongoing enquiry
- If the **offence** does not relate to children/vulnerable adults or **does not cause concern** the organisation may choose to allow the applicant to take up his/her chosen role
- If the **offence** relates to children, or if they **cause concern**, most organisations will form a disclosure assessment panel to review the case.

Disclosure Assessment Panels make decisions on unclear disclosures and acts as a 'Risk Assessment Panel'.

The panel is given anonymous information relating to the applicant, their offence, a copy of the job description, and enough information for it to come to a decision.

It is usually made up of three or five people who have relevant safeguarding experience eg. social workers, police officers or teachers. They do not have to be members of your organisation, but they would need to agree to become involved if a panel is required. A panel's decision is final.

Some organisations use umbrella bodies and their representative/counter-signatory to liaise with Access NI.

You need to have a written policy on the storage and handling of the information you receive regarding an employee/volunteer.



Managing Risk

5 Managing Risk

5.1 Insurance

Unfortunately for many organisations, insurance only becomes an issue when something goes wrong.

Seeking adequate insurance is a vital stepping stone in the setting up and development of an organisation. It is essential that all organisations protect their assets and liabilities by having adequate insurance cover.

Insurance is an on-going issue and should be reviewed on a regular basis by the management committee.

The voluntary and community sector is diverse - not all organisations are the same. They carry out different activities with different degrees of risk. Organisations may therefore require different insurance policies.

It is recommended when seeking insurance to 'shop around', obtaining alternative quotations from insurance companies.

It is useful to consult with a qualified insurance broker to ensure that adequate and affordable insurance has been obtained.

If an organisation fails to obtain appropriate insurance cover, then individuals within the organisation could be potentially liable. Insurance brokers will advise and inform organisations what insurance is needed to cover their particular work activities.

In an attempt to help groups obtain the necessary cover the Northern Ireland Council for Voluntary Action (NICVA) in conjunction with Marsh UK has arranged to provide an insurance scheme tailored to the needs of the voluntary and community sector in Northern Ireland.

The scheme will automatically provide the following cover:

- Employers' liability
- Public liability to cover your liability to employees/volunteers/members of the public
- All risks insurance on office contents and equipment. This can be further extended to cover buildings
- Increased costs of working following loss/damage at the premises
- Loss of cash.

The following insurances are also available at preferential rates - professional liability/directors and officers/trustees' liability/legal expenses/travel/minibus.

It is good practice to assign an individual in the management committee or a member of staff to oversee the issue of insurance for the organisation and to be the main point of contact with the insurer/broker and to report back to the committee. This may avoid overlapping and confusion.

The individual may be given additional responsibilities such as:

1. Establishing the insurance requirements of the organisation
2. Ensuring that the committee makes a clear decision regarding the terms and extent of the organisation's proposed insurance cover
3. Purchasing the insurance for the organisation
4. Ensuring that the committee carries out regular reviews of the activities, services and equipment used in case further insurance cover is needed
5. Renewing existing policies before they expire
6. Informing the management committee/managers of insurance issues
7. Taking responsibility for the risk management within the organisation.

Insurance should be put on the agenda for the Annual General Meeting and all individuals within the organisation should be aware of:

1. Insurance policies and the insurer for each policy, if applicable
2. Details of the insurance costs, risks that are covered under the policies and confirmation of any payments by insurer
3. Activities or assets that are excluded from insurance cover.

The management committee, as well as staff and employees, is responsible for minimising the risk of liability. All need to ensure that they adhere to legislation that can affect their insurance (for example, health and safety requirements), operate working procedures which minimise risk, and issue clear instructions for the action to be taken in the event of an emergency.

Insurance Policies

'An insurance contract contains an agreement by the insurer to provide, in exchange for a set insurance premium, agreed upon benefits to a beneficiary of the contract upon occurrence of specified uncertain or contingent future events affecting the life or property of the insured party ie. a transfer of such risks'.

Employers' liability insurance

Whether your organisation is an unincorporated or incorporated organisation, employers' liability insurance is compulsory whenever individuals are employed to work within an organisation - it is a legal obligation under the Employers' Liability (Compulsory Insurance) Act 1998. An employer is responsible for the health and safety of employees whilst at work.

When obtaining employers' liability insurance for a voluntary organisation, be sure to purchase insurance that covers employees, volunteers and trustees, as not all employers' liability policies automatically cover these categories. Remember to include temporary, part-time employees, casual staff, trainees and those placed on government schemes.

Employers' liability insurance covers an organisation if an employee has an accident or is injured at work, or becomes ill. The employee has the right to claim compensation for death or injury, if accidents or injuries occur as a result of negligence or misconduct of the organisation or staff or volunteers employed by the organisation.

In order for an organisation to pay compensation, an insurance policy must have been obtained, ie employers' liability. If this is not the case, a claim can be made against the management committee. They will be held liable and both they and their organisation are potentially at risk of financial difficulty.

A certificate of employers' liability insurance must be displayed in the workplace so that employees can read it at any time. An employer can be fined £2,500 for each day it does not have insurance for an employee, according to the Employers' Liability (Compulsory Insurance) Regulations 1998.

Public liability insurance

Public liability or third party insurance is a policy which is essential when working within the community. The policy protects an organisation from claims made by the public for death, injury, loss or damage to property due to negligence or misconduct of the organisation or staff employed by the organisation. The policy covers anyone who (for whatever reason) has contact with the organisation and its premises - usually the general public.

All organisations which have premises which are open to the public should have public liability insurance in force. It is required by the majority of funding bodies.

Public liability insurance is often combined with other policies such as employers' liability or building and contents insurance. An organisation should agree a list with the insurer to confirm what activities, etc. are covered within the insurance policy. Regular review of the policy is needed especially if an organisation decides to hold a special event that requires additional cover to that covered in the original public liability insurance document.

Some public liability policies may automatically exclude for example, damage to or loss of property in car parks or reception areas. The public should be made aware of this through a disclaimer notice. It is advisable to seek legal advice when doing this, as particular wording needs to be used. When a claim is made of negligence, misconduct or breach of duty must be acknowledged or proven for a claim to become valid. Public Liability insurance covers against the risk of the management committee potentially being held liable and putting the future of the organisation at risk.

Buildings insurance

If an organisation leases or owns a building, it will need to be insured against damage by fire and 'other perils'. Many leases contain a clause which requires the holder of the lease to insure the building. It is vitally important to get adequate cover so that if the worst happens and a building needs to be completely rebuilt, the replacement cost (not just the market value) of the property will be covered by insurance.

The replacement cost should include demolition and site clearance, architects' and other fees, building costs and any VAT which may be payable. It is sensible to get a quantity surveyor to estimate the cost of rebuilding an entire building at current prices.

Cover should be reviewed regularly to make sure it is still adequate. 'Other perils' in the context of buildings insurance covers damage which is likely to occur and is not usually costly eg. storm, flood, burst pipes, accidental and malicious damage.

Not all buildings insurance covers land, roads, pavements, ridges, etc., which can be damaged by, for example, fire or flood. This should be taken into consideration when buying the policy.

An organisation should also consider additional costs which will be incurred if the building cannot be used. This can be covered by consequential loss insurance.

Consequential loss insurance

Consequential loss insurance covers a situation where, for example, an organisation wants to ensure that it will have a place to house its activities and staff while the building is being rebuilt as a result of damage.

Also, if the organisation suffers from having to temporarily suspend fee-paying activities such as educational courses, this will be covered under consequential loss insurance.

The insurance policy will provide for the loss of income until the organisation is up and running again. It will also provide cover for additional costs such as temporary renting of a building and additional expenses to carry on activities provided by an organisation.

A period of time should be specified within the policy to ensure that expenses, etc., are covered while refurbishments or rebuilding takes place. The usual period is six or twelve months.

Contents insurance

Contents insurance covers damage or loss of property. It is important to make sure the cover is adequate to meet the cost of replacing any equipment, machinery and other items stolen, lost or damaged, including those damaged by fire.

With contents insurance it is important to check precisely what is covered and it is strongly recommended that the insurance is arranged on an 'all-risks' basis which would include cover for theft and accidental damage.

Make sure the contents of your premises are adequately valued and that the amount of cover is increased to reflect the contents.

It is best to take a 'new for old' clause in the contents insurance policy. This means if a three year old computer is damaged or lost in a fire, a brand new one will replace it (as long as the contents have been accurately valued).

Exclusions and limitations within the policy should be clearly identified so that you know what you are insured for.

This insurance should also cover loss of cash – including money on the premises/in transit and in the homes of authorised staff/volunteers.

Hired premises/contractual liabilities

Many public liability insurance policies exclude contractual liabilities (such as those arising from hired premises). It is vital when hiring premises that the two parties involved clarify, in writing, who is responsible for the insurance in the instance of damage to the property, including fire damage, damage or theft of the contents of the premises and public liability.

Conditions of hired premises insurance should be discussed and agreed between insurers and the hirer. Responsibility for potential liabilities must be clear to all parties involved, ie. a list of potential risks.

If a group is to arrange its own cover, the organisation from which the premises is being hired should take certain steps to ensure that the cover has been confirmed and have the group's name included as joint insured. This can be time consuming and complicated. The insurance broker can provide advice here.

Personal accident insurance

If the management committee, an employee, or a volunteer has an accident in the course of their business while working on behalf of a voluntary organisation, this will only be covered by employers' liability or public liability insurance if there has been negligence on the part of the organisation. Personal accident insurance covers accidents arising irrespective of negligence. In other words the claim is not against an individual.

A person claiming on this sort of policy will receive a sum of money to compensate for his/her injuries and the incapacity resulting from the accident. In the event of death, next of kin will receive a payment. The injuries would have to be of a disabling nature and are defined in the policy.

Professional/personal indemnity insurance

A voluntary organisation which provides advice and information (either written or oral) to members of the public could be liable if it gives incorrect information to a person and, as a result, financial loss is suffered by that person. This also applies to free advice given through helplines.

An advisor may even be liable in a situation where advice is passed on by a recipient (without the advisor's knowledge) to others. Professional indemnity insurance covers this type of risk. It also gives protection against defamation, breach of copyright, confidentiality and loss of documents.

Organisations providing advice or information should take reasonable care that the advice given is correct. Evidence of this would be helpful in defending a claim. A written notice stating that the advice and information provided may not necessarily be correct and should not be relied upon should be advertised. This is known as a disclaimer notice.

Included in the professional indemnity insurance policy is protection against claims due to injury, loss or damage as a result of incorrect or inaccurate information, negligence or misconduct.

It is advisable to discuss the nature of your organisation with your insurance broker/company, listing all the activities and services provided by the organisation. They will advise you if professional indemnity insurance is appropriate.

Legal expenses insurance

Getting legal advice in a dispute can be costly, even if the outcome is one where your organisation is cleared. Legal expense insurance covers solicitors' and barristers' fees, court attendance allowances and opponent costs in contract disputes, property disputes and unfair dismissal disputes. Legal expenses insurance protects an organisation from any legal fees incurred as a result of employment law, health and safety claims, etc.

Other insurance policies may include legal expenses. However, care must be taken to assess the terms of such cover in that policy. If the policy does not include this type of cover, an organisation should consider whether they want to purchase this policy. Organisations which provide high risk activities or which work with children or vulnerable groups within the community should especially consider purchasing legal expenses insurance.

Trustee indemnity insurance

In law, people on the board of any organisation are 'trustees' and have certain legal duties and standards to uphold. Trustees (even in a charitable company) can be made personally liable for breach of trust. This can arise if, for example, the trustees fail in their duty of care to act as reasonable and prudent businessmen and women and, as a result, cause a loss to the organisation.

Trustee indemnity insurance (also called trustee liability insurance, or directors' and officers' insurance) may be paid out of the funds of an organisation to protect the board as far as possible from personal loss or bankruptcy as a result of a breach of trust, or a breach of duty as a trustee or company director.

However, trustee indemnity insurance does not protect trustees from all risks of this kind. For example, the insurance will not cover any fraudulent or dishonest behaviour acts which the trustee knew to be a breach of trust or duty, or any act committed in reckless disregard of whether it was breach of trust or not. In non-charitable companies or industrial and provident societies, trustee indemnity insurance may cover a wider range of acts including acts such as 'wrongful trading' or acts where the directors did not take advice.

This would include situations where trustees allow the organisation's funds to be used for purposes outside the organisation's objects and powers, provided they genuinely had reason to believe the purposes were within the objects and powers.

Similarly the trustees may be covered if they allow the funds of the organisation to be used for political purposes outside the boundaries permitted by charity law provided they genuinely believed their actions were correct, or had been so advised.

Finally, trustees who cause loss to their organisation through poor investments may be covered, provided they had taken the proper advice and acted prudently.

Fidelity insurance

This protects organisations which experience theft or dishonesty by volunteers, employees or board members. It provides cover (up to an agreed limit) for fraud or dishonesty of staff and could be extended to include board members or volunteers.

Motor insurance

Where an organisation owns or operates motor vehicles, they must comply with the provisions of the Road Traffic Acts, which make it compulsory to have insurance against third party injury and property damage. It is usually advisable to arrange comprehensive motor insurance – which in addition to the requirement of the Road Traffic Acts also covers loss by fire, theft and collision damage to the charity's vehicles.

If trustees, employees or volunteers are using their own vehicles for the purposes of the organisation or on the business of the organisation, it is important to ensure that the insurance held by the owner of the vehicle extends to such use. Insurers need to be advised of this use.

There are special requirements in respect of minibuses used to transport people on a hire or reward basis and the organisation's insurance brokers should be able to give advice on this.

Travel insurance

If the organisation is arranging trips outside of the country, then it is advisable to arrange travel insurance protection. Such insurance will provide cover for accidents, medical expenses incurred, loss or damage to baggage/cash, cancellation/curtailment costs and personal liability of the individuals.

The medical expenses cover is particularly important whilst on trips outside of the UK and the limits for this should be adequate.

Refurbishment/renovation work at premises

When major refurbishment/renovation work is being undertaken at the premises, there are insurance issues which arise.

The insurance of the contractor should be checked out to ensure that it is adequate for the work being undertaken.

Contract conditions should be checked out to establish who is responsible for insuring contract works/materials/existing structures and contents. The organisation may be required to take out a specific contract works policy for the duration of the contract. In addition, the existing insurers would need to be advised of such work as a normal buildings/contents policy would not cover loss/damage caused whilst such contracts are being carried out.

Using external facilities such as outdoor pursuits centres

It is common for organisations to arrange trips to facilities such as outdoor pursuit centres where adventure type activities can be undertaken. The organisations' normal public liability insurance would not usually cover such activities and it is therefore recommended that they obtain written confirmation from the centre that there is insurance protection in force, which will cover visitors to the centre.

The authors acknowledge the Northern Ireland Council for Voluntary Action (NICVA) in sourcing this information.

5.2 Risk Assessment

A Risk Assessment identifies any potential hazards or thing that could cause harm to people working at your premises (or to the public accessing your services or taking part in your activities).

Once the risks are identified, you can put in place measures to minimise and control those risks to secure a healthy safe environment.

Carrying out a risk assessment demonstrates that your group is committed to ensuring that your volunteers and staff are working in a safe and healthy environment.

A risk assessment is essentially a critical audit of your activities; how you do them, the equipment you use and the surroundings in which you carry them out. The main purpose of doing a risk assessment is to make everyone aware of the risks, so that action can be taken to eliminate or at least reduce those risks.

It also considers the likelihood or the risk of someone being harmed by those hazards and how serious that harm could be. It is important to consider real risks, so involving your employees and volunteers in the risk assessment is essential as they will be familiar with the premises and will spot things that you may not have considered before.

Carrying out a Risk Assessment

Identify the hazards

- Walk around your group's premises writing down any potential hazards. Start with those which are most obvious - for example everyday things like the storage of cleaning materials or tools, or safe installation of electrical equipment, computer set up etc.
- Then write down any invisible hazards - for example, in the voluntary sector one of the biggest risks people endure is stress (often related to working long hours, under pressure, to tight deadlines) or physical assault. Invisible hazards can also include fumes from electrical equipment
- Finally, note down things that might be more hazardous in relation to specific people - such as pregnant women or workers who have a disability.

Identify who is at risk

- List the people who are going to be at risk from the hazards you have identified. Some people will be more at risk from particular hazards than others - for example pregnant women or people with disabilities.

Evaluate the risks and decide on precautions

- Part of your Risk Assessment needs to be an evaluation of the risk imposed by the hazards you have identified. In what way are they potentially harmful and how seriously might someone be injured?
- Does your group share facilities with others? How does this affect your measures in risk reduction?

- Decide whether any existing precautions you have in place are adequate. Think about what you can do to remove the risk. Could the hazards be completely eliminated? For example: If an electrical wire is exposed, you could replace it, or cover it with insulating tape. If your cleaner is using potentially dangerous chemical agents - change the cleaning product to something water-based
- Write down the actions currently taken - the actions you propose to take - who will be responsible for implementing them – and the date they will be completed by.

Record your findings

- If you employ five people or more, the law requires you to record the findings from your Risk Assessment, but it makes sense to do so anyway as a record which you can refer to and review
- Ensure the written record of your findings is made available to your staff and volunteers, and that they co-operate with the carrying out of the recommendations made as a result of the assessment
- Agree a review date.

Review your Risk Assessment on a regular basis and in response to changes

Regularly reviewing and revising your risk assessment will take account of changing circumstances.

Few workplaces remain the same. You must review your assessment when there are major changes in the workplace, such as the introduction of new machinery, or new ways of working - but you must carry out regular reviews anyway - possibly annually.

Further Sources of Information

Health and Safety Executive.

website:	www.hseni.gov.uk
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5.3 General Data Protection Regulation (GDPR)

The General Data Protection Regulation (GDPR) is a legal framework that sets guidelines for the collection and processing of personal information from individuals who live in the European Union (EU).

Individuals have a right to know what personal data you hold, how you are using it and that it is being processed and secured in a responsible manner. The legislation offers individuals the right to prevent the processing of personal data, particularly if it is being used for direct marketing purposes.

There are many ways in which your group may be gathering, storing and using personal data. It is likely that you will at least be keeping a membership list with people's names, home addresses, phone numbers or email addresses.

If your group handles or stores (processes) personal data in any way, legally you become a 'data controller' and will need to comply with the requirements of data protection legislation.

The Information Commissioner's Office is the independent authority on all aspects of the Data Protection Act, including the monitoring of communications. For advice and assistance visit their website.

website:	www.ico.org.uk/
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Allowing Access to Personal Data

The Data Protection Act 2018 updates our data protection laws for the digital age. Individuals have the right to request access to whatever personal data you might hold on file about them.

Your community group or organisation may be holding personal data as part of a membership database for example or as part of your records on volunteers and/or paid staff.

Personal data is any information which identifies an individual including names, addresses, email addresses and phone numbers. Sensitive personal data includes information about a person's health, religious beliefs, political opinions, racial or ethnic origins, sexual life or offences/alleged offences.

The individual whose personal details you may hold is the 'data subject' and under data protection legislation, every data subject has the right to access their data.

Handling requests for Subject Access

- A request for subject access must be made in writing - your group may choose to respond to a verbal request but you are not obliged to
- Your group may decide to make a charge (up to £10.00) for access and in this case a request would not be valid until the fee is paid
- You must check the identity of the person requesting access to ensure you only give details to the data subject themselves or a legal representative
- The request must be dealt with promptly and within 40 days maximum.

It is helpful to draw up a subject access form including the name of the data subject, the address for reply, any information you need to help you verify their identity or to help you find the record, your fee and a signature.

A person can only act on behalf of another if they have the legal power to do so.

🔗 website:	www.gov.uk/government/collections/data-protection-act-2018
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Data Protection Policy

Having a Data Protection Policy will show people that your group is giving due consideration to its responsibilities under Data Protection legislation. It will demonstrate that your group understands and complies with:

- The Data Protection Act 2018
- The principles of best practice when processing personal data.

A Data Protection Policy shows that your group has thought about the protection of the rights of its:

- Users
- Staff and volunteers
- Members.

It also shows that the committee understands their responsibility to protect the rights of the group as well.

Drawing up your Data Protection Policy

There is no one single Data Protection Policy that your group can simply download and adopt unchanged, although you may find some sample policies to use as a guide. Data protection is more about complying with general principles rather than having a fixed set of rules.

It is far better for your committee to sit down and discuss how your particular group will be collecting and using personal data and to consider what principles you need to include in your own policy.

Things to consider:

- Confidentiality - who will be gathering the data
- Security of data - where will the data be held - how secure is this? What methods will you put in place to ensure security is not breached
- Use of data for marketing purposes
- Storing and updating data - how long will you retain the data, how often will it be updated, what about archiving old data
- Consent - how will you get consent
- Making your volunteers and staff aware of data protection issues
- Policy review date - no policy should sit on the shelf or in a drawer after its written. Set down how often you will review the policy.

Data Protection Principles

The Data Protection Act defines eight data protection principles:

1. Personal data should be processed in a fair and lawful manner
2. You can only obtain personal data for specified and lawful purposes, for which the individual gives consent. You cannot simply gather lists of people's personal data
3. Personal data must be accurate and kept up to date
4. Personal data must not be stored for longer than is necessary for the specified purpose. Retaining details of people with whom you have had no recent contact, for example, previous volunteers, is an infringement of the law
5. Appropriate security must be taken to ensure against unauthorised access
6. Personal data must not be transferred abroad unless the country has adequate protection or unless the data subject has given consent to transfer
7. Personal data can only be processed in a way which does not infringe the rights of individuals.

Penalties for Breaching the Data Protection Act

Any organisation that breaches the Data Protection Act 2018 by seriously contravening one or more of the data protection principles could face substantial financial penalties under powers afforded to the Information Commissioner's Office.

Keeping and Using Personal Data

Personal Data

Personal data is any information about individual, identifiable, living people. It includes things like names, addresses, phone numbers, email addresses.

Your community group will typically be handling personal data as part of volunteer and/or staff records, membership lists, mailing lists or lists of donors. You may be gathering and storing this data on a spreadsheet or database on a computer or as a paper filing system.

The protection of personal data is regulated under the Data Protection Act 2018. With this legislation, people have a right to prevent you from processing information about them.

If your community group or organisation processes personal data, your group's committee (board) is responsible for ensuring that you comply with the Data Protection Act 2018.

Sensitive Personal Data

Sensitive Personal Data is information about a person's physical or mental health, political opinions, religious beliefs, racial or ethnic origins, sexual life or offences/ alleged offences.

The Data Protection Act 2018 includes special regulations governing the use of sensitive personal data.

Processing Personal Data

The definition of 'processing' in the context of personal data refers to the gathering, exchanging, storage or handling of information, whether on computer databases or paper. If your group processes personal data they are defined under the Data Protection Act 2018 as a 'data controller'.

Under data protection legislation individuals have a right to prevent you from processing information about them, especially for direct marketing. Unless they are exempt, every organisation processing personal data must notify the Information Commissioner. Failure to do so is a criminal offence.

Is my group exempt?

Exemption from mandatory notification to the Information Commissioner extends to some community groups/organisations. Your group may be exempt if you only process personal data for the purpose of:

- Establishing or maintaining a membership database
- Providing or administering activities for existing, past or prospective members or people who have regular contact with the organisation.

Although some 'data controllers' are exempt from notification, your group (its trustees or board of directors) will still need to comply with other aspects of the Data Protection Act including the eight Data Protection Principles.

Obtaining Consent

It is likely that your group is processing personal data in some way. You may be gathering and storing the names, addresses, email addresses or phone numbers of your membership, volunteers and/or staff for example. Your committee members have a legal duty to ensure that your group is complying with the requirements of Data Protection Act 2018 which regulates the protection of personal data.

Under Data Protection legislation, your committee should first be clear as to why you need to process personal data. What are you going to use it for? For example, you might want to keep a membership list so that you can keep members informed of what you do. You may need to administer a membership subscription database. You may also want to keep contact details for volunteers or donors. If you have staff you will need to keep personnel records.

Under Data Protection legislation, your committee has a legal duty to ensure that:

- The individuals (the data subjects) concerned are aware of what you intend to do with their personal data
- The individuals (the data subjects) concerned have given their consent for you to use/store their personal data for that purpose(s).

Consent to use personal data must be specific, informed and freely given. Consent does not need to be in writing, although this is preferable. Verbal consent should be recorded at the time it is asked for and given.

If you are processing sensitive personal data consent must be explicitly given - it cannot simply be implied.

Remember that an individual has the right to withdraw their consent at any time. Give them the opportunity to review and refresh their data and consent on a regular basis to ensure that your records are up to date and accurate.

Data Protection Statements

A Data Protection Statement will state clearly who your group is and why you are asking someone for their personal data. It should set out enough information for the individual to make an informed choice as to whether or not they give their permission or consent for their details to be used.

Your data protection statement can take the form of a short statement on your forms or letters, a standard paragraph in letters welcoming new members or a notice in your waiting room. If possible, it is a good idea to use the Information Commissioners' 'Padlock' logo.

State clearly who you are and why you are asking for their personal details. If your group intends to share the personal data in any way make that clear. Where relevant, offer the individual the chance to opt-out from disclosure to third parties and/or direct marketing.

Website Data Protection Statements

If your group has a website, you should add an online Data Protection and Privacy Statement. This should include:

- Why you are asking for the personal data
- Who you are
- How long you will keep the personal data
- Where the data might be transferred to
- What rights the individual has with respect to the data and how they can be exercised
- How an individual can decline email advertising
- Who to contact for more information
- What security is in place
- Whether anonymous browsing is possible
- The policy on IP addresses and cookies.

The Information Commissioners Office (ICO) has published guidance for UK website owners, setting out specific examples of what cookie compliance looks like. You will find a link to the guidance at the bottom of this page.

Your online Data Protection Statement should be followed by an option for the individual to agree their consent for you to use their personal data for the purpose you have stated.

This statement should be positioned prominently, linked to all pages that gather information, and should be reviewed, updated regularly and complied with.



Money Matters

6 Money Matters

6.1 Annual Accounts

'Annual Accounts' are essentially a report prepared either by your treasurer or appointed accountant at the end of your group's financial year, drawing together and analyzing your group's financial activity over the last 12 months.

Your group's annual accounts will be presented to your members for approval at the Annual General Meeting, and they are important because they:

- Show members that the committee or board (or Trustees) are managing the organisation's affairs in a proper manner
- Show funders that their grants are being spent on the purposes for which they were given
- Show prospective funders how the group manages its finances (and whether or not it is likely to manage any prospective grants prudently)
- Show donors how their donations are being used and that they help further the aims of the organisation
- Foster public confidence in the group and hence encourage ongoing support
- If your group has charitable status, your annual accounts demonstrate that
- The Trustees are meeting their legal duties and the charity is being accountable and compliant
- The charity is being managed in a fit and proper manner, with income being used to further the group's charitable purposes.

Annual accounts vary in format from the simplest income and expenditure sheets to the more complex accrued accounts.

The type of annual accounts prepared by your group will depend on:

- The legal form or structure of your group
- Your group's annual income in the period covered
- Whether or not your group is a registered charity
- Funder's conditions
- Your group's own constitution or governing document
- Any decisions of the committee or members.

These things will also determine whether or not you have a legal requirement to submit your annual accounts to a regulatory body.

For unincorporated associations that are not registered charities and handling relatively small sums of money over the year, the annual accounts can be a simple income and expenditure account reconciled to the opening and closing bank and cash balances compiled by the treasurer.

For unincorporated associations with larger incomes or organisations/groups which are incorporated, it is advisable to appoint a suitably qualified accountant who can prepare the annual accounts in the required format according to correct accounting procedures. Accounts of small charities preparing R&P accounts can be prepared by the Trustees or independent examiner rather than an accountant.

6.2 Finance

Your group's finances are your income and expenditure - in essence the cash and grants that come in and the bills you have to pay out.

Managing and developing your group/organisation will include managing the groups finances.

Financial management is not just about cash handling. It includes keeping day to day cash records, managing your group's bank account(s) and ensuring that all legal requirements relating to finance are complied with. It includes setting budgets, monitoring and reporting on income and expenditure and preparing Annual Accounts.

Your committee (or board of directors if your group is incorporated) has a joint responsibility to ensure that your group remains solvent, that the bills are paid, that all legal requirements (including grant conditions) are met.

Having someone on your committee or board who has financial (or accounting) experience can help, but ultimately the committee as a whole will need to be aware of their financial duties and responsibilities.

Managing Cash Flow

A month-by-month cash flow document will comprise two columns - one for your forecasted income and expenditure and one to record your actual income and expenditure.

Both columns should include details of:

- Income for the specific month you are dealing with
- Expenditure payable during the specific month you are dealing with
- Balance carried forward (the income for the month added to the balance carried from previous month less the month's expenditure).

Your cash flow is the change in cash balance from the start of the month to the end of the month.

You should review this document each month. If your actual income and expenditure are the same as your forecasted figures, or if you are showing a surplus, then your group or project is financially on track.

If your cash flow shows a deficit then you need to resolve this by reviewing your business plan, budget and fundraising strategy.

6.3 Planning and Budgeting

Budgeting is the key to effective financial management. A budget sets out how much money your group/organisation needs to carry out its planned activities, identify surpluses (or deficits) and highlight critical points in income and outgoing of cash.

Budgeting will:

- Ensure your group has the financial resources to achieve your plans with the object of meeting or exceeding budget
- Give direction by curbing activity due to limitation of resources
- Highlight periods of cash shortage and potential need for more funding
- Enable you to make sound financial decisions
- Enable you to keep track of your spending
- Enable you to cope with additional unexpected costs
- Provide a plan for saving and spending.

Preparation for the year ahead should ideally begin half way through your current financial year. Responsibility for drawing up and finalising the budget lies with the whole committee. They should start to prepare your group's budget by considering their business plan and considering what your group wants to achieve over the next financial year.

If you are a new group, drawing up a budget is one of the first things you should do.

Drawing up your budget is the first stage to budgeting. Once your budget is agreed, you will need to monitor your income and expenditure on a weekly or monthly basis. Be prepared to take action in response to how your actual income and expenditure compares with your budget.

Opening a Bank Account

When your group is first getting started, you will need to have at least adopted your constitution (or governing document) before your committee can open a bank account in the name of the group.

Once you have your constitution and structure, your committee or board should nominate at least two people to act as signatories on behalf of the group. It often makes sense for one of these signatories to be the Treasurer.

The two authorised committee members should approach the bank for the required forms to open the group's bank account. They will need to produce a copy of the group's constitution along with relevant personal identification (as specified by the bank).

6.4 Monitoring your Budget and Spending

Your budget sheet will give your committee or board a working tool for monitoring your group's financial progress.

The task of financial record keeping on a day to day basis will often be delegated to the Treasurer on a committee but it is important that the committee as a whole is kept informed and that they are involved in reviewing the budget on a regular basis (ideally every month).

The committee should be able to compare actual figures with budgeted ones (cash flow statements help you do this). If this reveals that the group is overspending or under spending the committee will need to identify why and if necessary revise the budget and/or the group's activities. If your committee makes changes to the original budget, they should add a note/comment and the date each time.

Purchasing Goods and Services – Procurement and Tendering

The term 'Procurement' in essence refers to the process of acquiring goods and services - the process which any customer goes through to buy something.

Once the customer decides that they need to purchase a particular product or service, they will follow through the various stages of the procurement process. For example, ordering a CD online, taking out a subscription to the local gym or booking a hotel. The potential customer might initially look round at the various products on offer, decide which is offering the best value, make contact with the supplier, agree a price, sign a contract, make the purchase and receive the goods.

For community groups the term procurement specifically refers to the purchasing of third sector services by local government through competitive tendering for contracts.

Private sector businesses have been providing goods and services to local authorities for years, but increasingly, local authorities are now looking to volunteer run community organisations to deliver services under contract. For some community groups and organisations, procurement offers an opportunity to build their financial sustainability and move away from relying on grant income and donations for the majority of their income. It may also offer community groups the chance to improve the services they can deliver.

The local government procurement process begins with commissioning. This will include identifying what goods or services the local authority department requires, drawing up the tender brief and preparing contracts. The next stage will be about defining the procedure for purchasing the goods, ensuring that the process is legally compliant and eventually signing off on the contracts.

- **Income and Expenditure**

Income and expenditure accounts (also sometimes called 'Receipts and Payments Accounts') - are the simplest format for annual accounts. They record exactly what money your group has had coming in (income or receipts) and what has gone out (expenditure or payments) over the 12 month period of your financial year and reconcile this to the opening and closing bank and cash balances held by the group.

Which groups should prepare Income and Expenditure Accounts?

Simple income and expenditure accounts are usually best suited to unincorporated groups not subject to any statutory regulation.

Unincorporated charities with an annual income under £250,000 can also prepare a form of income and expenditure account. However, they must follow a particular form with specific content that is set out in charity law.

Incorporated groups are required by company law to prepare accrued accounts rather than income and expenditure or receipts and payments accounts.

What to include in Income and Expenditure Accounts

Income and expenditure accounts can be presented in a number of different ways but will usually comprise of a statement that:

- Includes the name of the group and the period covered by the accounts
- Summarises the financial transactions carried out over the year. The categories of income and expenditure used will be those most appropriate for your particular organisation
- Discloses the difference between the income and expenditure. If you paid out less than you received, the difference will be a surplus. If you paid out more than you received, the difference will be a deficit
- Discloses the cash and bank balances at both the start and end of the year
- Reconciles the income and expenditure to the movement in the cash and bank balances. The opening balances plus the income minus the expenditure will equal the closing balances
- Includes the corresponding figures for the previous year for the purpose of comparison.

Adopting your Accounts

Once prepared, your annual accounts should be approved by the committee before being presented to your members at your Annual General Meeting (AGM). The constitutions of many organisations will require the accounts to be submitted to some form of external scrutiny before being presented to the members at the AGM. This should be done after they have been approved by the committee.

However, you may want to involve whoever is examining the accounts before the committee approves them so that if they require changes they can be made without calling another committee meeting.

Unincorporated Associations (without charitable status) have no statutory obligation to submit their Accounts to a regulatory body. You may however be required to submit your Annual Accounts to a funder as part of the conditions of grants received during the financial period in question.

• **Systems for Recording (What information do I need to record?)**

All community groups (large or small, unincorporated or incorporated and with or without charitable status) need to keep some kind of financial records.

Overall responsibility for your group's financial management remains with the committee (or board) as a whole but you may choose to delegate the task of keeping accessible, accurate and up to date financial records to a committee member who acts as the group's treasurer.

The Treasurer will then be expected to:

- Keep the rest of the committee informed about projected income and expenditure, prepare estimates, contribute to cash flows and budget plans
- Keep financial records on a day book or a spreadsheet
- Pull together the financial records information to prepare the group's annual accounts.

The Treasurer's role in keeping the committee informed about the group's financial position is particularly important. The Treasurer needs to be able to convey financial information in easily understood terms so that the rest of the committee are fully aware of the financial position of the group at all times, and can make any necessary financial decisions based on full knowledge of the implication.

Your committee (the Charity Trustees) are legally required to be in a position where they are able to disclose the financial position of the group at any time.

Keeping a record

A typical day/cash book/ledger or computer spreadsheet should note every transaction (sales, purchases, income and payments) - in and out - on a daily basis. Suggested headings for your day/cash book include:

- Date
- Amount In (credit or receipt)
- Amount Out (expenditure or payment)
- Method - for example, by cheque/cash/direct-debit/BACS/pay-in
- Reference - the cheque number or pay in number
- Description Category - taken from budget heading, could typically include grants; postage and stationary; rent; travel expenses etc.
- Space for details - Who? What?

When your bank statements come in, check them against the day book so that you have an accurate idea of your cash in hand. Keep a separate petty cash book if you need to, but remember that this will need to be drawn together with the day book at the end of the financial year, so be consistent.

If your group is a registered charity, your Charity Trustees have a legal duty to keep proper accounting records which:

- Show daily records of money received and spent
- Record assets and liabilities
- Disclose the financial position at any time
- Produce a statement of account.

6.5 Best practice for Financial Record Keeping

- Always get and keep receipts, no matter how small the amount
- Always give receipts for money received and pay cash into the bank as soon as possible
- Keep petty cash in a secure place and always get people to sign it in and out by entries in a petty cash book. Don't count cash on your own, always have someone who can verify your calculations
- Pay cash and cheques into the organisations bank account weekly
- Pay bills on time and, if your group employs staff, ensure staff salaries are paid on time
- If cash is given as a prize, for example, in a raffle, openly display a list of winners in a public place or inform the local press

- If your group holds a fundraising event record the expenditure (costs of any venue, refreshments etc.) separately to your income (entrance fees, sales etc)
- Get into the habit of recording grant income as either 'restricted' (that is, the funder has specified exactly what the grant is for) or 'unrestricted' (that is, core funding or funding for general running costs)
- Record separately and clearly any expenditure against restricted grant income. Your group may also have a legal requirement to keep your financial records for a specified number of years. If you are a registered charity, you need to keep financial records for 6 years.

All community groups (large or small, unincorporated or incorporated and with or without charitable status) need to keep some kind of financial records.

It is a good idea for your committee to get into the habit of recording grant income as either 'restricted' or 'unrestricted'. This will make things easier at the financial year end.

Restricted funds

Restricted funds are usually project grants where the funder has particularly specified what the money is to be spent on. Record the grant coming in as restricted, then, as the money is spent, mark the corresponding outgoings as restricted expenditure on your records.

At the end of the period relating to the grant, the restricted expenditure should balance against the restricted income. This may not always neatly fit into one financial year of course.

Sometimes your group will receive a grant as an advance which may need to be carried over into the next financial year before it is all spent. Make things like this clear on your records and make sure that your accountant (or the person preparing your accounts) is aware of this.

Unrestricted funds

Unrestricted funds include core grants where the funder has not specified any restrictions on what the money should be spent on.

Retaining your Accounts

A charity should retain its accounting records for at least six years. Organisations should also be aware that they may be required to keep information for longer for funders or if they are legislated by other bodies.

For HMRC purposes all records have to be kept for 6 years.

6.6 Help with Finance

- **Appointing an Accountant**

If a registered charity for preparation of annual accounts etc.

- **Other organisations which can help**

(North Down Community Network - offer assistance with accounts for member organisations); (Community Change provide training and assistance also).

For more information and useful templates visit:

website:	www.gov.uk/write-business-plan
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Funding and Fundraising

7 Funding and Fundraising

NICVA's Fundraising Advice Team provides the voluntary and community sector with help and support for all aspects of your fundraising needs.

7.1 Funding and Fundraising

Successful fundraising starts with a fundraising strategy which should identify what resources will be required in order to reach a fundraising goal. A fundraising strategy isn't just about raising money, it helps you to meet your other charitable aims.

A fundraising strategy forms part of the wider business plan for an organisation. As with a business plan, it's useful to plan fundraising in broad terms three to five years ahead - and have more concrete targets and plans twelve months ahead.

Why is a funding strategy useful?

- Helps focus, prioritise and diversify fundraising activities
- Ensures that there is a shared understanding of your priorities and objectives and how these will be reached
- Prevents you from wasting time and resources
- Helps trustees to consider the risks associated with any fundraising actions
- Supports the requirements of Statement of Recommended Practice (SORP) requirements
- Enables potential funders to determine the viability of your organisation and whether their money will assist in achieving your intended purpose.

Things to think about:

- Where are we now?
- Where do we want to get to?
- How are we going to get there?

What to do:

- Outline the main aims and objectives of your project or your project's mission statement
- Review what is happening externally eg. current economic situation, what the 'market' is doing
- Consider what resources do you have available internally
- Think of where do you want to be and start developing a plan for how to get there
- Research possible sources of funding
- Consider the extra resources you will need in order to fulfil your plan, such as extra volunteers or training
- Monitor progress and measure your success.

Some questions to ask:

- What kind and how much funding do we need
- What kinds of activities (and costs) do we need to fundraise for in the next 12 - 24 months and how much funding do we need for each area
- What are the funding or finance options that we could use to deliver this activity?
- How might we improve our profile?
- Do we have a clear case for support that outlines what we need (and why) to potential funders?
- What other resources will we need?
- Can we monitor the impact of our activity and demonstrate our success to potential funders/donors/supporters?
- What will other staff and volunteers need to do to support fundraising?
- How might Trustees support fundraising?

7.2 NI Trust Group Voluntary Action Booklet

The NI Trust Group comprised of over 40 influential funders in Northern Ireland, has released an up to date version of the Group’s Voluntary Action Booklet. The booklet contains an outline of the funders, funding programmes and the best way to contact them.

For more information visit:

<p>🌐 website:</p>	<p>www.nicva.org/resource/developing-a-fundraising-strategy</p> <p>www.niva.org/resource/ni-trust-group-voluntary-action-booklet</p>
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7.3 Tips for Successful Applications

There's no magical secret to writing a successful grant application but there are some things that you can do to improve your chances of getting funding.

1. Decide exactly what you want to do or what kind of grant you require

Be clear in your own mind what type of project you want to do, what kind of grant you require and why you want it.

2. Identify sources of funding

Increasingly, more and more government departments and community funding programs are putting their grant information on the internet. Newspapers and newsletters of various community organisations also publish grants from time to time. Pay attention to those publications in your sphere of interest for any suitable opportunities that may arise.

3. Address the funding guidelines

- Customise each grant application
- Get a copy of the grant guidelines and application forms in advance of the submission deadline and read them carefully
- Allow plenty of time to complete all the application requirements
- Make sure your submission directly addresses grant guidelines.

4. Do research

- Talk to other people or agencies that you know have received funding and talk to the funding agency for advice on their requirements
- If you're trying to get a community project off the ground, survey the local community and your target audience for their feedback and include this in your submission
- Check out secondary sources of information. Your local council will probably have a wealth of information, statistics and data and maybe even someone to help you with your submission.
- If you're required to submit any costings with your application, make sure you:
 - Are accurate and realistic - the funding organisation will spot the inconsistencies and this will reflect badly on your submission
 - Don't cut corners to be more competitive
 - Find out appropriate rates of pay
 - Don't forget overheads you might need such as insurances, office supplies, rent etc.
 - Get multiple quotes for any equipment you will have to buy
 - Relate any necessary equipment purchases to the aims of the project
 - Note your own contribution to the project, both your financial input and time commitment
 - Include profiles or resumes of yourself and any other people involved in the project if required to do so.

5. Present your submission well

When writing your submission and organising all the data you collect, make sure you:

- Are focussed on what you want to achieve
- Are clear and concise on your aims
- Use clear language and avoid jargon
- Present only relevant supporting material and make sure it's presented clearly (eg. graphs, tables, graphics)
- Structure your submission so that it is easy to follow (include a table of contents, index, appendix etc.)
- Get someone to proofread the submission
- Keep a full copy of your submission.

6. Follow up your submission

Call the organisation to check your submission was received ok and in good order. Try and drum up support for your project through other agencies, your local council and your community.

Keep a record of all discussions and contacts with the funding bodies and confirm any undertakings in writing, if required.

7. Agree grants with committee prior to submission

8. Take a deep breath!

You've done all the hard work. The decision is now with the funding body. Good luck!

7.4 Grant Finder

Grant Finder is the UK's leading grants and policy database and includes details in excess of 7,000 funding opportunities. Services include access to: a flexibly searchable database; Newsflash service; deadlines listing; and Research Help Desk. What's more, the information is **continuously updated**.

GRANTfinder subscribers include: local authorities; the voluntary and charitable sector; universities and colleges; housing associations; the health sector and business support organisations.

To access Grant Finder click on the following link:

🔗website:	www.open4community.info/lisburn/Default.aspx
🔗website:	www.northdown.gov.uk/About-the-Council/Grants/GRANTnet
🔗website:	www.ards-council.gov.uk/Council-Services/Community/Grants



Volunteering

9 Volunteering

8.1 Definition of Volunteering

‘Volunteering is the commitment of time and energy for the benefit of society and the community, the environment, or individuals outside (or in addition to) one’s immediate family. It is unpaid and undertaken freely and by choice’.

Source: *‘The Volunteering Strategy for Northern Ireland’*. May 2011.

8.2 Volunteer Policy Framework

Volunteer Policy Framework

It is recognised by Volunteer Now that the guidelines in the Volunteer Policy Framework will be considered in the light of individual organisations’s needs and/or situation.

The sample statements (in italics) are provided only as an illustration of the relevant guidelines and are not intended as a standard or model for use by any other organisation.

There may be other issues that you may want to address through your volunteer policy due to the nature of your organisation and particular volunteer roles.

Remember the difference between policy and procedure. Policy outlines what you intend to do and procedures then outlines how you you will do this.

Values

Your volunteer policy will need to be based on a clear set of values around the involvement of volunteers.

It is a good idea to begin the policy development process by agreeing a Value Statement, based perhaps on your organisation’s historical perspective, its wider values and ethos and your ‘first choice’ reasons for involving volunteers.

- 1 The policy should value the distinctive contribution that volunteers can make:

“Anytown Community Project values the involvement of volunteers in our work because they help reflect the interests, needs and resources of the community we aim to serve and bring a unique perspective on all our work”.

- 2 The policy should recognise the status of volunteers as a legitimate and complementary resource to that of paid staff.

“Anytown Community Project recognises volunteers as a core part of our team, with a distinctive but complementary role alongside paid staff”.

- 3 The policy should acknowledge that volunteering is a beneficial experience for both volunteers and service users.

“Insofar as Anytown Community Project benefits from the skills, experience and enthusiasm of volunteers, we believe that volunteers should be able to gain personal benefits from the experience too. We are committed to managing volunteers in a way that ensures that the needs of both parties are met”.

- 4 You should also include a statement in this section on the organisation’s beliefs about quality, equal opportunities, diversity, etc. and how they apply to volunteer involvement. *“Anytown Community Project strives to create a diverse and inclusive organisation within a diverse and inclusive community. Therefore, we are committed to ensuring equality of access to high quality volunteer opportunities and equality of treatment for our volunteers in all our policies and practices”.*

Preparation and Planning

The next areas that the policy should address are those actions and systems that need to be put in place before the organisation is ready to actually involve volunteers.

Even if volunteers are already active in your organisation, it is important to discuss the reasons for involving volunteers with staff, existing volunteers, service users or beneficiaries, Trade Unions etc. and agree on the nature and purpose of the volunteer involvement.

- 5 The policy should identify the ways in which the work of the organisation can be extended by the involvement of volunteers and ensure that these opportunities complement rather than substitute the work of paid staff (if applicable).

“Anytown Community Project identifies roles for volunteers which extend the work of the organisation. Volunteers are involved at every level of the organisation in roles which complement, but never substitute, the work of paid staff”.

- 6 Furthermore, the policy should make clear the position of volunteers in any staff dispute or action.

“Volunteers will not be used in times of industrial action to do the work of paid staff. They may continue with their regular tasks, but will not be asked to undertake additional duties”.

- 7 The policy should specify how volunteer roles would be defined, including the purpose of each role and tasks involved.

“All volunteers are provided with a written role description, outlining the purpose, tasks and main expectations of their role. This role is reviewed at least once a year with the volunteer’s supervisor”.

- 8 The policy should clarify what protection volunteers can expect from the organisation in terms of insurance.

“Volunteers with Anytown Community Project are fully protected by the organisation’s public liability and personal accident insurance. However, drivers using their cars in connection with their voluntary work must inform their own insurance company to ensure adequate and continued cover”.

- 9 The policy should state the organisation’s position on the reimbursement of expenses to volunteers including what expenses can be claimed and how to make a claim.

“Anytown Community Project reimburses volunteers’ out of pocket expenses for travel and dependant care when claims are submitted on a standard Expense Claim form and accompanied by proof of expenditure”.

- 10 It is essential that the policy commit the organisation to providing volunteers with adequate resources to do the work for which they were recruited.

“Anytown Community Project endeavours to provide adequate and appropriate facilities, equipment and resources to enable volunteers to fulfil their roles”.

- 11 The policy should make clear where the responsibility for day-to-day management of volunteers lies, specifying a member, or members of staff as appropriate and making a clear commitment to providing such staff with appropriate training.

“The project manager is responsible for the overall management of volunteer involvement, including overseeing the implementation of this policy and dealing with any complaint or grievance relating to volunteers. The volunteer’s designated supervisor provides support and supervision, identifies training requirements, countersigns expenses claims etc. All staff required to undertake such duties are provided with training in the management, supervision, support and training of volunteers”.

Recruitment and Selection

While attracting and selecting volunteers is a different process from staff recruitment, you should still aim to provide a fair, effective and transparent process that is truly inclusive.

Although you may wish to keep the procedures fairly informal in practice, it is still vital to lay down minimum requirements clearly in your policy to help ensure that they are consistently implemented.

- 12** The policy needs to lay down the organisation's approach to volunteer recruitment, stating how volunteer opportunities will be made accessible to all sections of the community.

"Anytown Community Project is committed to serving and representing all the people of Anytown and wishes to see all sections of the community represented among our volunteers."

Volunteer opportunities are widely promoted throughout Anytown and we will endeavour to make recruitment and selection materials available in a format accessible to any individual or group, upon request.

Furthermore, Anytown Community Project regularly reviews the make-up of the volunteer team to identify and target any under-represented group(s)".

- 13** The organisation should have an agreed recruitment and selection procedure for all volunteers, which reflects best practice in relation to equal opportunities and this should be briefly outlined in the policy.

"Anytown Community Project implements a fair, effective and open system in the recruitment and selection of volunteers and treats all information collected in this process confidentially."

All potential volunteers must complete registration forms, provide references and attend an informal chat/interview. Additional measures may be implemented depending on the nature of the volunteer role and police records checks are conducted where appropriate.

*The process is conducted by appropriately briefed/trained staff and aims to allow **both** parties to give and receive sufficient information to assess whether the volunteer opportunities available match the potential volunteer's skills, qualities and needs.*

If unsuccessful, individuals will be offered an opportunity to discuss the outcome and identify possible alternatives within or outside of Anytown Community Project".

Management of Volunteers

This section will specify how you intend to manage volunteers once they have become involved in your organisation. Goodwill alone is not enough to guarantee success and a pro-active approach is essential both to achieve the organisation's objectives and to ensure that volunteer's needs and motivations are met.

Remember the voluntary nature of the relationship between volunteers and the organisation as you develop this section and try to ensure that the policy holds benefits for both parties.

- 14 The policy should outline how the expectations of both parties are to be agreed and communicated.

"All volunteers are provided with a written letter of welcome, which outlines the expectations and responsibilities of both the volunteer and Anytown Community Project. This agreement may be reviewed at any time with the consent of the volunteer and his/her supervisor, including during the initial review meeting at the end of the settling in/taster period (see point 16)".

- 15 Volunteers will need to be properly briefed about the activities to be undertaken and given all the necessary information to enable them to perform them with confidence. The policy should commit the organisation to an appropriate induction procedure.

"All volunteers are provided with an induction within six weeks of commencing their voluntary work. The induction: provides background information on Anytown Community Project; explains its structures and procedures; describes the volunteer role and the work team and outlines how he/she will be supported, including practical information on eg. expenses.

During the induction period volunteers will be provided with written information on relevant legislation, organisational policies and codes of practice and will be given the opportunity to discuss any of the issues with the project manager and/or supervisor".

- 16 A settling in/taster period is helpful in providing an opportunity to assess the suitability/progress of the placement and allowing any problems to be resolved at an early stage. A policy statement should help ensure consistent implementation of the procedure and reassure new volunteers as to the reasons for such a measure.

"All volunteer placements are subject to a settling in/taster period, the length of which depends on the nature and hours of the voluntary work. During this period volunteers are given additional support and a review meeting between the volunteer and his/her supervisor is held at the end of the settling in/taster period to ensure that all parties are satisfied with the arrangement".

- 17** Access to regular support and supervision is key to maintaining effective and motivated volunteers. While the level of support and supervision needed will vary for different volunteers and different volunteer roles, the policy should commit the organisation to providing each volunteer with a named individual to provide this.

“All volunteers are allocated a named member of staff as their supervisor (although the project manager can also be contacted in case of an emergency or if the designated supervisor is unavailable). This individual can provide day-to-day help and guidance on any issue related to the voluntary work and is responsible for providing regular support to and supervision of the volunteer. The frequency, duration and format of this support and supervision is agreed between the volunteer and his/her supervisor at the end of the settling in/taster period”.

- 18** Training will enable volunteers to develop their capabilities and personal competence. The organisation must decide on what basis such training will be offered and to whom. A clear policy statement will ensure fair and equal access to these opportunities.

“Anytown Community Project is committed to improving the personal and professional effectiveness of volunteers. Volunteers may choose to attend any in-house training course that they feel is relevant to their voluntary work, subject to the approval of their supervisors and availability of places.

Volunteers may also apply to the project manager for financial and practical support to attend external courses, where they can be shown to have a clear relevance to the voluntary work. (c/f Training and Development Policy). Volunteers attending approved training courses, internal or external, may do so within their normal hours of voluntary work and may reclaim out-of-pocket expenses”.

- 19** The organisation must make arrangements to deal with any difficulties with the volunteer or their work in a fair, open and effective way. Equally volunteers should have access to an equivalent process to address grievances about any aspect of their work or how it is managed. The aim of such a policy is to protect all concerned while maintaining good relationships and effective volunteers where possible.

“Anytown Community Project aims to reflect the voluntary nature of our relationship with volunteers in all our policies and procedures for managing their involvement. Therefore the volunteer’s designated supervisor deals with minor complaints or grievances about or by volunteers or their work through the usual support and supervision procedures, in the first instance.

However, we recognise our duty to protect the wellbeing and interests of all our stakeholders and therefore operate a formal complaints procedure in the case of more serious complaints. In the case of particularly serious offences, as specified in the Code of Practice, this process may be bypassed and/ or the subject of the complaint asked to leave. Where a criminal offence is suspected, the matter will be handed over to the police”.

- 20** Volunteers should, as far as possible, be fully integrated into the organisation. You may want to include a commitment in your policy to specific communication systems to keep volunteers informed, special measures to recognise and publicise their contributions, opportunities to take part in decision-making etc.

“Anytown Community Project recognises the core role that volunteers fulfil at every level of the organisation. It endeavours to communicate with volunteers in appropriate ways, including bulletin boards at each site and the monthly ‘Volunteer Update’ news sheet.

It also recognises the importance of seeking volunteers’ ideas and opinions at regular intervals and conducts an annual volunteer survey and provides suggestion boxes at each site.

Feedback from volunteers is always welcome and any volunteer may make representations to the monthly meeting of the Management Committee”.

- 21** Records should be kept of the work done by volunteers, to enable their involvement to be monitored effectively.

“In order to effectively monitor the work that volunteers do and how they are managed, a personal file is maintained for all volunteers, which includes: contact details and other relevant personal information; details of the application and selection process; agreements made; hours worked; records of support and supervision activities; training undertaken and any complaints or grievances made or received.

Some of this information and other relevant information may also be recorded in computerised records. All such information is treated in accordance with the Data Protection Act (1998) and volunteers are entitled to inspect all such information pertaining to their own involvement”.

Reasonable precautions have been taken to ensure information in this publication is accurate. However it is not intended to be legally comprehensive; it is designed to provide guidance in good faith without accepting liability.

If relevant, we therefore recommend you take appropriate professional advice before taking any action on the matters covered herein.

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8.3 Recruiting new volunteers - The basics

- **Where to find them?**

To be successful in recruiting new volunteers it is necessary to advertise your volunteering opportunities as widely as possible. Where you advertise and find your volunteers depends on who you wish to attract.

It is important to promote your volunteering in a range of media such as local press, posters in shops and on notice boards. You may wish to use social media such as Facebook and Twitter as well.

If you have your own website, is there a section on volunteering? If not you should also use this tool to advertise; it doesn't cost you any extra money. Mailshots in local community bulletins may also be exploited to recruit volunteers.

Lastly you could also advertise your volunteering roles through the Volunteer Now website. Help and support is available from the Community Engagement Officers (contact details below).

Remember it is important to advertise your volunteering opportunities as widely as possible. It will allow you to attract a diverse range of people with a wide range of skills.

- **What information do I need from them?**

Once you have recruited your volunteers you need to carefully consider what type of information you need. This varies greatly depending on your organisation and the types of volunteering roles the individual will engage in.

At least you should have a system to record their full name and contact details. It might also be helpful to have contact details for their next of kin in case of emergency.

Many organisations use a Volunteer Registration Form to collect these details in a standardised format. Depending on the roles the volunteers wish to engage in you may wish to collect references.

Where a volunteer will be involved in working with children and vulnerable adults (depending on the role) a Criminal Records (ACCESS NI) check may be required.

- **Further information, advice and support**

For more information, advice and support in all aspects of volunteer recruitment and management, you can contact the Community Engagement Officers at Volunteer Now.

The Service is free of charge. Contact details overleaf:

Down District

Clara O'Callaghan
Community Engagement Officer
Ballybot House
28 Cornmarket
Newry
BT35 8BG

Tel: **(028) 3026 2037**
email: **newry@volunteernow.co.uk**

Website: **www.volunteernow.co.uk**

Lisburn, Castlereagh & Ards and North Down

Antje Otto
Community Engagement Officer
34 Shaftsbury Square
Belfast
BT2 7DB

Tel: **(028) 9023 2020 / 07850 851 821**
email: **antje.otto@volunteernow.co.uk**

Website: **www.volunteernow.co.uk**

- **Introducing new volunteers**

What	Who	When and Where	How
<p>About the organisation</p> <ul style="list-style-type: none"> - Aims, philosophy and ethos - About the clients - The kind of work done and why - How the clients benefit - Limitations of the organisation - Structure: departments/teams - Management - Importance of volunteers to the organisation (volunteer policy) 			
<p>The building</p> <ul style="list-style-type: none"> - Toilets, cloakrooms, parking etc. - Where to get tea/coffee (free?) - Facilities for volunteers eg. notice board, pigeon hole - Health and safety guidelines 			
<p>The role</p> <ul style="list-style-type: none"> - Volunteer's area of responsibility and boundaries with role - Line management - Days/hours, reliability - Code of practice or guidelines and expectations for working as a volunteer - Likely problems and how to cope - System for reporting back - Insurance cover - Practical help and suggestions 			
<p>The support system</p> <ul style="list-style-type: none"> - Who will supervise them, where and when to find them - Support available - Supervision/support meetings - Resources, facilities, equipment, - Training - Are expenses paid and if so how? - Issues re: expenses and benefits - How are poor behaviour, performance, complaints and grievances handled? - Insurance cover for volunteers 			

What	Who	When and Where	How
Fellow Workers <ul style="list-style-type: none"> - Who and what they do - Team meetings - Working with others, diversity and equity - System for internal communications 			
Other information <ul style="list-style-type: none"> - Trial period - Confidentiality 			

For further information on best practice in the induction and management of volunteers, see the **'As Good As They Give': Workbook Three.**

Disclaimer

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8.4 Volunteers and the law

Include

Updated Information Sheet

<http://www.volunteernow.co.uk/fs/doc/publications/volunteering-and-the-law-information-sheet-nl.pdf>

CAN'T GET LINK TO OPEN ON INFORMATION SHEET

Advice on Safeguarding Issues

For advice on all Safeguarding issues, including policies on Child Protection, Vulnerable Adults and legislative requirements for Criminal Record Checks contact:

Veronica Gray
Manager Safeguarding

Tel: **(028) 9081 8326**
email: veronica.gray@volunteernow.co.uk



Club Development

9 Club Development

9.1 Marketing and Promoting your Club

Promoting your service online or in a more traditional way sounds like it ought to be a doddle. So where do you start? This is what Google think you should consider before you actually start advertising.

1. What does your organisation (or group) do? Do you have different products or services? What are they?
2. Who's your primary audience (target market) for your products and services? Do you need to reach different audiences with separate advertising?
3. What are you trying to sell or promote? What do you want people to do (buy, visit, download, subscribe)?
4. What results would you like to see? What would you consider a good return on your investment?

When you have a firm understanding of this you can then set about putting together a simple marketing plan for your group/organisation. It is all about your customers/clients/members. Be very focused, understand what really motivates customers/clients/members and deliver exactly what they are looking for. Our simple but effective way of doing this is to consider the following points:



The hardest part is defining the practical steps that will deliver your strategy. We think the crucial points here are:

1. How will the potential customers/clients/members find you?
2. Why will the customers/clients/members buy from or engage with you?
3. How you are going to develop relationships with your customers/clients.

Finally don't expect too much too soon. It takes time to become viable and fulfill your potential. It is worth considering online promotion - more and more businesses are coming onto the web.

While it is increasingly competitive, there are still plenty of opportunities for the well planned website.

Source:

website:	www.purposemedia.co.uk/2011/04/selling-services-online/
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9.2 Improving Diversity and Equal Opportunities

Making reasonable adjustments to your communication skills

The Equality Act 2010 includes a duty to make reasonable adjustments to your services, facilities, goods etc to improve access for disabled people.

Making reasonable adjustments to the ways in which you communicate with people with disabilities is also important. Some of these will come naturally but it is always worthwhile reminding yourself:

- Communicate directly with the person with the disability - not to the person accompanying them (including sign language interpreters) and concentrate on what the person is saying, not on the disability
- If the person is hard of hearing or deaf - find out whether they can lip-read (if necessary you can ask this in writing) If they do - make sure your face is in the light, look directly at them, speak clearly and naturally, and keep your hands away from your face
- If the person is visually impaired or blind - introduce yourself when you meet them. When you are leaving/moving away - tell them. If you are guiding a person who is blind - do not push or pull them. Ask if they would like to take hold of your arm, and if there are steps, tell them whether they go up or down. Remember that guide dogs for blind people and hearing dogs for deaf people are not pets and should not be petted, fed or distracted whilst working
- If the person has a speech impairment - concentrate on what is being said, be patient, and if you do not understand do not pretend you do
- If someone, perhaps with a learning disability, has difficulty understanding you, be patient and be prepared to explain something more than once, using simple language
- When talking to a wheelchair user ensure your eyes are at their eye level - perhaps by sitting down
- Assistance should be offered to someone who looks as if they need it, but wait for their acceptance.

Further sources of information

Equality and Human Rights Commission legislation on the Directgovwebsite, Royal National Institute of Blind People (RNIB,) Royal Mail services for blind people, British Deaf Association Capability Scotland Sample Human Resources (HR) Policies and Guidance Notes (SVA).

Including People with Disabilities

Disability is one of the protected characteristics in The Equality Act 2010 which builds on and strengthens the previous Disability Discrimination Act 1995.

The legislation protects employees or service users from being discriminated against, or harassed, on the grounds of disability.

This includes access to goods, facilities, services and education.

The legal definition of disability refers to 'physical or mental impairment which has a substantial and long-term adverse effect on a person's ability to carry out normal day-to-day activities'.

Equality legislation also means that service providers are permitted to treat disabled people more fairly than non-disabled people. You may also restrict your services to disabled people only.

Improving Access for people with disabilities

The Equality Act 2010 includes a duty to make reasonable adjustments to your services, facilities, goods etc. to improve access for disabled people. This includes adjusting your premises or providing additional special equipment.

Any community project should aim to be accessible to all, including people with disabilities and sensory impairments. This includes access to information, buildings and transport. Examine your practices and consider what steps you can take to ensure people with disabilities can participate.

For people with physical disabilities:

- Ensure that you choose a venue which is accessible to wheelchairs and people who have mobility difficulties: look for ramps, rails, wide doorways, disabled toilets etc.
- Disabled parking spaces should be available close to the doorway
- Provide accessible transport.

For people with visual impairments:

- Information and publicity can be produced in large print formats. Use of colour, contrast of print in relation to background, and bold print will affect the visibility of posters
- Radio and audio-tapes are more useful than written information
- Large visual symbols can replace text
- Room interiors are more navigable if distinctly different colours are used for walls, floors, doors, furniture etc.
- Strip lighting doesn't throw shadows and is therefore more helpful.

For people who are hard of hearing or deaf:

- When hiring a venue ask about facilities for people using hearing aids, for example, loop systems
- Information can be conveyed by a British Sign Language translator
- Provide pen and paper to assist people to communicate
- Use clear signs, both words and pictures, to inform.
-
- Training Advice is available from a range of organisations such as:
 -
 - RNIB
 - Action on Hearing Loss
 - Equality Commission
 - Disability Action NI.

9.3 Introduction of New Members - Checklist

New Member Induction

New Member Induction		
Persons Responsible/Meet and Greet		
Date Completed		
Comments		

What?	Who?	When and Where?	How?
The Organisation <ul style="list-style-type: none"> • Aims, philosophy, ethos • About the clients/customers • The kind of work done and why • How the clients benefit • Limitations of the organisation • Structure: departments/teams • Management • Importance of volunteers (volunteer policy). 			
The Building <ul style="list-style-type: none"> • Toilets, cloakrooms, parking etc. • Where to get tea/coffee (free?) • Facilities for volunteers – noticeboard, pigeon hole • Health and safety guidelines. 			
The Role <ul style="list-style-type: none"> • Volunteer's responsibility and boundaries with role • Line management • Days/hours reliability • Volunteer code of practice or guidelines and expectations • Likely problems and how to cope • System for reporting back • Insurance cover • Practical help and suggestions. 			
The Support System <ul style="list-style-type: none"> • Supervisors – who, where and when to find them • Support available • Supervision/support meetings • Resources, facilities, equipment • Training • Are out of pocket expenses paid? How? • Issues re: expenses and benefits • How are poor behaviour, performance, complaints and grievances handled? • Insurance cover for volunteers. 			
Fellow workers <ul style="list-style-type: none"> • Who and what they do • Team meetings • Working with others, diversity & equity • System for internal communication. 			
Other Informaion <ul style="list-style-type: none"> • Trial period • Confidentiality. 			

9.4 Training Opportunities

Committee Skills

No	Training course	Provider	Contact	Cost

Capacity Building

No	Training course	Provider	Contact	Cost

Health and Wellbeing

No	Training course	Provider	Contact	Cost

Others

No	Training course	Provider	Contact	Cost



Monitoring and Evaluating your Work

10 Monitoring and Evaluating your Work

10.1 Monitoring and Evaluating Progress

Monitoring and Evaluation is about asking questions, gathering evidence, analysing it and then being prepared to act on the results.

Having systems in place that will enable your group to monitor and evaluate its progress, are crucial to effective management. It is inevitable that your plans (either an overall business plan or a specific project plan) may need to be modified as you go along. Checking and assessing whether things are working as you had planned will also enable you to identify what works (and what does not) for the future.

Monitoring

Monitoring is required to ensure your group is working to plan, it also allows you to review how your business or project plan could be modified to incorporate changes or when you might have arrived at a new stage in development.

Monitoring needs to be done regularly and at specific times (daily, monthly, quarterly, annually). It is important that your group collects information in a planned, organised and routine way. This means collecting information as you go along, about your activities, how they are used, the number of times they are accessed etc and it also means taking into account factors which affect your organisation or project from outside.

By monitoring progress you remain in control of the project and will be able to:

- Compare progress to the specific measures or outputs you identified before starting and determine how well you are doing
- Report back to funders and supporters of the project in a meaningful way providing key information
- Chart the impact of any modifications you have made to your original proposal, looking at the difference you are making
- Improve your knowledge of the impact of your project.

Evaluation

Evaluation should be a practical process that helps you plan, reflect, learn and improve:

- How do you know what you are doing is working
- What could make it better
- What difference does your project make
- What is being achieved by your project and how
- What needs to be changed and how
- What do people think about you.

Monitoring and Evaluation will enable your group to review your:

- Mission statement - every two to three years
- Strategic aims - annually
- Objectives - every six months
- Accounts and balance sheet - annually
- Income and expenditure - monthly.



Useful Contacts

11 Useful Contacts

No	Topic area	Description	Contact details



Directory of Services for Older People

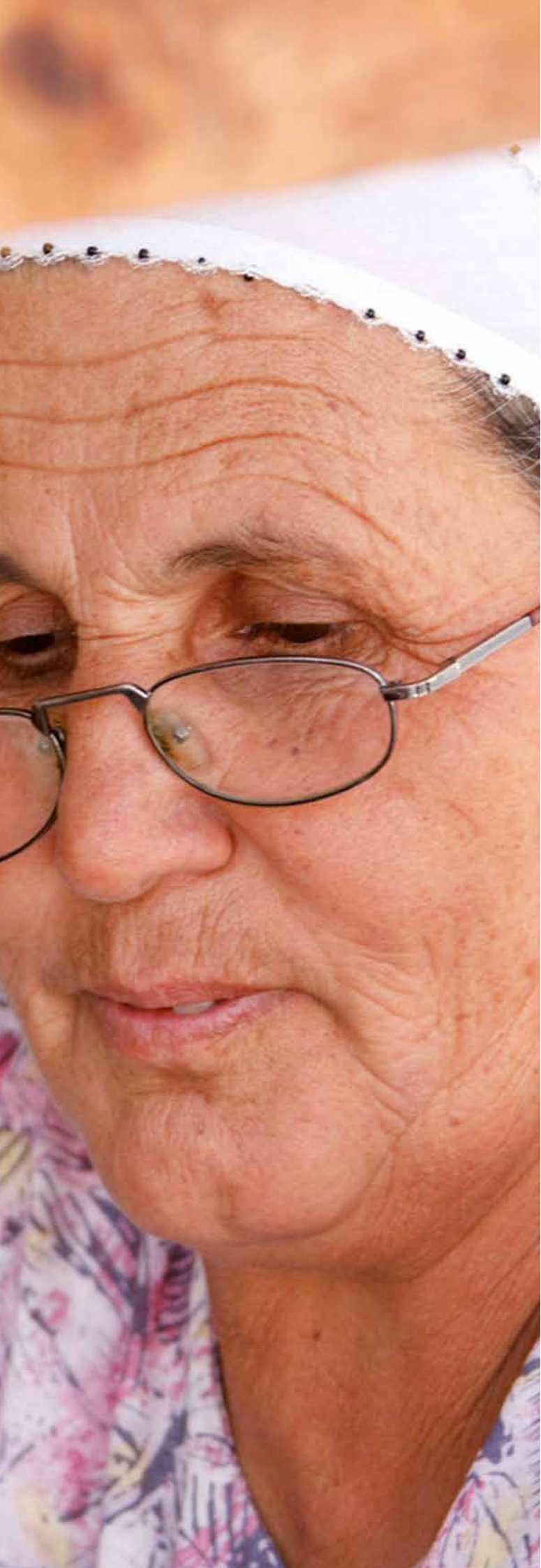
Your guide to programmes and services of interest to older people in the South Eastern HSC Trust area

Useful Contacts



The Directory of Services for Older People can be accessed online at:

website: www.setrust.hscni.net/healthliving/2825



Toolkit User Feedback Form

12 Toolkit User Feedback Form

12.1 Club Development Toolkit Questionnaire

If you have noticed an error or would like to suggest how to improve this toolkit please complete and return the user feedback form below.

Your name							
Organisation							
Position							
Contact details		Tel:			Email:		
Tick (✓ / Insert)							
Error	<input type="checkbox"/>	Change	<input type="checkbox"/>	Add	<input type="checkbox"/>	Remove	<input type="checkbox"/>
Insert Text/Comments							

Complete and return to:

Wendy McDowell
 c/o Health Development Department
 Level 5
 Lisburn Health Centre
 Linenhall Street
 Lisburn
 BT28 1LU

✉ email: wendy.mcdowell2@setrust.hscni.net



Appendices

Any Town Club

**Wednesday 26 September 2014 10.00am - 11.30am
Meeting Room, Any Town Health Centre**

Subject: Club Development Toolkit 'Older People'

Any Town Club

Parish Hall

5 Main Street

Any Town

BT24 6XL

Tel: (028) 1234 5678 Mob: 07801 234 567

email: secretary@anytownclub.com

1.0 Welcome and Apologies.

2.0 Previous Minutes.

3.0 Club Development Toolkit.

- First draft content
- Training in the use of the toolkit/best point of support for groups
- Promotion/Roll out.

4.0 Moving forward/Actions.

5.0 Any other Business.

6.0 Date and time of next meeting.

Appendix 2 Minutes of Meeting Template

Any Town Club

Minutes of Meeting

Wednesday 26 September 2014 10.00am – 11.30am
Meeting Room, Any Town Health Centre

Subject: Club Development Toolkit 'Older People'

Any Town Club

Parish Hall, 5 Main Street, Any Town, BT24 6XL

Tel: (028) 1234 5678 Mob: 07801 234 567

email: secretary@anytownclub.com

Present:

I M Equal, Diversity Officer, Any Town City Council
Kep Fitt, Health Development Specialist
Wee R. Together, Community Development Worker
Oonagh Script, Secretary
Callto Order, Chair
Always There, Member

Apologies:

Mist. Oute, Recruitment Officer
Daphne Absent, Publications Officer
Never Here, Member
Comin Nextime, Member

1.0 Welcome/Introductions/Apologies

Callto welcomed everyone to the meeting and apologies were noted.

2.0 Minutes of Previous Meeting

Previous minutes discussed and agreed

3.0 Action Club Development Toolkit

- First Draft Content

Keep highlighted the compilation of the toolkit to date and some discussion took place around the appropriateness of the toolkit to the various groups. Oonagh was concerned that the toolkit would be off putting to smaller groups as it was so comprehensive. The group discussed the option of developing a modified toolkit. There was some concern over the time involved for developing this however the consensus was that we should proceed with this.

Develop a modified toolkit

4.0 Action Moving Forward / Actions

Oonagh agreed to liaise with Daphne and the printer regarding outstanding templates and policies.

The timeline for completion is pre Christmas 2014.

5.0 Any Other Business

N/A

6.0 Date of Next Meeting

Next meeting is on Thursday 25 October 2014 at 10.00am Meeting Room, Any Town Health Centre.

Minutes Agreed: Chairman (Signature) _____

Proposed (Signature) _____

Seconded (Signature) _____

Appendix 3 Skills Audit Template

The responsibilities of the management committee vary widely and it is unlikely that each member will possess all the skills, experience and knowledge required.

A Skills Audit may include the following areas:

Area/Subject	Who
Chairing	
Employment issues/Practice	
Evaluation and Monitoring	
Financial Management	
Fundraising	
Legal Awareness	
Leadership	
Media	
Minute taking	
Networking and Public speaking	
Organising events	
Policy making	
Promotion and Marketing	
Volunteering	
Other	

Appendix 4 Accident Report Form Template

Name of Club/Group	
Person in attendance	

Injured Party	
Name	
Home address	

Accident Details	
Form completed by	
Date	Exact location
Time	Time reported
Reported by who?	
Nature of Injury	How accident happened Describe what activity was taking place eg. training/game/getting changed
Name and contact details of witnesses	
First aid involved?	Yes <input type="checkbox"/> No <input type="checkbox"/>

Were the following contacted?	Police <input type="checkbox"/> Ambulance <input type="checkbox"/>
Emergency contact person informed? Yes <input type="checkbox"/> No <input type="checkbox"/>	By whom?
	When?
Referred to designated person?	Yes <input type="checkbox"/> No <input type="checkbox"/>
Designated person's signature	Date
Any further action to be taken?	
Has person returned to <i>(Name of club)</i> Yes <input type="checkbox"/> No <input type="checkbox"/>	Signature of management representative
	Print name Position

All of the above facts are a true record of the accident/incident.

Signed Date

Name

Appendix 5 Risk Assessment Form Template

Describe the area/role this assessment covers:		How can you manage these risks?					REVIEW
MAIN RISKS to people, property and/or organisation's work and reputation	Evaluate the seriousness of these risks:						
	Likelihood of risk High/Medium/Low	Magnitude of risk High/Medium/Low					
a)			1. Stop the Activity Action needed/ Mitigating factors:	2. Reduce the risk/ Minimise the harm Action needed/ Mitigating factors:	3. Finance the Risk Action needed/ Mitigating factors:	4. Transfer the liability Action needed/ Mitigating factors:	How and when will you review the risks in this area?
b)							
c)							
d)							
e)							

Appendix 6 Volunteer Expenses Claim Form

Name:	
Address:	

Dates	Destination and Purpose	Mode of transport	Mileage	Expenses
TOTAL MILES				

FINANCE USE ONLY:	TOTAL MILES	AGREED RATE	TOTAL
TOTAL MILEAGE			
TOTAL EXPENSES			
TO BE PAID:			

NOTES

Volunteer Signature: _____ **Date:** _____

Authorised Signature: _____ **Date:** _____



Appendix 7 Promoting Your Club

PROMOTING YOUR CLUB: Your Club Name (2014 - 2015)	
Marketing Theme: To promote the club and recruit new members	
Category	Strategy
The aim for your club/ group:	<ul style="list-style-type: none"> • Provide company, support to those 50+.
What is the unique attraction?	<ul style="list-style-type: none"> • Friendliness, approachability • Useful talks, events, presentations • Empower members to contribute to local community • Local venue(s) • Meeting room with kitchen facilities • Working day and other times events.
Our ideal member(s) are:	<ul style="list-style-type: none"> • 50 - 70 years old • Come from a cross section of society • Opportunities to meet new friends.
What's most important to our ideal member/client regarding us?	<ul style="list-style-type: none"> • To be relevant to their needs.
What do we want to accomplish this year?	<ul style="list-style-type: none"> • 20 new members • Appeal retirees/stay-at-homes and working people • Event every 2 weeks • Promotion within a 20 mile radius.
The top 3 things that are going to get me there:	<ul style="list-style-type: none"> • Personal referral by members • Flyers/Posters in local towns • Local newsletter/radio articles.
How/how much will each activity contribute to our goals/revenue/ profitability:	<ul style="list-style-type: none"> • Personal invitations to events – 60% • Raise awareness leading to telephone / online enquiry – 25% • Reach a broader audience – 15%.
What will trigger my ideal customer/client to think of me:	<ul style="list-style-type: none"> • Being stuck at home and wanting to get out • Curiosity • Relevance of the events • Contribute to local community.
Programmes we are running to reach my goal	<ul style="list-style-type: none"> • Open house events • Varied programme of talks/activities/outings (reflecting the community survey 2013 - 2014).
How much money will we need to get it done?	<ul style="list-style-type: none"> • Flyers/Posters in local towns £400 • Local newsletter/radio articles £600 • Events/outings £2,000.
How will we measure success?	<ul style="list-style-type: none"> • Increase in membership numbers • Increase in new members or past members.

Appendix 8 Club Action Plan Template

Draft Action Plan

No.	Topic Area/ Objective	Current Issue	Action Planned	Action Achieved/Outcome	Target Date By whom	Status

Symbols used to indicate achievability status

Achievable – on course to achieve target

Doubtful – Effort required/behind schedule in achieving target

Not Achievable – Target not achievable or serious concern/major effort required to achieve target

Achieved – Target achieved

Appendix 9 Attendance Register Template

No	Name	Signature	Phone	Email
1				
2				
3				
4				
5				
6				
7				
8				
9				
10				
11				
12				
13				
14				
15				
16				
17				
18				
19				
20				

Appendix 10 Programme of Events Template

No	Month/Details												
	Event	Jan	Feb	Mar	Apr	May	Jun	July	Aug	Sept	Oct	Nov	Dec
1	Older Peoples Day												
2	Quit Smoking			13 th									
3	Falls Week						Falls Week						
4	Carers Week						Carers Week						
5	Older Peoples Day									1 st			
6	Healthzone Newsletter												
7	Food Safety Week						10 th - 16 th						
8													
9													
10													
11													
12													

Appendix 11 Hobbies, Crafts, Activities Template

Insert Title: Health and Wellbeing

No	Name/Company	Activity	Phone	Email	Cost
1					
2					
3					
4					
5					
6					
7					
8					
9					
10					
11					
12					
13					
14					
15					
16					
17					
18					
19					
20					

Appendix 12 Evaluation Form Samples - Template

Moira Friendship Group

Evaluation Form

We would be grateful if you would take some time to complete this evaluation. Your response will help us to evaluate the success of the programme.

**Please rate using the following scale
0 = Poor 5 = Excellent**

Programme Title _____ Date _____

1. How would you rate the following (please tick)

	0	1	2	3	4	5
1. How would you rate the quality of the programme?						
2. How would you rate the performance of the facilitator?						
3. How would you rate the access to the Venue?						
4. How would you rate the comfort of the Venue?						
5. How would you rate the timing of the event?						
6. How do you feel it has improved your health?						

2. Have you used the services of Moira Friendship Group in the past?

Yes No

3. Have you experienced any of the following benefits since participating in the Active Lifestyles Programme?

- Sleeping better
- Improved Energy
- Improved Mood
- Weight Management
- Decreased Stress Levels
- Improved Physical Health

Other - Please specify

4. How many days of the week would you have participated in 30 minutes of physical activity before this programme and then after this programme?

	Before	After
Once a week	<input type="checkbox"/>	<input type="checkbox"/>
Two days a week	<input type="checkbox"/>	<input type="checkbox"/>
Three days a week	<input type="checkbox"/>	<input type="checkbox"/>
Four days a week	<input type="checkbox"/>	<input type="checkbox"/>
Five days a week	<input type="checkbox"/>	<input type="checkbox"/>
Six days a week	<input type="checkbox"/>	<input type="checkbox"/>
Everyday	<input type="checkbox"/>	<input type="checkbox"/>
Never	<input type="checkbox"/>	<input type="checkbox"/>

5. Please indicate how you heard about this programme

Moirra Friendship Group Member	<input type="checkbox"/>
Local Press	<input type="checkbox"/>
Information Leaflet	<input type="checkbox"/>
Word of Mouth	<input type="checkbox"/>
Other (please specify)	<input type="checkbox"/>

6. Any additional comments?

7. Do you have any further suggestions for this programme or others?

Thank you very much for your co-operation.

Course No 1 Year 2013
Course Title....On Your Feet Dance Award

Venue... Ballywalter Village Hall

Section A: Your views

Q1. Overall, how would you rate the course in terms of the following?

Please tick one box for each option

	Very Good	Good	Average	Poor	Very Poor
Location					
Length of course					
Training provider					
Venue					
Food					
Refreshments					

Q2. How would you rate the information provided during training?

Please tick one box for each option

	Very Good	Good	Average	Poor	Very Poor
Amount of detail provided					
Ease of understanding					
Presentation					
Relevance					

Q3. How would you rate the trainers in terms of the following?

Please tick one box for each option

	Very Good	Good	Average	Poor	Very Poor
Subject knowledge					
Demonstrations					
Organisation and planning					
Helpfulness					

Q4. After attending training, how would you rate your current levels of confidence, knowledge and skills in relation to delivering this activity?

Please tick one box for each option

	Very High	High	Moderate	Low	Very Low
Subject knowledge	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Practical ability to deliver activities	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Confidence to deliver a class	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Section B: Starting a Dance Class

Q5. How easy or difficult would it now be to offer this activity?

Please tick one box for each option

Very easy Easy Difficult Very difficult Don't know

Q6. Do you require further advice or support? Yes No

If Yes what support do you require?

Q7. How do you intend using your new qualification?

Q8. Please provide us with any additional comments or views you might have on this training.

Print Name _____

Signed _____

Date _____

Thank you for taking the time to complete this important questionnaire.

Please return to Paula Hookings:

✉email: health.development@setrust.hscni.net

Thank you to all our partners

 <p>MOIRA FRIENDSHIP GROUP</p>	 <p>LCCC Lisburn & Castlereagh City Council</p>	
	 <p>nicva</p>	 <p>VOLUNTEER NOW <i>connect · build · change</i></p>

