Contents

Introduction

Welcome to the Wolverhampton Guide for **Small Groups**

This Guide explains what you need to know when setting up and running a local group, charity or enterprise.

All groups want to do their best for the people they help as well as their staff and volunteers - they want to make a real difference. Groups also know that they also need to stay safe and within the law. This Guide explains how.

Don't be put off by the number of pages in this Guide. You can work on developing your group bit by bit over time. Simple, small actions will add up to make a big difference.

If the Guide is used well, it will:

- ■ save time and effort in the long run.
- ■ cover some basic quality standards, recommended to make you more effective and funding ready.
- ■ help you offer an even better service to your community and staff and volunteers.

Many community groups tested the Guide and their ideas are included.

We hope you enjoy using the Guide and find it really helpful.

How to use the Guide

Contents

The Guide is split into short sections covering all the basics.

We start with an introduction and how to use this guide, plus a Jargon explained section.

After the introduction the main sections are:

1. **Getting Started**
2. **Planning**
3. **Funding**
4. **Finance**
5. **People**
6. **Policies**

We finish with the contact details of Wolverhampton support organisations, more background on the Guide and our thanks and credits.

Each section starts with a checklist, followed by 3 steps you can work through bit by bit with your group.

Checklist and Steps

The checklist shows the steps you need to tackle, with space to list what you need to do.

There are three steps which make the actions more manageable. You don't have to do everything instantly, just work through steadily in order to develop your group.

You can use the Jargon explained section to look up any unfamiliar words or ideas right from the start.

More information

Look out for the boxes with extra information and explanations. They will help if you want to know a bit more.

> **Extra information - Funding**
> Use me if you want to know more about …

Evidence

If you have a ringbinder file, you can use the Guide as an evidence file. Put your key documents in the same file or make a note of where you can find them (e.g. in the filing cabinet). You will then have the information and evidence ready in one place. This saves time when you need it for filling in forms or sharing with funders.

Templates

For the finance section we have created a separate template (model) of various budget spreadsheets. Contact the support organisations, page 54, and they will send you a website link to the template.

Jargon

Jargon - specialist or unusual words - is shown by words in black ***bold italics***. Look up the explanation at the front of this Guide, just after this section, on page 6.

Internet links

If you are using a computer, you can click on the links, shown in **blue underline**.

If you are using a paper copy, the full link is shown at the end of the relevant section.

If you don't have a computer, you can use your library
or contact the organisations on page 54 for help.

More Help

You can go through this Guide with your group on your own or with the support organisations on page 54. They can help or may suggest another organisation that can help, depending on your needs.

If you are a **medium/large scale organisation** and you feel you can move on from this Guide, there is another Guide called the **Firm Foundations Toolkit** . Look at the website and contact the Development Worker at WVSC on 01902 773 761 or **info@wolverhamptonvsc.org.uk** for more information.

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Jargon Explained

Here we explain specialist or unusual words that you may need to recognise or use. They are explanations, not official definitions.

You do not need to read through this section - it is just for reference and is in alphabetical order. When you come across any jargon or new ideas in the Guide, simply look them up here.

Account Book or Cash Account Book	Used to keep a log of your financial transactions (money coming in and money paid out). Can be a paper copy or an electronic spreadsheet (grid) e.g. Excel.
Action Plan	List of actions, people involved and calendar dates so you can plan and check that you are achieving what you need to.
Agenda	List of items/headings to discuss at Committee Meetings. Usually agreed beforehand. When you write up notes from the meeting, put them under the agenda headings.
(Overall) Aims or Mission	Why your group or project exists and the overall change you want to bring about e.g. Beacon Centre for the Blind "We're here to help local people with sight loss live fuller and more independent lives by offering them the finest facilities and support".
(Specific) Aims	Particular changes or differences your project or organisation plans to bring about for its users.
Annual Accounts Annual Return	A yearly report summarising the changes in your finances. An annual return covers all the documents you need to accompany the accounts.
Annual General Meeting (AGM)	Members meeting held once every year to review the year and vote in the Committee.
Appraisal (Performance Appraisal)	An annual review where the employee and their line manager think about the work, achievements and learning over the year (or a set time period).
Assets	Property or equipment that has a value and could be used to meet debts, commitments, or legacies.
Beneficiaries	The people or group your work benefits or helps. A shorthand term often used by funders.
Budget	A financial plan - the income (money coming in) you will need and expenditure (money paid out) you will make
Cashflow Forecast	Prediction of your income and expenditure at any month. Used to ensure your cashflow is sufficient to always pay your bills and run your project.
Committee	Members who take responsibility for leading your group. Voted in each year by all of your members.
Communications	Sharing or exchanging information or news.
Communications Database - WVSC	To apply to go on the database and receive the weekly newsletter with details of funding opportunities, contact Wolverhampton Voluntary Sector Council on **info@wolverhamptonvsc.org.uk** or call 01902 773761. They will send you a database registration form to complete.
Community or 'Community of benefit'	A community is usually a group of people in a neighbourhood or place. A 'community of benefit' comes from an interest or common factor e.g. young people, refugees, people with learning difficulties.
Consortia	A group of organisations that get together/form an association for a particular purpose.
Constitution	A document explaining the purpose of your group, your aims and your management rules, including your Committee or Board arrangements.
Cost-effective	Checking that the benefits you gain are worth the costs you incur.

Discrimination	Treating a person less favourably because they are perceived to have a certain characteristic e.g. not recruiting someone because you think they are an older person. Discrimination in this way is illegal.
Dissolution	Formally ending a charity - other words used are closing (down), dissolving and winding up.
Eligible	Able to apply - matching the funder's criteria e.g. projects for young people, projects with Wolverhampton postcodes
Equalities	Treating people with dignity and respect. Not treating anyone less favourably because you think they are different (discrimination).
Evidence	In this case: Proof that you have spent or received money
Expenditure	Money out.
Financially Compliant	Meeting basic standards in the area of your finances.
Group/Organisation Structure	The type of legal or organisational structure your group operates under - related to your constitution or governing document
Human Resources	Anything to do with managing and organising staff and volunteers.
Income	Money in.
Incorporated	Having a legal identity as a group, not as individuals. Registered as a legal entity or company.
Indicator	Something that can be measured that gives a clue that a change (outcome indicator) or an activity (output indicator) has taken place.
Induction Programme	A planned programme of events to help new staff and volunteers settle in quickly, for example, an introduction to the organisation and their role, meeting key people, receiving information etc.
Job Description	List of jobs or task a worker is expected to carry out.
Marketing	The action or business of promoting and selling products or services.
Memorandum and Articles of Association	Governing documents that describe your joint purpose and operating rules.
Monitoring and Evaluation	Checking and recording what is happening. Assessing reasons for your achievements or otherwise.
Objects or Charitable Objects	These describe the purpose of the organisation expressing the benefit you wish to bring to others.
Outcome	The individual changes or benefits and learning that result from what the project or organisation does.
Outcomes Champion	A person who promotes understanding of how to measure the difference your group or project makes. To get in touch with an Outcomes Champion in Wolverhampton, contact WVSC or YOW, page 54.
Outputs	The individual services, resources or facilities that the organisation or project provides e.g. 20 older people have attended a fitness class.
Overheads	Running costs you need for your organisation, for example utility bills, administration and management time, insurance.
Person Specification	List of experience, knowledge and skills required for the job.
Planning Triangle	A copyrighted tool from the Charities Evaluation Service that helps you plan for the difference you want to see by creating objectives and outcomes.