

# Setting Yourself Up

Setting up a new group or organisation will involve a variety of work and there are a number of things you will need to consider. The more aware of what you need to do the easier the task will be. Forethought and good planning at this stage can save a lot of wasted effort or work later. There are a lot of people with the expertise you need who can advise you and agencies that can help you. It has all been done before so you should be able to build on other peoples experience and resources.

How you organise yourselves is up to you but there is recognised good practice and those your organisation needs to work with (like your bank manager, funders, members and the Inland Revenue) may have requirements that you have to work within.

You may already have got a lot of work done in setting yourselves up. However it is good to check that there are not things you are missing or a better way of going about what you are setting out to do. Have a look at the list of questions below if only to reassure yourself that you have got it all set up right.

## Key Questions

### What do we want to do?

What exactly will the group, that you are setting up, do. Is it just for those involved, its members, like 'a photography club'? Is there a service you are offering to the community at large, like 'counselling for the bereaved'? What do you aim to accomplish? How will you know if you are being successful?

### Where do we want to do it?

Where are you going to be based? What area will your organisation cover - geographical or other (e.g. collectors of orchids, those with Sickle Cell Anaemia)? You could start locally and gradually expand rather than take too much on from the start.

### Who do we want to do it with?

Who are your potential customers or members? Do they want what you are offering? Is there a proven need for what you intend to provide. You may be the only ones interested in 'parascending' in your area.

### Are we overlapping with other groups?

Are there organisations that already offer what you intend to provide? Duplicating a service can be expensive, a waste of resources and create ill feeling with those you compete with. Funders will not want to be a part of that. Joining an existing organisation and working with them saves a lot of hard work setting yourselves up and getting everything off the ground.

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## Could we work in partnership with any other groups or organisations?

If there are groups already doing something similar you might work together to develop something new or set up a group for them in your area if they do not already reach there. You might share resources, premises and expertise.

## Do we have the time, energy, and commitment to do the work ourselves?

You may already have a core group of people who want to come together to form this organisation. If you all have the time, energy and commitment to do everything yourselves you can get going. If you need a lot more volunteers or other expertise you will have to be sure you can get this help. There are dangers of just getting together a team of planners who are not able to do the work themselves, or equally a group of capable volunteers with no one who has leadership or management skills.

Community pages in local newspapers, local radio, notice boards in community buildings, libraries, schools, colleges, and health centres are all good places to let people know what you are doing and to ask for people to join in.

## Do we have a plan for action?

If everyone does what they want to do it is unlikely that the whole job of setting up your organisation will get done. You need to be clear about all the jobs you will need to do and who is going to take on what. It is important to know when people are going to get these jobs done by and what help or support they will need to complete these tasks.

A Plan of Action will tell your members, supporters, and other interested people, what you are doing, why, and how you will go about it. You will need a plan if you apply for a grant.

Your plan should explain:

- What your group intends to do – Objectives
- How it intends to do it – Methods
- The resources it has available (e.g. people's time and support; any special skills; money; equipment; use of premises etc.)
- Any further resources it needs, and how it hopes to find them (e.g. by finding volunteers or raising money)
- How soon it hopes to do things - Timetable.

Drawing up a plan will help you to decide on priorities. For example, it might show that you have the resources to start one youth club, but not both; or that you need more money before you recruit more volunteers.

The plan will also mean that you can measure your achievements because you will be able to compare what you planned with what the organisation has actually done.

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## Do we need a Constitution?

Everyone will have different ideas about what your organisation is doing and how to go about it. If you do not have a set of rules you might be surprised to find you are all pulling in different directions and trying to achieve different things. Getting a constitution gets everyone clear about what you intend to do. Lots of constitutions have been written before and to get one off the shelf rather than invent it all yourself works for most groups. It ensures that important bits are not left out and it is an opportunity for everything you need to think about to get discussed.

## Do we need a Committee?

A constitution usually defines the governing body of an organisation as a Committee. You will at least need someone to Chair the meetings, someone to write down what happens at meetings a Secretary and someone who looks after the money, a Treasurer. You can add other Committee Members with or without specific roles and duties.

## What is a General Meeting?

All those involved in an organisation are usually members. Since it is run for them it is they who usually ultimately say how it is all organised. At the first General Meeting you should adopt your constitution and elect the Committee Members and Officers. You will normally have at least one General Meeting (Annual General Meeting) a year to complete business, authorise what the committee does and elect members and officers for the Committee for the forthcoming year.

## Do we need a Bank Account?

You will need to have a way of handling your groups money. For this reason it is useful to open a bank account. The account should be opened in the name of the group and should have 2 signatories for all cheques. It is often a good idea for groups to have 3 or 4 signatories on an account of whom any 2 can sign cheques to cover when committee members are on holiday or unable to sign cheques for the group.

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## Do we need to consider equal opportunities?

It is good practice to consider equal opportunities before applying for funding. A funder may ask to see your Equal Opportunities policy statement and if you do not have one or worse still never considered the issues involved it could mean your application is rejected out of hand. This would waste a lot of effort. It would be good to discuss Equal Opportunities rather than just borrow someone else's policy statement so that you explore what issues of ethnicity/race, religion, gender and sexuality, ability/disability, age etc. are relevant to your group or organisation. When these have been discussed referring to a draft policy from elsewhere may be helpful in identifying issues you might have missed.

## Does our work involve children and young people or vulnerable adults?

It is a requirement by law that those who work with children, young people and vulnerable adults are checked by their employer or the organisation they undertake work for, as a volunteer.

## The Criminal Records Bureau (CRB) - Disclosure service

The CRB Disclosure service provides a regulated 'one stop' service for England and Wales offering access to records held by the police, together with those held by the Department of Health (DH) and the Department for Education and Skills (DfES).

The Disclosure service enables organisations to make more thorough recruitment checks, particularly for positions that involve regular contact with children and vulnerable adults.

There is help and information about related matters on the Disclosure service website is at:

[www.crb.gov.uk](http://www.crb.gov.uk)

## Child Protection Policy

For advice on good practice, consult either the Every Child Matters Website ([www.everychildmatters.gov.uk](http://www.everychildmatters.gov.uk)) or the National Council of Voluntary Child Care Organisations ([www.ncvcco.org](http://www.ncvcco.org), 0207 833 3319) who have produced 'Positively Safe: a guide to developing safeguarding procedures', published 2005.

## Other help

Further help with setting up Community Groups and Voluntary Organisations can be gained from your local Infrastructure Organisation (LIO) (ie Community Action Voluntary Action, Council for Voluntary Service). To contact your local LIO go to the NAVCA website [www.navca.org.uk](http://www.navca.org.uk) to find their details. Your local LIO or Council will be able to tell you how you can find out about grants from local trusts, your local council and other local sources.