

# SCRAP Book Contents

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## **Evaluation Form**

# Why do we need a SCRAP Book?

A number of small voluntary and community groups in WEST Leeds identified a need for more accessible information to help them run their community centre, group, or tenants' association etc.

West Leeds groups were invited to an event in September 2004 where activities took place to determine what form of resource this might be and also some of the content. A handbook/directory was born and a name was chosen

## **Super Community Resource and Assistance Pack**

We obtained funding from Leeds VOICE for the printing of around 50 copies and over the winter months workers and community members met regularly pulling together resources and information from different sources. In Spring we had our first draft ready and we planned our launch for Summer.

We must give **A BIG THANK YOU** to everyone who has worked really hard to produce this resource which we believe will be an invaluable asset to local community groups.

West Leeds Healthy Living Network  
Neighbourhood Learning  
Leeds VOICE  
Fairfield Tenants and Residents Association - Gillian Withers  
New Wortley Community Centre – Charmaine Howell

If you need further help or advice regarding the contents of this pack or the running of your group please contact one of the local Development Workers who will be happy to spend time with you.

Pam Johnson – Neighbourhood Learning Project  
07891 270631  
Chris Coates/Gillian Black – West Leeds Healthy Living Network  
0113 295 1043  
Hannah Sowerbutts – Leeds VOICE  
0113 277 2227

We hope that this proves to be very useful to you all, however, we would welcome comments or ideas for improvement. You are welcome to make use of the back of the book to add your own material for more local use and we encourage you to complete the evaluation form enclosed.

Happy 'bedtime reading' and  
**GOOD LUCK**

# Legal structures for community & voluntary groups

## *Finding a legal structure to suit your group*

In this sheet we look at legal structures which are suitable for community organisations ranging from small neighbourhood groups run by local people to larger voluntary agencies with staff. The three usual types of structure which your organisation may want to consider are:

- Unincorporated association
- Charitable trust
- Charitable company

The first two are fairly quick and cheap to set up, while establishing a charitable company can be much more time-consuming and expensive. Whichever structure you choose, you must draw up a set of rules stating how your group will work (known as the governing document). There is a different type of governing document for each structure.

A few groups which think of themselves as community organisations may find that a business structure, such as a co-operative or a (noncharitable) limited company, is more appropriate than one of the three structures above.

*For more information about Co-operatives and Limited Companies see our information sheet: [Not for Profit Organisations - a brief guide to legal structures for community & voluntary organisations and social enterprises](#)*

## **Unincorporated association**

An unincorporated association is a membership organisation. It can be whatever its members want it to be, and carry out whatever activity you choose. It is the easiest, quickest and cheapest way for a group to set itself up. Unless there is a membership fee, you are not even obliged to keep a membership list - anyone who is entitled by your rules to be a member can simply turn up and take part. This structure is suitable for groups such as playschemes, pensioners associations, arts groups and campaigning groups. Very many groups fall into this category (sometimes without knowing it).

You do not have to seek approval of any kind before setting up. Nor do you have to register with any regulatory body, though if your group has charitable aims and an annual income above £1,000 you may be required to register with the Charity Commission. Once operating, your group may of course have to register with the City Council if, for example, you are providing childcare or are involved in catering.

You are free to draw up your own democratic constitution setting out the rules under which your group will be run. If your group plans to register as a charity, it may be best to adopt the Charity Commission's own model constitution for a charitable unincorporated association.

*For more details about how to write a constitution see our information sheet: [Constitutions - step by step help with writing a constitution](#) A copy of the Charity Commission's model constitution is on their website: [www.charitycommission.gov.uk](http://www.charitycommission.gov.uk)*

## **Advantages**

Simple and flexible. No need to have the constitution agreed by any outside body (unless you are registering as a charity).

Cheap to run. No need to submit accounts to anyone outside (unless you register as a charity, or funders demand it).

If you have charitable aims, you can register as a charity and gain advantages such as funding which is available only to charities.

## **Disadvantages**

Some funders may prefer a more formal structure, especially if you are looking for big sums of money.

Your group has no separate legal existence - it is a collection of individuals. This means that:

- it cannot own property in its own right

- it cannot enter into contracts - if it wants to rent premises or employ people, this is done in the eyes of the law by individuals on behalf the group.

- individual members of your management committee are personally responsible for the group's obligations and debts, and are liable if, for example, it is sued.

## **Summary**

The fact that this is so flexible and cheap means it is ideal for many small groups. If you are considering doing something more major - employing a worker or managing a building - you may well need a structure which gives the group a legal existence and gives members more individual protection.

## **Charitable trust**

A charitable trust is a legal form which is set up by means of a trust deed. Naturally the aims of the trust must be charitable and the trust will register with the Charity Commission. A trust is usually set up to manage money or property for a charitable purpose.

It is not a membership organisation but is run by a small group of people, known as trustees, although the trust deed can be written in such a way as to allow for members. The trustees make all the decisions and have all the responsibility. Trustees can be appointed for life when the trust is set up, or can be changed regularly. This means, for example, a representative of the local authority could be invited to become a trustee. Trustees must not receive any remuneration from the trust or receive any personal benefit from its activities.

## **Advantages**

It is fairly cheap to establish. There is no registration fee, although there is a small stamp duty to pay.

It is fairly simple to set up. The Charity Commission publishes a model declaration for a charitable trust (trust deed). However if you are at all uncertain about the trust deed it is sensible to get legal advice, as the deed is a formal document.

*A copy of the model Trust Deed is on the Charity Commission Website: [www.charitycommission.gov.uk](http://www.charitycommission.gov.uk)*

It is worth considering for a charity with more professional aims which wants to employ a very small number of workers or manage a building. Property can be held in the name of individual trustees for use by the charity, though the charity cannot purchase property in its own name.

It gives continuity to the group, and regulation by the Charity Commission gives a 'seal of approval' to its activities.

Funders may find the more formal and stable structure reassuring. Some funders will give grants only to registered charities.

## **Disadvantages**

As a registered charity, your group has obligations. Among other things, you must draw up your annual accounts and report in a particular way and send a copy to the Charity Commission.

A charitable trust is an unincorporated organisation which means that its trustees are personally liable for its obligations and debts.

You cannot carry out political or campaigning activities, but your group can have educational aims.

There is not generally any formal method for users to influence the work of the organisation. All decisions are made by a small group of people who are not necessarily easily replaceable (The Charity Commission suggests having between 3 and 9 trustees). So it is not a suitable structure for a group which wants to encourage a large and active membership.

## **Note on the Financial Liability of Trustees and Officers**

If an unincorporated association or a charitable trust closes with outstanding debts, its officers or trustees will be personally liable for the debts. Some insurance companies offer a policy which will enable officers to claim for any debts which they have to cover.

However, insurers usually state that closure of the group must be outside of the control of the officers or trustees. So if, for example, your group folds after getting into debt because of slack financial management, your claim is likely to be turned down. There are usually other exclusion clauses too which may make it difficult to put in a successful claim. However, if your main concern is debt arising from circumstances outside your control, this type of policy will reassure your officers and trustees.

If you think that your group really needs this sort of insurance cover, then it may be a good idea to look again at your structure and consider forming a limited company (an incorporated organisation) instead. If, after that, you decide to remain unincorporated and take out financial liability insurance, look very closely at the policy.

# Charitable company

A charitable company is a limited company with charitable aims. It is an incorporated organisation which means that it has a legal identity separate from its members. In law, a limited company is considered to be a person and it can therefore own land or enter into contracts. The directors are agents of the company and are not personally liable for its debts.

A company is a membership organisation. However, unlike an unincorporated association, members must be named and a list of members forms part of the Company Register. A company can also demonstrate, through its Memorandum & Articles of Association (its governing document) that it is accountable to the community and charitable in its aims. The directors of a charitable company are also its trustees and perform the role of the management committee.

The Charity Commission provides a model Memorandum & Articles of Association for a charitable company but you would be well advised to seek legal help in drawing these up. Establishing a charitable company currently involves registering with both Companies House and the Charity Commission.

If your group is an unincorporated association which is already registered as a charity, there may come a point when you wish to become incorporated. This is done by forming a charitable company to take over the affairs of the unincorporated charity. The Charity Commission now has an application pack, together with advice and guidance, on its website which makes the process quicker and easier.

*Find out more at:*

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

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

There are two types of limited company:

## **Company limited by guarantee**

There are no shareholders and any surplus is reinvested in the company. This type is recommended by the Charity Commission.

## **Company limited by shares**

This type of company is more usually found in the commercial sector, where its members (shareholders) are investing money in the hope of gaining a profit. However, there are some organisations in the community which are set up as companies limited by shares.

## Advantages

It is very suitable for a larger organisation which has considerable assets (e.g. equipment, a building) and employs more than a few staff.

The company can take on legal obligations and buy property in its own name. The organisation and not its members is responsible for any debts. However directors do have a legal duty to act prudently and to ensure that the company manages its finances carefully.

Many funders regard this structure as more stable, as they know the company will continue to exist even if there is a change of people involved. This increases your

chances of success if you are applying for larger sums of money. Some funders will give grants only to registered charities.

## **Disadvantages**

It is expensive to set up. It is time consuming to run and annual accountancy fees can be high. A charitable company is regulated by both Companies House and the Charity Commission. You have to notify them of every change of directors/trustees and draw up a particular form of annual accounts and reports.

A charitable company cannot have political or campaigning aims, but you can have educational ones.

## **Note about future plans for charitable companies**

The government is planning to introduce a new legal structure - Charitable Incorporated Organisation (CIO). This will be an incorporated body (similar to a company) but registered only with the Charity Commission. This may become law at some point in 2005. This should be simpler to set up and run and, if you can, it may be best to delay setting up a charitable company until details of the CIO are clearer.

## **Conclusion**

If none of these structures seems entirely suitable for your group, then it is worth considering one of the legal structures more usually associated with a business.

## **Useful addresses**

### **Charity Commission**

Harmsworth House  
13 - 15 Bouveries  
London EC4Y 8DP  
Tel: 0870 333 0123  
Minicom: 0870 333 0125  
[www.charity-commission.gov.uk](http://www.charity-commission.gov.uk)

### **Community Matters**

12 - 20 Baron Street  
London N1 9LL  
Tel: 0207 783 7887  
[www.communitymatters.org.uk](http://www.communitymatters.org.uk)

### **Companies House**

Crown Way  
Cardiff CF4 3UZ  
Tel: 0870 333 3636  
[www.companieshouse.gov.uk](http://www.companieshouse.gov.uk)

## **Arts council for England (South East)**

Sovereign House

Church Street

Brighton BN1 1RA

Tel: 01273 763000

[www.artscouncil.org.uk/regions/homepage.php?rid=6](http://www.artscouncil.org.uk/regions/homepage.php?rid=6)

## **Clickdocs.co.uk**

Their website at [Clickdocs.co.uk](http://Clickdocs.co.uk) has information on legal structures, together with model governing documents and application forms. They do charge for this service.

# Legal structures for Not-for-profit organisations

*A brief guide to legal structures for community & voluntary organisations and social enterprises*

## Introduction

There is a wide range of structures open to organisations which are active in the community. People frequently refer to such organisations as 'not-for-profit' or 'non profit-making' organisations. While these may be handy informal descriptions, these terms have no legal meaning in this country and do not refer to any particular legal structure.

In this sheet, we give brief details of structures for not-for-profit organisations, together with details of organisations which can give more help. For the purpose of this information sheet, we are dividing organisations in the community into two main categories:

### 1. Community Groups and Voluntary Organisations

This category covers a whole mass of organisations, ranging from small neighbourhood groups run by local people to larger voluntary agencies with staff. They may be working to improve their local area, campaigning for change or providing a service. Some, but not all, will be charities.

### 2. Social Enterprises

Social Enterprises have been defined as "a business with primarily social objectives whose surpluses are principally reinvested for that purpose in the business or in the community, rather than being driven by the need to maximise profit for shareholders and owners."

Social Enterprises are involved in providing services or making goods. However they have explicit social aims and social ownership with a structure based on participation by 'stakeholders' such as users, community groups and employees. Most aim to be viable trading concerns, making a surplus from trading alone.

## 1. Community Groups and Voluntary Organisations

The three usual types of structure which your group may want to consider are:

- Unincorporated Association
- Charitable Trust
- Charitable Company

The first two are fairly quick and cheap to set up, while establishing a Charitable Company can be much more time-consuming and expensive. Whichever structure you

choose, you must draw up a set of rules stating how your group will work (known as the governing document). There is a different type of governing document for each structure. The information sheet [Community and Voluntary Groups - A Guide to Legal Structures](#) looks in more detail at these three structures (see [www.resourcecentre.org.uk](http://www.resourcecentre.org.uk)).

A few groups which think of themselves as community organisations may find that a business structure, such as a Co-operative or a (noncharitable) Limited Company, is more appropriate than one of the three structures usually adopted by community groups or voluntary organisations. For example, a large campaigning group may decide that it needs a more formal structure than its starting point as an unincorporated organisation and that a limited company is more appropriate. Or a small group of community artists may prefer to set themselves up as a form of co-operative.

## Unincorporated Association

An Unincorporated Association is a membership organisation. It can be whatever its members want it to be, and carry out whatever activity you choose. It is the easiest, quickest and cheapest way for a group to set itself up. There is no need even to keep a membership list - anyone who is entitled by your rules to be a member can simply turn up and take part. It is ideal for many small groups, especially those without staff or premises. A large number of groups fall into this category (sometimes without knowing it).

You do not have to seek approval of any kind before setting up and you are free to draw up your own democratic constitution setting out the rules under which your group will be run. You do not have to register with any regulatory body, though if your group has charitable aims and an income above £1,000 per year you may be required to register with the Charity Commission.

## Charitable Trust

A Trust is usually set up to manage money or property for a charitable purpose and it will register with the Charity Commission. It is not a membership organisation but is run by a small group of people, known as Trustees, although the Trust Deed (its governing document) can be written in such a way as to allow for members. This structure is suitable for a charity with more professional aims which wants to employ a very small number of workers or manage a building, but you should bear in mind that the Trustees of a Charitable Trust are personally liable for any debts. A Trust is fairly cheap and simple to establish.

*The Charity Commission  
Harmsworth House  
13-15 Bouveries  
London EC4Y 8DP  
Tel 0870 333 0123  
Minicom 0870 333 0125  
[www.charitycommission.gov.uk](http://www.charitycommission.gov.uk)*

## Charitable Company

A Charitable Company is a Limited Company with charitable aims. It is a membership organisation (a list of members is part of the Company Register) and accountable to the community. It also has a legal identity separate from its members and its directors are agents of the company and are not personally liable for its debts.

There are two types of Limited Company. A Company Limited By Guarantee is one in which there are no shareholders and any surplus is reinvested in the company. This type is recommended by the Charity Commission. A Company Limited By Shares is more usually found in the commercial sector, where its members invest money in the hope of gaining a profit. Establishing a Charitable Company currently involves registering with both Companies House and the Charity Commission.

*Companies House  
Crown Way  
Cardiff  
CF14 3UZ  
Tel 0870 3333636  
[www.companieshouse.gov.uk](http://www.companieshouse.gov.uk)*

## 2. Social Enterprises

Businesses covering a wide range of activities are defined as social enterprises. Legal structures to consider are:

- Partnership and Limited Liability Partnership
- Limited Company
- Community Interest Company
- Industrial and Provident Society
  - Bona Fide Co-operative Society (including a Credit union)
  - Society for the Benefit of the Community

### *Co-operatives and Workers' Co-operatives*

*A Co-operative is a business that is owned and democratically controlled by its employees but it is not a single legal structure. A Coop can be established as a Partnership or a Company Limited by Shares. But, the two most common forms are as a Company Limited by Guarantee or as a Bona Fide Co-operative Society.*

## Partnership and Limited Liability Partnership

A partnership is not generally considered to be a Social Enterprise, though social aims can be spelled out in the Partnership Agreement. A Partnership Agreement is between two or more people and defines how the business will be run. But there is likely to be a problem if the business wants to apply for funding as it will be difficult to demonstrate any wider social involvement. Partners can be self-employed or employees of the partnership and they are personally liable for debts.

There is also a form of Limited Liability Partnership (LLP) which is safer for the partners; they are not personally liable for any losses provided they have acted in a reasonable manner. An LLP requires you to register with Companies House and to publish annual accounts.

Information and forms for Partnerships and Limited Liability Partnerships are available at [www.clickdocs.co.uk](http://www.clickdocs.co.uk)

## **Limited Company**

This may be a company limited by shares or limited by guarantee. Its Memorandum & Articles of Association must state that any surplus is put towards the company's social purpose and usually defines the company as democratic and accountable to the community through its membership. In law, a Limited Company is considered to be a person and it can therefore own land or enter into contracts. The directors are agents of the company and are not personally liable for its debts. This is a flexible structure, suitable for a wide range of Social Enterprises, but regulation by Companies House is fairly strict and there are detailed requirements for annual reports & accounts.

## **Community Interest Company**

It is expected that from 1<sup>st</sup> July 2005 there will be a new legal form for the social enterprise sector - the Community Interest Company (CIC). This will be a limited company but it will have special features to ensure that it works for the benefit of the community. It will commit its assets and profits permanently to the community by means of an "asset lock", ensuring that its assets cannot be distributed to its shareholders. It will also report to a new independent regulator, the Regulator of Community Interest Companies. A big advantage will be that its not-for-profit status will be visible as well as assured.

CICs will have to register with Companies House as a company limited either by guarantee or by shares and then apply to the new Regulator for CIC status. The Department for Trade and Industry is bringing out a series of fact-sheets to help you decide whether a CIC is appropriate for you and to provide information on areas such as the role of the Regulator and of shareholders. [www.dti.gov.uk/cics](http://www.dti.gov.uk/cics)

## **Industrial and Provident Society (IPS)**

An Industrial and Provident Society (IPS) is an incorporated organisation and its members benefit from limited liability. There are two types of IPS: a bona fide co-operative society and a society for the benefit of the community. An IPS must register with the Mutual Societies Registration section of the Financial Services Authority, the regulatory body. In general regulation is lighter than for Limited Companies and the accounting requirements far less stiff.

*The Financial Services Authority - registration of Industrial & Provident Societies*  
25 The North Colonnade,  
Canary Wharf,  
London E14 5HS  
Helpline 0845 606 1234  
[www.fsa.gov.uk/mutual\\_societies\\_registration/](http://www.fsa.gov.uk/mutual_societies_registration/)

An IPS is run by its members and there are several sets of model rules. Profits must generally be ploughed back into the business. Where parts of the profits are used for another purpose, that purpose should be similar to the main aim of the society, for example for philanthropic or charitable purposes. Where the rules of the IPS allow assets to be sold, the proceeds must be put into its business activities. A change in the law has now made it possible for a non-charitable IPS to have an "asset lock", similar to a CIC above, to ensure that its assets are always used to benefit the community.

An IPS whose aims are wholly charitable is considered an 'exempt charity' - it cannot register with the Charity Commission and is not regulated by them, but it is generally bound by charity law. A charitable IPS already has an "asset lock" under charity law.

#### **a) Bona Fide Co-operative Society**

This is a business owned and democratically controlled by its employees and founded on seven basic principles, one of which is Concern for the Community. Although a co-op must make a surplus to be successful other motives may be equally important; for example, a recycling co-op will be based on concern for the environment. A co-operative must have at least two members.

A Credit Union is a specialist form of co-operative, regulated by an act of parliament covering financial services. It is a financial cooperative whose savers are its members. Money is saved in a common fund and can be used to make low interest loans to members. A Credit Union is run by a Board of Directors elected from among the membership at the AGM. There are other specialist cooperatives such as housing co-ops which are covered by separate regulation.

#### **b) Community Benefit Society**

A Community Benefit Society (called a Society for the Benefit of the Community until a recent change in legislation) must show that its activities benefit the wider community rather than simply its members. It also has to demonstrate a 'special reason' for registration as an IPS rather than as a company.

### **Development Trusts and Social Firms**

These are two fairly common forms of Social Enterprise but neither is a legal structure in itself. Development Trusts are set up to bring about local regeneration and are often established as Limited Companies with a broad membership. They see their role as seeking "to move beyond provision of welfare services, by setting up enterprises (social businesses) which encourage self-help and reduce dependency." Social Firms are

businesses set up specifically to provide employment or training to disabled people, and they are usually limited companies or co-operatives.

## Further help and useful addresses

### Community groups and voluntary organisations

#### Community Matters

12-20 Baron Street  
London, N1 9LL  
Tel: 020 7837 7887  
[www.communitymatters.org.uk](http://www.communitymatters.org.uk)  
Email: [communitymatters@communitymatters.org.uk](mailto:communitymatters@communitymatters.org.uk)

#### The Charity Commission

Harmsworth House  
13-15 Bouveries  
London, EC4Y 8DP  
Tel: 0870 333 0123  
Minicom 0870 333 0125  
[www.charitycommission.gov.uk](http://www.charitycommission.gov.uk)

#### Companies House

Crown Way  
Cardiff, CF14 3UZ  
Tel: 0870 3333636  
[www.companieshouse.gov.uk](http://www.companieshouse.gov.uk)

#### Arts council for England (South East)

Sovereign House  
Church Street  
Brighton BN1 1RA  
Tel: 01273 763000  
[www.artscouncil.org.uk/regions/homepage.php?rid=6](http://www.artscouncil.org.uk/regions/homepage.php?rid=6)

## Social Enterprises

### General

#### Business Link (Small Business Service)

DTI agency offering advice on all aspects of starting up small businesses, including partnerships and forms of social enterprises.  
Advice line: 0845 600 9006  
Minicom 0845 606 2666  
[www.businesslink.gov.uk](http://www.businesslink.gov.uk)

## **Social Enterprise Coalition**

54 Haymarket  
London, SW1Y 4RP  
Tel: 020 7968 4921  
Email: [info@socialenterprise.org.uk](mailto:info@socialenterprise.org.uk)  
[www.socialenterprise.org.uk](http://www.socialenterprise.org.uk)

## **Community Action Network**

Support for social enterprises  
The CAN Centre  
Mezzanine Floor  
Elizabeth House  
39 York Road  
London, SE1 7NQ  
Tel: 0 20 7401 5310  
Email: [canhq@can-online.org.uk](mailto:canhq@can-online.org.uk)  
[www.can-online.org.uk](http://www.can-online.org.uk)

## **Limited Companies**

### **Companies House**

Crown Way  
Cardiff CF14 3UZ  
Tel: 0870 3333636  
[www.companieshouse.gov.uk](http://www.companieshouse.gov.uk)

## **Industrial & Provident Societies**

### **Co-operatives UK**

Holyoake House  
Hanover Street  
Manchester, M60 0AS  
Tel: 0161 246 2900  
[www.cooperatives-uk.coop](http://www.cooperatives-uk.coop)

### **Industrial Common Ownership Movement (ICOM) Limited**

A membership organisation promoting the democratic control and ownership of enterprises by the people who work in them. Its members are co-operatives and other businesses under democratic employee control, local co-operative development agencies and other organisations within the social economy. It provides a constitution for co-ops.  
Co-op Union incorporating ICOM  
Holyoake House  
Hanover Street  
Manchester, M60 0AS  
Tel: 0161 246 2900

Email: [icom@icom.org.uk](mailto:icom@icom.org.uk)  
[www.euro-social-economy.org.uk/icom.htm](http://www.euro-social-economy.org.uk/icom.htm)

## Association of British Credit Unions (ABCUL)

Holyoake House  
Hanover Street  
Manchester, M60 0AS  
Tel: 0161 832 3694  
Email: [info@abc.ul.org](mailto:info@abc.ul.org)  
[www.abc.ul.org](http://www.abc.ul.org)

## The Financial Services Authority Registration of Industrial & Provident Societies

25 The North Colonnade  
Canary Wharf  
London, E14 5HS  
Helpline: 0845 606 1234  
[www.fsa.gov.uk/mutual\\_societies\\_registration/](http://www.fsa.gov.uk/mutual_societies_registration/)

## Social firms

### Social Firms UK

Aspect House, 2-4 Monson Rd  
Redhill  
Surrey, RH1 2ET  
Tel: 01737 764021  
Email: [socialfirms@cqm.co.uk](mailto:socialfirms@cqm.co.uk)  
[www.socialfirms.co.uk](http://www.socialfirms.co.uk)

## Development Trusts

### Development Trusts Association

1st Floor, Red Lion Court  
London, EC4A 3EF  
Tel: 0845 458 8336  
Email: [info@dt.a.org.uk](mailto:info@dt.a.org.uk)  
[www.dta.org.uk](http://www.dta.org.uk)

# To BE or not to BE.....

## A Charity or a Company?

WYCAS, Bradford CVS and VA- Leeds advise literally hundreds of small groups every year on the pro's and con's of choosing Company versus Charity status as follows.

### Company Limited status:

- Need Memorandum and Articles of Association
- Income of under 90K requires accounts
- Income of over 90K requires Accountants Report
- Income over 250K requires an Accountant's Report
- Annual accounts to be submitted in certain format
- Fines if you are late with returns
- Lots of bureaucracy, Companies House is very petty with detail and you are not allowed to get anything wrong. Need to be well organised and competent to deal with this
- Need Company Secretary who has legal duties
- If you are a Company and a Charity, two sets of Returns to deliver annually
- They don't advise small organisations with less than a couple of staff to become Companies as there is no discernable benefit, they see many small organisations who struggle with Company status
- Memorandum and Articles are needed for a Company Ltd not a Constitution (similar)
- Company Ltd status may not be enough on its own to draw down funding from some grant bodies

OR

### Registered Charity status:

- You may need to be a Registered Charity to be eligible to apply for some funding
- Need a Constitution
- If your objectives are wholly charitable, you are legally obliged to register as a Charity if your income is over £1,000, yes! That's one thousand pounds! Most people don't know this.
- Charity Commission do not fine you for late Returns
- Officers do not have the same legal obligations as Co Ltd
- SORP (Statement of Recommended Practice) has to be complied with whatever your income, this describes the things you have to do regarding money and way it has to be laid out
- Ordinary bank account is ok if income is under 10K
- Accounts have to be independently examined at income over 10K
- Audited accounts at 250K
- Bureaucracy is less petty

That said there is new legislation going through Parliament at the moment to create 'Charitable Incorporated Organisations' which should join the two things into one and make things much easier in future. Don't know when this will become law.

# Constitutions

## *Step by step help with writing a constitution*

A constitution is simply the aims and rules that your group will use. It's a written understanding of what your group is going to do and how it is going to do it. It is important because:

Without this written understanding people can easily find themselves at cross purposes and the jobs won't get done

It will serve as a reference, and help to resolve problems in times of controversy

Outsiders, and especially potential funders, will want to see that your group is democratic and accountable. This involves having a clear procedure by which decisions are made.

For these reasons it is important to try and get a constitution that actually reflects the way in which you do things, or want to do things. There is no point in lumbering yourself with a lot of bureaucracy you don't want, or writing down loads of things you don't intend to do, simply because you think they are what people expect. It is best to have a discussion in the group and decide what everyone wants to do, rather than send someone away to draft a long document that everyone ignores!

This information sheet will help you to draw up a constitution for what is termed an 'unincorporated association'. It is entirely up to your members how you organise your group and, therefore, what you put in your constitution. This constitution will be suitable for your community group unless you plan to set up either a limited company or a charitable trust - these are different types of organisation.

Your constitution should reflect what your group wants to do, and so will be different from the constitutions of other groups. Even so most constitutions have a similar structure and will have similar headings.

You will probably want to include sections on:

- Name of Organisation
- Aims (sometimes called Objects) of Organisation
- Powers
- Membership
- Officers
- Meetings
- Committee (if any)
- Rules of Procedure
- Finances
- Dissolution
- Amendments to the Constitution

If you are considering registering your group as a charity, you may wish to write your constitution along the lines of the model drawn up by the Charity Commission - this will make certain that it conforms to charity law. Even if you do follow the model constitution, it is still a very good idea to work through this information sheet to make sure you write a constitution which suits your group.

Later in the sheet we look at the clauses one by one, but first there is a checklist for you to fill in.

*You can download the Charity Commission model constitution from their website at: [www.charitycommission.gov.uk](http://www.charitycommission.gov.uk)*

## **Checklist**

Sit down with other members of your group and try and answer the following questions before you start to draft a constitution. They cover all the basic organisational points: what you are called, how often you will meet, whether you will have officers, etc. They don't cover the Aims or the Powers of your organisation, or certain standard clauses. These will be dealt with in the next section.

### **Name of Organisation**

What is the name of the organisation?

### **Membership**

Who will be allowed to be members of the organisation? (e.g. everyone who pays a membership fee, everyone who lives in a certain area, all users and volunteers at the project)

Will there be a membership fee?

If so, how much?

### **Meetings and committee**

How many general meetings (open to all the members) will there be each year?

Will there also be a committee?

If so, how many people will be on it?

How will they get there? (e.g. elected by AGM, invited)

How often will it meet each year?

### **Officers**

Which officers will there be?

Chair?

Vice Chair?

Secretary?

Treasurer?

Any others? - make a note of the officers you will have

How will they be elected? By the whole group at AGM or by the committee?

If you can answer the above questions then you are ready to write a constitution. Don't think that you have to use complicated or legal language. The main point of a constitution is that everybody can understand how the group runs. You are writing it for people like yourself, not for lawyers. If you make things complicated then the chances are that nobody will understand it and everyone will ignore it.

## Sample Clauses

Below we look in more detail at the areas to cover and give some sample clauses that you can adapt. Don't put in any clauses that don't suit what you want to do.

### 1. Name

Every constitution begins with a simple clause.

#### Example

"The name of the group/organisation shall be \_\_\_\_\_"

### 2. Objects

The objects clause should lay out the main aims of the group, what it does and who it works with.

#### Examples

"To promote community activity in the area of West Leeds by providing equipment, advice, information and training to voluntary and community groups."

"To arrange social and support activities for single parents and their children, resident in the Queens Park, Kingscliffe and Marine electoral wards."

"The organisation will not discriminate on the basis of race, sex, disability, sexuality, age, or on the basis of political, religious or other opinions."

#### Notes

If you aim to register as a charity then this clause has to make clear that the aims of your group are charitable in a legal sense. See the Resource Centre's information sheet on Charity Registration for more details on what activities are covered by this.

If your work is specific to one geographical area, you need to define this clearly. Bear in mind that you may want to expand your area of activity in the future, so you may not want to define it too narrowly in your constitution.

### 3. Powers

In more formal constitutions there will be a clause which spells out more specifically what the group can do in order to achieve its aims. These powers are usually broad:

#### Example

"In furtherance of the above objects, the Association may

Raise funds in a legal manner  
Borrow money and provide as security any property held in trust on behalf of the Association  
Rent buildings or land"

## **Notes**

Your group (as an unincorporated association) cannot acquire property in its own right, so members of the management committee or some other organisation will have to hold the lease or own the premises on behalf of the group - the details should be spelled out in the clause.

If you wish to take out insurance cover to protect the management committee in the event of the group collapsing with outstanding debts, it may be advisable to include this power in the clause.

## **4. Membership**

Any group will be composed of members. Your constitution should spell out who can be a member, how they join, whether there is a membership fee, and the procedure for resigning or for membership being terminated. Looking at each in turn

### **Eligibility for Membership**

#### **Examples of a simple membership clause**

"Membership is open to everyone resident in the area." (for a community centre)

"All workers, volunteers and users of the Centre are entitled to become members."  
(for an advice centre)

"Membership is open to all who support the aims of the group and participate in its activities." (for an amateur dramatic society)

#### **Example of an Associate Membership clause**

"The committee may invite any individual who supports the aims of the group to become an Associate Member. Such members shall have no voting rights."

#### **Note**

Associate membership is useful, for example, if you want a friendly accountant who lives outside the area to do your books.

#### **Example of Group Membership clause**

"Any group whose work is supportive of the organisation may be invited by the management committee to become a group member."

#### **Note**

This would be useful if, for example, an advice agency wanted to allow other agencies in the town to become members.

## **Who is a member?**

You must have an agreed procedure for deciding how people become members.

### **Examples**

"Membership will begin when a valid application form is accepted by the membership secretary."

"Each management committee will consider applications for membership as its first item. Membership will begin as soon as agreed by the management committee."

"Membership of the Association will be free and all tenants will automatically become members unless they indicate in writing to the Secretary that they do not want to be."

### **Note**

Even if you plan to have a very open membership, and an informal structure, it is a good idea to have a membership list. It is then clear who you mail about meetings and who can come.

## **Membership fee**

Whether you have a membership fee is entirely up to you. The advantages are that it makes it very clear who is a member - the people who have paid - and it raises a bit of money. The disadvantages are that it may put people off and that it can be fiddly to collect.

### **Examples**

"The membership fee will be as agreed annually at the Annual General Meeting (AGM) and will be payable by all members within a month of the AGM."

"Membership will be free."

## **Ceasing to be a member**

Essentially people can resign, their membership can lapse or (in extreme cases) they can be expelled.

### **Examples**

"Members may resign at any time in writing to the membership secretary or verbally at a meeting."

"Any person no longer living in the area of benefit will cease to be a member."

"Any member not having paid their membership fee within one month of it falling due will be deemed to have resigned."

"The management committee may unanimously and for good reason terminate the membership of any individual. The individual concerned shall have the right to be heard by the management committee, accompanied by a friend, before a final decision is made."

## 5. Officers and committee

You need to say what officers the group will have and how they will be elected. You will also want to say whether there will be a committee and, if so, how large it will be.

### Examples

"The officers of the Association shall be:

A chair, who shall chair both general and committee meetings;

A secretary, who shall be responsible for the taking of minutes and the distribution of all papers;

A treasurer who shall be responsible for maintaining accounts."

"All Honorary Officers will be members of the management committee. In addition the AGM will elect seven other committee members."

"The officers of the Association will be elected annually at the Annual General Meeting."

"The officers of the Association will be elected by the Management Committee from among their number at the first meeting following the AGM."

"In the event of an officer standing down during the year a replacement will be elected by the Management Committee."

"Any committee member not attending a meeting without apology for six months will be deemed to have resigned."

### Note

You may wish to elect more officers than the above. Larger organisations often have, for example, a vice chair and membership secretary.

## 6. Meetings

You should spell out what meetings are expected. At the least you will need to hold an Annual General Meeting to which every member is invited. There are inevitably going to be formalities involved in this. You will also want to outline what other meetings will occur.

### Example clauses for Annual General Meeting

"An Annual General Meeting (AGM) will be held within fifteen months of the previous AGM."

"All members will be notified in writing at least two weeks before the date of the meeting."

"Items for the agenda, or motions to the meeting, must be given in writing to the Chair of the meeting no less than three days before the meeting date."

"Nominations for the committee must be given in writing to the Chair of the meeting no less than three days before the meeting date."

"Nominations for the committee may be made at the meeting."

"The quorum for the AGM will be 10% of the membership or 20 members, whichever is the smaller number."

### Note

A quorum is the minimum number of people that must attend a meeting for that meeting to make decisions on behalf of the group. Only members with voting rights can be included in

the quorum. Take care not to make the quorum so high that you can never have a proper meeting. On the other hand, a quorum can prevent the organisation being taken in an unwanted direction by two or three people.

### **Example clauses for general meetings**

"A General Meeting open to all members will be held monthly on the second Tuesday of the month."

"The quorum for a General Meeting shall be 10 members. In the event of the meeting failing to achieve a quorum business may be discussed and proposals put to the next meeting for ratification. In the event of two consecutive meetings being inquorate the second meeting may call a Special General Meeting. Such a Special General Meeting will be deemed to be quorate."

"The secretary will call a Special General Meeting if asked to do so, in writing, by ten members. Members will be given one weeks notice of such a meeting, and notice may be by telephone."

### **Example clauses for committee meetings**

"The management committee will be responsible for running the Association and will be responsible to General Meetings."

"The management committee will meet monthly between Annual General Meetings at a date and time to be agreed by the committee."

"The Secretary will, if requested by three or more members of the committee, call a special committee meeting. Such a meeting will be called within a week of the request. Notification of members may be by telephone."

"All members of the Association may attend the Committee as observers but will not be entitled to speak, unless invited to do so, or to vote."

"The committee may co-opt members. Only a third of the committee members at any one time may be co-opted members. Co-opted members do not need to be members of the Association."

## **7. Rules of Procedure**

These spell out how you will run things. It is best to keep these as simple as possible.

### **Examples**

"With the exception of changes to the constitution all questions that arise at any meeting will be decided by a simple majority of those present and entitled to vote."

"If the number of votes cast on each side are equal the chair of the meeting shall have an additional casting vote."

"Any motion must have a proposer and seconder before it is discussed or voted on."

## **8. Finances**

You need to spell out how you will deal with any money.

## Examples

"An account will be maintained on behalf of the Association at a bank agreed by the committee. Signatories to the account will be the officers of the association. Each cheque will require two signatures one of whom will normally be the Treasurer."

"Records of income and expenditure will be maintained by the Treasurer and a financial statement given to each meeting."

"All money raised by the Association will be spent solely on the objects laid out above."

## 9. Amendments to the Constitution

Once you have your constitution decided you don't want to change it without good reason. It is therefore normal to expect most people to be in agreement with the change before it can be made.

### Examples

"Any proposal to amend the constitution must be given to the Secretary in writing at least a week before the notice of the meeting at which it is to be discussed is due to be circulated. The proposal must then be circulated with the notice of meeting."

"Any proposal to amend the constitution will require a two thirds majority of those present and entitled to vote."

"Amendments to the constitution may only be made at the Annual General Meeting. Proposed amendments will be distributed with the agenda for the meeting."

## 10. Dissolution

You need to decide what will happen if you decide to close the group down, and who is entitled to decide to do so.

### Examples

"If a meeting, by simple majority, decides that it is necessary to close down the Association it may call a special meeting to do so. The sole business of this meeting will be to dissolve the Association. At least 21 days notice will be given to members."

"If three consecutive General Meetings are inquorate members at the third meeting may agree to call a special meeting to discuss dissolving the group. Posters advertising the meeting, and the intention to dissolve, will be displayed prominently in the area."

"If it is agreed to dissolve the Association all remaining money, once outstanding debts have been paid, will be donated to a local charitable organisation. The organisation to be agreed at the meeting which agrees the dissolution."

# The Chair's job

*How to Chair a meeting*

## What are the Chairperson's main responsibilities?

Getting the meeting through all the business in the time allotted.

Making sure it is clear what decisions have been made.

Making sure it is clear who is going to do what tasks.

Keeping the meeting in order - stopping interruptions and irrelevancies, and allowing everyone to be heard.

## The agenda

You will need an agenda to help you organise the business to be discussed at the meeting.

If the meeting is very small and informal, you could simply agree the agenda at the start of the meeting.

If the meeting is larger or more formal, or you want to let people know in advance what you will be discussing, you will need to prepare an agenda before the meeting. Sometimes the Chair and Secretary do this together.

The sample agenda below shows you what items are usually included in an agenda.

### Agenda

1. Apologies for absence
2. Minutes of the last meeting - agree these are a correct record
3. Matters arising from the minutes of the last meeting
4. Correspondence
5. Treasurers Report
6. Any Other Business
7. Date of next meeting

*End of sample agenda*

It is useful to have a record of everyone who was at the meeting, so pass around a piece of paper for people's names and addresses.

*If you want to have copies of the agenda to distribute at the meeting you can get these done by the Neighbourhood Learning Project worker in your area.*

## Some helpful tips

### Keeping the meeting in order

How well the meeting runs depends on the people at the meeting, as well as the Chair. It makes a Chair's job easier if the group has agreed some basic rules about how they want the meetings to work - think about discussing this in your group.

## **Making sure everyone's view is heard**

In larger and more formal meetings it is usual to ask people to speak 'through the Chair'. This means they put their hand up when they want to speak, and then wait until the Chair tells them it is their turn. The Chair keeps track of whose turn it is.

In a smaller meeting you may want to be more informal, but you still need to make sure that everyone gets a chance to speak. Be aware that some people find it more difficult to talk at meetings than others, and try to make it easier for them. On the other hand, some people like to talk all the time, and you need to be firm about stopping them.

It can help to say something like "is there anyone who hasn't talked yet who would like to say something about this..." or "Clifford has spoken several times already so I'm going to let Doris go next..."

Sometimes it works well to go round everyone in turn asking them what they think about a particular issue.

Before a decision is made, or you move on to another item, check that everyone has had their say.

Don't let people interrupt all the time. This is really frustrating for the person who is trying to talk, and leads to frayed tempers. Politely ask people to wait until the person speaking has finished.

## **Getting through the business**

Keep an eye on the time, and remind the rest of the meeting - eg "we need to move on if we are going to cover all the other business. We need to make a decision about..... our options are...."

If it is clear you are not going to get through all the business, suggest that some items are left until next time, eg "this discussion clearly needs more time, I propose we give it an extra 15 minutes and drop the report back on the trip to London..."

It is always better, if possible, to give a clear suggestion, rather than say something vague which leads to endless debate.

## **Drawing it all together**

At the end of a discussion, summarise the main points and what has been decided.

If the meeting has agreed to do something, make sure you've also agreed who is going to do it.

Make sure the minute taker has had time to take down the decision and who will do it.

## **Some things to avoid**

Don't use your position to push your views

Don't talk too much yourself

Don't let someone talk a lot because they are your friend or you are a bit wary of them

Don't ignore people who want to speak

# The Secretary's Role

## Role of Officers

The Chair is responsible for the smooth and fair running of the organisation. Their main job is to chair the meetings of the organisation.

The Treasurer has overall responsibility for the organisation's finances.

Their main job is keeping financial records.

The Secretary is responsible for keeping people informed about the organisation's activities. Their main job is taking minutes of meetings.

This information sheet looks at the Secretary's job. There are separate sheets on the Chair's job and the Treasurer's job.

## What does the Secretary do?

The exact work of the Secretary will vary from organisation to organisation. It is worth having a discussion in your group to agree what the responsibilities of all the Management Committee members should be.

This list can be used as a guide to the Secretary's job:

- Taking minutes in meetings.

- Keeping files of past minutes and reports.

- Letting people know when and where the next meeting is and what it is about.

- Helping to prepare agendas for meetings with the Chairperson.

- Writing and receiving letters on behalf of the group.

- Keeping members informed of what correspondence has been sent out and received.

- Keeping a record of membership.

- Keeping a record of important phone numbers.

How you organise this work is up to your group to decide. You may want to divide the jobs up amongst a number of people. You could have a minutes' secretary, a correspondence secretary, a membership secretary.

Or you may want to have a Secretary and Chairperson who work closely together, and share some of these tasks.

It just depends on the size of your group, the amount of time people have available, the skills people have, and what people like doing.

*The Resource Centre's information sheet Taking Minutes has more detailed advice and tips.*

## **Taking minutes**

Taking minutes is an important part of the job, and can be a bit daunting when you first start.

The basic tasks for the minute-taker are:

- Taking rough notes during your meetings.
- Writing up these notes neatly or typing them out.
- Copying and distributing them to relevant people.
- Keeping all minutes together in a file for future reference.

## **Tips on being a good secretary**

### **Organisation**

- File things! This is very important - you need to be able to find papers and reports quickly and easily. Get a stack of cheap cardboard folders and label them. Have a separate file for every important issue.
- File things quickly. Don't let huge mounds of papers you haven't looked at build up. If you sort them out regularly it is a small and manageable job.
- Have a 'to do' list or notebook. It helps to have everything you need to do written down in one place. Don't rely on your memory.
- Get a book to record correspondence the group receives.
- Get a diary to record dates of future meetings.

### **Share information**

- Make sure information that comes to you gets passed on, or publicised more widely. Often things for a group are sent to the Secretary and never get any further. Work closely with other Committee members, particularly the Chair.

### **Don't take on everything**

- A common complaint from Secretaries is that they end up doing everything. Be clear with your Committee about what tasks you will do.
- If you start to feel over burdened, talk about it with your Committee, and see if jobs can be shared out more.

# Taking Minutes

*Quick and easy guide to taking minutes*

Minutes are simply notes taken during the meeting to remind you what was discussed and agreed. They don't need to be long or complicated, in fancy language or perfect grammar. They do need to record clearly and simply what decisions were made at the meeting and who is going to carry them out. Some sample minutes are at the end of this sheet.

It is the Secretary's job to take minutes.

## Why is it important to have minutes?

It is useful to have a written record of the meeting, what you've decided to do and who is going to do it - memories are unreliable! This is true even if the meeting is very small and informal.

Minutes keep members of the group who weren't able to attend a meeting informed about what went on.

## What tasks are involved in taking minutes?

The basic tasks for the minute-taker are:

- Taking rough notes during your meetings.
- Writing up these notes neatly or typing them out.
- Copying and distributing them to relevant people.
- Keeping all minutes together in a file for future reference.

## What should you write down?

One of the most difficult things about taking minutes is knowing what to write down and what to leave out. Keep these three central points in mind:-

- Don't try to write everything down - it's impossible and not useful.
- Concentrate on WHAT has been decided and WHO is going to do it. These are the most important things to have records of.
- Don't worry about producing the perfect minutes - it's not a test or a competition.

## Sort out the basics

Make sure you have a copy of the agenda to follow. If the agenda is produced in advance of the meeting, read it carefully and if possible go over it with the Chair.

*See the Resource Centre information sheet The Agenda for more information on producing an agenda.*

Get a decent pad of paper and some good pens.  
Make up an attendance sheet in advance, and pass this around for people to sign.

Have the file of past minutes with you, in case any questions come up about decisions from previous meetings.

## Writing rough notes

The rough notes you take at the meeting need to be clear enough for you to make sense of them when you come to write them up!

The following things can help: -

Start the page with the name of your group, date and place of meeting.

Always put an underlined heading for each separate item.

Leave a few lines space between one item and the next, so you have room to add other points if the discussion comes back to it later in the meeting.

Underline or highlight decisions and who has agreed to do what.

Try dividing the page so you have a narrow column down one side for recording who has agreed to do what.

Remember that the minutes need to be understood by someone who wasn't at the meeting, so you need to give a bit of background. For example, put 'the people in Hargreave Court were disgusted by the rubbish in the street' rather than 'they all thought it was disgusting'.

The most important thing is to write the minutes up quickly. Don't put the job off for weeks - it makes a huge difference if the meeting is still fresh in your mind.

## Some common problems

There are some things that make every minute-taker's life difficult. Here are some of the most common problems: -

It is difficult to know exactly what has been agreed. No one is sticking to the point and lots of different suggestions are being made about what to do.

The discussion jumps from one item to another before any of them are finished.

Everyone is talking at once, and you can't follow the discussion.

There is a long, confusing discussion and you don't know which bits are important to get down.

You have been very involved in a particular issue and want to say things, but can't minute at the same time.

You are nervous about getting it right.

## Some solutions

If a meeting is well run it makes taking minutes much easier. It's the Chair's job to keep the meeting in order - but they can only do this with the co-operation of everyone at the meeting.

*See the Resource Centre's information sheet Chairing meetings for more ideas*

One idea is to discuss and agree together some guidelines by which you'll run your meetings - for example not interrupting, putting your hand up if you want to talk, keeping to the agenda item under discussion.

Feel free to point out that is impossible to take minutes if everyone is talking at once and not following the agenda.

If it's not clear what decision has been made, ask the Chair to clarify this.

If there is a particularly important or controversial decision it can be useful to check what you are writing down with the meeting. For example; 'so the meeting wants it minuted that we have agreed to boycott all Council meetings until they meet our demands.'

If you are concentrating on taking minutes it does limit how much you can join in the meeting - it goes with the job. If there is an item where you have been centrally involved and have a lot to say, think about asking someone else to take minutes just for that item.

## Some more solutions.....

If there is a long discussion try to pick out the main points and just list them. For example; 'There was a long discussion about rubbish collections and the following points were made...'

Discuss the agenda with the Chair before the meeting - the clearer you are about the content of the meeting, the easier it is to minute it.

Go through your minutes with the Chair after the meeting. It can be helpful to check through what you've written with someone else.

Don't worry if your minutes aren't perfect - this won't really matter, and like everything it gets easier the more you do it.



*The local Library has computers you can use for typing up your minutes. You can also get your minutes copied for free by contacting your Neighbourhood Learning worker.*

## Golden Rules

The main things to remember when you are taking minutes are:

Don't try to write everything down.

Concentrate on writing down what has been decided and who is going to do it.

Give each item a separate heading.

Write your rough notes up soon after the meeting.



*Contact the Neighbourhood Learning worker or Voluntary Action Leeds for local training on Minute Taking.*

# The Treasurer's job

*How to look after your group's money*

The aim of this information sheet is to help the treasurer to look after the association's money. It looks at basic rules for handling money day-to-day and keeping records of money which you receive and pay out.

## The treasurer and the committee

As treasurer, you have day-to-day responsibility for dealing with money. It is your job to keep accounts and report to the committee.

The whole committee is responsible for deciding how the money will be raised and spent.

Apart from small amounts (which may be left to the treasurer's discretion) the whole committee should agree on spending decisions. The committee, not just the treasurer, is responsible for ensuring that proper records are kept.

Sometimes the committee leaves the treasurer to get on with it alone, only showing an interest at the AGM or when something goes wrong. This is worrying for the treasurer and also means that the association does not make the best use of its money.

## Why keep accounts?

Because your association is responsible to all its members for any money which it receives and spends; every member has the right to know how the money has been used.

To keep track of money (eg to ensure that you have collected all the subs or to avoid paying a bill twice) and to know how much you have available.

To help make the best use of your money. Your records will help you work out how much money the association needs next year and then budget accordingly.

To help with fundraising.

If you apply for a grant to the Council or to a charitable trust, they will ask to see accounts as proof that the association is well run and will use the grant properly.

If you are trying to decide whether to run a raffle or have a stall at a local fete then past records will show which raises the most money.



*The Neighbourhood Learning Project has a small library, with lots of information on raising money. Funderfinder can also be accessed at Armley Library and Central Library in Leeds.*

## Basic rules for dealing with money

Each association may deal with its money in a slightly different way depending on circumstances. But there are basic rules for dealing with money which apply to everyone.

Be methodical. Keep clear records at the time of money which you receive or pay out. Do not rely on memory to write it up later.

Make sure that you have paperwork for any money which you take in or pay out. Keep paperwork in number or date order. This is best done by using treasury tags or a ring-binder. It will make it much easier to look through your records.

Always record the full amount of cash you receive or pay out. For example, if you take in cash from a jumble sale and then use some of it to buy tea and coffee, you should record both the total takings and the cost of the supplies.

Keep the association's cash separate from your own.

Do not hold on to large amounts of cash; bank it as soon as possible.

Check regularly that the cash in your tin equals the balance in your cash book.

Building society or bank account - make sure that two people are required to sign cheques or withdrawal forms. Many associations put down the treasurer, chair and secretary as signatories to the account - any two of the three sign the cheque.

Check bank statements carefully.



*WYCAS and VAL run training sessions for small groups on keeping accounts*

## **Receiving money**

Issue a receipt whenever you take in cash. It is best to use a small duplicate book with numbered pages. Record the total, the date, the name of the person handing over the cash and where the cash came from (eg subs). Hand over the top copy as the receipt and keep your copy in the book.

When you receive a cheque, file the paperwork (eg a covering letter with a grant) and write on it the date on which you received the cheque.

## **Paying out money**

Get invoices or till receipts for all purchases. This rule applies to both cash and cheques.

When you pay out cash, write out a petty cash voucher. Ask the person receiving the cash to sign for it. Staple the till receipt, firm's bill or bus tickets to the voucher. Give the voucher a number and keep them in number order.

Paying by cheque: make a note on the cheque stub of the value of the cheque and who it is made out to. Write the number of the cheque on the firm's bill.

Paying by cheque from a Building Society treasurers or savings account: when you ask the building society account to write you a cheque to pay a bill, write the date of the cheque on the bill.

## Writing up the cash book

Your book-keeping will depend on the circumstances of your association. There is no single "right" way. It is best to keep things as straightforward as possible.

### Some basic tips for writing up your cash book.

Keep separate records of (a) your cash and (b) your bank or building society account.

Have separate columns in your cash book to record each amount which you receive or spend and also to show how much you have left (the balance). Do this for both the cash account and the bank account. (If you have a building society treasurers or savings account the balance is shown in the pass book) This will help to ensure that you do not spend more money than you have available.

You may be asked to show how much the association has made from jumble sales, or grants or subs. Or you may need to know the spending on phone calls, stationery or bingo cards. So, each time you take in or pay out money record the amount under a heading of this type. There are no standard headings - use ones which are useful to your association, such as items of expenditure which are covered by your Council grant.

## End of month procedure

### Cash account

If you have a lot of entries each month in your cash account, it is best to rule off the page at the end of the month. Add up each column. Check that the balance in your book is the same as the cash in the tin. Carry over the balance to the new month.

If you have very few entries simply check your balance against the cash in your tin.

If you cannot get your cash account to tally with the cash in the tin, do not carry over the error to next month. Write "error in cash" and adjust the book so that it tallies with the actual cash.

### Cheque account

When the bank statement arrives, this gives you the opportunity to check that you have written everything correctly in your account book and that the bank has not made any mistakes with your money.

Tick off each cheque in your book which appears on the bank statement (and any sums which you have paid in). Have you written any cheques which do not yet appear on the statement? Did you make a last minute deposit which is not on the statement? You will need to take these into account.

NB. Once you are satisfied that you have written up your book correctly, it is your book (not the bank statement) which tells you how much money is available to spend.

## Reports to the committee

Your report gives a summary of the information in your cash book so that the committee knows the financial position. The committee should decide how much detail it needs and whether a verbal report is enough.

You should always be in a position at any meeting to say how much money the group has available. For small groups, this may even be enough. However, to give the committee a more useful picture, it is best to report:

- money available in cash account and bank or building society
- amount received and amount spent so far this year
- expected bills and income over the next month or quarter

## Report to the AGM

This must be a written report showing:

Total amount received, with a breakdown of the receipts (ie. how much the association received from grants, subs, bingo and so on).

Total amount paid out, with a breakdown of the payments (how much the association spent on stamps, stationery, etc, and large one-off payments).

The amount of money left ("balance of funds") and where the funds are held. You should show how much is in the bank or building society (and give its name) and how much you hold in cash or a float.

## Independent Examination of Accounts

There is no legal requirement for most small community organisations to have an independent examination of their accounts.

Many organisations, however, include in their constitution a clause that accounts must be independently examined before they are presented to the AGM.

Some funders, such as the National Lottery, make it a condition of the grant.

Many small associations choose to have an independent examination as it:

- Provides an itemised written account for the treasurer to present to the AGM.
- Helps reassure a new or unconfident treasurer.
- Helps sort out any problems with the accounts.
- Demonstrates to members and to other organisations that the accounts are in order.

The independent examiner need not be a professional accountant but must be someone from outside the association who is competent to examine accounts, such as a finance worker, bank manager or Council treasurer.

# The Agenda

*Quick and easy guide to preparing an agenda*

An agenda is simply a list of the things you want to discuss in your meeting. It is useful because:

- It helps you plan the meeting.
- It helps you to get through the business of the meeting efficiently.
- It helps people at the meeting follow what is going on.
- It gives people the opportunity to think about the meeting in advance.

It is formally the Chair's job to prepare the agenda. However, in a lot of groups the Secretary and the Chair work together to produce the agenda. This can make life a lot easier.

Some very small and informal groups simply work out the agenda together at the start of the meeting. This is fine if you don't need a lot of structure or advance planning for the meeting.

## A basic agenda

An agenda can be very simple. Here is an example:

1. Apologies for absence
2. Item 1
3. Item 2
4. Any other business
5. Date of next meeting

## Who decides what's on the agenda?

Often agenda items are just decided by the Chair and the Secretary. However, if you can it is useful to find ways of giving your members the opportunity to contribute. Some ways of doing this are:

- Put up a suggestion sheet on a notice board.
- At the meeting, ask for items for the next meeting.
- When you send out the notice of the meeting, ask for suggestions for the agenda.
- Remember to put a contact address and the date you need them by.

## Items for your agenda

The bulk of your agenda will simply be the items you need to discuss. Make each important matter a separate item.

Look through the minutes of your last meeting. Are there any things to report back on? Are there items that need to be discussed again? Put each issue down as a separate item.

Have you received any information - for example about meetings or other events - you need to tell everyone about?

Some groups always include an item 'minutes of the last meeting'. The purpose of this is to agree that the minutes of the last meeting are accurate and reflect what happened. If your group is very small and informal you may decide you don't need to do this.

Some groups have 'standing items' on their agendas. These are items that are always on the agenda at every meeting. They are usually reports from officers such as the Treasurer, or reports from sub-groups.

'Any Other Business' is a regular item at the end of most agendas. It allows people to raise issues that aren't already on the agenda.

Try to avoid 'Any Other Business' taking up the majority of the meeting. If you can, it's better to find out beforehand what people want on the agenda. This allows you to organise the meeting more efficiently.

## **How long will each item take?**

It is useful for the Chair and Secretary to look at the agenda before the meeting, and work out how long they think each item is going to take. This can really help with the chairing and general smooth running of the meeting.

Try to make sure the important discussions get all the time they need, and the minor issues don't expand to take over the whole meeting.

It's hard to estimate exact times, but you can get a rough idea. For example, if you have 6 items to discuss in an hour's meeting you could give each item 10 minutes, or one important item 35 minutes and the rest 5 minutes each.

If this looks impossible you need to have fewer items on the agenda, or a longer meeting!

## **What order do items go in?**

It is general practice to put the short, easy to deal with items at the start of the agenda. You get them out of the way quickly, and can concentrate on the important issues.

There are no hard and fast rules about this. It depends on what you think will work best at any particular meeting.

## **When do you prepare the agenda?**

The crucial thing is to think about the agenda in advance. It's a tool to help you plan the meeting.

The agenda for a large public meeting will need careful advance planning and thought, while a small committee meeting can be prepared the day before.

If you are having speakers at the meeting, or need background papers or information, remember to prepare the agenda enough in advance to give yourself time to organise these.

Think about whether you want to mail the agenda out in advance, or give it to people at the meeting.

# Annual General Meeting

The agenda for your Annual General Meeting will have to include specific items such as elections and yearly reports. Check your constitution to see what these are.



*See the Resource Centre information sheet AGM Checklist.*

## Some other things to think about

Think about whether an item needs an introduction and if so who will do this. It doesn't necessarily have to be the Chair.

Make sure you have background papers prepared in advance if an item needs them and distribute them to the group if necessary.

Be informative: describe each item in sufficient detail so that members come prepared and interested.

Make sure you have a good idea what each item is about; you may need to refer to past minutes or discussions.



*If you want help downloading other information sheets from the Resource Centre website contact your local Neighbourhood Learning worker.*

# AGM Checklist

*Organising your Annual General Meeting*

## What is the purpose of an AGM?

To allow your membership to hear reports from the Committee on the achievements and work of your group over the year.  
To elect the Committee for the next year  
To make any changes to the constitution

## Check your constitution for any regulations about your AGM

For example:

How often do you have to hold AGMs?  
How much notice are you required to give of the meeting?  
Who do you have to notify about the meeting?  
Do you have to send the notice of the AGM to your members' homes?  
How many people have to be at the meeting to make it official? (This is called the quorum)  
Do the group's accounts have to be independently examined (audited) before the AGM?  
Do nominations for new committee members have to be taken in advance or can you take them at the meeting? (It is usual to have a proposer and seconder for each nomination)  
How much notice is required if anyone wants to propose an amendment to the constitution?

## Venue, date and time

Book meeting room and set date and time

## Notice of meeting

Produce a notice giving details about the AGM & mail to everyone  
This should include date, time, venue and that elections will be held  
You may want to include the whole agenda or just highlight one or two items

## Sample agenda

Your AGM agenda should include certain items - use this sample agenda as a starting point

# **Annual General Meeting of Brighton & Hove Pigeon Fanciers Association**

**Thursday 20th October, 7.30pm  
East Brighton Community Centre (small hall)**

## **Agenda**

1. Apologies for absence
2. Minutes of previous AGM
3. Chair's report
4. Secretary's report
5. Financial report
6. Election of committee

*End of sample agenda*

## **Accounts**

You will need to present a report on your finances for the year to your AGM.  
Do you need your accounts examined by an independent person before the AGM or will you just have a report from your Treasurer?

## **Elections**

Make sure the minutes show who was nominated, the proposer and seconder for each candidate, the number of votes each person received, and who was elected for each post.

Decide on your voting system in advance and make sure it is explained clearly at the meeting. For example: Do you want to have a show of hands or a private ballot? Will it be a 'first past the post' election?

You may want to arrange a neutral person to count the votes

## **Minutes**

Organise someone to take minutes of any decision made at the AGM. It is particularly important to have clear records of the elections and any changes to the constitution.

Take a list of people attending the meeting so you can contact them afterwards

## **Getting people to the meeting & making it work**

Try to make the meeting enjoyable - think about making the business brief followed by a social with wine or snacks

Have a speaker on a burning issue

Organise a raffle

Have someone welcoming people at the door

Introduce the present Committee

Think about providing a crèche or organising babysitters

It may encourage people to come if you offer to pick them up or meet them outside

Think about whether the room is accessible to all your members - could a wheelchair user attend the meeting?

Think about having a loud speaker system or an induction loop



*An induction loop makes sound clearer for people using hearing aids. Ask your Neighbourhood Learning worker for loan of this equipment.*

# Ground Rules

Ground rules are a set of written guidelines to help groups agree on how they will work together. The list below is just an example of some of the rules a group may decide upon.

1. Keep good time-keeping.
2. Maintain a safe learning environment.
3. Keep discussions confidential to this group.
4. Keep mobile phones switched off.
5. Take responsibility for contributing to the session. Share your experiences and ideas with the group.
6. Take responsibility to keep contributions brief, to the point and relevant to the topic
7. Give people an opportunity to speak and let them finish. Listen to people. Hold one conversation at a time.
8. Respect everyone's contributions. Challenge the idea/issue but not the person.
9. Think about equality, welcome diversity and work inclusively.

## For further help see below ...

<b>NAME OF ORGANISATION</b>	<b>CONTACT DETAILS</b>	<b>Help/information provided on:</b>
Neighbourhood Learning Project	<p>Pam Johnson c/o Armley Library 2 Stocks Hill Armley, LEEDS LS12 1UQ</p> <p>Tel:0789 127 0631 Email: <a href="mailto:neighbourhoodlearningwest@yahoo.co.uk">neighbourhoodlearningwest@yahoo.co.uk</a></p>	Any of the resources found in the SCRAP book, including training, funding, equipment for loan, grants, photocopying etc.
West Leeds Healthy Living Network	<p>Chris Coates Unit 12 Armley Park Court Stanningley Road LEEDS 12</p> <p>Tel: 0113 2951043 Email: <a href="mailto:info@westleeds.org.uk">info@westleeds.org.uk</a></p>	Any of the resources found in the SCRAP book.
Voluntary Action – Leeds	<p>Luisa Squatriti Stringer House 34 Lupton Street LEEDS LS10 2QW</p> <p>Tel: 0113 2977920 Email: <a href="mailto:info@val.org.uk">info@val.org.uk</a></p>	Offer training, support and advice to voluntary and community groups
Leeds VOICE	<p>Hannah Sowerbutts Suite 56 Concourse House 432 Dewsbury Road LEEDS LS11 7DF</p> <p>Tel: 0113 2772227 Email: <a href="mailto:info@leedsvoice.org.uk">info@leedsvoice.org.uk</a></p>	Strengthens and represents the voluntary and community sectors in Leeds.
The Resource Centre	<p>Website: <a href="http://www.theresourcecentre.org">www.theresourcecentre.org</a></p>	A good internet resource site for downloadable information on all aspects of running a small voluntary/community group.

Social  
Business Consulting

Unit 2, Aire Street Workshops  
30-34 Aire Street  
Leeds  
LS1 4HT

0113 2443280

Local advice on setting up a  
social enterprise

Social Firms UK

[www.socialfirms.co.uk](http://www.socialfirms.co.uk)

Lots of useful information on  
site

# Equal opportunities

- How will you make sure your services are provided fairly to those who need them?
- How will you try to avoid discriminating, intentionally or unintentionally, against anyone that your group works with, whether they are a service user, volunteer, employee, management committee member?

Many groups have an equal opportunities policy or statement which explains that they intend to make service, employment opportunities and decision-making processes accessible to everyone. It is important to be aware of discriminating against or excluding people or ignoring their needs – and to monitor your group's practice at all levels. When you stay aware of what is happening in your organisation, you can work to change things as necessary to ensure people's participation.

# Model Equal Opportunities Summary

.....recognises:

- that the UK is a society which is diverse in race, culture, beliefs and lifestyles
- that there are many groups of people who are discriminated against in this society
- that in many cases, legislation has been lacking; and that where such legislation does exist, it has not ended this discrimination

.....believes:

- that no person should suffer discrimination, oppression or lack of opportunity based on gender, race, colour, nationality, ethnic origins, religious or philosophical belief, disability, HIV status, age, marital status, parental status, sexual orientation, political belief or trades union membership, class, responsibility for dependants, appearance, ex-offender status, lack of formal qualifications, or any similar grounds
- that all persons should have equal rights to recognition of human dignity, to education, to work, to receive services and to participate in society
- that the concept of voluntary action is in itself a means of combating discrimination and disadvantage, and contributing to enhanced quality of life for individuals, groups, communities and society as a whole
- that every group and community has a right to a fair share of ..... services, and to have these services delivered in ways which are sensitive and appropriate to their needs; however, .....is committed to prioritising its services, targeting its resources, and being responsive to communities in greatest need.

.....affirms:

- that we recognise our responsibility to work towards the elimination of all discrimination, oppression and lack of opportunity, both within .....itself and externally
- that we will seek to challenge discrimination, oppression and lack of opportunity, and work towards a more just society
- that we will positively promote equality of opportunity as a core value in all areas of our work and in our structure
- that we will endeavour to fulfil all legislative requirements concerning equal opportunities, and to implement recognised good practice where resources permit
- that we will seek to find ways of working which ensure equality of opportunity and accountability
- that we will encourage those with whom we work to adopt and practice sound policies on equal opportunities
- that we will monitor and review our own policy and practice, taking positive action where necessary, to ensure that equal opportunities are an integral and active part of everything VA-L is and does.

*Statement adopted by the Management Committee on .....*

*Signed by Chair .....*

# Model Confidentiality Policy

..... offers a confidential service to all its service users, partners and all the members of groups that we work with.

1. **Confidentiality** is taken to mean 'a way of working that ensures service users can disclose information about themselves to organisations in the knowledge that this information will not be passed on in any form without explicit consent'.
2. **Limits of confidentiality.** It should be stressed to users that the limits of confidentiality extend to the team of workers and volunteers.
3. **Informed consent.** The decision to inform others about a piece of confidential information should be the decision of the individual concerned. The reasons and the likely consequences of sharing or not sharing information should be discussed fully with the individual.
4. **Breaches of confidentiality.**
  - a) An exception to the right to complete confidentiality would be if child abuse was disclosed.

Although there is no statutory responsibility for a voluntary organisation to disclose this information, ..... believe they have a moral obligation to do so. All users of the service offered by ..... should be made aware of this policy.

b) In the case of other vulnerable dependants, if knowledge of abuse whether physical, sexual or emotional is brought to the attention of a worker or volunteer, they should attempt to gain the confidence of the person giving the information. They should try to obtain permission from them to contact other agencies and make a referral. If this is not possible and there is a risk of another person's safety, and a breach of confidentiality is being considered then the Co-ordinator must be informed.

c) If a member of staff or volunteer is approached by the police for information, the principle of confidentiality should be explained. There is no legal duty to give information to the police.

If a worker or volunteer from ..... is under any pressure to breach confidentiality they must speak with the Co-ordinator whose final responsibility it would be.

d) In the case of service users who disclose they may self-harm or attempt suicide, workers would spend time discussing the issues involved and offering the person all available opportunities and choices.

The autonomy and rights of the person would however be respected and staff would not be expected to intervene or coerce or contact other agencies without the expressed permission of the person involved.

If a user is found to need emergency medical treatment then staff would contact the emergency medical services.

e) If at any time the Co-ordinator is not available due to leave or illness then their deputy or the Chair of the Board should be contacted about any breaches of confidentiality.

**5. Responses to questions about a third party.** Any responses to questions should be answered in such a way that confidentiality is ensured. Workers and volunteers must make sure that by not denying the facts about someone, they lead the enquirer to an affirmative interpretation.

**6. The keeping of records.** Any written records kept on users must be kept in locked cabinets and kept to a minimum of information. Details that may identify a user should not be made public under any circumstances. The Board will only be given details of service users on a need to know basis.

Service users will have access to any written information about themselves on request. This however does not mean that their records belong to them. Service users' records are the property of ..... and will be shredded on site after three years of closure of the users file.

Consent from users should always be obtained before photographs are taken or case studies used.

**7. Personal information about staff.** Any written information about workers or volunteers must be kept in locked cabinets.

Any personal information about a worker or volunteer that is discussed in supervision sessions will be kept confidential by the supervisor providing it does not affect any situations that are directly linked to the work of the project.

There may be times when issues concerning workers or volunteers need to be discussed with members of the Board. Examples of this could be when a worker is on long term sick leave or when the grievance and disciplinary procedures are utilised.

**8. General regard for confidentiality.** All those connected with ..... including paid staff, volunteers and Board members are required to keep confidential not only the details of service users but also the affairs of the organisation. Failure to do so will be seen as a serious matter.

# Model Child Protection Policy

.....believes that the interests and safety of children is paramount. We believe that every child has the right to:

- have the opportunity to achieve their full potential.
- have their needs determined and met.
- be protected from abuse, exploitation and neglect.
- be listened to, believed and have their views given careful consideration.
- be respected and understood in the context of their own cultural, religious and ethnic origin.

Under the Children's Act (1989), and for the purposes of this policy, children are defined as being under 18.

## **Definition of child abuse**

Child abuse is usually defined under one or more of the following:

- neglect
- sexual abuse
- physical abuse
- emotional abuse

The general term of child abuse is used to describe situations where a child is experiencing ill-treatment or restricted development. This can occur in many different settings including the home. It can include both the actions and omissions on the part of parents/carers but could equally involve other family members or friends.

## **Definition of child protection**

Child protection is the term used to describe the responsibilities and activities that are undertaken to prevent or stop children from being abused.

## **Recognition of abuse**

All staff and volunteers at ..... have a responsibility to act on any concerns or suspicions they may have with regards to child abuse. These concerns must be discussed with the person who has the final responsibility (see below) as soon as possible and a written record must be made of the concerns.

## **The responsible person**

This will normally be the Co-ordinator or in their absence, their Deputy or the Chair of the Board.

The responsible person will make the decision as to whether the information should go outside of the organisation. They will give due consideration to each case with regards to how to share concerns with a parent or carer in a sensitive manner. It should be noted however there may be situations where it is not possible or reasonable in terms of the safety of a child to share concerns with a parent or carer.

The responsible person will contact Social Services if and when necessary. It is not the responsibility of individual staff or volunteers to contact Social Services.

**Criminal Records Bureau**

It is the policy of .....that all newly recruited paid staff and volunteers will have CRB checks carried out.

**Confidentiality**

Any service user who indicates that they may disclose abuse should be informed, and be able to fully understand .....Confidentiality Policy.

The identity of any child or young person and the details of the concern will be given to the minimum number of people. Within .....this will be the responsible person and the worker or volunteer who raised the concern.

If it is necessary to inform other members of staff to ensure that the area of concern is not made worse by lack of information, then only the minimum of information will be released.

If the responsible person decides that maintaining confidentiality will further endanger the child or member of staff, then information may be released to guard against this.

**Support**

.....will provide support to members of staff during a child protection investigation.

# Working with Children or Vulnerable Adults

- Do you have people working or volunteering with children or the elderly?
- Do not leave yourself open to allegations or suspicion... feel confident about what you do.

Everyone working with children under the age of 18 or adults who are elderly, disabled or have impairments should be checked by the Criminal Record Bureau.

There are agencies in the area who act as 'umbrella organisations' and are registered to check the identification of any such worker or volunteer. Volunteers' checks are free of charge however organisations will be charged for paid worker checks.

Forms can be obtained from these agencies.

BARCA Leeds - 0113 255 9582  
Surestart Bramley - 01132 255 7755  
Bramley Elderly Action - 01132 236 1644

There may be others.

For further advice contact the Criminal Records Bureau on 0870 9090811

# Model Health & Safety Policy

This is the Health & Safety Policy Statement of

.....

**Our statement of general policy is:**

- to provide adequate control of the health and safety risks arising from work activities;
- to consult with our employees on matters affecting their health and safety;
- to provide and maintain safe plant and equipment;
- to ensure safe handling and use of substances;
- to provide information, instruction and supervision for employees;
- to ensure all employees are competent to do their tasks and to give them adequate training;
- to prevent accidents and cases of work-related ill health;
- to maintain safe and healthy working conditions; and
- to review and revise policy as necessary at regular intervals.

Signed.....

Date.....

Review Date.....

1. Staff Safety Rules

- Any employee who finds a hazard in their place of work at ..... should report it to the Co-ordinator immediately.
- It is the responsibility of each worker to ensure that the work areas are kept tidy and that doorways and gangways are kept clear for safe entry and exit.
- Employees must treat electric points and electrical equipment with respect: sockets must not be overloaded, wires must not trail across walkways, equipment must be switched off when not in use and any perceived problem must be reported immediately, as above and the equipment must not be used until the problem has been addressed by the responsible person.
- Staff must not lift or handle any item which might involve the risk of injury.
- ALL accidents and injuries MUST be reported and recorded in the accident book.
- In the event of an accident resulting in minor injury or illness, one of the first-aiders MUST be called. In the event of a more serious injury or illness, an ambulance should be called immediately.

- Any employee using hazardous or potentially hazardous materials (e.g. Cleaning fluids, toner) should ensure that the materials are not left unguarded and that they have received training/advice in the proper handling of such materials; it is ..... responsibility to ensure that such training/advice is provided.
- Staff who use VDU's regularly as part of their work for ..... must ensure that they take regular breaks from screen-work. It is ..... responsibility to assess and control the risks associated with such work, and employees must report to the Co-ordinator any concerns about such work relating to eyesight, physical problems or mental stress, and must comply with any remedies implemented by .....
- Staff must ensure that their whereabouts during working hours is known to ....., and they are contactable in an emergency.
- ..... take seriously the potential threat to the health of its staff which may be caused by work-related stress. Any staff member who feels that such stress is causing or is likely to cause them ill-health MUST report this to the Co-ordinator as soon as reasonable practical.
- Any employee, who is pregnant, or any employee who has recently given birth or is breastfeeding (and any employee who receives a visitor in these categories) must take care with regard to dangerous substances, processes or working conditions (including VDU's). It is ..... responsibility to ensure that these risks are assessed and controlled, and the employee's responsibility to ensure that the Co-ordinator is made aware of their situation.
- ..... will provide alternative working conditions OR offer protection in such cases.
- ..... takes seriously the possibility of violence against staff; any employee who feels threatened or is threatened or who may be entering a risky situation MUST report this to the Co-ordinator immediately, and should ensure that they are accompanied by a colleague and have received training/advice if there is any likelihood of the situation recurring; it is ..... responsibility to provide such training/advice where necessary.
- Staff must abide by fire drill procedures and ensure that their visitors do likewise.
- Staff are encouraged to involve themselves in ..... health and safety activities and should consult the Co-ordinator should they wish to be more actively involved.
- Smoking is not permitted in the offices of ...../
- Adherence to the Health & Safety Policy of ..... is a condition of employment for all ..... staff, and staff MUST familiarise themselves with the policy. Staff should note that other ..... Policies (e.g. Equal Opportunities, Harassment, Working Time as laid out in the Terms & Conditions of Employment, etc) are intended to be complementary to this Health & Safety Policy and should be viewed as such.

# Sample Volunteer Code of Practice

## Introduction

The purpose of ..... is: (insert mission statement)

## Principles

- ..... will ensure that volunteers are properly integrated into the organisation.
- ..... does not believe in using volunteers to replace paid staff.
- ..... expects all its staff to work positively with volunteers.
- ..... is committed to recognising and promoting the value and contribution of volunteers. (Awards, Press etc.)

## Recruitment

Outline the recruitment procedure for volunteers, including requirements for application forms, interviews, police checks and references.

## Volunteer Agreement

Volunteers will have a volunteer agreement outlining what ..... will provide. A job description, person specification and outline of the role will also be provided. This is not intended to be a contract of employment.

## Expenses

Volunteers will be re-imbursed for their travel, when working on behalf of ..... Give details of further expenses that will be paid.

## Induction and Training

Volunteers will receive a full induction into ..... either one-to-one or in a group. Appropriate training will be provided.

## Support

Volunteers will have a named individual as their main contact. Regular supervision will be provided with feedback on performance, discussion of future development and any problems that have arisen.

## Volunteer Representation

Volunteers are encouraged to express their views about ..... They should be included in internal communications and have the right to join a trade union. Give details of volunteer representation at staff meetings and the management committee.

## **Insurance**

Volunteers should be covered by ..... insurance policy, while they are on the premises or involved in any work on ..... behalf.

## **Health and Safety**

Volunteers should be covered by the Health and Safety policy.

## **Equal Opportunities**

..... should have an Equal Opportunities Policy affecting both paid staff and volunteers. Give details as appropriate.

## **Grievance and Disciplinary Procedures**

Procedures should be in place for dealing with complaints either about or by volunteers.

## **Confidentiality**

Volunteers should be covered by the same requirements for confidentiality as paid staff.

# Accident Form

Scheme name:.....

It is important that any accidents are recorded in registered day care/childminding provision by the adult(s) who dealt with the accident. If the accident is serious it may be necessary to notify the emergency contact of the person involved. The registered person must be informed and also ensure that a full accident report is completed by whoever dealt with the situation, in line with health and safety requirements. This forms gives an outline of what information should be included.

---

**To be completed by person dealing with accident:**

Full name of patient: .....

Date of accident: ..... Time: .....

Where the accident took place:.....

Details of accident: (please include any actions taken)

Witness(es): .....

Injuries sustained: (please state if and what treatment was given and by whom)

Were the patients emergency contacts informed:

no       yes  (date and time: .....) )

Signed:.....)date: .....) )

---

**To be completed by the registered person:**

I have been informed of the above incident.

Signed: ..... date: .....

Name: .....

**To be confirmed by the patient:**

I agree with the events recorded above:

Signed: ..... date: .....

Name: .....

## Parent / Carer Consent Form

**Group Name:** ..... **Proposed place to be visited:** .....

Details of trip/activities: ..... **Date:** .....

.....

.....

**Supervision details:** .....

.....

**Child's First Name:** .....

**Surname:** .....

**Preferred Name:** .....

**Date of Birth:** .....

**Address:** .....

**Home Tel No:** .....

.....

.....

**Doctors Name:** .....

**Tel no:** .....

**Address:** .....

.....

### **Who should we contact in an emergency? (please supply two alternatives)**

**Name:** .....

**Address:** .....

**Tel No:** .....

.....

**Mobile No:** .....

.....

**Name:** .....

**Address:** .....

**Tel No:** .....

.....

**Mobile No:** .....

.....

### **Attention needs to be given to my child as indicated below:**

Health, Diet, Behaviour:

.....

.....

.....

### **Activity Consent:**

## Parent / Carer Consent Form

I give permission for my child to take part in general activities considered appropriate for his/her age and ability as well as the specific activities indicated.

- |       |     |     |     |
|-------|-----|-----|-----|
| 1.    | 2.  | 3.  | 4.  |
| <hr/> |     |     |     |
| 5.    | 6.  | 7.  | 8.  |
| <hr/> |     |     |     |
| 9.    | 10. | 11. | 12. |
| <hr/> |     |     |     |

Activities that my child **can not** participate in:

- |    |    |    |
|----|----|----|
| 1. | 2. | 3. |
|----|----|----|
- 

I consent to the organisers arranging emergency medical treatment if this is considered necessary.

I understand that the child's health and welfare is your first consideration and for my part, I will ensure that during hot weather my child will bring a sun hat and high factor sun cream for his/her own use.

I understand that whilst every care will be taken by the organisers they cannot be held responsible for incidents resulting from the unreasonable behaviour of my child, or others, resulting in loss or damage to personal property.

I understand that children under the age of 10 should be brought and collected by a responsible adult.

**We regret that your child cannot attend until this form is returned.**

Signed: ..... Parent/Guardian Date: .....

.....

Print name: .....

**Young Peoples Consent Form**

The attached consent form covers all groups and projects, which are managed and delivered by ..... Please note it is not always possible to confirm activities in advance if you need to know precise details of an activity please contact the relevant project co coordinator.

**Contact Details – please note and keep these for your information**

Name and contact of agency involved.....  
*For your information*

**ACTIVITIES PROJECTS UNDERTAKEN**

- Centre based group activities in and around buildings/community centres etc.
- Local out of centre activities e.g. Bramley Park.
- Informal Education – Sex Education, Drug Education etc. Issue based discussions and Information & Advice.
- Trips and visits e.g. to other youth centres, or leisure activity venues such as cinemas, sports centres etc.
- Sports activities – Football, Cricket, Rugby, Basketball etc – these can involve physical contact.
- Residentials – You will always be informed in good time of any residential and additional consent will be sought.

\_\_\_\_\_  
Name of young person \_\_\_\_\_

a) Has he/she received a tetanus injection in the last 5 years? If yes, dates if known: \_\_\_\_\_

b) To the best of your knowledge, has your son/daughter been in contact with any contagious or infectious diseases or suffered from anything in the last four weeks that may be contagious or infectious? (For Residential & Exchanges Only) If yes please give brief details \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

c) Does she/he have any special dietary requirements?  
If \_\_\_\_\_ yes \_\_\_\_\_ please \_\_\_\_\_ give  
details \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

Additional information

a) Does she/he have any religious or similar beliefs which may need to be considered? If yes please give details \_\_\_\_\_  
\_\_\_\_\_

b) Name and address and telephone Number of emergency contact (*Every attempt will be made to contact this person in the event of an emergency*)  
\_\_\_\_\_  
\_\_\_\_\_

Relationship to your daughter/  
son \_\_\_\_\_

c) Alternative Emergency Contact Name and  
Number \_\_\_\_\_  
\_\_\_\_\_

d) Name and address and telephone number of family  
doctor \_\_\_\_\_  
\_\_\_\_\_

e) Does your child/ward have any disabilities, if yes please give  
details \_\_\_\_\_  
\_\_\_\_\_

All our activities are open to all young people who wish to take part, but in some cases this is not possible, please contact the activity organiser for further details

DISCLAIMER

Some of our activities are open access, this means that young people can attend and leave as and when they please throughout the programmed events.

The open access nature of the group makes it difficult to monitor totally

Should your child decide to leave during an activity It must be recognized that the ultimate responsibility for the whereabouts and behavior of the young people remains with the parent or guardian  
\_\_\_\_\_

DECLARATION

I agree to my son/daughter receiving medication as instructed and any emergency dental, medical or surgical treatment, including anaesthetic or blood transfusion (unless stated otherwise), as considered necessary by the medical authorities present.

I authorise the staff of the group to act on my behalf in all matters relating to the above named for the period of the trip/activity

- I accept that .....will be keeping information about my son's/daughter's membership for .....purposes.
- I give explicit consent to the holding of information of my son's/daughter's health; disabilities; religion/faith; race/ethnic origin again for .....purposes.
- (I give/do not give) consent to the disclosure of any of information held to third parties associated with .....in order that they may offer opportunities and services that may be of interest or benefit.

Signature of parent/carer.....

DATE.....

## Application for Community Centre Hire

Name: .....

Address: .....

.....

.....

Contact tel: .....

Purpose of hire: .....

Number of people attending: .....

Date: ..... Start: ..... Finish: .....

**Regular hire**

**One-off hire**

I enclose:

- £10 non-returnable deposit for reservation of the building
- £20 returnable deposit – to be returned when the building is left in a clean and tidy condition
- Cost @..... per hour to be paid in advance

£10.00

£20.00

..... hours @ .....

Total

Details of refreshments if required (drinks and biscuits can be provided if booked in advance)

.....

.....

---

**I/We undertake** to leave the premises in a clean and tidy state and to pay for any breakages or damage occurring during, or as a result of our hire of the premises, unless caused by external agencies not connected with our group.

**I/We undertake:** not to allow any unauthorised person access to the premises during our period of hire.

## Application for Community Centre Hire

**I/We undertake** that ..... Community Association cannot be held responsible for any injury or damage to person or property on our premises (inside or outside) unless this can be shown to be due to neglect of breach of our public duty.

### **Checklist for condition of building:**

Clean & tidy?	yes	No – please give details	
Kitchen	<input type="checkbox"/>	<input type="checkbox"/>	.....
Small Room	<input type="checkbox"/>	<input type="checkbox"/>	.....
Large Room	<input type="checkbox"/>	<input type="checkbox"/>	.....
Toilets	<input type="checkbox"/>	<input type="checkbox"/>	.....

If any damage occurred, how did it happen? .....

.....

.....

### **Damage must be paid for – if damage occurs frequently the user will be given:**

1. Verbal warning regarding the damage or condition of the building
2. Formal letter of notice
3. Final notice to no longer use the building

---

Signature of user ..... date .....

Signed on behalf of ..... Community Centre: .....

Date .....

## Risk Assessment

When you do the assessment walk around the area where the activity is going to take place and look afresh at what could reasonably be expected to cause harm.

Ignore the trivial and concentrate on significant hazards which could result in serious harm or affect several people.

Risk Assessments must be suitable and sufficient. You need to be able to show that :

1. A proper check was made.
2. You asked who might be affected.
3. You dealt with all the obvious significant hazards, taking into account the number of people who could be involved.
4. The precautions are reasonable and the remaining risk is low.

## Risk Assessment

1. ACTIVITY (SEPARATE ASSESSMENTS FOR CHILDREN AND STAFF)	2. DESCRIBE SAFETY AND/OR HEALTH HAZARD	3. WHAT IS THE RISK LEVEL TO PERSONS? *	4. PRECAUTIONS TO TAKE	5. RISK LEVEL ACHIEVED	6. WHAT FURTHER PRECAUTIONS ARE NEEDED? (COMPLETE FOR RISK LEVELS 4/5)

\* Risk levels guide:                    0 = no risk    5 = death

## For further help see below ...

NAME OF ORGANISATION	CONTACT DETAILS	Help/information provided on:
Voluntary Action – Leeds	<p>Stringer House 34 Lupton Street LEEDS LS10 2QW</p> <p>Tel: 0113 2977920 Email: <a href="mailto:info@val.org.uk">info@val.org.uk</a></p>	<p>Offer training, support and advice to voluntary and community groups. Downloadable templates from website <a href="http://www.val.org.uk">www.val.org.uk</a></p>
The Resource Centre	<p>Website: <a href="http://www.theresourcecentre.org">www.theresourcecentre.org</a></p>	<p>A good internet resource site for downloadable information on all aspects of running a small voluntary/community group.</p>
WYCAS	<p>Stringer House 34 Lupton Street LEEDS LS10 2QW</p> <p>Tel: 0113 2706269 Email: <a href="mailto:info@wycas.org.uk">info@wycas.org.uk</a></p>	<p>To develop the ability of voluntary and community sector organisations with charitable aims to manage their money more efficiently and effectively. See website <a href="http://www.wycas.org.uk">www.wycas.org.uk</a> for resources.</p>
Neighbourhood Learning Project	<p>Pam Johnson c/o Armley Library 2 Stocks Hill Armley, LEEDS LS12 1UQ</p> <p>Tel:0789 127 0631 Email: <a href="mailto:neighbourhoodlearningwest@yahoo.co.uk">neighbourhoodlearningwest@yahoo.co.uk</a></p>	<p>Any of the resources found in the SCRAP book, including training, funding, equipment for loan, grants, photocopying etc.</p>
West Leeds Healthy Living Network	<p>Chris Coates Unit 12 Armley Park Court Stanningley Road LEEDS 12</p> <p>Tel: 0113 2951043 Email: <a href="mailto:info@westleeds.org.uk">info@westleeds.org.uk</a></p>	<p>Any of the resources found in the SCRAP book.</p>
Leeds VOICE	<p>Hannah Sowerbutts Suite 56 Concourse House 432 Dewsbury Road LEEDS LS11 7DF</p>	<p>Strengthens and represents the voluntary and community sectors in Leeds.</p>

Tel: 0113 2772227  
Email:  
[info@leedsvoice.org.uk](mailto:info@leedsvoice.org.uk)

Criminal Records  
Bureau

Tel: 0870 9090811  
  
Customer Services  
CRB PO Box 110  
Liverpool L69 3EF

Information and fact sheets about  
CRB checks for adults working  
with children and vulnerable  
people.

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

Early Years Service

Tel: 0113 3950909 for your  
free information pack, or for  
further information about  
working with children.

The Leeds Early Years Service  
supports local childcare workers  
and playworkers by offering them  
extensive training, and networks of  
support.

Health & Safety  
Executive

Tel: 0113 2834200  
  
[www.leeds.gov.uk](http://www.leeds.gov.uk)  
[www.hse.gov.uk](http://www.hse.gov.uk)

For local information and fact  
sheets visit the [leeds.gov](http://leeds.gov) website  
and click on H for health

# Good Practice Guides Available from West Yorkshire Community Accounting Service

## Dealing with Cash

This guide is designed to set out a few basic rules and procedures for handling cash within your organisation. Keeping track of cash in an organization can be difficult, by setting up some procedures and being clear about who is responsible for cash, this task can be made simpler.

- **What to do with cash income**
- **Cash donations from individuals; collections; fundraising**
- **How to use cash for purchases (Petty Cash System)**
- **Writing up the Petty Cash Book**

## Financial Procedures

These money rules/financial procedures have been written for small to medium-sized voluntary sector organisations.

- **Money rules template to complete detailing general rules; banking; income; payments by cheque; payments by cash; wages and salaries and controls over fixed assets.**

## How to do a Bank Reconciliation

A bank reconciliation is the process that you go through to ensure that the bank statement and the cash book agree. It is important to do this in order that the organisation's records are both complete and accurate

- **Reasons for differences between bank statements and cash books**
- **When to do a bank reconciliation**
- **How to do a bank reconciliation**
- **What do you do with .... Out of date cheques; cancelled cheques; dishonoured cheques;**
- **Bank Reconciliation form**

## Book-Keeping

This good practice guide is aimed at smaller voluntary sector organisations, who use a book rather than a computerised accounts package for recording transactions. There is a separate WYCAS Guide on how to deal with petty cash. If you receive funding for a specific purpose (known as restricted funds), you may also need to consult our Guide on Accounting for Restricted Funds

- **What information should the books provide?**
- **Who should be involved in keeping the books?**
- **What equipment is required for book-keeping?**
- **When should the books be done?**
- **Paying out money**

- **Receiving money**
- **The Cash book**
- **Bank Accounts**

### **Insurance for Voluntary and Community Groups**

Very often it is only **after** the organisation has been burgled or had a fire that the committee realises that the organisation was not insured properly. This guide is designed to provide you with information about the different types of insurance available, and what they are for. The level and type of cover that you need will depend on the risks that your particular organisation is exposed to, how big your organisation is, what kind of activities you carry out, and what you use or own. Although decisions about insurance are a management committee responsibility, many groups find it is very helpful to have one member of the committee who is delegated the task of overseeing insurance, who will also ensure that it is kept up to date. The committee should review the cover annually.

- **Insurance Companies**
- **Types of Insurance**

### **QuickBooks – A Starter Guide**

This guide will be of use for anybody just starting to use the QuickBooks package; WYCAS also offer individual support and training. The guide is based on Version 8, but the capabilities and functions of each version are very similar.

- **Getting Started**
- **Setting up Company details**
- **Menu Bar commands**
- **Banking**
- **Reports**
- **Windows and Help**

### **Why Should your Organisation Register as a Charity?**

If your annual income is over £1000 and you have charitable objectives then you are legally obliged to apply to the Charity Commission for charitable status. A charity is an organisation established for charitable purposes.

- **Because you have to...**
- **The benefits of Charitable status**
- **Where can I get further help?**

### **The Beginners Guide to Spreadsheets for Finance**

All you need to know about setting up and using a software spreadsheet package like Microsoft Excel for your group's finances.

### **The Role of the Treasurer**

Information on taking responsibility for financial management, including checklist of financial tasks.

### **Getting ready for having your annual accounts checked**

What you need to do

### **Gift Aid**

What is Gift Aid

**Becoming a Company – The accounting requirements for a small charitable company**

**What are Reserves**

For copies of any of the above Guides then please contact:

WYCAS on the number below.

# Request Form for Good Practice Guides

Please complete and return to WYCAS, Stringer House, 34 Lupton St, Leeds, LS10 2QW or E-Mail [linda.pearson@wycas.org.uk](mailto:linda.pearson@wycas.org.uk)

N.B. Guides will routinely be sent on floppy disc or by E Mail, if you require hard copies please indicate, below.

Guide No.	<u>Organisation</u> Name AND address	
1	Dealing with cash*	
2	Financial Procedures*	
3	How to do a bank reconciliation*	
4	Book keeping*	
5	Insurance for Voluntary & Community Groups	
6	Quick books A starter Guide	
7	Charity Registration	
8	Excel Spreadsheets for Finance	
9	The Role of the Treasurer	
10	Getting ready to have your Annual Accounts checked	
11	Gift Aid	
12	Becoming a Company	
13	Reserves	
	Date order despatched	

\*This Good Practice Guide is also available in Punjabi, Urdu and Bengali in hard copy only.

English language copies of these publications are available by E Mail or on disc, if you would like them by E Mail please write your E Mail address below.

# Bank Accounts

## *Banking for voluntary and community organisations*

Some of the major banks and building societies offer special accounts for small voluntary and community organisations and give free banking as long as your account is in credit. The conditions and benefits vary slightly from bank to bank - the details for each are listed in this fact sheet.

## Opening an account

To open an account you can go into the local branch or ring the contact number. They will give you forms to fill in. Once this has been done and the forms returned to the bank, they will send you an account number and a passbook/ chequebook depending on the type of account. You can then start using the account.

Banks and building societies generally require proof that your group is a voluntary, non-profit making organisation and not a private business. This could be one of the following:

- Letter from the chair and secretary of your group
- Copy of resolution passed at AGM authorising your group to open an account with the bank
- Copy of your group's Constitution
- Charity Registration certificate/Trust deeds (if group is a charity)

At least two people should sign each cheque that your group writes. You can have a pool of people who are named as 'signatories' for the account, any two of whom can sign the cheque. The bank/ building society will require evidence of the identity of each person, and unless they have an account with that bank already it will be necessary for them to go down in person with:

- Proof of identity - eg driving license, passport, child benefit book
- Proof of address - eg utilities bill, benefit book, tax demand.

The signatories should be people with good credit ratings (ie no 'bad debts') as the banks will often refuse to accept people as signatories that they consider a high risk, however trustworthy.

Make sure you tell the bank that you are a NON PROFIT MAKING organisation. If you do not make this clear, you will be treated as a small business and you will pay more charges than you need to.

All the accounts listed offer 'free banking', ie no day-to day charges, unless specified. You will still be charged for things like going overdrawn, stopping cheques, extra statements etc.

When you are looking for information on the internet remember that most banks refer to community and voluntary organisations as 'Clubs and Societies'. Accounts for these groups are usually classed as 'Business Banking'.

We update our information sheets regularly, but if you want to check these details the British Bankers Association produce comparative tables for 'charity' and 'club and society' accounts that are available online at: <http://www.moneyfactsonline.co.uk/mfBAF/root.asp>

## **Alliance & Leicester**

### **Community Current Account**

Cheque account with paying in book  
Does not pay interest (but you can open a high interest saving account to work in conjunction with your current account)  
No initial down payment  
Banking by phone, internet, post, or through Post Offices.

*Alliance & Leicester*  
*For application form*  
*Tel: 0800 5870800*  
[www.alliance-leicester.co.uk](http://www.alliance-leicester.co.uk)

## **Bank of Scotland/Halifax**

### **Halifax Treasurer's Account**

Cheque account  
Interest paid annually on balances of £2,500 or more  
No minimum balance or initial down-payment  
Unlimited deposits and withdrawals can be made at the local branch with a passbook free of charge

*Bank of Scotland*  
*For an information pack call*  
*Tel: 08457 26 36 46*  
[www.bankofscotlandhalifax.co.uk](http://www.bankofscotlandhalifax.co.uk)

## **The Cooperative bank**

### **Community Directplus**

All credits free of charge  
All debits including standing orders and direct debits free of charge  
No monthly fees  
Interest paid on balances in credit  
Banking by phone, internet, post, or through Post Offices.

*The Cooperative Bank*  
*Leeds 0113 2465432*  
[www.co-operativebank.co.uk](http://www.co-operativebank.co.uk)

# HSBC

## Treasurer Account

Cheque account with the ability to make and receive payments, by cash, cheque or internet  
Pays interest  
No initial down payment or minimum balance  
Free Banking  
Free Audit Letter or Certificate of Balance

*HSBC*

[www.ukbusiness.hsbc.com/hsbc/mm/business-bankaccounts](http://www.ukbusiness.hsbc.com/hsbc/mm/business-bankaccounts)

# Lloyds TSB

## Treasurers Account

Cheque account  
No interest paid  
No initial down-payment or minimum balance  
Free Banking

*Lloyds TSB*

[www.lloydstsb.co.uk](http://www.lloydstsb.co.uk)

# Triodos Bank

Triodos Bank works specifically with 'organisations and groups which create real social, environmental and cultural value'. They have a range of accounts specifically for such groups, including Savings Accounts. Their current Accounts provide cheque and deposit books, which can be used at local Royal Banks of Scotland branches:

## Charity Current Account

No minimum opening balance  
Cheque Book and Paying-in Book  
Direct Debits, Standing Orders and other automated payments  
Interest on credit balances  
Some charges made for day to day banking  
Also available to groups which are not registered as charities, but do meet the criteria listed above

*Triodos Bank*

[www.triodos.co.uk](http://www.triodos.co.uk)

## NatWest Bank

### Clubs and Societies Current Account

- Pays interest
- No minimum balance or initial down-payment
- Free audit certificate
- Free banking if your annual expenditure is less than £25,000
- Banking by internet or local branch

*NatWest Bank 0800 200 400*  
[www.natwest.com](http://www.natwest.com)

## Nationwide Building Society

### Treasurers Trust Account

- Passbook, not cheque account
- Pays Interest
- No initial down-payment or minimum balance
- Free Banking
- Cheques can be issued for you by the Branch free of charge

*Nationwide Building Society*  
[www.nationwide.co.uk/savingsinvestments/business\\_offshore/treasurers\\_trust.htm](http://www.nationwide.co.uk/savingsinvestments/business_offshore/treasurers_trust.htm)

## Unity Trust Bank

This is a bank run specifically for non-profit making organisations, and has a variety of current and deposit accounts available. While the rates and facilities don't vary hugely from the high street banks and building societies, the service may be more tailored to your needs and the investment of the bank goes into more ethical areas (community development.)

### Ideal Current Account

- Cheque account
- Free banking but no interest paid

### Ideal Deposit Account

- Pays interest (tiered rates)
- Instant access to funds

Note: All accounts run on postal/ telephone banking but you can nominate a local high street bank and use their counter services eg for cash withdrawals.

*Unity Trust Bank  
4 The Square  
111 Broad Street  
Birmingham  
Tel: 0121 616 4101  
[www.unity.uk.com](http://www.unity.uk.com)*

## **CAF Bank (Charities Aid Foundation)**

CAF is a registered charity which provides tailor-made financial products and services exclusively for the voluntary sector. CAF BANK is a subsidiary of CAF (Charities Aid Foundation).

### **CafCash Account**

Free banking.  
Cheque Book account using HSBC.  
ATM card for cash withdrawals if required.  
Pays interest on all credit balances.  
BACS and CHAPS transfers available for a fee.  
Initial deposit must be £1000 minimum - then account must always be kept in credit.

### **CAF Gold Account**

High interest deposit account.  
Can transfer payments into CafCash account at any time.

CAF Bank  
Tel. 01732 520033  
<http://www.cafonline.org/ccs/>  
[cafbank@cafonline.org](mailto:cafbank@cafonline.org)

## For further help contact...

NAME OF ORGANISATION	CONTACT DETAILS	Help/information provided on:
WYCAS	Stringer House 34 Lupton Street LEEDS LS10 2QW  Tel: 0113 2706269 Email: <a href="mailto:info@wycas.org.uk">info@wycas.org.uk</a>	To develop the ability of voluntary and community sector organisations with charitable aims to manage their money more efficiently and effectively – free advice and help sheets
Charities Information Bureau	93 Lawefield Lane WAKEFIELD WF2 8SU  Tel: 01924 239063 Email: <a href="mailto:funding@the-cib.demon.co.uk">funding@the-cib.demon.co.uk</a>	Downloadable help sheets on all aspects of funding including budgeting and finance for small community groups.
Voluntary Action – Leeds	Stringer House 34 Lupton Street LEEDS LS10 2QW  Tel: 0113 2977920 Email: <a href="mailto:info@val.org.uk">info@val.org.uk</a>	Offer training, support and advice to voluntary and community groups
Money Matters to me - website	<a href="http://www.moneymatterstome.co.uk">www.moneymatterstome.co.uk</a>	A useful website to understand the different aspects of personal and practical day to day finance.
Skillswise	<a href="http://www.bbc.co.uk/skillswise/numbers">www.bbc.co.uk/skillswise/numbers</a>	A useful website for adults wanting help with basic number skills
Neighbourhood Learning Project	Pam Johnson c/o Armley Library 2 Stocks Hill Armley, LEEDS LS12 1UQ  Tel:0789 127 0631 Email: <a href="mailto:neighbourhoodlearningwest@yahoo.co.uk">neighbourhoodlearningwest@yahoo.co.uk</a>	Any of the resources found in the SCRAP book, including training, funding, equipment for loan, grants, photocopying etc.
West Leeds Healthy Living Network	Chris Coates Unit 12 Armley Park Court Stanningley Road LEEDS 12	Any of the resources found in the SCRAP book.

Tel: 0113 2951043  
Email: [info@westleeds.org.uk](mailto:info@westleeds.org.uk)

# What is a Business Plan?

Writing a Business Plan will help greatly when applying for funding.

A business plan puts down on paper what your organisation will do to turn its vision into reality. It summarises the activities, systems, skills and resources needed to achieve your short, medium and long term aims.

## Why prepare a Business plan?

A good business plan will:

- help you plan for the future
- assess strengths and weaknesses
- highlight risks and opportunities
- guide your organisation's activities
- show how you will monitor success and manage setbacks
- establish credibility
- demonstrate that your organisation can successfully carry out the existing and new projects
- show that your plans are feasible and realistic.

The process you go through to produce a business plan is valuable in itself as it makes you think realistically about your organisation and its plans. Your business plan should be prepared by a team of key people in your organisation and involve all the key staff, committee members', volunteers, and service users if appropriate. It is an opportunity to consult with a wide range of people and find out their views. This will help to ensure that everyone in your organisation understands and is happy with the business plan. If everyone is in agreement your organisation is more likely to achieve its aims.

## What to include in a business plan

There is no set list of things to include in a business plan as this will depend on your organisation. Here is a list of some of the things you might want to include.

**Your organisation:** Its aims, its history, the background to your work (for example, information about your area or the people you serve) and its finances. **Your people:** Your committee members, staff and volunteers, including their skills, and experience. You may want to include a diagram showing your staffing structure.

**Your work:** The services you provide and who benefits. Again, you may want to include a diagram showing how different services fit together.

**Your plans for the future:** Plans to develop current activities, plans for new services and projects, including how they will be managed, staffed, marketed and financed. Show how this is different from what you do now and include an analysis of need and a survey of similar or related services or projects provided by other organisations. You might also analyse your organisation's strengths and weaknesses and any opportunities and threats (this is called a SWOT analysis) and how you will respond to these.

**Your finances:** How your organisation and its projects will be funded. You can show this through budgets together with details of where money will come from. You should also consider including a cashflow forecast. Cashflow forecasts show how much money you will receive and spend on a month-by-month basis, together with the balance you expect to

have at the end of each month. This helps you to plan your expenditure so that you will be able to pay your bills. Funders use this information to check that your financial planning is sound and that your organisation will be financially healthy.

**Backing up your plan:** Your business plan must show that your plans for the future will work. So you might include an analysis of the risks involved in a new project, details of the assumptions you made when planning and how you will react if things do not go to plan.

**Putting your plan in to practice:** Here you could include a timeline of key tasks and activities or a workplan for the first year of new projects. Think about how you will monitor and review your plan and who will be responsible for this.

### **How detailed should a business plan be?**

Just as the content of your plan will depend on your organisation, so will the amount of detail you put in. You may need to include more detail if your work is complex or new. If you are a new organisation you might concentrate on why you were set up. But if you are more established you will probably spend more time on your track record.

**Make sure that the project you want your funder to fund is easily identifiable within your business plan.**

### **Presentation**

Your business plan does not need to be a glossy document with lots of colour pictures, diagrams and jargon. It is more important that the information is clear and easy to understand. Although you need to include the amount of detail that's right for your organisation, a large document may not be very workable. It may be difficult for you and the funder to find important information. If your business plan is large you may not use it and other people are less likely to read it. Whatever the size of your business plan, it is always useful to have a contents page.

# Funding

Fundraising can be fun – it often isn't. But it's not something you can ignore – getting the money to do what you want to do is a central part of a group's activity. If everyone takes it seriously, thinks about getting money well in advance of needing it, then puts some time and effort into *getting* it, the chances are that you will find yourselves with the money and the time to get on with the real work.

There are lots of funding opportunities out there and lots of helpful, local organisations willing to offer advice, support and information. Check out the directory at the back of this section.

The Charities Information Bureau, among others, has downloadable documents from their website [www.cibfunding.org.uk](http://www.cibfunding.org.uk) and what follows is a short list of the headings of the documents showing what help they can offer.

## **Charities Information Bureau**

93 Lawefield Lane, WAKEFIELD WF2 8SU

Tel: 01924 239063 Email: [funding@the-cib.demon.co.uk](mailto:funding@the-cib.demon.co.uk)

## **General Advice**

- Write out your shopping list
- Who do you approach
- Plan Ahead
- Be realistic
- Keep records
- Say thank you

## **Fundraising – The Basics**

- What you will need

## **Different Sources of Cash and Resources for Your Group**

The plus' and minus' of:

- Your users/members
- The public
- Charitable Trusts
- Business
- Local Government
- Central Government
- National Lottery
- Special Trusts

## **Planning a Fundraising Strategy**

A fundraising strategy sets out what a group's funding needs are likely to be, over a future period (say a year) and outlines how the group intends to raise the money to meet those needs.

- Aims
- Objectives
- Why
- Drawing up a budget
- Possible sources
- Dividing up the tasks

## **DIY Fundraising**

There are lots of different groups out there, all trying to raise enough cash. Planning well and using your imagination will pay you dividends.

- Think before you fundraise
- Be daring – and careful
- Use your members/volunteers
- Keep a good eye on the money
- Start a fundraising group
- Get organised
- Produce good quality, targeted promotional material
- Use your contacts
- Sponsorship
- Raffles
- Collections
- Stalls
- Before you go ahead
- Ideas

## **Recognising the Right Funder for your Group**

Many groups waste time and effort applying to the wrong funders. Read and assess all information from the funder very carefully, looking out particularly for the following points.

- Eligibility
- Criteria
- Exclusions
- Timescale
- Difficulty of application method
- Requirements after you get the grant
- Good match with your aims

## **What makes a good application?**

There is no magic formula. What you say will depend on who you are, who they are, how much you want and what you want the money for. But a good way of working out what to say is to put yourself in their shoes. This document does that for you.

## **Check List**

The Grant Making Body – is it the appropriate one? This document offers you a full check list to tick before submitting your application for funding.

## **Partnership Working – a Voluntary Sector Perspective**

Partnerships are becoming ever more popular with formal funders, and to a lesser extent with the general public. Increasing numbers of funders require voluntary organisations to work in partnership with others (often from different sectors). This document weighs up the **advantages** and **disadvantages** of partnership working and **ways to avoid any problems**.

## **Funding for Training Projects**

Training is popular these days, with Government and other funders, which creates funding opportunities. Read this document to find lists of funders and what initiatives they consider.

- Small scale funding
- Large scale funding
- Government area-based initiatives

## **Monitoring and Evaluation**

Funders need to know that their money has been spent well, put to good use and that the aims and objectives have been met. Organisations have to have some way of measuring that their aims and objectives have been met – monitoring and evaluating. This document suggests different methods.

- Asking questions
- Observing
- Keeping records
- Feedback
- Take up rate
- Communication audit
- Follow up reviews
- Analysis

# Information about Grants available to Voluntary Organisations

“Small Grants to Voluntary Organisations” is a Leeds City Council booklet which provides information on small grants available in Leeds.

The booklet is published on the Leeds City Council Website [www.leeds.gov.uk](http://www.leeds.gov.uk), or can be obtained from the Neighbourhoods and Housing Department (contact details below). The booklet is also available in other formats on request.

Updated in April 2005, the booklet covers the following grants :

- Area Committee – small Grants
- arts@leeds Grants
- Awards For All
- Black History Month (October) Grants
- Breeze International Youth Festival Grants Scheme
- Capital Equipment Grant
- Carer’s Group Small Grants
- Community Buildings Capital Grant Scheme
- Local Network Fund for Children and Young People
- Leeds Community Chest (Health & Social Care)
- Luncheon Club Annual Grant
- Mental Health Drop-in and Outreach Budget Scheme
- Neighbourhood Renewal – Community Chest & Community Learning Chest
- Playscheme Grants
- Recreational (Non Sporting) Organisation Grants
- Registered Tenant Group Grants
- Special Grants Programme (Health & Social Care)
- Sports Grants
- Supplementary School Grants
- Teenage Pregnancy & Parenting Grants

If you need assistance with this information in a language other than English, please phone the number below and we will arrange for someone to provide help.



For further information, contact Sufia Khan on:  
**0113 247 4575**, Email: [sufia.khan@leeds.gov.uk](mailto:sufia.khan@leeds.gov.uk)

Neighbourhoods and Housing Department

**Partnerships Team, Regeneration Service, 5<sup>th</sup> Floor,  
Merrion House, 110 Merrion Centre, Leeds, LS2 8BB**

## For further help contact ...

NAME OF ORGANISATION	CONTACT DETAILS	Help/information provided on:
Awards for All	Yorkshire and Humber Tel: 0113 2245300	Awards for All is a Lottery grants scheme aimed at local communities. Grants of between £500 and £5,000 are awarded in a simple and straightforward way.  Projects can be funded that enable people to take part in art, sport, heritage and community activities, as well as projects that promote education, the environment and health in the local community.
Charities Information Bureau	The Charities Information Bureau 93 Lawefield Lane Wakefield West Yorkshire WF2 8SU  Tel: 01924 239063  Email: <a href="mailto:funding@the-cib.demon.co.uk">funding@the-cib.demon.co.uk</a>  <a href="http://www.cibfunding.org.uk">www.cibfunding.org.uk</a>	Supporting voluntary organisations and community groups in funding their work. Free help and resource sheets. Download these now or ask your NL worker for help.
Capacity Project	Voluntary Action – Leeds Stringer House 34 Lupton Street Hunslet LEEDS LS10 3YY  Tel: 0113 2977946 Email: <a href="mailto:capacity@val.org.uk">capacity@val.org.uk</a>	CapaciTY offer voluntary and community groups an IT support pack comprising phone and email support, onsite visits, training courses and email /web hosting for a small fee
Funderfinder	Available at Armley Library Stocks Hill LEEDS LS12 1UQ  Tel: 0113 3951010  <a href="http://www.funderfinder.org.uk">www.funderfinder.org.uk</a>	Funderfinder is a piece of software that allows you to search for charitable trusts that offer funding for innovative projects
Leeds City Council – Small Grants	See <a href="http://www.leeds.gov.uk">www.leeds.gov.uk</a> for contact details dependent on the funding you wish to apply for.	Offers small grants to local community groups within Leeds

Library Service	Armley, Bramley, Pudsey, Swinnow, Broad Lane, Cow Close, Armley Heights	Offer training in IT, CV and Job Skills, as well as having book stock and IT facilities and the chance to create your own website
	Tel: 0113 3951010 Email: <a href="mailto:armleylibrary@leedslearning.net">armleylibrary @leedslearning.net</a>	
Neighbourhood Learning Project	Pam Johnson c/o Armley Library Stocks Hill LEEDS LS12 1UQ	Offers support, information, advice, signposting, training as well as resources, photocopying facilities and capital grants for community events, adult learning and minor works
	Tel: 0789 127 0631 Email: <a href="mailto:neighbourhoodlearningwest@yahoo.co.uk">neighbourhoodlearning west@yahoo.co.uk</a>	
RTC Resourcing the Community	Roundhay Road Resource Centre 233-237 Roundhay Road LEEDS LS8 4HS	Support community groups to access information and resources and to develop additional confidence and skills for greater involvement in regenerating our communities
	Tel: 0113 3805622 Email: <a href="mailto:info@resourcingthecommunity.org.uk">info@resourcingthe community.org.uk</a>	
The Resource Centre	Website: <a href="http://www.theresourcecentre.org">www.theresourcecentre.org</a>	A good internet resource site for downloadable information on all aspects of running a small voluntary/community group.
Trafford Hall	Email: <a href="mailto:mas@traffordhall.com">mas@traffordhall.com</a>	Young Movers Training Course aims to inspire and support groups of young people to organise community projects in their local areas. Information and training, and funding available.
Leeds VOICE	Suite 56 Concourse House 432 Dewsbury Road LEEDS LS11 7DF	Strengthens and represents the voluntary and community sectors in Leeds, as well as helping with funding applications.
	Tel: 0113 2772227 Email: <a href="mailto:info@leedsvoice.org.uk">info@leedsvoice.org.uk</a>	

Voluntary Action – Leeds	Stringer House 34 Lupton Street LEEDS LS10 2QW  Tel: 0113 2977920 Email: <a href="mailto:info@val.org.uk">info@val.org.uk</a>	Offer training, support and advice to voluntary and community groups
West Leeds Healthy Living Network	Armley Park Court, Unit 12, Stanningley Road, LEEDS LS12  Tel: 0113 2951045 Email: <a href="mailto:info@westleeds.org.uk">info@westleeds.org.uk</a>	Offers support, information and advice as well as training.
Big Lottery Fund	<a href="http://www.biglotteryfund.org.uk">www.biglotteryfund.org.uk</a>	They aim to give grants mainly to groups that help meet the needs of those at greatest disadvantage in society and also to improve the quality of life in the community.

# Good Practice with Volunteers

This Good Practice Guide is taken from Voluntary Action-Leeds Volunteer Policy to assist Volunteer Co-ordinators with their management of volunteers. It is a good idea for any voluntary organisation to have a full policy regarding work with volunteers and it is important to stress that this document does not constitute a policy.

If you think that you may want to use a volunteer then it is important to consider the following:-

- What will the volunteer be doing? An opportunity description should be compiled while thinking about this.
- How long will the opportunity run? Is it a short-term, long-term or ongoing opportunity?
- Where will the volunteer be based? Is there space for another body?
- Who will supervise the volunteer? Think about day-to-day and also running regular one-to-one or group sessions.
- How many hours a week will the volunteer work.

Answering these questions should prepare you and your organisation to recruit volunteers into your opportunity. There are other considerations, however, which should ideally be in place when setting volunteers on.

**How Voluntary work affects benefits:** It is important that you tell an adviser in the Jobcentre Plus office about any voluntary activity that you do. This helps the adviser dealing with you to take account of your voluntary activity, and make sure that all the details are recorded. If you are claiming Jobseeker's Allowance you can take part in voluntary activity during the hours that you have agreed to be available on your Jobseeker's Agreement. You must be able to rearrange the hours you do the voluntary activity to attend an interview for employment on being given 48 hours' notice and you must be able to take up paid employment at one weeks notice.



*A representative from Voluntary Action Leeds, Neighbourhood Learning or the West Leeds Healthy Living Network would be happy to meet with you and give you more information on volunteers and volunteering in general. Check out the further help contact sheet for details.*

*See Models and Templates section for Volunteers Code of Practice*

# Volunteer's Charter

Every individual has the right to volunteer and volunteers have rights which should be met in the course of their volunteering. Volunteering is a legitimate activity in its own right and not a substitute for paid work.

If you are registered unemployed, you may spend time doing voluntary work,

- Volunteers should have a clear idea of the tasks they are being asked to perform and of the responsibility which goes with those tasks.
- Volunteers should be told who is responsible for their support and supervision. They should have regular access to this person and the person should ensure that each volunteer is given adequate support.
- To ensure the fair representation of the needs and interests of volunteers, volunteers should have access to, and play a part in, the decision making process of the organisation where they are working as volunteers.
- Volunteers should be protected against exploitation of their interest both as volunteers and as individuals. Volunteers should not be put under moral pressure to undertake work which is against their principles.
- Volunteers should be adequately protected against any risks involved in volunteering. (The organisation should have adequate public liability and motor insurance. Some organisations may have additional personal accident cover).
- Volunteers should not suffer financially by volunteering. Volunteers should receive all reasonable out-of-pocket expenses (including travel, meals and child/dependent care costs) and be provided with the appropriate equipment/tools/materials to enable them to carry out their tasks.
- Unless all volunteers receive expenses, those who cannot afford to volunteer without being paid expenses may be too embarrassed to ask, and may be unable to continue volunteering. Volunteers who don't wish to claim expenses can always donate the money back to the organisation.
- Volunteers should not undertake work which agency staff are being paid to do. Also volunteers should not be used to replace previously paid workers.
- The relationship between paid workers and volunteers should be complementary and mutually beneficial. Paid workers should be fully aware of the areas of work undertaken by volunteers and of the distinction between paid work and volunteering.
- Volunteers should have the right to join a Trade Union relevant to their area of voluntary activity.

**Volunteering should be a fulfilling experience. Through adequate support and supervision, volunteers should be able to develop, expand and change their work.**

## For further help see below...

### Volunteering Opportunities in West Leeds

<b>NAME OF ORGANISATION</b>	<b>CONTACT DETAILS</b>	<b>Help/information provided on:</b>
Armley Helping Hands	Strawberry Lane Community Centre Strawberry Lane LEEDS LS12  Tel: 0113 2799292	Offers support, training, outings and other opportunities for the older people of Armley
Bramley Elderly Action	Bramley Town Street LEEDS LS12  Tel: 0113 2361644 Email: <a href="mailto:bramleyea@tiscali.co.uk">bramleyea@tiscali.co.uk</a>	Offers support, training, outings and other opportunities for the older people of Bramley
Homestart	Homestart, Oxford Chambers, Oxford Place, Leeds LS1 3AX  Tel: 0113 244 2419 Email: <a href="mailto:office@home-startleeds.co.uk">office@home-startleeds.co.uk</a>	Homestart are committed to promoting the welfare of families with at least one child under 5 years. Volunteers offer support, friendship and practical help to families under stress and help to prevent crisis and breakdown.
Learndirect	0800 100 901  website: <a href="http://www.learndirect.co.uk">www.learndirect.co.uk</a>	Can provide information and training on local courses, as well as volunteering opportunities
New Wortley Community Centre	Tel: 2793466	Opportunities for volunteering
Stanningley and Swinnow Live at Home Scheme	Tel: 0113 2558461	Caring for the older people of these areas, offers
Surestart	28-32 Elder Road Bramley Leeds LS13 4DL  Tel: 0113 217 2200 Email: <a href="mailto:info@surestartbramley.co.uk">info@surestartbramley.co.uk</a>	Offers high quality, co-ordinated child care services through a partnership of local parents, voluntary, community and statutory agencies.

www.do-it.org.uk/

Website offering searchable database of volunteering opportunities

**There are lots of opportunities for volunteering in West Leeds – too many to mention here, but contact Erica Simmonds from West Leeds Healthy Living Network or check out the do-it website above for more information.**

### **Volunteer Support**

<b>NAME OF ORGANISATION</b>	<b>CONTACT DETAILS</b>	<b>Help/information provided on:</b>
Leeds VOICE	Suite 56 Concourse House 432 Dewsbury Road LEEDS LS11 7DF  Tel: 0113 2772227 Email: <a href="mailto:info@leedsvoice.org.uk">info@leedsvoice.org.uk</a>	Strengthens and represents the voluntary and community sectors in Leeds.
Voluntary Action – Leeds	Stringer House 34 Lupton Street LEEDS LS10 2QW  Tel: 0113 2977920 Email: <a href="mailto:info@val.org.uk">info@val.org.uk</a>	Offer training, support and advice to voluntary and community groups.
National Centre for Volunteering	Regent's Wharf 8 All Saints Street LONDON N1 9RL  Tel: 020 7520 8900 Website: <a href="http://www.volunteering.org.uk">www.volunteering.org.uk</a>	A national advisory agency which publishes a variety of information leaflets.
The Resource Centre	Website: <a href="http://www.theresourcecentre.org">www.theresourcecentre.org</a>	A good internet resource site for downloadable information on all aspects of running a small voluntary/community group.
West Leeds Healthy Living Network	Armley Park Court, Unit 12, Stanningley Road, LEEDS LS12  Tel: 0113 2951045 Email: <a href="mailto:info@westleeds.org.uk">info@westleeds.org.uk</a>	Offers support, information and advice as well as training.

# RESOURCES, EQUIPMENT HIRE, VENUES

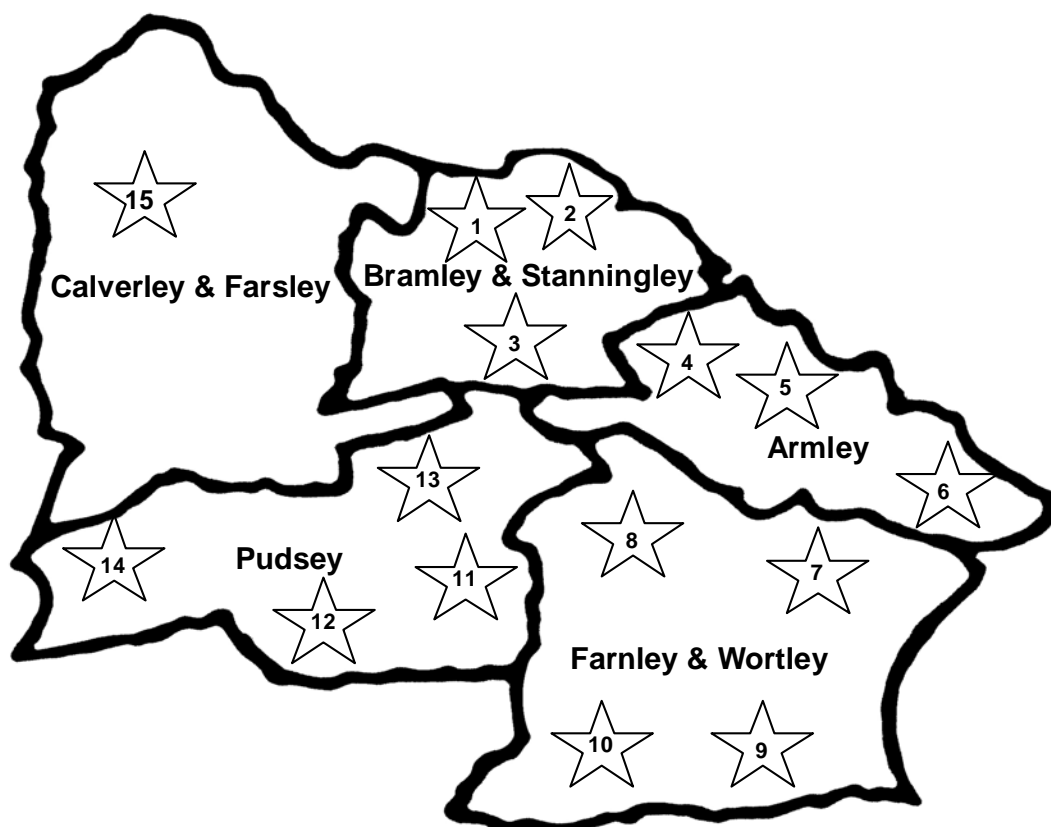
NAME OF ORGANISATION	CONTACT DETAILS	Help/information provided on:
Armley Helping Hands	Strawberry Lane Community Centre Strawberry Lane LEEDS LS12  Tel: 0113 2799292	Offers support, training, outings and other opportunities for the older people of Armley including an extensive Library of information on health, housing, etc plus wheelchair hire.
BARCA – Play is Sorted	227 Upper Town Street LEEDS LS13 3JT  Tel: 0113 2559582	Has numerous items for hire eg sports equipment, special needs equipment, bouncy castle, lighting and big games. Also have arts and craft materials
Bramley Elderly Action	Bramley Town Street LEEDS LS12  Tel: 0113 2361644 Email: <a href="mailto:bramleyea@tiscali.co.uk">bramleyea@tiscali.co.uk</a>	Offers support, training, outings and other opportunities for the older people of Bramley, as well as hire of wheelchairs, minibus and a recommended list of local tradesmen for members use
Community Work Training Company	128 Sunbridge Road BRADFORD BD1 2AT  Tel: 01274 745551 Email: <a href="mailto:info@cwtko.org.uk">info@cwtko.org.uk</a>	Information, advice, resources and learning programmes to anyone involved in community development work – individuals, groups, voluntary organisations and public sector agencies – FREE membership. Extensive Library, audio visual equipment for hire and printing, binding, and laminating service for members.
Leeds Library & Information Service	Armley, Bramley, Pudsey, Swinnow, Broad Lane, Cow Close, Armley Heights  Tel: 0113 3951010 Email: <a href="mailto:armleylibrary@leedslearning.net">armleylibrary@leedslearning.net</a>	Have free access to computers and internet. Offer training in IT, CV and Job Skills, as well as book stock and the chance to create your own website

Neighbourhood Learning Project	Pam Johnson c/o Armley Library Stocks Hill LEEDS LS12 1UQ	Training and event equipment for <b>free</b> loan, eg tables, cameras, projector, large games, laptops and printers. Assistive technology for visually impaired. <b>Free</b> photocopying facilities and capital grants. Offers support, information, advice, signposting and training, as well as small Library for voluntary and community groups
	Tel: 0789 127 0631 Email: <a href="mailto:neighbourhoodlearningwest@yahoo.co.uk">neighbourhoodlearningwest@yahoo.co.uk</a>	
RePlay	Unit 2 Belle Isle Open Access Workshops, Enterprise Way, Middleton Road, Belle Isle, LEEDS LS10 3DZ	Promotes increased involvement in local communities in the provision for children's play. Resource and recycling centre offering a wide variety of art and craft materials to enhance children's play. Also hires out sport and games equipment, parachutes, musical instruments, circus skills kit etc.
	Tel: 0113 2710715 Email: <a href="mailto:replay@leedsplaynetwork.org.uk">replay@leedsplaynetwork.org.uk</a>	
RTC Resourcing the Community	Roundhay Road Resource Centre 233-237 Roundhay Road LEEDS LS8 4HS	Equipment for free loan include digital cameras and video recorder. Support community groups to access information and resources and to develop additional confidence and skills for greater involvement in regenerating our communities
	Tel: 0113 3805622 Email: <a href="mailto:info@resourcingthecommunity.org.uk">info@resourcingthecommunity.org.uk</a>	
Surestart	Fairfield Terrace Bramley LEEDS LS13 3QD	Resources including Library at Drop-in Shop on Bramley Shopping Centre. Offers high quality, co-ordinated child care services through a partnership of local parents, voluntary, community and statutory agencies.
	Tel: 0113 217 2200 Email: <a href="mailto:info@surestartbramley.co.uk">info@surestartbramley.co.uk</a>	
Voluntary Action – Leeds	Stringer House 34 Lupton Street LEEDS LS10 2QW	Extensive Library providing information on all topics relating to voluntary and community group work. Offer training, support and advice to voluntary and community groups
	Tel: 0113 2977920 Email: <a href="mailto:info@val.org.uk">info@val.org.uk</a>	
The Resource Centre - online	<a href="http://www.theresourcecentre.org">www.theresourcecentre.org</a>	Visit this website to see recommended books to support voluntary and community groups

Book Lists	www.actionlink.org.uk/lvsc	Click on Publications to see a list of recommended books to support voluntary and community groups eg Voluntary but not Amateur – Hayes and Reason Just about Managing – Sandy Adirondack
TIC	Leeds Tenants Federation FREEPOST NEA 16248 LEEDS LS2 3YY  (you do not need a stamp)  Tel (0113) 2145330  Email: <a href="mailto:tenants@leeds.gov.uk">tenants@leeds.gov.uk</a>	We provide a range of services to tenants and residents to enable them to participate in the running of their homes and communities. We run major consultation events to enable residents to shape the decisions that affect their communities.
WLFLC	West Leeds Family Learning Centre Conference Place, Whingate Road LEEDS 12  Tel: 0113 2633333 Email: <a href="mailto:westleedsflc@leeds.gov.uk">westleedsflc@leeds.gov.uk</a>	Offers information, advice, support and guidance on training, further education, job search and CV

## Community Spaces in West Leeds

1. **Bramley Community Centre**- Waterloo Lane, Bramley, LS13 2JB
2. **Sandford Community Centre**– 15-17, Broadlea Hill, Bramley, LS132SN
3. **Fairfield Community Centre** - Fairfield Terrace, Bramley, LS13 3DQ
4. **Wyther Park Community House** - Wyther Park Road, LS12
5. **Strawberry Lane Community Centre**– Strawberry Lane, Armley LS12 4RF
6. **St Bartholomew’s Church Hall**- Wesley Road, Armley, LS12
7. **New Wortley Community Centre**– 40, Tong Road, New Wortley, LS12 1LZ



8. **Hillside Community Centre** – Cross Lane, Farnley, LS12 5AA
9. **St Johns Community Hall** - Dixon Lane, Wortley, LS12 4RU
10. **Greenhill Community Centre**– Gamble Hill Drive, Wortley, LS13 4JL
11. **St James’s Church Hall** - Galloway Lane, Pudsey, LS28
12. **St Andrew’s Church Hall**- Church Lane, Pudsey, LS28
13. **Swinnow Community Centre**– Swinnow Lane, Swinnow, LS13 4RF
14. **Pudsey House** - The Market Place, Pudsey, LS28 7BE
15. **Calverley Mechanics Institute**- Blackett Street, Calverley, LS28 5NQ

The majority of the above centres have disabled access, please check with them direct for other facilities. This list is in no way complete, please let us know of other venues in your area. Most Church Halls have large spaces that they may be willing to let

# TRAINING OPPORTUNITIES

NAME OF ORGANISATION	CONTACT DETAILS	Help/information provided on:
Age Concern	188a Woodhouse Lane, LEEDS LS2 9DX  Tel: 0113 2458579 Email:chris@leeds silversurfers.net	Offers training in IT, as well as other topics for the older active person
Armley Helping Hands	Strawberry Lane Community Centre Strawberry Lane LEEDS LS12  Tel: 0113 2799292	Offers support, training, outings and other opportunities for the older people of Armley
Basic/Key Skills	Adult and Community Learning Service Leeming House Vicar Lane LEEDS 2  Tel: 0113 3951519	Can offer basic skills training in local community venues English, Maths, IT, ESOL
Bramley Elderly Action	Bramley Town Street LEEDS LS12  Tel: 0113 2361644 Email: <a href="mailto:bramleyea@tiscali.co.uk">bramleyea@tiscali.co.uk</a>	Offers support, training, outings and other opportunities for the older people of Bramley
Capacity Project	Voluntary Action – Leeds Stringer House 34 Lupton Street Hunslet LEEDS LS10 3YY  Tel: 0113 2977946 Email: <a href="mailto:capacity@val.org.uk">capacity@val.org.uk</a>	CapacITy offer voluntary and community groups an IT support pack comprising phone and email support, onsite visits, training courses and email/web hosting for a small fee

Community Matters	6 – 8 York Place LEEDS LS1 2DS	Training for community organisations including committee skills, marketing, Leadership skills etc
	Tel: 0113 244 3844 Email: <a href="mailto:training@communitymatters.org.uk">training@communitymatters.org.uk</a>	
Community Work Training Company	128 Sunbridge Road BRADFORD BD1 2AT	Information, advice, resources and learning programmes to anyone involved in community development work – individuals, groups, voluntary organisations and public sector agencies – FREE membership
	Tel: 01274 745551 Email: <a href="mailto:info@cwtko.org.uk">info@cwtko.org.uk</a>	
Herd Farm Residential Education Centre	Eccup Reservoir Harrogate Road LEEDS LS17 7RJ	Works with young people across Leeds, as part of Environmental Youth Project – offers organic gardening, animal husbandry, opportunities for young people to develop skills and hands-on experience in environmental issues
	Tel: 0113 3930012 Email: <a href="mailto:satbinder.soor@leeds.gov.uk">satbinder.soor@leeds.gov.uk</a>	
Home-start	Home-start, Oxford Chambers, Oxford Place, Leeds LS1 3AX	Homestart are committed to promoting the welfare of families with at least one child under 5 years. Volunteers offer support, friendship and practical help to families under stress and help to prevent crisis and breakdown.
	Tel: 0113 244 2419 Email: <a href="mailto:office@home-startleeds.co.uk">office@home-startleeds.co.uk</a>	
Kellett Outreach Support Services	KOSS 79 Roundhay Road, LEEDS LS7 4AA	Supporting people with physical and sensory impairments find out about and use facilities in their local community.
	Tel: 0113 2477350 Email: <a href="mailto:koss@leeds.gov.uk">koss@leeds.gov.uk</a>	
Learndirect	0800 100 901 website: <a href="http://www.learndirect.co.uk">www.learndirect.co.uk</a>	Can provide information and training on local courses, as well as volunteering opportunities

Leeds Library & Information Service	Armley, Bramley, Pudsey, Swinnow, Broad Lane, Cow Close, Armley Heights	Offer training in IT, CV and Job Skills, as well as having book stock and IT facilities and the chance to create your own website
	Tel: 0113 3951010 Email: <a href="mailto:armleylibrary@leedslearning.net">armleylibrary@leedslearning.net</a>	
Neighbourhood Learning Project	Pam Johnson c/o Armley Library Stocks Hill LEEDS LS12 1UQ	Offers support, information, advice, signposting, training as well as resources, photocopying facilities and capital grants
	Tel: 0789 127 0631 Email: <a href="mailto:neighbourhoodlearningwest@yahoo.co.uk">neighbourhoodlearningwest@yahoo.co.uk</a>	
Northern College	Wentworth Castle, Stainborough, BARNSELY	Residential college offering FREE training for individuals or groups eg regeneration, setting up your community group, IT
	Tel: 01226 776010 Email: <a href="mailto:info@northern.ac.uk">info@northern.ac.uk</a>	
Park Lane College	St Bartholomews Centre Strawberry Lane LEEDS LS12 1SF	Offer training in an extensive range of courses ranging from basic skills and IT to Tai Chi and Art
	Tel: 0113 2162280	
Surestart	Fairfield Terrace LEEDS LS13	Offers high quality, co-ordinated child care services through a partnership of local parents, voluntary, community and statutory agencies.
	Tel: 0113 217 2200 Email: <a href="mailto:info@surestartbramley.co.uk">info@surestartbramley.co.uk</a>	
The Leeds Network	0808 100 8081 Website: <a href="http://www.leedsnetwork.org.uk">www.leedsnetwork.org.uk</a>	An information and advice service on work and learning for local people
TIC	Leeds Tenants Federation FREEPOST NEA 16248 LEEDS LS2 3YY	We provide a range of services to tenants and residents to enable them to participate in the running of their homes and communities. We run major

	(you do not need a stamp) Tel (0113) 2145330 Email: tenants@leeds.gov.uk	consultation events to enable residents to shape the decisions that affect their communities.
Trafford Hall	Trafford Hall Ince Lane Wimbolds Trafford Nr Chester CH2 4JP  Tel: 01244 300246  Email: <a href="mailto:mas@traffordhall.com">mas@traffordhall.com</a>	Young Movers Training Course aims to inspire and support groups of young people to organise community projects in their local areas. Information and training, and funding available.
Voluntary Action – Leeds	Stringer House 34 Lupton Street LEEDS LS10 2QW  Tel: 0113 2977920 Email: <a href="mailto:info@val.org.uk">info@val.org.uk</a>	Offer training, support and advice to voluntary and community groups
WEA	Workers Educational Association 6 Woodhouse Square LEEDS LS3 1AD  Tel: 0113 2453304 Email: <a href="mailto:sblockley@wea.org.uk">sblockley@wea.org.uk</a>	The Workers' Educational Association offers adult education to as wide a range of people as possible. Unlike most other education providers, the WEA is governed by its voluntary members.
West Leeds Healthy Living Network	Armley Park Court, Unit 12, Stanningley Road, LEEDS LS12  Tel: 0113 2951045 Email: <a href="mailto:info@westleeds.org.uk">info@westleeds.org.uk</a>	Offers support, information and advice as well as training.
WLFLC	West Leeds Family Learning Centre Conference Place, Whingate Road LEEDS 12  Tel: 0113 2633333 Email:	Offers information, advice, support and guidance on training, further education, job search and CV

[westleedsflc@leeds.gov.uk](mailto:westleedsflc@leeds.gov.uk)

WYCAS

Stringer House 34  
Lupton Street  
LEEDS LS10 2QW

Tel: 0113 2706269

Email:

[info@wycas.org.uk](mailto:info@wycas.org.uk)

To develop the ability of voluntary and community sector organisations with charitable aims to manage their money more efficiently and effectively. Training opportunities available

Training courses are being offered on a regular basis by the majority of the above providers – most for FREE! Give them a ring and get on their mailing list or check out the monthly Neighbourhood Learning e-newsletter by subscribing to:  
[neighbourhoodlearningwest@yahoo.co.uk](mailto:neighbourhoodlearningwest@yahoo.co.uk)

## OTHER USEFUL CONTACTS

NAME OF ORGANISATION	CONTACT DETAILS	Help/information provided on:
Victim Support	Cranmer House, 39 Brixton Road, LONDON SW9 6DZ  Tel: 0845 3030 900	Independent national charity which helps people cope with crime. Local branches offer free, confidential support and information.
Leeds City Council – Early Years Service	CIS 6 <sup>th</sup> Floor East Merrion House, 110 Merrion Centre, Leeds LS2 8DT  Tel: 0113 247 4386	Guidance and support with Childcare services in Leeds
POLICE	Pudsey division  0845 6060606	Ring 999 for emergencies only.
RSPCA	RSPCA Animals' Home & Clinic Mount Street, Bradford, West Yorks BD3 9SW	Opening times: Mon/Tues/Wed & Fri 10am to 4.30pm Reception only Sat & Sun 10am-2.30pm
FIRE SERVICE	West Yorkshire Fire Service Stanningley Fire Station Stanningley Road LEEDS 13  Tel: 0113 257 4223	Ring 999 for emergencies only
Leeds City Council – Environmental Services	Neighbourhoods and Housing Department Environmental Health Services Millshaw Park Way Churwell LS11 0LS  Telephone 0113 247 6026 FAX 0113 2476282  Email <a href="mailto:env.health@leeds.gov.uk">env.health@leeds.gov.uk</a>	
Leeds City Council	Tel: 234 8080  <a href="http://www.leeds.gov.uk">www.leeds.gov.uk</a>	All your local council enquiries

Leeds West Homes	Tel: 3984708	To report anti-social behaviour as well as other Leeds West Homes concerns.
Highways, Street Cleaving and Lighting	Tel: 2477500	To report street lamps out or holes in the road
Groundwork	The Environment and Business Centre Merlyn-Rees Avenue Morley Leeds LS27 9SL	Large UK voluntary organisation working in the community on clean ups and other environmental issues
	Tel: 0113 238 0188	

**Check out the following for more useful information:**

Skills for Life Provider Directory  
 ACLS Signposting Directory  
 LCC Small Grants Booklet  
 NL Directories mapping local learning venues  
 Monthly Neighbourhood Learning newsletter

Telephone your Neighbourhood Learning Worker on 07891 270631 or  
 Email: neighbourhoodlearningwest@yahoo.co.uk if you want copies of the above.

**Create your own useful list of contacts**

**NAME OF  
ORGANISATION**

**CONTACT DETAILS**

**Help/information provided on:**

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**NAME OF ORGANISATION**

**CONTACT DETAILS**

**Help/information provided on:**

# Running a crèche

*Legal issues | Practicalities | Useful addresses*

## Registration

Crèches and other childcare services are covered by the Children Act.

Crèches are defined by National Standards as:

"facilities which provide occasional care for children under eight and which are provided on particular premises on more than five days a year. They need to be registered where they run for more than two hours a day, even when individual children attend for shorter periods. Some are in permanent premises and care for children while parents are engaged in particular activities, e.g. shopping or sport. Others are established on a temporary basis to care for children while their parents are engaged in time-limited activities, e.g. a conference or exhibition."

As a rough guide, if your crèche.....

lasts for two hours or less in any one day, or  
is at a one-off event (lasting no more than 5 days on a particular premises in a year).

... you do not have to register with OFSTED Early Years.

All other crèches have to be registered.

To register with Ofsted early Years, you need to meet certain standards, set out in the law. Your first step to registration will be to contact the Early Years Development Team who can give you information about these standards and will tell you how to proceed.

For your crèche to be registered, an Ofsted inspector will come and inspect your premises to see if you are working towards the National Standards.

*For information about the registration process or anything else to do with starting a creche contact:*

*Early Years Development Team (for more advice on standards and registration.)*

*Early Years Service, 6th Floor East, Merrion House, 110 Merrion Centre, Leeds LS2 8DT*

*Tel: 0113 247 4563*

## What you need to run a crèche

### Staff

Whether or not you need to register your crèche, it is advisable to contact the Early Years Development Team for guidelines on the number of staff you will need to run a safe crèche / childcare facility.

If your crèche needs to be registered, the Ofsted inspectors will want to see your staffing ratios, qualifications and experience. They will also take into account the age and needs of the children and space available for the number of children you will be looking after.

*Ofsted have published a crèche standards and guidance which is available to people who are interested in setting up a crèche. The booklet contains information on staff/child ratios, space required per child, staff qualifications, care and learning environment, physical environment and health and safety. Download it from their website or request it by phone [www.ofsted.gov.uk](http://www.ofsted.gov.uk) 0845 601 4771*

## **Toys and other equipment**

You can contact the Early Years Development Team for advice on toys and equipment. Also, talk to other crèche workers about what you need to provide and visit other crèches within the city.

Think about the ages of the children who will attend your crèche, the space you are providing, how you will promote a relaxing environment for children to play. Look at your equipment, is it suitable for all the ages? Are activities suitable for the age ranges that are attending?



*The Neighbourhood Learning worker has items of indoor/outdoor play equipment for free short loan. Also check out the Resources section for art and craft materials etc..*

What materials will you need for the activities? Do you need scrap paper and paints or glue? (You may need to ask parents to supply a change of clothes, if you are planning messy activities.) Think about natural materials, i.e., water play, using shells, things made out of wood and cork, art and craft, recycling, card board boxes, paper envelopes etc. Remember before purchasing paints and glues always check their labels to see if they comply with Health and Safety standards.

Will parents provide food or drink for their own children, or do you need to arrange this? Will you have access to a kitchen area?

You need to have a first aid box in the building and somebody must be the named first aider.

*The Childrens Information Service offer advice and information on all aspects of childcare. They can also help you start a career with children. 0113 2474386*

## **A safe, child friendly space**

Ensure that the area you are using is safe. Possible danger areas are:

- power points steps and stairs
- unsteady furniture
- loose carpets, uneven floors
- electric or gas fires

swinging doors

Think about the comfort and convenience of the children in the crèche:

Are there separate areas for messy or noisy play and quiet reading or drawing?

Is there somewhere to wash hands?

How far away is the toilet?

Think about access to the area. Is there any danger of strangers walking in?

Note: Ofsted are very hot on this.

# Event planning checklist

*For fêtes, fun days, parties and other events*

However big or small your event is going to be, planning it will follow the same general pattern - and include some common pitfalls!

## 1. Make sure your objectives are clear

Discuss what you want your event to achieve - will it raise the profile of your group? Will it bring people together? Are you aiming to raise money or just to have fun? Who are you hoping to attract to the event? Will there be activities for a range of different people?

## 2. Plan out the work - and delegate!

Working together on a timetable with all the main dates and deadlines on it can help clarify how much work there is to do, and when.

Most events are too much work for two or three people. Try to get more people involved by:

- advertising planning meetings widely
- thinking about the timing and location of your planning meetings, and asking potential volunteers what suits them best
- producing early publicity for the event which also serves as an appeal for volunteers
- putting together a list of jobs that can easily be handed over to new volunteers, even if they don't want to come to meetings.
- pinning a list or rota up on a noticeboard and asking people to pledge a small amount of time on the day or contributions of food, raffle prizes, etc

Think about asking other local organisations to get involved. They may have the expertise to take a major aspect of the event off your hands.

Make sure everyone knows what is going on. Reporting regularly to the other people organising the event and to the whole group is not just politeness - it can stop an individual or an organising committee from making costly mistakes.

## 3. Think about safety and access

Bear in mind health and safety for volunteers and visitors when you are deciding on a venue and planning the layout of the event.

Decide who will be responsible for first aid on the day. For large events, you could ask the local St. John Ambulance to attend. Even if you are just using your own volunteers, you need to have a visible first aid point at the event.

**St. John Ambulance - National Headquarters**

27 St. John's Lane  
London  
EC1M 4BU

08700 10 49 50

How will people get to the event? Make sure your publicity gives details of public transport and parking. Will you need to put up signs in the surrounding streets to make the event easier to find?

Is the venue accessible for wheelchair users? Many people who don't use a wheelchair nevertheless have great difficulty with steps. Will there be a sign language interpreter for performances and speeches? Make sure your publicity is clear about the level of access visitors can expect.

## 4. Make a budget for the event

### Take into account all your costs:

venue  
publicity  
hire of equipment  
decorations  
entertainers  
prizes, refreshments, face paints, art materials  
transport  
phone bills, postage and other admin  
insurance  
first aid equipment and volunteers  
fees for licences and permissions



*Neighbourhood Learning have equipment for loan for events.*

### Then plan how you are going to cover them:

entrance fees?  
grants or sponsorship?  
raffle?  
sale of refreshments?  
money-making sideshows and stalls?  
charging stallholders or catering suppliers?

## 4. Think about publicity

Who do you want your publicity to reach? Think about where those people are most likely to see a poster or flyer, and what will attract them to the event.

How much money do you have to spend on it?

Have you considered using the local media?

Make sure you get your publicity out early enough for it to be distributed and read - don't wait until every last detail of the event is finalised.



Neighbourhood Learning has printing equipment that groups can use to produce cheap publicity flyers and posters.

## 5. Bookings, permissions and licences

Find out about the regulations early on - it can take months for some licences to be granted. You may need to consider:

- public entertainment licence
- alcohol licence
- street collection licence
- road closure permit
- permission to use public land



See information sheet on Licensing and Regulations for more details

Make sure the venue is booked and confirmed. Think about what equipment you will need to hire. Check with entertainers what they expect you to provide.

## 6. Plan in detail

Shortly before the event, you need to run through the day in detail:

- Where will everybody be on the day?
- Is the rota full, or do you need to do a last-minute ring round to fill some gaps?
- How will equipment and volunteers get to the venue - and away again?
- Will you be able to take hired equipment directly to and from the event, or will it need to be stored?
- Who is responsible for money on the day?
- What will happen if it rains?
- Do you have enough time, materials and people for setting up and clearing up?

## 7. Afterwards

If possible, it's a good idea to count takings from the different stalls separately, so that you know which activities made money and which didn't do so well. This will help you make a more accurate budget for your next event.

It's always worth having a brief discussion after an event is over, to talk through what went well and badly on the day, and draw lessons for future events.

# Remember!

- You have Policies and legal obligations.
- Check out your Insurance cover.

## **These should be considered when planning your event eg**

- Disco – qualified workers with child protection awareness should be present according to age range etc.
- Are you covered for using a bouncy castle?

## **It is often a good idea to gain consent from parents or guardians.**

- Your publicity can contain statements such as:

young people should be accompanied by an adult or responsible person;

we cannot take responsibility for the behaviour of your child or others in their company

This does not entirely negate your responsibility but does remind others that they should know where their children are and take responsibility them.



*see example in Templates and Models section*

## **Find out more about**

Raffles – types of raffles and value of prizes or cash  
Bingo – Prize bingo only (other types need licensing)



*see Licensing and Regulations next*

## **ALWAYS GAIN PERMISSION FOR TAKING PHOTOGRAPHS**

Particularly of children and accept NO.... do not ask why!

The children may be 'In Care' or adopted and their whereabouts should not be made public

To prevent misuse by inappropriate people

Adults could be victims of violence and therefore do not want to be located.

# Licensing and Regulations

## *Essential information for event organisers*

This information sheet gives the basic information about whether you need to register or apply for a licence for your event, and local contact details. We have more detailed information about the law in relation to community activities - please contact us if you can't find the information you need here.

## **1. Raffles & lotteries**

You do not have to register a raffle or lottery if:

The raffle happens during the course of an event - eg the tickets are sold and the raffle drawn during a meeting, fête, dinner dance, party. This is called a 'small lottery'.

Or if any of the below apply:

The sale of raffle tickets is restricted to members of your organisation.  
The sale of tickets is restricted to people who all work on the same premises.  
The sale of tickets is restricted to people who all live on the same premises.

This is called a 'private lottery'.

In both cases the entire proceeds of the lottery must be used for the benefit of the organisation.

If you are selling raffle tickets in advance of the draw, there are rules about what goes on the raffle tickets, even if this is a 'private lottery'. Ask the Resource Centre for details.

## **Registering a Raffle or Lottery**

If you want to run a raffle where tickets are sold in advance to members of the public, you have to register in advance with the local council. There is an annual fee of £35 (which is reduced to £17.50 if you re-register for a second year).

To register contact the Entertainment Licensing Department of Leeds City Council  
Civic Hall  
Leeds  
LS1 1UR

Telephone: 0113 247 4095 or 0113 247 4720 at least 28 days in advance, to request a form. Once they receive your completed form they will assess it and request police vetting. When this is received they issue a certificate. You cannot start your lottery until a certificate has been received.

When your raffle is finished you will need to complete another form showing how much money you collected, and how much you spent on expenses and prizes.

The Lotteries and Amusements Act 1976 outlines the conditions you must meet if you hold a public raffle or lottery. The main conditions are:

A member of your committee must be named as the 'promoter' and this must be agreed in writing in by the committee.

Your raffle tickets must include the following information

the name of the group running the raffle

the name of the promoter

the address of the promoter (this can be the group's address)

the date of the raffle

confirmation that the raffle has been registered with the local council

Tickets can only be sold to those aged 16 or above.

Ticket charges cannot be more than £1 per ticket.

No more than 55% of the proceeds can be used for prizes.

No more than 35% of the proceeds can be used for expenses. If your expenses are for less than 35% you can only claim for the amount you actually spent.

It is sensible to keep clear records of all money spent, how many tickets individuals took, and all money received so everything can be accounted for.

If you are selling tickets worth over £20,000 you have to register with the Gaming Board!

## **2. Bingo & other games of chance**

You do not have to have a licence to play bingo as long as:

Only members and signed in guests take part, and no more than 60p is charged for admission. In this case there is no limit on ticket or stake money and all ticket money is paid out as prizes.

Or (all of the below must be true):

Each player makes only one payment of not more than £4, which includes entrance fee and stake or ticket money and

The total value of prizes is not more than £400 and

The proceeds, after deducting prizes and running costs, are not used for private gain.

It is important to keep careful accounts, particularly when dealing with large amounts of cash.

## **3. Public entertainment licences**

Premises generally need to be licensed by the local authority for public music, dance or sporting events, plays and film or video shows.

If you are hiring a venue to put on an event, check that the venue has appropriate licences for the activities you are organising, and whether there are any restrictions on use of the building. For example, some premises are licensed for music and dancing but not for stage and film shows.

If you want to organise an event outdoors, eg a street party, or on public land (see section 4 below) you need to contact the Council to find out if you need a public entertainment licence.

All or part of the fee can be waived if the entertainment is educational, or is being held for a charitable or similar purpose.

### **Note**

From 7th February 2005 there have been some changes to Public Entertainment Licences. The City Council now issues entertainment licences **and** licences for the sale of alcohol, late night sales, etc. All these licences will come together under the council's management. Existing licences will be replaced by four new types of licence - Premises Licences, Personal Licences, Temporary Event Notices and Club Premises Certificates.

## **4. Events on public land**

You have to apply to the council if you want to hold an event on public land. Permission for this needs to be arranged through the Events Office at least a month in advance. They can also help with advice and information about organising outdoor events.

Check out the council's website [www.leeds.gov.uk](http://www.leeds.gov.uk) or telephone 0113 2348080

## **5. Food & drink**

You can sell food and non-alcoholic drinks as long as:

All profits go to the organisation

You ensure food is prepared in a hygienic manner and complies with the Food Safety Act.

If food is prepared, stored, supplied or sold on five or more days in any 5-week period you have to register with the Health & Safety Licensing Team at Leeds City Council at least 28 days in advance (see above for details).

*For information about food hygiene contact*

*Environmental Services*

*Leeds City council (as above)*

## **6. Alcohol**

You are not allowed to sell alcohol unless you have a licence. If you want to sell alcohol at an event you are organising, you can apply to the Licensing Justice for an 'Occasional Permission' which will allow you to sell alcohol at your event. Applications for licences are considered once a month on average, so contact the Licensing Office as soon as you have a date for your event (ideally 6 weeks in advance) to ensure that you've left enough time to obtain a licence. There is a £10 fee.

If you don't want to apply for an Occasional Permission, you can ask a local publican to run a bar for you under an 'Occasional Licence'. The advantage of getting someone else to run your bar is that they will supply stock, equipment and staff. The disadvantage of an

Occasional Licence is that most or all of the profits from the bar are usually retained by the licence holder - so try to negotiate a share in the profits!

You may still need to get an alcohol license even if you are giving alcohol away at a public event - check regulations with with your local magistrate's court.

NB It is NOT permissible to sell tickets which can then be exchanged for an alcoholic drink, or to ask for a donation in return for alcohol.

## 7. Street Collections

You need to apply for a licence for a street collection or to collect money at events and in public places. Contact the Licensing Department at Leeds City Council and they will advise what sort of licence you need for your event and send you the relevant forms. Town centre collections are popular with many organisations, and so the Council takes bookings and will allocate you with a permit for a particular day, time and location in town. This avoids organisations 'competing' with each other. The council advises that you book your street collection well in advance as they get very booked up - particularly for the summer months.

Leeds City Council  
Civic Hall  
Leeds  
LS1 1UR

Telephone: 0113 2348080

You will need to:

- Apply for the licence at least 28 days before your collection
- Complete a straightforward application form
- Have a responsible person as the applicant for the licence - the Council will run a Police Check on this person
- Supply the Council with a 'return of expenses' form after the collection
- Place an advert in the local press after the collection to let the public know how much money was raised

## 8. Street Closures

If you want to have a street party you need to get permission from the Council to do so.

The first step you need to take is to contact the Council to find out if it is feasible for your road to be closed. Some roads are essential access routes for the emergency services. If a nearby street is to be closed on the same day, the Council may not allow your street to close as well.

If it is feasible, you then need to find out if the majority of the people who live in the street you want to close are happy for you to do so, and that no one has any strong objections. To do this you will need to take a petition door-to-door and get people to sign their names against their house number. The council's guidance is that it is desirable to get a good majority of residents to sign.

Once you've got your petition signed, and at least 28 days before the date of your street party, contact the Council to apply for permission to close the road. The council officer will then tell you what you need to do to proceed. They will contact the emergency services, bus companies and any other organisation who may need to be aware that your road is going to be closed for a day.

You will be supplied with a plan of signs you need to put up to notify road users of the road closure. You will also need to erect barriers to prevent vehicles from entering. The signs and barriers can be hired from the Events Team at the City Council at a small cost. If they are not available from the council you will have to hire them from a private hire company. You are responsible for placing the barriers and signs as shown on the Council's plans, and for removing them again at the end of the event.

## 9. Crèches & Childcare services

Crèches and other childcare services are covered by the Children Act. Crèches are defined by National Standards as:

"facilities which provide occasional care for children under eight and which are provided on particular premises on more than five days a year. They need to be registered where they run for more than two hours a day, even when individual children attend for shorter periods. Some are in permanent premises and care for children while parents are engaged in particular activities, e.g. shopping or sport. Others are established on a temporary basis to care for children while their parents are engaged in time-limited activities, e.g. a conference or exhibition."

As a rough guide, if your crèche.....

lasts for two hours or less in any one day, or  
is at a one-off event (lasting no more than 5 days)

... you do not have to register with Ofsted Early Years. For one-off events where the crèche will last more than two hours, you should contact the council's Children's Information Service in advance for guidance.

*For information about the registration process and advice on running a safe childcare facility, contact:*

*Children's Information Service  
Leeds City council  
Civic Hall  
LEEDS  
LS1 1UR*

Telephone: 0113 2474386

All other crèches have to be registered.

Even if you do not have to register, it is still advisable to seek guidance about standards, staffing ratios and and general good practice for running a safe crèche.

*A copy of the National Standards for Creches is available at: [www.surestart.gov.uk/doc/0-B4D245.PDF](http://www.surestart.gov.uk/doc/0-B4D245.PDF)*

*See the more detailed information sheet on [Running a Crèche](#)*

This information has been reproduced from the Resource Centre website with their permission.  
[www.resourcecentre.org.uk](http://www.resourcecentre.org.uk)

## 10. Trading activities and tax

You do not have to pay tax on money raised at bazaars, jumble sales, carnivals, fire work displays and similar activities provided that all of the following conditions are satisfied:

The activity is carried out by a charity or other voluntary organisation and is intended to raise funds for charitable purposes.

The organisation is not regularly carrying out these trading activities.

The trading is not in competition with other traders.

The activities are supported substantially because the public are aware that any profits will be devoted to charity.

The profits are all used for charitable purposes.

This also applies to any profits made from advertising, programmes, souvenirs, raffle tickets, refreshments as long as these are part of the main event, and not a separate activity.

Any event which takes place more than three times a year is regarded as regular. Each type of event is considered separately, so it would be acceptable to have 3 fêtes, 3 concerts and 3 fireworks displays in a year.

# Jargon Buster

The following are examples of and explanations for jargon and acronyms that may appear in information that you receive.

## **Added Value/ In Kind**

Your volunteers, local contacts, donations to and from other organisations can all be counted as contributions that support investments that funders make in financial value. It is possible to work out the cash value/equivalent of volunteers etc.

## **Additionality**

Demonstrating that the service you provide is additional to services that statutory agencies offer

## **Business Plan**

A written document, which contains information, plans, projections etc to clearly present and make a case for your organisation or project. Often written for funders, but also a very useful tool for organising yourselves and planning in a structured way.

## **Business Case**

A scaled down version of a business plan (usually no more than 1 side of A4).

## **Criteria**

Funder's priorities and requirements, which must be met to obtain funding.

## **Core Funding**

General non-project costs involved in running your organisation, eg Administration, management support, general overheads.

## **Delivery Plan**

A statement of your targets in terms of outputs and outcomes.

## **End Date**

An agreed set date for ending a project or project phase.

## **Evaluation**

Looks at how your project works (process) or what it delivers (programme) to see how well it meets it's original aims, objectives and targets – in other words, how well have you done and how satisfied have your users been. Evaluation measures your **Outcomes**.

## **Outcomes**

The measured benefits that your project produces.

## **Exit Strategy**

A plan of how the project will close down, or progress beyond it's current funding.

## **Impact**

What sort of difference the project can make.

## **Distance travelled**

Progress and impact that has been made since your project started to present day.

**Inputs**

The resources, of all kinds, going into the project.

**Outputs**

The agreed objectives that your project produces and delivers.

**Targets**

Present outputs or outcomes that your project is aiming to meet.

**Leverage**

Bringing in other money – showing how an investment from one funder will enable you to access other funds.

**Match Funding**

Other funding required to complete your funding needs. Often funders will not support you until you have definite commitments from other sources.

**Milestones/Landmarks**

Key events marking the completion of certain stages in your project

**Monitoring**

Checking up on the projects achievements, standards etc, regularly during it's lifetime. Monitoring measures your outputs

**Performance measurements/indicators**

Present targets and standards by which the project will be measured

**Quality Assurance**

Setting minimum standards to aim for

**Sustainability**

Aiming to be self sufficient and independent i.e. not dependent on other organisations for funding, staff etc

**Value for Money**

Showing that your project will produce worthwhile and economically viable results

**Partnership working**

Working with other agencies and organisations in either a similar geographical area of subject matter in order to pool resources and/or share ideas.

**Vision/Mission Statement**

Short but all encompassing statements of vision and values for an organisation or project

**Infrastructure**

Organisations and structures that are there to support and provide resources to service deliverers

**Capacity Building**

Increasing an organisations/sectors confidence and ability to carryout their work and promote it to other organisations/sectors.

**PCT**

Primary Care Trust. Split into five wedges over Leeds. Each hold own budgets for service delivery in their allocated areas.

**PALS**

Patient Advocacy Liaison Service. An independent group that has been set up for patients to give honest and open feedback on NHS services which is fed back in order to make constant user led improvements.

**Terms of Reference**

An agreed set of aims and objectives that define the existence of your organisation. Funders often ask to see a copy of a constitution as it signifies that your organisation is formalised and has an agreed focus.

**Constitution**

An agreed plan of how your group/organisation will deliver your terms of reference.

**Non-profit making**

An organisation or group that ploughs any earnings back into the development of the organisation rather than seeing it as a profit.

**Charity**

An organisation that has registered itself with the Charities Commission and has received a Charity Number and produces an annual

**Social Enterprise**

Similar to the definition of a non-profit making organisation but different in that it generates income by delivering a product/service rather than existing by receiving finance from funding bodies

**Service delivery**

A term that is often used when identifying what service an organisation 'brings to the table'.

**Tendering**

When services are put out to 'tender', organisations and groups are invited to submit an expression of interest and a quote to carry out the work/deliver the service. All of this information is taken into consideration and a decision made based on it.

**VCS**

Voluntary and community sector

**VCFS**

Voluntary, community and faith sector

**GOYH**

Government Office Yorkshire and Humberside

**SRB**

Single Regeneration Budget

**ERDF**

European Regional Development Fund

**ESF**

European Social Fund

**Leeds Initiative**

Public, private and voluntary and community sector partnership, who facilitate vision and strategy for Leeds.

**Local Strategic Partnership**

Public, private and voluntary and community sector partnership, who facilitate vision and strategy within a city. In Leeds they are called the Leeds Initiative

**Yorkshire Forward**

The body responsible for driving the economic development and regeneration of the Yorkshire and Humber Area

**RES**

Regional Economic Strategy

**SLA (Service Level Agreement)**

An official document that is drawn up between two or more organisations as evidence of what each one has agreed to deliver.

# Area Committees - what do they mean to you?

Do you think you need the streets cleaned more often? Do you think there are enough things for young people to do in your area? Or do you have thoughts about local crime and disorder issues? Area Committees are able to address all these things and more.

Your Area Committee aims to improve the delivery and co-ordination of local council services, and improve the quality of local decision making. Area Committees give local people a local way of addressing their local priorities.

Leeds City Council has divided the City into 5 areas or "wedges". Each wedge has an "inner" and an "outer" Area Committee. Your Committee is made up of the councilors you elected in your area to represent your views. Area Committees can also co-opt up to 4 people although only the Councilors have voting powers.

Most Area Committees have an open session during the meetings where members of the public can bring any issues and concerns to the members for discussion.

Area Committees are making sure that good quality services are being delivered how you want in your area. To do this they are working hard to find out what you think are the priorities for your area and turning them into a local action plan called an Area Delivery Plan. Area Committees will tell you regularly how they are doing against their Delivery Plan to make a difference and meet your priorities.

Area Committees have a lot of influence, they are making sure your local priorities are taken into account in the development of major policies and strategies.

As a result of past consultation your Area Committee is initially concentrating on improving council services in the following areas:

- Streetscene - keeping your streets clean, emptying bins, maintaining roads and grassy areas.
- Youth Service - providing activities and support for your young people.
- Community Safety - helping make your area safer through the presence of Neighbourhoods and Street Wardens, Police Community Support Officers, CCTV schemes, preventing burglaries

The Area Committees are also making sure different organisations work together better so that your priorities are addressed. To do this, a **District Partnership** is being set up in each wedge. These District Partnerships are made up of major organisations who deliver key services to your area such as the Primary Care Trust, the Police, local companies, voluntary and community groups and Leeds City Council. The District Partnerships come under the umbrella of the Leeds Initiative - a city-wide partnership made up from the major organisations in the City. How do I get more information?

You can find out what is being discussed and agreed in your area by looking at the agendas, minutes and reports on the [www.leeds.gov.uk](http://www.leeds.gov.uk) website or check out Leeds Communities Online.

You can also contact your local Councillor or your **Area Management Team** for information about your Area Committee or **District Partnership**; there is one for each of the 5 wedges in the City.

Each wedge has an Area Manager who is leading on the delivery of your local priorities:

- East Area Manager Stephen Boyle (0113) 2141530
- North East Area Manager Rory Barke (0113) 2145686
- North West Area Manager John Bracewell (0113) 2144837
- South Area Manager Dave Richmond (0113) 2475536
- West Area Manager Steve Crocker (0113) 3950966
- General Enquires Martyn Stenton (0113) 3950647

Check out [www.leeds.gov.uk](http://www.leeds.gov.uk) for your local councillor

# SCRAP book

## Evaluation form

**Please spend some time making use of this resource  
(around 3-4 months) and feedback to us your comments**

- Have you made use of the SCRAP book?                      Yes/No  
How?
- Which section(s) have you found most useful?
- Are there any other sections or subjects that you would recommend?
- Do you feel that the SCRAP book could have been better presented and how?

Most of the content can be updated by yourselves however opportunities for training will be sent out to you to include in the SCRAP book. A review of its usefulness will take place around 12 months after the Launch.

Your name and contact address for our records

Name

Address

Phone

Email