

ADP/WALCOT FOUNDATION RESOURCE LIBRARY

This resource library has been set up to provide access to information and resources for organisations funded by the Walcot Foundation as part of the capacity building project delivered by ADP Consultancy.

The information and resources are intended to supplement the support provided by ADP Consultancy and to act as an introduction to the different areas of support. ADP will continue to add new resources and new sections to the library.

You can access each section of the resource library by clicking on the section heading.

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- D. Financial Planning & Management**
- E. Funding & Fundraising**
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- A. **Starting up**
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A. Starting up

This section provides information that may help you when starting up your organisation.

A.1 Voluntary Works

Voluntary Works is an organisation based in Bedford that works to represent the voluntary and community sector and support organisational development. It provides information on its website about Developing Your Organisation [<http://bit.ly/WnHyIX>].

A.2 Voluntary Action Lewisham

Voluntary Action Lewisham has produced an introductory Start-Up Guide [<http://bit.ly/QtFNw>] for people thinking of starting up a voluntary organisation. It provides information on the types of things you will need to do and provides information on other resources that are available.

A.3 Directory of Social Change – Voluntary but not Amateur

DSC produces a guide to the law for voluntary and community groups – Voluntary but not Amateur [<http://bit.ly/TrONRZ>] that includes a section on starting up. The guide costs around £35. The guide is currently being updated.

A.4 Russell-Cooke Voluntary Sector Legal Handbook

The Voluntary Sector Legal Handbook provides a comprehensive guide to a range of issues affecting voluntary and community organisations including setting up an organisation; governance and membership; running an organisation; finance; funding and fundraising. The 3rd Edition of the Handbook is available from DSC [] and costs £60. Part of the section on setting up an organisation [<http://bit.ly/WnPHE5>] is available free on the DSC website.

A.5 NCVO – Know How Non Profit

The NCVO Know How Non Profit website provides a range of information about the voluntary and community sector. The site provides an Introduction to the non profit sector [<http://bit.ly/XcFJVr>] and provides a forum for people Setting Up An Organisation [<http://bit.ly/P4dd93>].

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B. Legal Structures

This section provides information on the range of legal structures that can be used when developing a voluntary and community organisation. General information is provided on the range of legal structures available. More detailed information on the information structures can be accessed

B.1 ADP Legal Structures Workshop PowerPoint

ADP carried out a workshop on Legal Structures [Link to PowerPoint] that provided an introduction to the range of legal structures available. The notes provide a basic introduction to the different legal structures that voluntary and community organisations may decide to use. [<http://bit.ly/XVVnZy>]

B.2 NCVO – Get Legal

NCVO in partnership with Bates Wells and Braithwaite solicitors has developed Get Legal decision tool to provide organisations with an indicator of an appropriate legal form for them before signposting them to other resources to help make their decision. The site should be used as a starting point and further research and advice should be sought before making a final decision. The Get Legal [<http://bit.ly/P4bz7f>] tool is available on the NCVO website.

B.3 Resource Centre Route Map

The Resource Centre based in Brighton & Hove has developed a route map [<http://bit.ly/RwpXUM>] to help organisations decide on the most appropriate structure along with a basic introductory guide to the different structures.

B.4 DIY Committee Guide – Understanding your legal structure

The DIY Committee Guide website provides a range of information resources for those involved in running voluntary and community organisations including a section on Understanding Your Legal Structure [<http://bit.ly/R6EF2U>]. The site is produced by Volunteer Now in partnership with the Developing Governance Group [<http://www.diycommitteeguide.org/>]. The site focuses on Northern Ireland and information should be checked to ensure it is compatible with the law in England.

B.5 NCVO – Setting Up A Charity

The NCVO website has a section on Setting Up A Charity [<http://bit.ly/Pxgn4V>] that outlines things to consider before setting up a charity and why an organisation may decide to become a charity. The Charity Commission website [<http://bit.ly/QGGToH>] provides information on submitting an application but does not provide information on whether it is the right direction for an organisation.

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B. Legal Structures continued

B.6 Guardian – Setting up a charity Q&A

As part of our series of pieces giving legal advice to the voluntary sector the Guardian website explains what you need to know when setting up a charity in a useful question and answer format [<http://bit.ly/Qh5hMm>].

B.7 Charity Commission – Public Benefit

The Charity Commission website provides a guide to Charities and Public Benefit [<http://bit.ly/TTcjNv>] and what organisation's and charities should consider in order to demonstrate that their aims are for the public benefit and meet the Public Benefit requirement.

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C. Planning

This section provides information and resources regarding planning the work of organisations. It focuses on strategic and business planning and provides access to resources that will assist organisations to be clear about the direction they are going.

C.1 NCVO – Strategic Planning

The NCVO website's Strategic Planning section [<http://bit.ly/R6JZDd>] provides information on strategic planning for voluntary and community organisations. It provides information on how to develop a strategic plan; considers the four main phases of strategic planning and how to make the most of the process.

C.2 Business Link – Strategic Planning

The Business Link website provides information on Strategic Planning [<http://bit.ly/OBxEsi>]. The guide sets out the basics of the strategic planning process. It explains how to go about drawing up a strategic plan, it highlights some important issues to bear in mind and it shows how to turn from planning to implementation.

C.3 Business Link – Business Planning and Template

The Business Link website provides information on Business Planning [<http://bit.ly/OBxEsi>], defining short to medium time goals and identifying the steps necessary to achieve them. The site provides a basic introduction to business planning and provides a template for developing a plan.

C.4 Community Matters – Can You Plan It?

The Community Matters – Can You Plan It? [<http://bit.ly/RLDzc3>] provides a scenario-based online resource to assist organisations to plan their activities. The resource can be used as a standalone resource which is free to download from the Community Matters website or with support from a facilitator, for which a fee is payable.

C.5 NAVCA – Creating Successful Business Plans – e learning and information materials

NAVCA has produced an e learning package and information materials based on its training course 'Every Business Matters' [<http://bit.ly/RLF8a6>] that provides an introduction to business planning and an outline of the main stages involved.

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C. Planning continued

C.6 Directory of Social Change – The Complete Guide to Business and Strategic Planning for Voluntary Organisations

DSC has produced a book The Complete Guide to Business and Strategic Planning for Voluntary Organisations [<http://bit.ly/QhTzRD>] that provides an introduction to planning as well as a number of templates to help organisations develop their plans. The book costs £19.95 and is available from the DSC website.

C.7 Business Plan templates

There are a wide range of templates available on the internet to assist organisations to develop a business plan. Some examples include:

- [Red Ochre/Business Link – Writing a Business Plan](http://bit.ly/RwLrO6) [<http://bit.ly/RwLrO6>]
- [Community & Voluntary Service: Mid & North Bedfordshire – How to produce a development of business plan for your organisation](http://bit.ly/SXHDZw) [<http://bit.ly/SXHDZw>]
- [Big Lottery Scotland – Your Business Plan](http://bit.ly/QphAIK) [<http://bit.ly/QphAIK>]
- [Big Lottery – Business Planning](http://bit.ly/SXIf1n) [<http://bit.ly/SXIf1n>]

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D. Financial Planning & Management

This section provides resources on financial planning and management. It deals with budgeting and financial reporting and provides information on Full-Cost Recovery. See the section on Funding and Fundraising for resources relating to planning and raising funds.

D.1 Mango's Guide to Financial Management for NGOs

Mango, a UK-based charity working to strengthen the financial management and accountability of Non Government Organisations has produced a comprehensive online Guide to Financial Management [<http://bit.ly/USrFmi>]. The guide includes Top Tips for Financial Management [<http://bit.ly/Wt2QvJ>] and a section on Financial Sustainability [<http://bit.ly/TpV7d2>]

D.2 CASH On-line Factsheets

The CASH On-line website has over 20 factsheets that provide information on a wide range of financial planning and management issues including budgeting [<http://bit.ly/Pznutl>], full-cost recovery [<http://bit.ly/Rx5DPY>] and financial controls [<http://bit.ly/S12Sc4>].

D.3 Community Accounting Plus

The Community Accounting Plus website [<http://bit.ly/Rx6z7b>] provides a range of resources relating to financial management including pricing, costing and budgeting; cashflow; reserves and accounting jargon.

D.4 Full Cost Recovery

There are a number of websites that provide information on full cost recovery. These include:

- **Acevo** – Full Cost Solutions [<http://bit.ly/T7JkWg>]
- **Big Lottery** – Full Cost Recovery [<http://bit.ly/Wt7zxk>]
- **NCVO** – Full Cost Recovery [<http://bit.ly/QNzggg>]

ADP has produced a Costing Model for Projects that provides a template for organisations to use in developing their budgets using the process of full cost recovery.

D.5 Charity Commission - SORP, Charity Accounts and Reports: What you need to know

The Charity Commission website provides a guide to the Statement of Recommended Practice (SORP) and what charities need to do in relation to submitting accounts and financial reports [<http://bit.ly/QlFBht>].

E. Funding & Fundraising

This section provides information and resources in relation to both identifying sources of funding and submitting applications.

E.1 Sources of funding

- **Funding Central** - an NCVO website that provides information on funding and finance opportunities and a range of tools and resources relating to funding and other financial issues [<http://bit.ly/OEjB5h>]
- **GrantNet** – information on 5,000 funding schemes that are available in the UK from European and national sources, directed at the public, private, charitable, and voluntary and community sectors [<http://bit.ly/R7UuGq>].
- **Government funding** – the Government funding website from Directory of Social Change provides information on a range of funding sources [<http://bit.ly/R7UB4S>].
- **Trust funding** – the Trust funding website from Directory of Social Change provides information on over 4,000 trusts [<http://bit.ly/T7NkWX>].

E.2 Fundraising strategies and other information on funding

A number of organisations have provide resources on developing fundraising strategies. These include:

- **NCVO** – Fundraising Strategy Essentials [<http://bit.ly/SXMFFp>]
- **NCVO** – Sustainable Funding Project [<http://bit.ly/T7MJVc>]
- **Charity fundraising Ltd** – Fundraising Strategy [<http://bit.ly/P6N21q>]
- **Voscur** – Writing a Fundraising Strategy [<http://bit.ly/R7VgDg>]
- **Dummies.com** – Fundraising for Dummies [<http://bit.ly/P6OxwB>]

E.3 ADP fundraising strategy template

ADP has produced an template for organisations to support the development of a fundraising strategy [<http://bit.ly/UnPJvd>].

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F. Governance

This section provides information on resources available on the governance of voluntary organisations including information about trustees and committees.

F.1 NCVO – Good Trustee Guide

NCVO has produced a guide that provides information on the duties and responsibilities of trustees; committee structures; good governance; board development and improving governance. The guide is priced £25. A list of the contents and a sample chapter on the essentials is available on the NCVO website [<http://bit.ly/QmfUNH>].

F.2 Charity Commission – Good Governance: A code for the voluntary and community sector

The Charity Commission has produced a code for the governance of the voluntary and community sector [<http://bit.ly/Xig3XE>]. The code is written by the sector and is based on six key principles.

F.3 VolResource website

The Volresource.org.uk website [<http://bit.ly/R2BWcb>] provides a range of information for voluntary and community organisations including resources on trustees, committees and governance.

F.4 Governance Pages

The Governance Pages website [<http://bit.ly/R2CnTM>] provides a wide range of resources on a range of issues including recruiting Trustees; staff and Trustees working together; chairing and taking rough decisions.

F.5 TrusteElearning website

The TrusteElearning website [<http://bit.ly/RPkfe7>] provide a range of elearning training courses for trustees of voluntary organisations and those interested in becoming trustees. The courses include introductions to being a trustee; building an effective board; good governance; effective meetings; financial management; managing people and complying with the law. Courses are free but learners are required to register to access them.

F.6 Board skills surveys and audits

There are a range of board skills surveys and audits available online. Some examples include:

- **Governance Pages – Skills Audit** [<http://bit.ly/V4fqOz>]
- **Trustee Works – Skills Audit** [<http://bit.ly/PzLKfe>]

G. Monitoring & Evaluation

This section provides information on resources relating to the monitoring and evaluation of services. It includes information on identifying potential outputs and outcomes and how to monitor the work projects and to demonstrate the impact on users.

G.1 Walcot Foundation - Long Term Monitoring of Project Beneficiaries

The Walcot Foundation has developed a long-term monitoring process for use by organisations to monitor the impact of their work on beneficiaries. [Link to file]

G.2 Measuring outcomes and impact

A wide range of information is available online about collecting outcomes, impact and monitoring and evaluation. These include:

- **Advice Services Alliance** – How to measure client outcomes [<http://bit.ly/SY4Tqk>]
- **NCVO** – Impact tools [<http://bit.ly/Tqqd4p>]
- **CES - Prove and Improve** [<http://bit.ly/Tqt11o>]
- **KnowHow NonProfit** – Monitoring and Evaluation [<http://bit.ly/RxLnxR>]