STRENGTHENING SMALL DAIRY COMMUNITIES

TOOLKIT

GARDINER FOUNDATION

Produced for the Gardiner Foundation by Our Community

ourcommunity.com.au

INTRODUCTION
About the *Strengthening Small Dairy Communities* Program

Strong and vibrant communities are essential to attract and retain people in Victoria's dairy industry. The Gardiner Foundation's *Strengthening Small Dairy Communities* program is helping rural Victorians plan the future of their towns and bring their visions to life.

With two-thirds of dairy workers based in small rural communities, the dairy industry depends on the services these communities provide and the facilities they offer. At the same time, small rural communities rely on farming families to support local economies. After a decade of drought, floods, and other challenges, many of these towns are struggling with declining services, infrastructure, employment and population.

As a proactive investor in projects that benefit the Victorian dairy industry and its communities, the Gardiner Foundation is proud to work in partnership with local councils, community groups and regional dairy industry organisations to help strengthen small dairy communities. We know that any improvements made within small communities need to be driven by the residents themselves. They are the ones who best understand what their town needs and are best placed to see that it happens.

Through Gardiner's *Strengthening Small Dairy Communities* program in Gippsland and north-east Victoria, communities are being supported to build cooperative relationships and formulate a shared vision and priority actions for their community. Residents participate in training workshops on project management, grant writing and other key skills as required. The Gardiner Foundation then provides small grants to community groups for local projects including infrastructure and equipment, training and events. Alternatively these grants can be used as seed funding to help get larger projects up and running.

Through these key elements of planning, skills enhancement and grants, the program seeks to equip rural Victorians with the ongoing capability to build communities that thrive and support a successful dairy industry.

Our friends at social enterprise firm Our Community have played a vital role in the *Strengthening Small Dairy Communities* program by providing practical training to community members. This training has produced outstanding results, with many participants winning a Gardiner Foundation grant and gaining experience and confidence in running successful projects. Our Community has also helped participants identify lots of new and untapped funding sources outside their local area and have also helped build stronger clubs and organisations.

This Strengthening Small Dairy Communities Toolkit has been produced to support people who are participating in the *Strengthening Small Dairy Communities* program. It is full of practical tips, techniques, templates and further sources of information that draw on Our Community's 10+ years of experience in assisting communities all over Australia.

We hope you find this Toolkit useful in supporting your community to remain strong and vibrant long into the future. Please use and distribute this Toolkit as needed – it is available for download from our website as a whole document, in sections, or as individual topic sheets and templates. You can also request a printed copy from the Gardiner Foundation if required. We encourage you to contact us via the details below, to share your experience of the Toolkit, and we welcome your suggestions for how future editions can be improved.

Thank you to our dairy industry and local government project partners, to Our Community, and the local organisations and individuals we have worked with during the *Strengthening Small Dairy Communities* program so far. It is the Gardiner Foundation's great pleasure and privilege to work in partnership with each of you to build strong, vibrant and sustainable dairy communities.

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September 2012

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CASE STUDY:

How to build and sustain a local community initiative

A chat with Tarwin Lower's Grants Only Group (GOG)

The Grants Only Group (GOG) is a grassroots initiative that helps local community groups become more successful grantseekers.

Tarwin Lower is a small community in Southern Victoria with a population of 363 people.

In this video, we talk to members of the group about the process they went through in setting up their group, and ask for some hints and tips for other communities looking to set up their own initiative.

Watch the Video (approx. 9 minutes) [www.ourcommunity.com.au/gog]

GETTING STARTED:

Identifying what your community needs

WHAT HAVE YOU GOT?
Calculating your community's assets

The Takeaway: A community assets register will help you identify and articulate what your community has and who can help you identify and achieve your community's goals.

Community resources, or community assets, are people, places, or organisations that can be used to help achieve your community goals.

You need to develop a database that is useful for you. You don't have to come up with a report in a glossy cover, or a complicated computer system; the important thing is that you have the relevant contact details in your mailing lists, and that where necessary you have set up arrangements to collaborate.

A community assets register can be used for

- member recruitment
- strategic planning
- fundraising
- government compliance
- building partnerships
- media briefings, and
- proposal writing.

The first step in developing a community assets register is to accurately describe your community's current situation.

You will also need to know what organisations, what groups and what general trends share your space, or overlap with it, or border on to it.

Work through the lists below to build up a clear picture of your community.

Who do you serve?

How do you see your community?

- the geographic boundaries of the community

- the length of time the community has been in existence
- the general history of the community, the way priorities have changed over time
- the key people and leaders in the community
- demographics: ethnic makeup, male/female ratio, age profile, economic standing, education levels
- issues of most concern to the community
- community morale and involvement levels

Don't just note down facts, like numbers and costs and phone numbers – it can be just as important to know about people's opinions, hunches, prejudices, assumptions, and allegiances.

What are your community assets?

Check out the Community Assets Map at **http://abcdasiapacific.ning.com/notes/The_Key_Principles**. It shows a community's assets divided into three categories:

- Local Institutions and Resources – local businesses, schools, ovals, hospital, local facilities, community stories, government agencies, local council
- Community Associations – service clubs, churches, community organisations, sporting teams, neighbourhood house
- Gifts of Individuals – young people, senior citizens, artists, all residents, labelled people

Drilling down further than this, you can get even more specific. An asset could be any of the following:

- the practical skills, capacity and knowledge of local residents
- the passions and interests of local residents that give them energy for change
- the networks and connections – known as 'social capital' – in a community, including friendships and neighbourliness
- the effectiveness of local community and voluntary associations
- the resources of public, private and third sector organisations that are available to support a community
- the physical and economic resources of a place that enhance wellbeing.

Compile a list like this for your own community. Try to be as specific as possible.

Who and what is important in your community?

Who are the leaders – the people who are respected and followed? Politicians, ministers of religion, doctors, school principals, spokespeople for self-help groups, heads of clubs or societies, business leaders, social workers; can they help you?

Who are the stakeholders – people who are not actually a part of your community, but are involved in the area? Who are your allies, the people you work closely with? Who is your competition, if any? Who, if anybody, regulates the area? Who are the community leaders? Who are the gatekeepers – the people who can encourage or hinder new developments?

Government

What layers of government – national, state, regional or local government – are working in your area? You can find out which federal MPs are serving your electorate at **http://apps.aec.gov.au/esearch/** and state members here: **http://www.parliament.vic.gov.au/members**. Go to your local council's website to find a list of councillors.

How good are your links with your local representatives? How good are their information services? Do they have databases you can access?

Are there government grants you can apply for? (Get on the ***EasyGrants*** subscription list to get a regular list of available grants.) Are there other government resources you can use or borrow?

Other not-for-profit organisations

You want to identify the bodies that can help you and the bodies you have to deal with. You will need to consult available local databases (your council's community development section is a good place to start), and you will probably need to look around on your own account for the pieces that have been missed.

Our Community has a comprehensive list of Australian community organisations (see **www.ourcommunity.com.au/directories/all**). Plug in your local postcodes and see what comes up.

Private sector

You will also want to investigate the possibility of linking up with local business and industry. As well as individual businesses in your area, there may be organisations such as Rotary or a Chamber of Commerce that will be able to give you an overview and help you to network and forge links. Private business can provide assistance, sponsorship, or allies.

Media

Keep a contact list of all the media sources in your area – the local paper, local radio station – as well as the larger state media organisations. Use them for a two-way information flow; reporters generally have a good feel for what's going on.

Check **www.ourcommunity.com.au/mediacontacts** to find a list of contacts in your area.

Future trends

What opportunities and constraints will be placed upon you by the circumstances of the community – the economic cycle, the crime rate, how much people trust each other and want to get involved, and how all these things are developing over time?

The best way to get this information is by asking people. Use your listings of community resources to bring people together to discuss the situation. Use their conclusions to guide your organisation.

Maintaining the files

Keep abreast of what's happening in your community, and keep that information in a form that can be easily passed on from one person to another and will not simply be lost when somebody leaves.

The initial community overview needs to be updated and modified as circumstances change, and as you change the circumstances through your initiatives.

Mailing lists

A mailing list is an asset because it can be used to drum up support – people who may want to donate, or serve, or volunteer, or answer questions, or participate.

Don't neglect your lists. They need constant maintenance. Australians are a mobile people – we move house every few years, and regularly change our telephone numbers and email addresses.

Membership lists

Your most important and useful asset lies within your own membership list. It is a vital resource, and one that must be maintained and serviced. Keep in touch with the people on it; give them something often enough to keep yourself in their mind.

COMMUNITY ASSETS ASSESSMENT CHECKLIST

The Community

- Geography
- Demography [ethnic makeup, male/female ratio, age, economic standing, education levels]
- History [chronology, social and economic changes over time, general themes]
- Future projections (find statistics here: **www.ourcommunity.com.au/stats**)
- Physical Assets – local institutions, associations
- Residents' Assets – skills capacities and knowledge of local residents

Institutions

- Public
    - Government:
        - Federal
        - State
        - Local Government
- Private
    - Major employers
    - Major financiers
    - Media
- Community
    - Churches
    - Educational institutions
    - Not-for-profits
    - Culture
    - Other stakeholders

Leaders

- Public
- Private
- Community
  - o Churches
  - o Educational institutions
  - o Not-for-profits
  - o Culture
  - o Other stakeholders

Physical resources

- Community
  - o Churches
  - o Educational institutions
  - o Culture
  - o Halls/clubrooms

Allies, partners, funding sources

- Public
  - o Government:
    - Federal
    - State
    - Local Government
- Private/Business
- Community
- Foundations/Philanthropists

Important Note:

"Communities have never been built upon their deficiencies. Building communities has always depended on mobilising the capacity and assets of people and place."

Kretzman & McKnight (1993) Building Communities from the Inside Out

While it's important to identify what gaps your community may have, it is critical that you focus on the "half full" part of the glass rather than the "half empty" portion.

Focusing on what we *don't have* tends to make us forget what it is that makes our community special. Just because your community does not have a stadium the size of the MCG doesn't mean that you need one – identifying what you *do have* will help you better demonstrate the gaps (the real needs), and to set priorities as well.

WHAT DO YOU NEED?
Working out what's missing

The Takeaway: Finding out what your community needs – as opposed to what it wants – is incredibly important. Unless there are common goals, you will struggle to find committed and motivated volunteers, and you will have little support from funders and stakeholders.

Communities are as individual as the people within them and all will have different ways of approaching their goals.

Once you have gone through the process of identifying and understanding your community and identifying its assets and resources, you will need to establish how you can best serve its needs.

But what does it need?

You may think you know what your community needs. You may even be right. Nevertheless, you must still consult the community first to find out what it wants – and you must do this genuinely, with a mind that's open to change.

What the community wants may not always be the same as what it needs – your job may be to persuade it that it has needs it hadn't turned its mind to – and if there are large differences between wants and needs you need to know about that, too.

Finding out what your community says it needs is incredibly important because unless there are common goals, you may be unable to gain committed and motivated volunteers, and you will have little support from funders and stakeholders.

Consultation will cost you some time, and it may cost you some money, so you may have to balance your ideals with your finances, but consulting your community can be done in many ways. Look for a process that will both give you the information you want and move you along the way to finding solutions within your present resources.

Questionnaires and surveys can help (see the example **below**), focus groups and open-ended investigations are better, and best of all is a forum made up of all your stakeholders, where you can think things through productively as a community.

Interviews and background research

Begin by talking to a few of the influential people who know about the area – the heads of community groups, local personalities, local government community/economic development officers, local business leaders, local officials.

Ask them to identify:

- the important issues for the community and what they think is needed;
- who else should be consulted and where the information you want is held.

If time is very limited, if the issues are really clear, or if you can't afford the resources to go further, this may be all you need to do as you will probably have already developed a reasonable insight into your community's needs.

Be aware, however, that leaders aren't always in close touch with the situation on the ground. Even when they are up-to-date, they may have their own interests to serve and their own barrows to push so their perspectives may not be universal. And remember that the best ideas can spring from the collision of many different positions.

Research

Check what research has already been done, with this community or in other similar communities in Australia or overseas. Start with an internet search. Ask your local government for help. Check local papers.

You don't want to reinvent the wheel (and you don't want to accept previous data uncritically, either).

Surveys

If there isn't any existing research done about your area, or what you have found is too old to be of use, you may want to carry out a survey of your own.

You're not doing an academic research project, you just want a guide to action, so don't fret too much about statistical accuracy.

A survey – handed out at a street stall, posted out (if you have a good mailing list), delivered in local mailboxes, or inserted in your newsletter – can give you an idea of how people feel about the issues that concern you. Give a copy to anyone who shows an interest.

Set up an online form as well to make it as easy as possible for people to respond (there are several online programs that you can plug into, and for small-time users they're often free. Try **www.surveymonkey.com**). Email round the link.

Survey design will depend on your aims. If you want to establish that there's community support for a particular course of action you'll go about it differently than if you're simply seeking a feel for the priorities of members of the community.

Focus groups

If you can gather a selection of people from your membership base, potential members and other stakeholders around a table and take them through the options for your present and future work, you will throw a real light on your operations and your priorities.

Start with a list of issues, and have a facilitator in the room (or appoint a good chair) to stop people wandering too far from the list.

See if people agree, but don't stay around on any one point until they do or you'll never get through. Ask:

- What are your main concerns?
- What groups in particular have these problems?
- Do you know where to find any previous data on these issues in this area?

Focus groups are good at finding out about perceptions, but not so good at finding out facts. Don't undercut the opinions expressed by your group, but don't carry your positive attitude as far as not checking statements before taking action.

It can be a good idea to record your focus groups, or make sure someone's appointed to take extensive notes.

Community forums

If you want support from the community it's important that the community feels an ownership of the process – that they feel they've been genuinely consulted and that their views have been heeded.

Try and get your stakeholders and your partners together to thrash out what's needed, who should do it and how you should work together. The experience and expertise contained in a room full of administrators, members and advocates can be very effective in identifying needs and remedies.

On the other hand, this is a lot of work. If you're contemplating taking this on, look around for partners – people with a common interest in some part of the field. What resources can they contribute? Use the process to build relationships and trust.

Again, you will probably want to record these discussions.

Review

At the end of the process you should have more than a cold set of statistics – you should have a picture of the agreed needs you should be addressing in your community, and a story about how you'll go about dealing with them that you can use to motivate and inspire your volunteers, your staff, and your funders.

Translate this story into a set of new goals and strategies. In fact, now might be a good time to think about developing a strategic plan – see the Sample Strategic Planning Process provided **below** for some clues on how to do this, or go to **www.ourcommunity.com.au/strategicplan**.

SAMPLE COMMUNITY NEEDS SURVEY

Available for download at **www.gardinerfoundation.com.au/programs/ssdc**

[Name of Group] is conducting a survey about the current and future needs of **[Name of Community]**.

The results of this survey will help shape our directions as we work to build and strengthen our community.

To help us move forward we would like to hear from you about what you want for our community.

After our information-gathering is completed, we will circulate a report to all participants.

About our community

1. What do you think are the strengths of **[Name of Community]**? Why do you like living here?

2. How would you like to see **[Name of Community]** change in the next five years?

3. Are there needs or gaps in programs and services that are not being met at the moment?

4. Are there any changes taking place in **[Name of Community]** that concern you? What are they? What do you think might be done about those changes?

5. What programs do you know of that people are trying in other places that we should try in **[Name of Community]**?

About you

We'd like to know a little about who's answered our questionnaire. We promise that the data will be used for no other purpose, and we'll destroy it after the survey is completed. Feel free to skip any questions you don't fill comfortable answering.

6. Your Name

7. Contact details (please provide these if you would like to receive a copy of the result of this survey)

- Postal Address
- Email Address
- Telephone Number
- Alternative Telephone Number

8. Age

9. Gender

10. Postcode

11. Occupation

12. How long have you lived in this community?

13. Would you be willing to help us in our community building work in some form?

14. If yes, please list any particular skills you have that might be able to assist us.

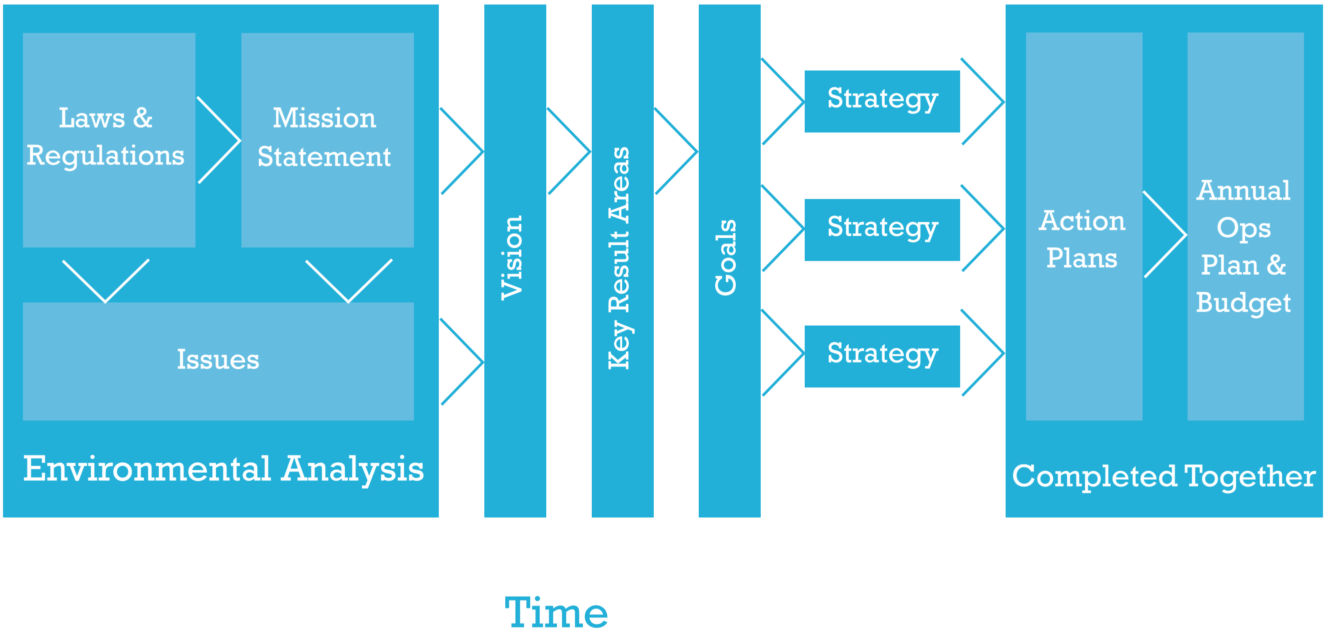
Anything else?

Please feel free to provide any additional comments that you think will help improve our group:

This survey can be

Mailed to:	**[Postal address]**
Faxed to:	**[Fax number]**
Emailed to	**[Email address]**
Completed online:	**[Web address]**

SAMPLE STRATEGIC PLANNING PROCESS



WHAT DO YOU WANT TO DO?
Setting priorities

The Takeaway: If you want to bring about change, you need to be up for the challenge. But you also need to set reachable goals.

You want your work to make a difference so you have to tackle important issues.

You want to succeed, so you have to be realistic.

In setting your goals, you must consider several questions. Faced with the range of challenges that have been thrown up by your community consultation – youth unemployment, say – and your review of the available data, you have to decide where to start.

Pull the common factors and the surprising insights out of your research and see how they line up with your previous assumptions of what your particular community needs.

Think about what new partners have emerged in the course of the consultation process, and how you might be able to work with them.

Be open to new insights, wherever they originate.

Come together to discuss the major issues that confront your community. For each, discuss:

- **Their prevalence:** is the need widespread?
  Establishing need may not be straightforward – you may have anecdotal reports but no hard data, or you may have data from other centres but nothing from your own community.
- **Their severity:** is the need serious or only a minor inconvenience?
  Every community has its problems, but not all of these are so acute as to be require community mobilisation.
- **Their generality:** is it expressed most by a particular segment of the community?
  A severe problem that affects only a small section of the community is not necessarily unsuited for a community-wide project, but such a project may need to be handled differently.

- **Their solvability:** is there a straightforward way that the need can be met? Some problems have known solutions, while some require further research before you can work out where to go next.

Consider all these aspects together, and don't let any one of them dominate the discussion. You need the whole picture. At the end of the discussion, though, you have to be able to identify one or more of the possibilities for further action.

Don't assume that the most vociferous complaints represent the most serious problems. Any community has its share of people with bees in their bonnet, chips on their shoulder, and megaphones in their hands. Try to step back and see their demands in context.

Some needs are going to be very real but out of your reach, requiring just too much in the way of resources or expertise or public support to carry out at this stage. You'll have to pick out the needs that your organisation (or your network) is capable of addressing – either by finding a problem that is your size, or by putting in the preliminary effort to raise your group's resources up to the next stage.

Where you feel your group lacks the capacity to attack a real and pressing problem, ask yourself what changes would be needed to allow you to meet them. If these changes are broken down into separate steps they may appear more manageable, allowing you to reach for more ambitious objectives.

You don't have to settle on a single issue, and you can tackle several issues at the same time. You don't want to end up with a laundry list, though. If you've got a long list of things to do, set priorities (see the Priorities Planning Tool **below**), or see if you can find underlying connections that would allow you to take action on several issues simultaneously by attacking underlying issues.

PRIORITIES PLANNING TOOL

Available for download at **www.gardinerfoundation.com.au/programs/ssdc**

1	2	3	4
DO THESE TASKS FIRST	DO THESE TASKS NEXT START PLANNING NOW	SPEND MINIMUM TIME & RESOURCES POSSIBLE ON THESE TASKS DO ONLY AFTER TASKS IN COLUMN 1 ARE COMPLETED	STRICTLY AVOID SPENDING ANY TIME OR RESOURCES AT ALL ON THESE TASKS
Important & Urgent	Important but not Urgent	Not Important, but Urgent	Not Important, not Urgent

HOW CAN YOU GET FROM HERE TO THERE?
Selling your project

The Takeaway: Identifying your ultimate goals for your community will help you gain the support of funders and other supporters, as well as later assess whether what you've done has worked.

You want your work to make a difference. But what, exactly, do you expect to be different when you complete the project? What are your ultimate goals?

There is a temptation in any community project to make the task easy by phrasing your goals in terms that can't fail: "We aim to fund these activities, build these facilities, hold these events, and publish these materials."

Yes, but will that solve the problems that you started with?

You have to be able to say what you really want to achieve in ways that will both convince other stakeholders and provide guidance for project evaluation afterwards.

The Five Whys

The Five Whys is a Japanese management tool for pushing you to think more deeply about what you're doing. It involves behaving like a particularly irritating six-year-old – but it works.

Why do you want the money?

So we can run a camp for local at-risk children.

Why?

So we can give them an adventure holiday.

Why?

So they can get a chance to be involved in group experiences they enjoy.

Why?

So they can learn about co-operation and gain self-esteem and see new possibilities in life!

Why?

So they can build resilience strategies to cope with their difficulties better!!

There, was that so hard?

Similar to the Five Whys **above**, a Logic Model has five levels, running from input (what you spend) right through to impact (what you want to see at the end of it all). It's that last level – the bit where you change the world for the better – that really counts. (See the Logic Model template **below** for more on this.)

Once you've identified your ultimate goals, you then have to start fleshing out the bits in between – the activities and facilities and events and materials, and their effects, that will get you from here to there. These form the other three bits of your Logic Model.

Don't be scared off by the terminology. All a Logic Model really is is an explanation of why you believe what you're doing is going to have the results you think it will. It's a mechanism that works in terms of actions and consequences – *"We will do this, and because of this, that will happen"* – adding in the reasons why you're entitled to think that's actually going to happen:

*"We're funding a community volunteering scheme[1] **(input)** to make it possible to start up a town football team[2] **(process)** to give more young people meaningful occupations[3] **(output)** to reduce youth alienation and substance abuse[4] **(outcome)** to reduce the accident rate and improve health **(impact)**."*

1 "See overall project budget for feasibility study."
2 "See community consultation records for assessment of demand for improved sporting facilities."
3 "See case study of project in comparable environment."
4 "See review of research evidence on community projects and substance abuse."

If all goes well, every level along the way will have its spin-offs, and you can hope to have a lot of fun along the way while learning some useful lessons on how to do better next time.

LOGIC MODEL TEMPLATE

Available for download at **www.gardinerfoundation.com.au/programs/ssdc**

<table>
<tr><td>Input</td><td>In order to carry out our project we'll need these resources in funding, staffing, and support:</td><td></td></tr>
<tr><td>Process</td><td>These are the different things we're going to do, in the order we're going to do them:</td><td></td></tr>
<tr><td>Output</td><td>We'll be able to show afterwards how many people have been through the program, and what they did:</td><td></td></tr>
<tr><td rowspan="2">Outcome</td><td rowspan="2">We expect that if completed (or if still going on) these activities will lead to the following changes in the target group –</td><td>in the short-term (1-3 years out):</td></tr>
<tr><td>and in the longer-term (4-6 years out):</td></tr>
<tr><td>Impact</td><td>These are the ways we foresee the community being different in the long term, and these are the reasons why we think this will happen.</td><td></td></tr>
</table>

HOW WILL YOU DO IT?
Formulating a plan

The Takeaway: Good planning involves careful attention to detail when it comes to setting tasks and timelines. There are some great computer programs that can help.

Planning is the process of setting down how you propose to transform your inputs into your outputs, except that it works backwards; you begin with your objectives, and then say which actions will bring them about. You then assign each action a place in the timeline, being careful to include any necessary preliminary work that needs doing, and then divide up your resources across them all.

You might, for example, have two objectives –

- Establish tourist centre
- Convert historic prison into museum

Each of which breaks down into smaller components –

- Establish tourist centre
  - Hire facilities
  - Buy office equipment
  - Hire part-time coordinator
  - Organise volunteer registry
  - Organise online presence
  - Organise launch event
- Convert historic prison into museum
  - Determine current ownership/status of building
  - Conduct feasibility study, including fundraising/resource assessment
  - Negotiate transfer of building to community
  - Hire coordinator

- Organise volunteer registry
- Organise online presence
- Organise launch event

For each component you will need to assess in advance who is to be responsible for achieving that action, what resources will need to be assigned to it, how long it will take, and when it will start. Where one action depends on previous actions – you can't launch your Tourist Centre until you've hired a building and a coordinator and set up an office – you have to set up a timeline to make sure it all fits together in the allotted time.

Once you've worked out all these things you'll need to put all the individual component plans side by side to ensure that your timelines are consistent, your resource allocation is within budget, and the same person hasn't been double-booked.

One way to do this is through what's called a Gantt Chart (see Example Planning Skeleton, **below**), which links all your dates and tasks into a matrix that shows what parts of it depend on finishing other parts. You can draw one of these up on graph paper, but it's much easier to use computer planning software such as Microsoft Project (Windows), OmniPlan (Mac), or **http://www.ganttproject.biz/** (Windows, Mac, or Linux – an open source program).

Looking at a chart like this over the course of your project helps you to see what's running behind schedule and what the consequences of that will be.

The planning process also provides a perfect opportunity for setting your performance measures so you will have something to refer back to later once your plans are under way and you want to know if you're on target. See the section titled 'Assessing Progress' for more on this topic.

Budgeting

The next step is to prepare a budget for each component of the project, and a consolidated budget for the project as a whole. Be careful to include all foreseeable costs (and allow yourself some leeway in case something runs over budget – keep a contingency reserve).

You'll probably need to run two budgets – one project-by-project, so that you can see exactly where you're making or losing money, and one that shows cash flow across the year, so you can see if you're going to run out of money at any point.

We have provided some sample plans budgets below to show how this can be done. If you need more help, Our Community's Community Financial Centre has a lot of resources that can get you going – see **www.ourcommunity.com.au/financial**.

Calculating your in-kind contribution

Many grantmakers allow community organisations to claim the value of the volunteer and other no-cost input as part of their contribution to the project, most often described as an "in-kind contribution".

Your in-kind contribution might include volunteer labour, administrative support, rent-free accommodation or donations of materials or equipment. These contributions should be given a dollar value and included in your budget.

Here's an example budget that you might be expected to submit for a typical grantmaker, 'GoodWorks Fund'.

INCOME	**$**
Please include all income to be used for your project	
Grant requested from GoodWorks Fund	
Cash contributed by your organisation	
Value of in-kind support from your group (other than volunteer contribution)	
Value of in-kind support from other areas (other than your organisation)	
Value of volunteer hours (@ $20 per hour)	
EXPENDITURE	**$**
Purchase of goods (please list details)	
Human resources costs (please list details)	
Value of in-kind support from your organisation (other than volunteer contribution)	
Value of in-kind support from other areas (other than your organisation)	
Value of volunteer hours (@ $20 per hour)	

In some cases, the monetary figure attached to your in-kind contribution of voluntary labour will be a standard rate regardless of the type of volunteer input (as in the example above, where the grantmaker has stipulated the rate at $20 per hour).

Other grantmakers will allow you to estimate the approximate value of that input. For example, input from a professional such as a carpenter or an accountant might be valued at much more than $20 an hour.

It is important that you read the guidelines to make sure that the value you claim is within the grantmaker's guidelines – if it isn't in the guidelines it's worth a call to make sure.

If you are allowed to stipulate your own value, do it carefully and fairly (the grantmaker will easily be able to sniff out a bogus or inflated claim). This helpsheet will help you to work out how to calculate an accurate value for your volunteer labour: **www.ourcommunity.com.au/volunteervalue**

While the in-kind contribution will be acknowledged by the grantmaker, it is important that you understand that it is not "paid" to you. It is simply counted as part of your contribution to the project. Normally you will only be able to "claim" a maximum of 25-30% of any project's total cost in-kind.

When you write your final report or acquit your grant, you will need to demonstrate that the amount of time and effort that you budgeted for in-kind has actually been contributed. A great way to show this is through a volunteer log, recording who provided the volunteer time, the type of work they did and when. It's always helpful to provide some photos too.

EXAMPLE PLANNING SKELETON

		Week 1	Week 2	Week 3	Week 4	Week 5	Week 6	Week 7	Week 8	Week 9	Week 10	Week 11	Week 12
Establish Tourist Centre	Dara Edwards	1/07/12	8/07/12	15/07/12	22/07/12	29/07/12	5/08/12	12/08/12	19/08/12	26/08/12	2/09/12	9/09/12	16/09/12
o Hire facilities	Colin Dillinger												
Get permissions	"												
Organise utilities	"												
Organise insurance	"												
Sign contract	"												
o Set up office	Fred Gorringe												
Purchase computer	Gerda Harry												
Purchase furniture	Hung Nguyen												
o Hire P/T coordinator	Ellen Fallon												
Advertise position	"												
Assess applications	"												
Conduct interviews	"												
Contact referees	"												
Sign contract	"												
o Set up volunteer registry	Bernard Cohen												

GARDINER FOUNDATION

EXAMPLE PLANNING SKELETON (continued)

Convert lists	"												
o Online presence	Colin Dillinger												
Buy URL	"												
Commission page layout	"												
Go online	"												
o Launch event	Alan Bandler												
Design program	"												
Send invitations	"												
Stage event	"												

BUDGET TEMPLATE (BY PROJECT)

Income	Core costs	Tourist Centre	Prison museum	Total
Grants	0	40,000	60,000	100,000
Contracts	0	0	0	0
Donations	0	0	0	0
Membership	0	0	0	0
Fees for services	0	0	0	0
Sales	0	0	0	0
Events	0	0	0	0
Interest income	1,750	0	0	1,750
Miscellaneous	0	0	0	0
Total income	**$1,750**	**$40,000**	**$60,000**	**$101,750**
Expenditure				
Salary costs	0	16,667	28,000	44,667
Rent	1,000	6,333	0	7,333
Utilities	0	1,833	2,292	4,125
Insurance	0	4,000	6,000	10,000
Legal, accounting	0	800	800	1,600
Equipment	0	4,500	2,300	6,800
Supplies	0	300	6,300	6,600
Printing and copying	100	800	1,100	2,000
Telecommunica-tions	150	450	550	1,150
Travel and meetings	300	50	120	470
Marketing	0	600	1,200	1,800
Staff training	0	0	600	600
Contract services	0	1,500	6,500	8,000
Event costs	0	800	1,200	2,000
Other	0	580	0	580
Total expenditure	**$1,550**	**$39,213**	**$56,962**	**$97,725**
Deficit/Surplus	**$200**	**$787**	**$3,038**	**$4,025**

BUDGET TEMPLATE (BY MONTH)

Income	**Budget**	**Jul**	**Aug**	**Sept**	**Oct**	**Nov**	**Dec**	**Jan**	**Feb**	**Mar**	**Apr**	**May**	**Jun**	**Total**
Grants	100,000	0	40,000	60,000										100,000
Contracts	0	0	0	0										0
Donations	0	0	0	0										0
Membership	0	0	0	0										0
Fees for services	0	0	0	0										0
Sales	0	0	0	0										0
Events	0	0	0	0										0
Interest income	1,750	0	0	0				1,200					550	1,750
Miscellaneous	0	0	0	0										0
Total income		$0	$40,000	$60,000	$0	$0	$0	$1,200	$0	$0	$0	$0	$550	101,750
Expenditure	**Budget**	**July**	**Aug**	**Sept**	**Oct**	**Nov**	**Dec**	**Jan**	**Feb**	**Mar**	**Apr**	**May**	**Jun**	**Total**
Salary costs	44,667		1,515	4,315	4,315	4,315	4,315	4,315	4,315	4,315	4,315	4,315	4,315	44,667
Rent	7,333	0	667	667	667	667	667	667	667	667	667	667	667	7,333
Utilities	4,125	0	500	750		500	500	125		500	750		500	4,125
Insurance	10,000	0	2,000	125	3,000			1875			3000			10,000
Legal, accounting	1,600	0	0	400				800				400		1,600
Equipment	6,800	4,500	0	2,300										6,800

Supplies	6,600	100	0	1,200		2,200			3100					6,600
Printing/copying	2,000	300	0		200			1000			500			2,000
Telecoms	1,150	300	0			300			350			200		1,150
Travel/meetings	470	150	0	60			200			60				470
Marketing	1,800	0	0	200		600			700			300		1,800
Staff training	600	0	0	280			320							600
Contract services	8,000	0	0	1,000	1,000			1500	1500	1500	1500			8,000
Event costs	2,000	0	150	220	430							1200		2,000
Other	580	0	0	580										580
Total expenditure	**$97,725**	**$5,350**	**$4,832**	**$12,097**	**$9,612**	**$8,582**	**$6,002**	**$10,282**	**$10,632**	**$7,042**	**$10,732**	**$7,082**	**$5,482**	**$97,725**
Deficit/Surplus	**$4,025**	**-$5,350**			**-$9,612**	**-$8,582**	**-$6,002**	**-$9,082**		**-$7,042**		**-$7,082**	**-$4,932**	**$4,025**

GETTING GOING:

Putting in Place the Team

WHO CAN HELP?
Building a team

The Takeaway: Your core group may not have the skills you need to bring your plans to fruition – you may need to look elsewhere. You will need to strike the balance between working with what you have and making sure you have what you need.

Your planning process will have produced a list of the actions and activities that have to be worked through in order to reach your objectives.

With this in hand, you can look around your group and decide who has the skills and experience to carry out each task reliably to a satisfactory standard.

If there is nobody in your group who is qualified to take on a task – if, for example, you need a webpage designer, or a lawyer, or a marketing expert, or a carpenter, and you don't have one – then you have two choices. You can train someone in the group to take on the task, or you can bring someone else into the group.

If you think the gap can be bridged with training,

- **Check out the available offerings**
  Look at the Council of Adult Education, TAFE, university and council for course/seminar/training options in your region. Our Community also provides training on topics such as fundraising, grantseeking and governance. See **www.ourcommunity.com.au/training**.
- **Check out any available subsidies**
  Check the EasyGrants database (**www.ourcommunity.com.au/easygrants**) and the Our Community Matters newsletter (**www.ourcommunity.com.au/ocmatters**) for any grants, fellowships or scholarships, that you could use to subsidise your group's further training.
- **Budget for the time**
  In your planning, factor in the unavailability of the trainee for the period of the training.

If you decide to bring someone else on board – if you're short of time, for example, or if the task requires more specialised knowledge than can be gained easily – then you turn to recruitment.

- Compile a list. Talk to group members, staff, business colleagues, local leaders, and other groups to scout for potential talent. Follow up stories in local papers about interesting, enthusiastic "doers". Keep in mind the skills that your group needs.

- Consider diversity. As well as different skill sets, you also want to ensure that you're bringing in a variety of different perspectives and views.
- Run a story in your newsletter (or, if you don't have a newsletter, in your council's newsletter or through a column or letter your local paper) spelling out exactly what sort of skills you need.
- Once you have your "possible" list, check they have the qualities you need. Can they work in a team situation? Do they have a genuine interest in your group? Are they prepared to put in the time?
- Approach them and explain what your group does, its vision and where you think they could help out. Don't be too apologetic about asking them for help – you're offering them the chance to build a community!
- Keep an open mind. Often the best convert and keenest activist is someone you had previously never considered.
- Offer them a limited involvement – don't ask for a lifetime commitment, at least at first. Be prepared to accommodate their convenience.

If you really need particular expertise and can't find it anywhere, then you may have to pay for it – but that's a last resort (it is very hard indeed to find funding to pay for salaries, particularly ongoing ones).

If you do have to pay, it may be possible to leverage your relationships to get discounts and fee reductions, with the savings counting towards your organisation's in-kind contribution to the project. An example might be where a local architect that knows of your group's good works agrees to provide her services at a discounted rate – the difference between the full price and the discounted rate can then be highlighted in your grant application as part of your group's own in-kind contribution.

Some grantmakers will allow this, others not. If it's not clear, check first. See the section titled '**How Will You Do It?**' for more on calculating and accounting for an in-kind contribution to a project.

SKILLS AUDIT TEMPLATE

Skills needed	Existing group							Skills Shortfall
	Alan Bandler	Bernard Cohen	Dara Edwards	Ellen Fallon	Fred Gorringe	Gerda Harrison	Hung Nguyen	
Community leadership			*		*			
Project administration								Project administration
Financial administration					*			
Fundraising	*							
Legal knowledge								Legal knowledge
Negotiation		*	*					
Community development				*	*			
Government liaison		*						
Technology	*					*		
Gender	M	M	F	F	M	F	M	4/3
Indigenous culture								Indigenous culture
Disability experience		*						
Ethnic background								Sudanese
Youth voice							*	
Other								

WHAT ARE THE GROUND RULES?
Laying down the boundaries

The Takeaway: Rules are like parachutes; you don't need them often, but when you do need them you really need them.

Most of the time a community group can get by through just talking things over, and when things are working well you want to have as few formalities as possible.

The time will come, though, when people disagree violently, and when that happens you want to be able to know who has the final word.

Group rules

Nobody wants to clog everything up with formalities, but if you're going to be a proper group, as opposed to "whoever happens to turn up on the day", you're going to need to put some things in writing.

At a minimum, you will need:

- **a membership list** (and a procedure for joining up as a member, and a procedure for resigning, and perhaps a procedure to get kicked out)
- **an executive** (and a procedure for electing an executive)
- **some guiding rules** (procedures for getting the opinions of the members – a general meeting, or an online consultation – and spelling out how many members it takes to make a valid decision (quorum), and how often that needs to happen.

That's also pretty well the list of things you have to have in the constitution of an incorporated association – have a look at the Victorian Model Rules for incorporated associations at **www.fobg.org.au/aa_nonhtmlfiles/Association_Model_Rules.pdf**. You don't have to incorporate in order to use this – just trim it a little to suit your group's needs and it's good to go.

Meeting rules

Meetings need to be conducted under rules that are fair, understandable, efficient, and capable of overriding attempts at obstruction.

In order to provide a proper balance between democracy and decisiveness, the head person (the Chair, or President, or whatever you decide to call the person in charge) should be an elected position, and that election should give them a good deal of discretion to ensure that the conduct of business runs smoothly.

After that, you need as few rules as possible – cut it back to the minimum set of conditions that will allow necessary decisions to be taken efficiently and expeditiously, and specify who or what should make the decisions that aren't specifically covered in the rules.

Some sample meeting rules (generally known as Standing Orders) are provided **below**, but they may be more formal than you need. Just trim them to suit.

The Chair should run the meeting according to the Standing Orders, but where the Standing Orders are ambiguous or contestable or silent, the Chair can make a ruling off the top of their head. If someone else disagrees (strongly) they can move a motion of dissent. If this motion is seconded, a vote shall be taken. If the motion of dissent is carried, the Chair's decision is reversed.

For the ordinary members of the group, the basic rules of any discussion are that you should

1. **Read the papers.** Proper preparation gets through things so much quicker.
2. **Stick to the agenda.** Don't ramble, don't bring everything up at once, don't revisit past history.
3. **Speak up.** You're here because we want your opinion. Don't hold back.
4. **Sit down.** Other people have opinions too. Give them room to speak.
5. **Do the work.** Take your share of the labour, and do everything you say you'll do.
6. **Don't do other people's work.** Don't push into other people's areas unless you're asked. Accept the division of labour.
7. **Don't get personal.** Everybody's working for the same objectives – cut them lots of slack.
8. **Know what you want.** Decisions have to be taken, and you're there to take them.
9. **Don't obsess over trivia.** Develop a sense of perspective. Take the long view.
10. **Don't put things off.** Not taking a decision on the day is taking a decision to drift.

Management

As your organisation moves towards becoming more formalised – preparing for incorporation, for example – you will need to have in place some clear governance structures: a properly constituted Management Committee or Board becomes essential.

If you grow larger, too, you'll also have to work out how your Committee works with paid employees; how your group will be *governed*. Governance is about how your organisation is run, and deals with the structures and systems and understandings that enable you to make the right decisions and set the right course. It's not the same thing as management. What the Committee does is governance; what the CEO does is management (although the division can become blurred if committee members have to act as managers as well).

The Committee has total authority over the group's decisions and strategies and activities and legal responsibilities and budgets, though it may delegate some of those responsibilities to others. Final decisions on important issues must always pass by the committee.

To find out more about committees, boards and governance, go to **www.ourcommunity.com.au/boards**.

SAMPLE STANDING ORDERS

Notice of Meeting

Notice shall be given of General Meetings according to the organisation's Constitution. Wherever possible, 10 working days notice shall be given of the date, time and place of committee meetings. Where urgent matters arise, shorter notice may be given.

Notice shall be given of meetings of any sub-committees at the discretion of the Chair.

Where possible, agendas and any papers to be discussed at the meeting will be circulated in advance of the meeting.

Minutes of any meeting of the Committee shall be circulated to all members before the scheduled date of the next meeting. The minutes shall record

- the date, time and venue of the meeting;
- the names of those members and officers present;
- the name of the meeting Chair;
- any apologies tendered;
- any failure of a quorum;
- a list of items considered;
- any resolutions pertaining to those items; and
- details of any declarations of pecuniary interest.

Any other matters may be recorded at the discretion of the Secretary and the President.

Ordinary meetings of the Committee shall be held at the dates, times, and places decided by the Committee from time to time, except that no fewer than four meetings shall be held in any one year.

A special meeting of the Committee shall be called at any time at the request of no fewer than three Committee members. Ten working days notice must be given of any such meeting.

Quorum

The quorum for any Committee meeting shall be as laid down in the constitution. The quorum for the meeting of any other sub-committee shall be as laid down in the sub-committee's terms of reference, or if not there specified shall be as adopted by the sub-committee.

At any point after the opening of a meeting, any member of the Committee may call attention to the lack of a quorum. The meeting shall then terminate.

Voting

The President must receive and put to a vote any properly seconded motion moved by any member of the Committee, including motions dissenting from decisions by the President.

The mode of voting (show of hands, ballot, etc.) shall be as determined by the President from time to time.

Members of the Committee may vote for any motion or may abstain. A motion shall be declared carried if a plurality of members present (that is, a majority of members present and voting) vote in its favor. In the event of an equality of votes for and against a motion, the motion will automatically lapse.

Members' Interests

Where a member has a notifiable interest, as defined in the organisation's Conflict of Interest Policy, in a matter before the Committee, the member shall inform the President of this interest, either at the beginning of the meeting or, if the matter is not featured on the circulated agenda, when the matter arises. The President will then ensure that the provisions of the Conflict of Interest Policy are followed.

Every member present when any matter is raised on which they directly or indirectly have a pecuniary interest, apart from any interest in common with the public, is under a duty to fully declare any such interest to the meeting through the President. This disclosure, and any subsequent abstention of such member from discussion or voting on the item, are to be recorded in the minutes.

Speaking

Members may speak to any motion when granted the right to speak by the President.

The President shall grant priority to members who express an intention to move dissent with a decision of the President.

In speaking to any motion or amendment, members are to confine their remarks strictly to such motion or amendment, and shall not introduce irrelevant matters or indulge in needless repetition. In this matter, the President's ruling is final and not open to challenge.

Amendment

The Committee may amend these standing orders at any time either permanently or for a specified period.

Other Matters

The President is to decide all questions where these standing orders make no provision or insufficient provision.

In reaching his/her decisions, the President is to take account of, but not to be bound by, Robert's Rules of Order (**http://www.rulesonline.com/**).

WHO DO YOU NEED IN YOUR CORNER?
Finding key partners

The Takeaway: Work out who you want on your side, work hard to bring them on board, then work at the relationship to keep it on track.

In carrying out your work, your group will require assistance from other organisations in the area –

- **To lend credibility**
  If your group is new, or small, or unknown, it will give weight to your proposals if a well-established, larger, better known organisation stands behind you.
- **To show support**
  Your goals will also carry greater weight if it is seen that they are widely shared – if organisations that have a wide reach in the area find them persuasive, it's more likely that others will as well.
- **To give permission**
  Many organisations serve as official or unofficial gatekeepers, having effective veto power over developments in particular fields. You will need to get their assent to your proposals.
- **To give protection**
  If you have competitors, or even opponents, you may need to have some allies in quarters that can block or divert unhelpful interventions.
- **To provide funding**
  Any organisation that can make a contribution to your budget should be given particular attention.
- **To provide help**
  Similarly, it's useful to align yourself with any organisation that may be able to provide access to facilities, resources, volunteers or publicity.

These other organisations may be

- **Government – federal, state or local**
  The most useful contact you can have in these affairs is your local council's Community or Economic Development Officer, who could be able to offer you support ranging from good advice to partial funding. Make sure you get

to know your local state and federal MPs as well, including their staffers.

- **Business**
  Business might be able to contribute the use of premises, volunteers (with, perhaps, particular skills), interns, mentoring, in-kind support, pro bono services, donations from their staff, or organisational sponsorship. If their contribution is significant, you might want to draw on their expertise by having one of their people join the Committee.

- **Community**
  You may conceivably even be able to operate under the aegis of another group for tax or other purposes. See the section titled '**Maintaining Friendships**' for more on this.

- **Media**
  Local media outlets make for some great allies. Call them in early to brief them about what you're doing. If they're part of your community, they should be able to easily see the benefits of what you're proposing.

These other organisations will, you hope, support your work because their aims overlap with yours. Their aims, however, are not exactly the same as yours (if they are the same then there's probably no need for your group), which means that the possibility of disagreement and dissension breaking out does exist.

It is thus a good idea to be as clear as possible about what you are asking for and what your partners have agreed to give you, and it is even better to have this written down and placed on file to be referred to when difficulties arise.

PARTNERSHIP REVIEW CHECKLIST

When you're in a close partnership with another organisation – a business, a government department, another stakeholder – it's wise for both partners to review the partnership on a regular basis, perhaps once or twice a year.

Regularly evaluating how the partnership is travelling reminds both partners about the partnership's aims, responsibilities and details, and can help to identify and address any hidden problems that may exist.

- **Happiness and comfort:**
  - ❐ Are both parties still happy in the partnership, and still comfortable with their own roles and responsibilities as well as those of their partner?
  - ❐ Do staff and group members still support and believe in the partnership, and do the people who are leading the partnership still feel comfortable and happy doing so?
- **Purpose:**
  - ❐ Do both partners still feel there is a clear definition of purpose, as well as the roles and responsibilities in partnership?
- **Goals, benefits and resources:**
  - ❐ Do both parties still feel the partnership is achieving or working towards achieving its aims for the community?
  - ❐ Do both partners believe the partnership is achieving the benefits and objectives for their own group that they want to see?
  - ❐ Are the resources of the partnership – goods, donations, services, volunteer work, resources or learning opportunities – being focussed in the right areas?
  - ❐ Are the resources that have been assigned to the partnership still enough to achieve those aims?
- **Responsibilities:**
  - ❐ Are responsibilities still being shared fairly in the partnership, or is there a need to review who does what?

- **Decision-making and ideas:**
  - ❒ Are decisions of the partnership still being made jointly, with both partners actively involved in the process?
  - ❒ Do both partners still look for ways to improve the relationship, as well as recognising when an element of the partnership has worked well?
- **Honesty, respect and trust:**
  - ❒ Is there a clearly defined environment of honesty, respect and trust in the partnership – not only between the two groups, but within those groups as well?
  - ❒ Are all those involved in the partnership's work valued and respected, and treated well?
- **Communication:**
  - ❒ Does there remain a healthy level of communication between and within the two partnership groups?
  - ❒ Are both partners able to talk about partnership issues – both good and bad – and speak to each other as partnership equals?
  - ❒ Are both partners able to listen to each other's thoughts and ideas respectfully?
  - ❒ Has the partnership been recognised internally and externally?
- **Flexibility:**
  - ❒ Is there still flexibility in the partnership – an ability or willingness to be flexible or change if necessary?

MAKING GOOD DECISIONS
An eight-step process

The Takeaway: A decision made by the group now belongs to the whole group – even if you voted against it, it's your decision, and you must be prepared to do the work to see it carried out.

Good decision making calls for an eight-step process.

1. Formulate the problem

Before you come up with an answer you need to be sure you have the right question.

Don't see your task as to carry out a project or a program; step back and think about the need the project's supposed to meet, and ask whether the need can be met in another way (and whether this project can in fact meet it).

Refer to the section titled **'What Do You Need?'** for more on this topic.

2. Identify your goals

You'll need to be clear about what criteria have to be considered. Apart from your primary measures – the achievement of your performance indicators (see the section titled **'How Will You Do It?'** for more on this) – some solutions will be better than others because they're cheaper, quicker, or more media-friendly.

3. Set your priorities

Technically, this is called 'allocating weights to the criteria'. If one solution is quicker and one is cheaper, which is most desirable? Get some idea of what your parameters are. Make your assumptions clear.

4. Develop proposals

Try and set up several alternatives so that you have some choices to consider. At worst, it'll bring out your criteria more clearly and help you see what the crunch points are in the process.

5. Analyse alternatives

Play through your alternatives under different sets of circumstances and see how sensitive they are to particular assumptions. What has to happen for everything to come out right? How likely is that? What risks will need to be monitored?

6. Make a decision

Decisions have to be made, and deciding not to make a decision is just as much a decision as any other. You'll have to work on incomplete information, uncertain predictions, and educated guesses; there's no way around that – you just have to take a deep breath and go for it.

7. Just do it

Once the decision is taken, you must be committed to carrying it into effect – and you can't afford to be half-hearted.

It doesn't matter, at this stage, whether the decision was taken on a narrow majority, or against your own personal preference, or just because no better alternative was available – a decision made by the group now belongs to the whole group – even if you voted against it, it's your decision, and you must be prepared to do the work to see it carried out.

8. Did that work?

Throughout the project you'll be monitoring whether you're achieving your aims or whether you're falling short.

As well as this, consider whether your decision-making processes worked or whether they contributed to your difficulties. If you'd been faster on your feet, or had taken extra time to research, would it have made a difference? What advice do you have for yourself next time?

DECISION-MAKING TOOL

(Examples shown in red text.)

1. **What is the issue we are trying to decide?**

   Whether or not to purchase 4 properties.

2. **Is this timeframe dependent?**

   Yes – properties to be sold by Dec 12, 2013

3. **What are the options available – incl no decision?**

a) No purchase of any property – do nothing

b) Purchase 1 property at 47 Community St

c) Purchase 2 to 4 properties

d) Purchase all properties

e) Purchase properties other than the ones offered by government

4. **What are the benefits and costs of each option?**

Option	Benefit	Cost	Comment
a) Do nothing	Save our cash reserves	Lost opportunity for long-term investment and cash flow	
b) Purchase property at 47 Community St	Currently tenanted by State Government department on long-term lease Save some cash reserves	May be able to get better return on house	Long-term lease gives us ability to budget better

Option	Benefit	Cost	Comment
c) Purchase 2-4 properties	Gives us opportunity to house ourselves and co-tenant others Raises our profile	Most cash reserves will be gone Some properties need work Some supporters may not appreciate us spending money in this way	Local paper would highlight our investments – possible negative feedback
d) Purchase all properties offered	Gives us opportunity to house ourselves and co-tenant others Raises our profile Potential for good return on all properties	All cash reserves will be gone Some properties need work Some supporters may not appreciate us spending money in this way	Local paper would highlight our investments – possible negative feedback
e) Purchase other property not offered directly by government	Allows us to take time to decide & obtain valuation	May not get as good a return	

5. How do we get information (data) to assist us in the decision?

Real estate valuation

Government info on properties

Accountant to do financial model of options

Can we get a property expert to join the Committee?

6. What are the criteria to decide? (Financial, planned, social, cultural, economic)

Financial

We need to set an estimated rate of return for each option

Has Plan been budgeted?

Yes – allocated as part of last year's strategic plan and budget

What are the social benefits to our organisation/members?

Potential to have our own premises and raise our profile

What are the cultural benefits to our organisation/members?

Potential to utilise property for social benefits also.

What are the economic benefits for our community?

Part of long-term viability and investment strategy

7. **Who wins/loses from this decision?**

   With proper analysis and planning, our members can benefit greatly from having a long-term home.

   Some supporters may be upset that we are investing rather than using our cash reserves for program development.

   Locals may feel we don't deserve the funding and spread stories about waste.

8. **How and who will communicate this decision to stakeholders?**

   Press release focusing on our decision and long-term strategy for future, letter to members, presentation at launch.

ESTABLISHING AN ONLINE PRESENCE
Colonising cyberspace

The Takeaway: You need a website. End of story.

Today's technologies make it easy to reach out into that ever-increasing proportion of the country – and of your membership – that has internet access.

You'll have to get yourself a web presence, and you'll have to put some financial and human resources into keeping it up to date.

If you've got someone in the group who's web-savvy, this is their moment. If you don't, someone is going to have to learn, and you may have to pay a consultant. You have to know enough to update your own webpages.

Webpage

You can either get yourself a free website through, for example, Google – having your own internet address costs about $10 – or you can commission an organisation like Infoxchange to make one up for you.

Your home page should

- Say what you do
- Headline what's new and link to a News page
- Provide contact details and links (including email)
- Provide a link to an online donation service like **www.GiveNow.com.au**
- Provide case studies – examples of what you do, at the human scale
- Provide a copy of your last annual report
- Link to your Facebook page

Don't just set it up and leave it; someone has to check the mail and update the announcements.

Facebook page

Facebook is the world's most active online social community. Almost every family in Australia will have at least one member with their own Facebook page.

Facebook lets you

- insert your messages into the social life of your members and sympathisers
- Connect with other organisations with similar interests
- Open up a whole new potential younger audience
- Enter into two-way discussion with your members.

It's not a particularly good fundraiser, and you'll have to keep your old fundraising systems working.

While Facebook pages are remarkably easy to set up, they require constant feeding. Assign members to keep a constant watch on what's coming in, and keep them supplied with material to go out.

Email list

No interaction between yourself and your members or your sympathisers or your community should go by without your seeking their email addresses (as well as their snailmail addresses, which are useful for fundraising). Use this list to

- Send out newsletters
- Call for volunteers
- Advertise events

Moneysaving tip: Not-for-profits can get heavily discounted software (and sometimes hardware) at DonorTec (**http://www.donortec.org**)

SIMPLE WEB DESIGN

1. **Keep it simple**

   Have as little clutter as possible. Use plain HTML, and have a consistent look and feel on all your pages. Use an easy-to-read font (10-11 pt). Shrink the size of your photos before putting them up.

2. **Keep it clean**

   Keep animations, pop-ups, flashing text, music or other attention-grabbing features to an absolute minimum – they only make it harder to get your message across immediately.

3. **Keep it short**

   Keep each page small enough to fit on a computer screen, and cut long documents up across a line of linked pages. The average casual visitor lands on your site for only three seconds, and you have just that long to hook them.

4. **Keep it easy to navigate**

   Make it obvious what links to what.

5. **Keep it current**

   Webpages go out of date quickly. You need to go through every page of your site every couple of months to see if there's anything to be updated or deleted.

6. **Keep them coming back**

   Offer visitors the opportunity to sign up for your newsletter. Change your content frequently so that if they do return there's something new for them to look at.

7. **Keep it private**

   Work out a privacy policy, and post it online (you can find a template policy in Our Community's Policy Bank – **www.ourcommunity.com.au/policybank**). Don't put your members' contact details anywhere that anybody else can access them (and the same goes even more so for any financial details).

8. **Have a 'how you can help' page**

Set out all the ways that people can invest in your programs (donations, volunteering, purchasing of products, attending your events, joining in your advocacy activities, etc.). Have a donate button on every page.

9. **Have a search facility**

People who come to your site don't necessarily start at the beginning and go through to the end in the way you'd planned. They need to be able to find what they came to the site from any page. Have a search button (you can get this free from Google) and a site map.

10. **Make the site accessible**

You will want to make your website easy to access by people with various disabilities. There are websites like the Vision Australia site (**http://www.visionaustralia.org/i**) that will tell you how to achieve this.

HOW WILL YOU KNOW IF IT'S WORKING?
Inputs, process, outputs, outcomes, impacts

The Takeaway: It's not enough to rely on your gut to know if your programs are working or not – good community development requires more than your general impressions. You need to collect some evidence.

You need to know where you are up to and how you're doing as you go along.

You don't want to have to rely on guesswork or how it feels to you – as far as possible, you should be checking your own impressions against other evidence.

This will be important, also, when funders and supporters knock on your door wanting to know whether what they're helping you to do has been worth all the bother.

Plus you can share what's worked and hasn't worked with other groups undertaking similar projects, in your community or in other communities like yours.

Look at four areas: inputs, processes, outputs and outcomes.

Note that measures of inputs, processes and outputs need to be available in time for you to change your practices and put right any mistakes. Outcomes, however, are a longer-term affair, and may need to be revisited months or years afterwards.

Inputs

If you count the number of people using a program you're running, that's an input measurement. This is the most basic form of information that there is, and you need to have it recorded – how many people were contacted, how many came, how many cancelled, how long they stayed, and what they did. You can also go further and record the particular characteristics or problems or shortfalls that you want to address.

Processes

If you count the number of things you do yourself – staff hours, or miles travelled, or cost – that's process. You'll need those details for the budget.

Don't forget to log your volunteer hours, too; they're an important measure of community commitment and can be counted as your contribution in any joint project.

Outputs

The numbers of items coming off the belt at the other end – the number of meals served, say, or number of students graduating – are the outputs. This is particularly important as an efficiency measurement – something to back you up when you say to funders that you're working quickly and at the cheapest rate.

User/client/community satisfaction is also an output measurement so you need to build a reliable mechanism for getting feedback, even if it's just a user survey once a year.

Outcomes

Many assessments stop at outputs, but yours shouldn't. If you were running a commercial business it wouldn't be enough for you to know that you'd produced 1000 widgets. That wouldn't mean anything unless that had produced a change for the better in the measure that really mattered – your bottom line, your profits.

As a community organisation, that simple measure (profit) isn't available to you, but you have to know what your measures are. How have you changed the world for the better?

The problem in measuring how much you've made the world better, of course, is that you can't just read it off a dial. You'll have to find other measures that approximate what you want to know. If what you wanted to happen had happened, what would be different? How can you measure that?

If what you want involves attitudinal change, you may have to include some time and money in your budget for surveys or focus groups.

Impacts

Once you've measured everything you can measure, there's still another stage.

Estimating the impact of your project is more difficult again, because you not only have to establish that things have changed significantly but you also have to be able to link the change with your own activities.

So many other things are happening in the world that could be working for or against your intended goals that it's often almost impossible to demonstrate clear cause-and-effect mechanisms – but it's still worth speculating.

EVALUATION CHART

Available for download at **www.gardinerfoundation.com.au/programs/ssdc**

Examples shown in red text

Objectives	Input	Process	Output	Outcome	Outcome measure	Outcome data	Outcome assessment
Objective 1 – Skills development	Teaching staff (EFT)	Students enrolled	Students graduated	Skills / knowledge developed	More people employed	Employment statistics	Client follow-up survey
	Resource allocation	7 training sessions	Dairy farmers	Attitude to community development changed	More farmers involved in local community committees or as members	Membership of clubs Annual reports	Better communities
	Student catchment						
Objective 2							
Objective 3							

KEEPING GOING:

Maintaining your Momentum

GETTING GRANTS

Where to look, who to target, what to ask for

The Takeaway: You *can* get grants for your community project. You just need to follow the process.

There are billions of dollars in grants given away each year. And in truth it's not that hard to get a slice of the action. You just need a little bit of knowledge.

All levels of government – federal, state, and local – give out grants, as do many philanthropic trusts and foundations, community foundations, and some large corporations.

Be aware, though, that almost all grants are available only to properly constituted, incorporated community organisations. If your group is not incorporated, you may be able to get auspiced by an organisation that is incorporated. See the section titled **'Maintaining Friendships'** for more information about auspicing.

The project

It's important to have a good idea in mind of exactly what you want funded before you start your search for grants.

Do your homework – work out exactly what your community's needs are and how you think you can meet them. Collect the evidence.

Once you've done that, you're ready to search, and pitch.

Finding grants

To find where the money is, start by checking in with your local council's Community Development Officer. Ask what sort of local grants are available, and if they can recommend others that they think would suit your project.

Think about subscribing to Our Community's *EasyGrants* newsletter (see **www.ourcommunity.com.au/easygrants**), which lists every government, corporate and philanthropic grant in Australia – if you're embarking on a community project and you need outside funding, it's pretty much indispensible.

Grants are often listed in categories – rural or youth, for example. Don't try to stick too closely to what it is you think you are and you do – it pays to take a wide view. Taking a broader approach may open up a whole new range of funding options.

For example, a sporting club's main aim is to field teams each week, so it might look first in the Sport & Recreation Grants category. But it also:

- Builds community spirit through providing a rallying point for community activities [try community services and development grants]
- Provides opportunities for young people in the area, building self-esteem and teamwork [youth grants]
- Maintains and develops community facilities - the playing field and clubrooms [infrastructure grants]
- Provides participation opportunities for people from non-English-speaking backgrounds [multicultural grants], and people with disabilities [disability grants]
- Fosters responsible drinking, sun-smart behaviour, smoke-free facilities, etc. [health and wellbeing grants]
- Brings people together through volunteering [volunteer grants]
- Builds administrative capacity in the community through service on the Management Committee and experience [capacity building/governance grants].

Picking which ones to apply for

Now you've taken a broad look at what your organisation does and what grants it might be able to apply for, you have to pull back again. You need to assess whether you fit. Don't try to fit a square peg into a round hole – if your aims and values and structures and timetables don't align with what the funder is and does, you're just wasting your time applying.

Do your research. Have a look at the grantmakers' annual reports. Zero in on those who have a track record of funding similar projects. Ring them up and ask whether you have a chance – most grantmakers really do want to hear from you!

Writing the application

You have to follow whatever application process the funder has laid down. Have a good look before you start and make sure you know what's required.

The following provides a brief description of the sorts of information most funders ask for, but be aware that the questions may be different or differently expressed for each and every one.

A brief description of the organisation

Here, the funder wants your organisation to establish its credibility and qualifications for funding, and get a feel for how your programs have been developed to meet identified community needs.

They may ask you to include short, relevant descriptions of the qualifications and experience that your organisation and its key staff have in the area for which program funds are being sought.

The case for support

It's vital to establish a specific problem or issue in a geographically (or community, or interest-based) identifiable area. The problem needs to be one that you can prove you can realistically address.

- **Match up:** Show where the project fits into the funder's priorities. Check their websites and annual reports to get a feel for what they like to fund. Call up and speak to them about where your project might fit.
- **Produce evidence:** Use up-to-date and accurate data based on objective research (see **www.ourcommunity.com.au/stats**)
- **Tell the story:** An evocative case study illustrating the issue will drive your points home better than descriptions might.
- **Demonstrate community support:** Most funders ask for evidence of community support for your group's work, particularly in relation to the project you want money for. Refer to the section titled '**Who Do You Need in Your Corner**' for tips on assembling partners. Ask your partners for a letter of a support.

The proposed project

This is where you show that you've developed a clearly defined, creative, achievable and measurable strategy to address the issue/s previously described. Be as concrete as possible. Include

- The objectives – clearly defined aims and objectives.
- The methodology – how the objectives are to be achieved.
- Evaluation – how the success of the program will be measured.

The budget

The program budget can vary from a simple one-page statement of income and expenses to a more complex set of budget papers including explanatory notes. Be honest, open and realistic.

Have a look at the budgets provided in the section title '**How Will You Do It?**' for some clues on how to go about it.

Proofreading

The most important part of any application is READING THE GUIDELINES and following them to the letter.

Follow the application format that the grantmaker asks for, and answer the questions that they ask.

At the end, have someone who hasn't been involved in the application process to check it over to see that it meets the guidelines, nothing's been left out, and there are no typos. Ask them to provide feedback on whether they think you've made a compelling case for funding.

And get it in on time.

Don't give up

Grantmakers don't have enough money to fund every worthy proposal they get. If you don't get a grant, that doesn't mean you didn't have a good proposal. It means that there was someone else out there with a better one. Ask the grantmaker for feedback – you may not get it every time but at least it shows you're interested in learning.

Smile, improve, and try again.

For more information on this topic, visit **www.ourcommunity.com.au/funding/grants**

TOP 10 TIPS FOR GETTING A GRANT

Our Community's Director of Training and Development Patrick Moriarty has submitted countless grant applications and assessed many applications as a grantmaker as well.

He's gone face to face with thousands of grantseekers across the country, delivering grants and fundraising training in big cities and small towns to community groups of all sizes and types – he knows what works and where you might need a booster.

Here are his top 10 tips on how to get a grant.

Watch the Video (approx. 5:03 minutes) [www.ourcommunity.com.au/patgrantstips]

GRANTS TEMPLATE

Available for download at **www.gardinerfoundation.com.au/programs/ssdc**

Fill in this template and keep it up to date. If you're serious about grantseeking, you will use it over and over and over again.

Registered Organisation Name:	
Also known as:	
ABN:	
Tax Status: (ITEC, PBI, DGR?)	
Are we registered for GST?	
Bank Details: (BSB)	
Incorporated Association Number/ ACN:	
Where can annual reports be accessed?	
Where can our photos be accessed?	
Year Established?	
What is our background/history?	
What is our mission?	

Physical address: (include each branch if relevant)	
Postal Address: (include each branch if relevant)	
Phone Number: (include each branch if relevant)	
Email address:	
Website:	
Facebook/Twitter – other social media:	
Contact person and details (general):	
Contact person and details (media):	

Committee/Board Member Details:

Name	Position	Years in Org	Background brief

Famous Current or Past Members/ Players/Students	
Patrons (inc past patrons):	
List of achievements/awards:	
Affiliated/Associated Membership: (e.g. part of league/peak body)	
Current Membership Numbers: (detail each category)	
Membership 5 years ago: (detail each category)	
Do we have disabled members? How many?	
Do we have older members? How many?	
Do we have indigenous members? How many?	
Do we have members from other cultural backgrounds? How many? Where from?	
How do we engage with community on matters of social inclusion?	

Previous Grant Wins:

Who From	What for	How Much	When	Reported

Local Community Data:	
Current Population and Demographics:	
List of achievements/awards:	
Provide relevant reports/data on our issues:	
Testimonials from Community partners:	
Testimonials from Corporate/Business partners:	
Testimonials from Government partners:	
Testimonials from clients/members:	
Do we have indigenous members? How many?	
How many staff do we have?	
How many volunteers do we have?	
Where do we operate? Provide map and GPS Location	
Insurance details and certificates of currency - attach	

GRANTSEEKER'S CHECKLIST

Grantmakers need to be convinced of three main things – that a significant need exists, that your group has the capacity to meet the need, and that there aren't any other more deserving recipients.

Your Pre-Prep

- ❒ Have you done the research to support your selling points?
- ❒ Have you checked that your group is eligible? **Read the guidelines carefully.**
- ❒ Have you rung the grantmaker to have a chat about whether or not your project seems like a good fit?

The Funder

- ❒ Have you got their (full) name right?
- ❒ Have you shown how your project fits their priorities?
- ❒ Have you used their buzzwords?

Your Group

- ❒ Have you said what you do?
- ❒ Have you included any particular selling points?
- ❒ Have you shown which of your staff or volunteers have the skills to do the job?

Your Issue

- ❒ Have you shown what the problem is you're trying to fix?
- ❒ Have you shown how many people it affects, and how seriously?

Your Project

- ❒ Have you described what you want to do?
- ❒ Have you said what you hope to achieve at the end?

- ❒ Have you been clear about how long it will take and how much it will cost?

Your Evidence

- ❒ Have you laid out the research evidence?
- ❒ Have you given proof of community support?
- ❒ Have you listed the stakeholders and partners who support you?

Your Budget

- ❒ Have you included all the indirect costs of the project – administration, rent, electricity?
- ❒ Have you costed your estimates carefully – with quotes, if possible?
- ❒ Have you added up all the columns again, just to check?

Your Proofing

- ❒ Have you followed all the guidelines, and all the instructions, and all the notes?
- ❒ Have you got the funder's name exactly correct, throughout?
- ❒ Have you observed the word limits, and the page limits, and the font size?
- ❒ Have you included all the attachments and appendices?
- ❒ Have you had it all checked by an independent person?
- ❒ Has it been signed and authorised correctly?

FUNDRAISING

Other options for funding your plans

The Takeaway: You need your group's money to be drawn from as many of the six pillars of fundraising as you can manage, raised by as many people as you can coordinate.

You need your group's money to be coming from as many sources as you can manage, raised by as many people as you can coordinate.

Many groups get into trouble because they have only one or two sources of funding, or because they have only one or two people really involved in raising money. If any one of the sources or any of the people goes away, the organisation starts to slide into trouble.

A good fundraising plan rests on six pillars:

1. Donations
2. Grants (see **previous section**)
3. Community-Business Partnerships
4. Membership/Alumni/Friends-of
5. Special Events
6. Earned Income

To survive and thrive in a changing world, you need to be drawing from as many of these as possible.

Donations

The most important element in gaining donations is your willingness to ask – if you don't ask, you won't get.

Successfully asking for donations involves some solid groundwork in finding the prospects you're going to concentrate on and using the right pitch to convince them to donate.

The people you want to approach fall into four groups:

1. **The Hot List** – People who have made contact already, your members and supporters. They should be your first stop to ask for a donation.

2. **The Warm List (1)** – People who don't know the problem, but who know you. These are the people who are close to your organisation's members, and will at least hold still to hear your pitch.
3. **The Warm List (2)** – People who know about the problem, but don't know you. These are people who have shown an interest in the problem and should be able to see the logic of what you're trying to do.
4. **The Cold List** – Total strangers. These are people who don't know your group, and don't know the problem. It's going to be hard work getting them to donate to you.

Whoever you're asking for a donation, remember – you're not begging. You're offering them a chance to invest in the solution of a problem, or towards a group or cause, that they, too, have a human interest in addressing or contributing to.

For more information on this topic, visit **www.ourcommunity.com.au/funding/donations**

Community-Business Partnerships

Australian businesses spend hundreds of millions of dollars each year on community sponsorships.

Big, small or in between, almost all businesses have something they could offer to a community group. Look around for a business that has what you need – supplies, use of office equipment, meeting space, pro bono professional services, whatever.

Then think of what you might be able to offer in return – it's not a handout that you're after, it's a partnership. What's your part of the deal?

You might be able to offer an advertising spot in your newsletter, space for logos on your footy jumpers, free tickets that they can give away to their staff or customers, or a referral to your members to encourage people to buy from their shop.

If you do enter into a formal partnership or sponsorship arrangement, get the agreement down on paper, including details on who does what, who takes credit for what, what happens when, and what the procedures are for settling disagreements or dealing with disasters.

Keep in touch regularly to pass along information and avoid misunderstandings.

For more information on this topic, visit **www.ourcommunity.com.au/funding/partnerships**

Memberships/Alumni/Friends-of

When it comes to fundraising, members are low-hanging fruit.

Here's how to tap into this vital and ongoing source of funds:

- **Appoint a membership coordinator:** Choose someone who can not only look after existing members, but knows the networks well enough to recruit new ones.
- **Charge a fee:** Most community groups are able to (and should) charge a membership fee; set it at a level that you think your current and potential supporters can manage. Provide free memberships in special cases, if you think that's warranted, or put in place tiered membership, providing different privileges for each.
- **Set, revise and review targets:** Targets for memberships should be set each year, reviewed regularly and revised if needed.
- **Keep your membership lists up to date:** Keep records of every contact you have with your members, as donors, volunteers, or activists. Put someone in charge of keeping their contact details up to date.
- **Provide the right member services:** Strike a balance between encouraging them to do the right thing for "doing the right thing's sake" and having special offers if possible.
- **Consult with your members:** Ask members what they want. Conduct a survey if you can. Have a Facebook page and pay close attention to the comments. Keep them in the loop with regular (but not too frequent) emails.
- **Be relevant to their concerns:** If members have joined your group because of its work, its stance on an issue or the cause it supports, better make sure you stay true to it.
- **Give your members something to do:** Have a petition that they can sign, or a letter-writing campaign they can join. Strengthen the bond between you by showing you need their input and appreciate their contribution.
- **Keep existing members before recruiting new ones:** Be sure that you know your retention rate from year to year. If it's less than 90%, investigate.

For more information on this topic, visit **www.ourcommunity.com.au/funding/memberships**

Special Events

Special events – fetes, balls, trivia nights, sports carnival, etc. – can provide an important source of funds for community groups of all sizes.

The key to holding a successful event (and here we mean successful in the financial sense, rather than a social sense) requires careful planning and costing. They're hard work, and you need to make sure you're going to come away with a reasonable margin for your investment of time and effort.

Whatever you're planning, would you get more if you cancelled it and just asked people for the money face to face?

If you go ahead, plan carefully for everything, including

- **Communications:** Get everyone on the same page with running sheets, briefings and instructions.
- **Publicity:** You're going to need flyers, posters, advertising, media releases, media kits and a media strategy.
- **Invitations:** Who's on the Hot list? Are there any freebies? Design your invitation list, check printing and mailing requirements, monitor RSVP acceptance.
- **Venue:** Lots to do here, including venue readiness, permits/licences, deposits, guest registration/table listings, parking, audio-visual requirements, seating plan, decorations, and promotional material. There are additional requirements for an outdoor venue (toilets, trestle tables, seating, etc).
- **Catering:** Check on costings, special dietary needs, alcoholic and non-alcoholic drinks, council and government and health department rules (including liquor and food preparation licensing).
- **Talent and VIPs:** Arrange for confirmations/bookings (and any contracts), transport, refreshments, gifts or other staging requirements, as well as speeches and security.
- **Recording the event:** Line up competent people to look after any photographic, film or videotaping needs.
- **Prizes/Auction items/Giveaways/Awards:** Make sure these items are purchased or organised, ensure donors or sponsors are recognised appropriately, decide how items are going to be presented or sold.
- **Extras:** Make the most of your captive audience. Think if there's anything else you can sell to people on the day.
- **Members:** Have a membership stall and try and bring in new blood.
- **Exhibitors:** Consider bringing in other stakeholders, and decide on fees, set-up and take-down times and display requirements.
- **Risk Management:** Plan your insurance requirements and coverage, emergency plans, first aid needs and other crowd or traffic management considerations.

- **Acknowledgement of appreciation:** Work out how, where, and for whom thanks are going to occur, both during and after the event.
- **Post-event:** Organise takedown, cleanup, transport, and a post-event get-together/debriefing.
- **Evaluation and reporting:** Plan any post-event surveys or information gathering, and agree on any review or evaluation or reporting procedures.

For more information on this topic, visit **www.ourcommunity.com.au/funding/specialevents**

Earned Income

Microsoft doesn't go around asking people to donate money to fund its operations. Instead, it sells them things. That can work for a community group too.

There are two important things to note, though:

(1) **Sell what people want to buy.** Don't simply sell what's available (type 'fundraising' into Google and you'll find hundreds of companies desperate to get you to sell on their wares for them). Choose a product that makes sense in your particular community.

(2) **Watch your reputation.** Some products – chocolates, raffle tickets – can bring in money but also stir controversy because of their connection to public issues such as obesity and gambling. Again, find a fundraiser that's a good fit with your image.

There are three main types of earned income that your group might consider.

Charging for what you do

Consider charging for your services – or at least some of them. Some of the people you serve probably do have enough to pay for their needs without any great hardship. You could charge fees and give 50% or 100% concessions to those who can't afford them. If you don't want to charge your clients fees, can you sell them anything? Manuals? Equipment? Software? Coffee?

Can you use elsewhere the skills you've developed here? Try to work out what the market rate is for your expertise and your experience and your ability to provide workable solutions and advice, and ask who might be willing to pay for it.

Charging for what you have

You may have other assets – an office, some office equipment, some knowledge, some history, some techniques. Is there any possibility of profiting from any of these? Make a list. Can you rent your office or your computers or your parking to other community groups for weekends when you're not there? Can you organise a conference?

Sales to the public

Two types of sales come under this heading. Firstly, there are things like drinks, food, sports apparel, special arts equipment and so on that you can sell to the public (and/or your members and supporters) as an adjunct to what you do – during the sports match, for example, or at the interval, or as part of the class you hold.

Another fundraising staple that falls under this heading is product fundraising – buying bars of chocolate, say, or mugs, or lamingtons, or socks from a wholesaler and selling them on to your supporters. In Australia, around 80% of the funds used to purchase "non-necessities" for school and kindergarten groups is raised through product fundraising.

For more information on this topic, visit **www.ourcommunity.com.au/funding/earnedincome**

THE GOLDEN RULES OF FUNDRAISING

Here's Our Community's Director of Training and Development Patrick Moriarty's Ten Golden Rules of Fundraising.

We can't promise you it won't be hard work to raise funds, but we can promise you you'll be successful, and have a lot of fun on the way, if you follow these 10 tips.

Watch the Video (approx. 4:38 minutes)
[www.ourcommunity.com.au/fundraisingrules]

BRINGING OTHERS ALONG

Achieving buy-in for your community project

Interview with Fay Sinclair, Secretary of Meeniyan Recreation Reserve Committee

The Takeaway: As this case study illustrates, the three keys to achieving community-buy in are communication, communication and communication.

What was the project?

Originally we applied for funding to seal the road around our Recreation Reserve – it's currently gravel, which gets really dusty and muddy and full of holes, and can be dangerous for people with limited mobility.

Sealing the road was going to cost more than $100,000, and we found that there just weren't any large grants out there for road sealing as a stand-alone project. Instead, a couple of funders suggested that they would be able to support projects that were part of an overall Master Plan for the whole Rec Reserve. One funder offered $10,000 to help us get started – and then we had to convince our members that having a Master Plan drawn up by a professional was the way to go.

Who did you need to "bring along", and how did you communicate with them?

Membership of our Rec Reserve is made up of nine different user groups including footy, yoga, tennis, netball, drama, bowls, and more ... as you can imagine, they all have very different needs!

We called a meeting and asked each user group to bring along two representatives. We tend to do most of our communication by email these days, but we thought this issue needed face to face discussion with all members.

What was their initial reaction to changing the project?

Most people weren't keen. They thought the Master Plan approach was too big and complex when all they wanted right now was to get the road sealed. The Master Plan would cost between $10,000 and $15,000, and this was seen as a waste of money – good money that could have contributed to part of our road sealing project.

So how did you persuade them that the Master Plan was the better approach?

It was really just the facts that convinced them. The facts were that funders want to see a more sustainable "big picture" plan that their grants can contribute to, rather than a series of un-coordinated one-off projects. The Master Plan was a way for all the diverse user groups to have their needs captured in a big-picture plan that we would all benefit from in the long run.

At the meeting I explained why the road-sealing project just was not going to happen if we relied on grants. I used the analogy of going into a bank and asking for a loan without any figures. If we stuck with our original plan the project would go nowhere very slowly, and we all knew that fundraising for that kind of money was going to be impossible in such a small community.

Because we met face to face, everyone had the opportunity to raise other options and discuss them together. Eventually we came to the conclusion that no other options were realistic, and the user groups agreed to spend the money to get a Master Plan, that we could then take to a whole range of funders with confidence.

So where is the project at now?

Next week we get to see the first draft of our Master Plan! We'll be able to have input into the final version to make sure it reflects our needs. It includes linking the Rec Reserve to the nearby Rail Trail with a nice outdoor area for the whole community. It will have a skate park for the kids, and the sports facilities will be upgraded – including our poor old road! It's taken six months to get to this stage, which isn't bad for such a big project.

When the plan is finished, we'll have the key information for various elements of the Rec Reserve project written up so we're ready to respond to a whole range of grants as they become available. It will be a lot easier than seeing a new funding announcement and then thinking "Now what could we apply to them for?" and having to plan projects out from scratch.

How will you communicate the progress as you go along?

All the user groups continue to meet with the committee regularly, because we found the face-to-face communication worked best for this issue. We used to only meet twice a year, but now because of this project we meet every six weeks or so. It's a big commitment, but it's also great because each group is getting to know the others better, and people are seeing more of the "big picture" rather than just focusing on their own activities.

Recently I have been talking to people I know in the town down the road, who are on the Fish Creek Rec Reserve committee. They are now also considering pursuing a Master Plan to support their improvement projects too.

From this experience, what have you learned about "bringing people along"?

Do your homework and get the facts first – at the end of the day, facts are what will influence people to either change their mind or not. If you have the relevant information you can communicate your case with confidence. Discuss these things face to face – they need the opportunity to explore a range of options before making a decision.

TEN GOLDEN RULES FOR CLEAR COMMUNICATION

Community development is hard work. Not everyone is going to agree with everything all of the time.

The key to minimising conflict and misunderstanding is clear communication.

Whether you're designing a flyer, constructing a survey or a media release, applying for a grant or writing a speech, there are 10 golden rules of clear communication to keep in mind.

1. Get their attention

Where's your hook? Your flypaper? The poke in the ribs? You need a new idea to tickle their interest.

2. Start where they're at

Don't assume that your audience knows who you are or what you do or why it's important. Don't assume that they have the same assumptions and prejudices you do. Begin with concrete examples of what you're sure is common ground and fan out from there.

3. Talk as a friend

Queen Victoria quite disliked her Prime Minister, William Gladstone. "That man," she used to say, "addresses me as if I was a public meeting." Nobody likes that. The atmosphere you're aiming at is a casual conversation between two friends. Use contractions (it's, you're, we'd); use the words "I" and "you" and "we" a lot.

4. Tell them up front

Tell your audience firmly exactly what you want from them, with no room for misunderstanding. Give them clear take-aways and to-do items.

5. Subject. Verb. Object. Full stop.

Use simple sentences and common words. Avoid anything that breaks the flow or that makes the audience pause to wonder what you meant. Your job is to get them from A to B. If difficult or flowery or showy language gets in the way of that, you've failed to communicate clearly.

6. Front-end-loading

When writing, get into the habit of putting 60% of your message into the first paragraph, 75% in the first two paragraphs, 90% on to the first page, expanding on your points as you go further in. The same goes for speeches. You never know when their attention is going to break.

7. Subject, Subject, Subject

Don't be afraid to repeat yourself, rephrasing the same idea a few times, or even repeating the same words. Concentrate on getting a simple message across.

8. Dot

In writing, lead the reader through the text. Use:

- Headings and sub-headings
- Dot-points
- Boxes
- Pie charts
- Photographs

If you're speaking rather than writing, considering providing visual aids such as PowerPoint slides (but DON'T just write what you're saying on the slide. Use a picture or graph or cartoon to represent your words).

9. Read it back

When you've finished writing your flyer, brochure, survey, media release, application or speech, give it a day or two then go back and read it again. See where you stumble or lose the place (or the point). Correct the text until it's easier to digest.

Get someone else to listen to it or read it. Ask them for honest feedback.

10. Cut

Almost every document could be a few pages shorter, every page a few lines, every line a few words. Read over your text, and wherever you meet with a passage which you think is particularly well-sculpted, strike it out.

TOP 10 TRAITS OF A GOOD MEDIA SPOKESPERSON

Every organisation needs a spokesperson – someone who is willing to stand up and enunciate your group's successes, achievements and opinions.

For most organisations, that task usually falls to the Chair/President or the CEO/Executive Director, or in some cases both, jointly. Other groups will choose the person who has the skills and ability to get the message across.

In selecting your spokesperson, look for the following traits:

1. **Knowledge** about the issues, activities or items that concern your group, and familiarity with your group's attitudes and philosophies.
2. **Authority** – not only because of their position, but also because they've been involved in deciding your group's attitudes, reactions and opinions on certain issues.
3. **Credibility** – your spokesperson should be well respected, both within the group and outside of it.
4. **Eloquence**, otherwise known as the gift of the gab – your spokesperson must have the ability to communicate knowledge and generate interest when talking about your group.
5. **Good judgement** – they should be able to exercise restraint when needed.
6. **Resourcefulness** – the media seldom follows a set script. Your spokesperson needs an ability to think on their feet.
7. **Likeability** – the ability to develop a good rapport with those in the media will be useful.
8. **Application** – many media skills can be learned. For courses, try Toastmasters – **http://www.toastmasters.org.au/** – or Hootville – **http://www.hootville.com/**.
9. **Intuition** – it's useful to have the ability to know when a reporter has an axe to grind, and the talent to counteract that without looking defensive or ill at ease.
10. **Clarity** – your spokesperson must be clear about what they're authorised to say on behalf of the group, and where their mandate ends.

TEMPLATE MEDIA CONTACTS LIST

Available for download at **www.gardinerfoundation.com.au/programs/ssdc**

Keep a database listing all your media contacts, including sections for national, state and local media, and separating those sections into print, radio, TV and online.

Add to it each and every time your group has contact with any media organisation.

Keep the list updated by going through it every four to six months to confirm the reporters and their contact details are still the same. Add new journalists to your list as well.

Individual entries might look like this (example text shown in red):

Name:	Bill Bloggs
Organisation:	North Coast News
Position/title:	General news reporter (including community affairs)
Phone:	5555 0555
Mobile:	0405 000 000
Fax:	03 5557 0666
Email:	b.bloggs@ncnews.com.au
Website:	www.ncnews.com.au
Deadlines:	Tri-weekly newspaper; with deadlines at 11am Monday, Wednesday and Friday. All information must be submitted by 5pm the previous day – unless it's a big story, in which case by 10.30am on the day.
Other information:	Prefers email contact, unless issue is urgent.
Contact history:	• 30/09/2011 – Bill telephoned us seeking comment about council plans to demolish grand stand. Comments provided by Tom Jones. Story ran with small quote page 3. • 20/09/2011 – Tom Jones emailed Bill re: death of CEO. Story ran page 22. • 10/08/2011 – Tom Jones emailed media release re: car rally. Ran pic page 1 and story page 5.

MEDIA RELEASE TEMPLATE

Available for download at **www.gardinerfoundation.com.au/programs/ssdc**

Your media release should not be written like an advertisement. It must be concise, newsworthy, of interest to the public, and informational (not overtly promotional). Your first question must always be, 'What's the hook?' And after that, 'What's the story?' And after that, 'Where's the picture?'

Fill in the following template before you start to write your media release. Make sure you've included everything from this template in every release. Note that you don't necessarily have to work from the top down. You might, for example, want to sort out your key messages before going back to construct your headline.

On the following page you can see how the information comes together to produce a media release. Example text shown in red.

When the release can be used	FOR IMMEDIATE RELEASE or EMBARGOED TO 2PM, NOVEMBER 1, 2012
Headline	Domestic Abuse Prevention Is Everyone's Job Moora Organisation for the Prevention of Domestic Abuse launches local campaign
Organisational information: • Name of Organisation • Address • Phone Number • Website URL • Email	Moora Organisation for the Prevention of Domestic Abuse (MOPDA) 22/35 Station St, Moora, Victoria 3987 (03) 5000 6000 www.mopda.org.au admin@moora.org.au
Contact information: • Name (person, or position) • Email address • Phone (office and mobile)	Jennifer Hustings, Media Liaison Officer jhust@mopda.org.au (03) 5033 1234 (office) (03) 4004 123 345 (mobile)
What, Where and When (Place, day, date, time of announcement/event/activity)	Launch of new campaign to combat domestic abuse MOPDA headquarters 45 Breen St, Moora, Victoria, Thursday, November 1, 2013 2pm

Key Messages	• Domestic abuse goes up during hard economic times • The ongoing drought has brought hard times to Moora • Moora Organisation for the Prevention of Domestic Abuse has launched a campaign to increase awareness of this problem in the hopes that we can help prevent instances of abuse in our community • Campaign includes distribution of a brochure on domestic abuse prevention, listing common signs of abuse and key actions and resources
Quote	"Domestic abuse is an issue that has the potential to wreak havoc on our community. It's something that we all have a responsibility to address. You can help by making sure that you know the signs of abuse and what to do about it." Lisa Gordon
Picture opportunity	Media to be invited to the launch event: Local MP Sharon Brigson launches brochures
Boilerplate information	**About the Moora Organisation for the Prevention of Domestic Abuse** MOPDA is a not-for-profit organisation that was founded in 1995 to provide support in the Moora Shire Council area for people experiencing domestic abuse. The organisation provides support and referral services to individuals and organisations.
Interview contact information	MOPDA Executive Director, Lisa Gordon VIA Jennifer Hustings, Media Liaison jhust@mopda.org.au (03) 5033 1234 (office) (03) 4004 123 345 (mobile)

MEDIA RELEASE – EMBARGOED TO NOVEMBER 1, 2012
(Issued October 14, 2012)

Domestic Abuse Prevention Is Everyone's Job
Moora Organisation for the Prevention of Domestic Abuse launches local campaign

A new campaign will put the spotlight on domestic abuse in the Shire of Moora, with locals urged to learn the signs of abuse, and to know what to do when they spot them.

The campaign by Moora Organisation for the Prevention of Domestic Abuse (MOPDA) is underpinned by a belief that it's everybody's responsibility to participate in domestic abuse prevention in their communities.

Domestic abuse goes up during hard economic times. Job losses, foreclosures, and fear for the future put tremendous stress on families. Unfortunately, those stresses are sometimes taken out on the first target to hand – family members.

The stresses brought on by the ongoing drought means that members of the Moora community need to be vigilant to the signs of domestic abuse – and to know what to do if they suspect someone is in danger.

MOPDA has published a brochure on domestic abuse prevention that will be distributed freely throughout the community.

The brochure, to be launched at a special event at MOPDA headquarters at 2pm on Thursday, November 1, will help the public identify and refer suspected cases of domestic abuse, before irretrievable damage is done to a vulnerable family.

Executive Director of the Moora Organisation for the Prevention of Domestic Abuse Lisa Gordon said domestic abuse prevention was everyone's job.

"Domestic abuse is an issue that has the potential to wreak havoc on our community," Ms Gordon said.

"It's something that we all have a responsibility to address. You can help by making sure that you know the signs of abuse and what to do about it."

Copies of the brochure will be available from MOPDA, and via the MOPDA website, and will be included in rate notices distributed by MOPDA Shire Council in December.

###

Media organisations are invited to attend the launch of the new MOPDA campaign – please let us know if you plan to attend. The Executive Director of MOPDA, Lisa Gordon, will be available at the event for interviews about how to recognize the warning signs of domestic abuse. Moora MP Sharon Brigson will also be attending and available for photos and interviews.

Contact: Jennifer Hustings, MOPDA Media Liaison
jhust@mopda.org.au
(03) 5033 1234 (office)
(03) 4004 123 345 (mobile)

About the Moora Organisation for the Prevention of Domestic Abuse
MOPDA is a not-for-profit organisation that was founded in 1995 to provide support in the Moora Shire Council area for people experiencing domestic abuse. The organisation provides support and referral services to individuals and organisations.

DEALING WITH DIFFICULTIES

What to do when things go wrong

The Takeaway: Look upon every bad experience as an opportunity to learn. Deal with the problem at hand, then go back and reflect on how you can do better next time.

Every cause, every group, every person is a hostage to circumstance.

However well you manage, however much you minimise your risk, success is not guaranteed and disasters are still possible – natural disasters, negligence, criminality, media stuff-ups, and stock market crashes are just a few of the things that can waylay your best laid plans.

When bad things happen to good groups, your objective is first to minimise the damage and secondly to come back strongly.

Tighten your decision-making

This is a time for the executive committee (the President/Chair, CEO, Secretary, and Treasurer, say) to shine – a smaller and more flexible group than the full Management Committee.

It helps to have this group recognised in the constitution, but in an emergency it may have to be called together regardless.

The group needs to be small enough to be able to meet at short notice, knowledgeable enough to understand what's gone wrong.

Tighten your communications

When you're making decisions on the run it's vital that everybody is kept in the loop so that nobody goes off on a frolic of their own.

Keep in continuous contact through email and phone; if any of your members don't use email, this is the moment for them to step up to the plate – you may need to be able to send round documents and make contact with many people at once.

Nail down from the outset who's able to speak for the group and forbid any other public statements.

Don't waste time complaining

Don't play the blame game, don't waste time on recriminations, don't complain it's not fair, don't say, "If only we'd ..."

It's happened, and you have to deal with it. If there's no good solution, don't hang around wishing there was; go for the least worst.

Call on your partners

Don't keep secrets from your stakeholders. Whatever it is that's going on might affect them directly, and even if it doesn't they'd expect to be informed.

Furthermore, they may be able to help, even if only by expressing their continuing support.

It's particularly important to let your funders know what's going on; if you have to make adjustments to your programs, you'll need their permission.

Profit from your mistakes

Afterwards, you should analyse what went wrong and put in place precautions against it happening again.

After that, see if you can do better. A crisis can be an opportunity for reform and innovation – a 'fluid moment' when you can contemplate major changes in your organisation.

More information on particular problems can be found online:

Dispute resolution

- **http://tinyurl.com/VLFdisputes**
- **http://www.ourcommunity.com.au/boards/disputes**

Insolvency

- **http://tinyurl.com/pilchinsolvency**

Criminal Conduct

- **http://tinyurl.com/pilchcrimcon**

DEALING WITH A MEDIA STORM

How you respond to a media crisis will depend on your group and the particular circumstances, but here are some rules that pretty much always hold true.

Here are Our Community's Director of Training and Development Patrick Moriarty's Ten Golden Rules for Dealing with a Media Storm.

Watch the Video (approx. 4:11 minutes) [www.ourcommunity.com.au/mediastorm]

DEALING WITH DIFFICULT PEOPLE

Dealing with the public, or even with the members of your group, or even with the members of your Management Committee, you're probably going to come across some people who don't fit in easily – people who make trouble.

You're going to have to deal with people who appear to be ignorant, over-sensitive, dull, inarticulate, selfish, misguided, malicious, devious, self-interested, lazy, pedantic, obsessional, chronically absent, insensitive, boorish, misinformed, boring, or malcontent. Every one of them is different, and there's no one-size-fits-all strategy for dealing with them.

There are, however, some common factors.

1. Generalise

The first step is to treat the particular problem as a general problem. Have a review of the whole Management Committee, followed by a session on good meeting practice, respect for others, and people skills. Introduce training for all Committee members. Announce that meeting guidelines will be enforced for everybody. Make clear what's expected.

If that doesn't work,

2. You're going to have to talk to them.

Everybody wants to avoid a nasty scene. It's a tempting to think that there's a purely procedural solution to these problems, something where you can say to them, "Sorry, it's in the rules, nothing to do with me." This might work sometimes, but mostly it just gives you long delays, bad feeling, and possibly even nasty scenes. Speak to them in confidence. Offer them a dignified way out ("Pressures of work …").

3. Don't make it personal.

Where the entire issue is exactly an individual's personality, this is difficult. Nonetheless, keep calm, focus on the good of the organisation, and don't say anything nasty or demeaning. Play the ball, not the person.

4. Try and see their point of view.

Take a step back and think about whether you might have been prejudiced against a particular course of action by your dislike of the person suggesting it. Are there any elements of the proposal that might work? Is the evidence against it really that strong? Would giving it a go actually waste less time and money than arguing about it?

5. Negotiate.

Find out what they want. Be prepared to discuss it. Be as tactful as you can – phrase the problem in terms of other people's perceptions, or in hypothetical people's perceptions – but get the point across.

6. Compromise.

The squeaky wheel gets the grease. It may not be fair, but it's effective. See if you can come to some sort of agreement and document it – who is going to do what and when.

If that doesn't work,

7. Get the numbers.

In the final analysis, it's the members' votes that can decide this. Stand someone against them at the next AGM (that may seem a long way off, and a long time to wait, but you'll find that most other methods take just as long).

RISK MANAGEMENT

Staying safe

The Takeaway: Risk management is important – make a thorough assessment of what needs to be planned for, what needs to be insured for, and what needs to be fixed. Then do it again.

Every community group faces a certain amount of risk – ensuring the health and wellbeing of their volunteers, protecting the clubrooms, and handling virtually anything that threatens or limits their ability to get the job done.

Risk management is a process of thinking systematically about all possible risks, problems or disasters before they happen and setting up procedures that will avoid the risk, minimise the impact, or cope with the fallout.

It's also about making a realistic evaluation of the true level of risk. The chance of a tidal wave taking out your beach picnic is low. The chance of your minibus being involved in a road accident is a real possibility.

Risk management begins with three basic questions:

- What can go wrong?
- What will we do to prevent it?
- What will we do if it happens?

Committee members should take a leadership role in overseeing risk management for their group, developing duty statements, policies, and operating guidelines where needed and ensuring that everyone has a clear understanding of their collective and individual responsibilities.

Establishing the context

To ensure that you're able to identify all risks you need to take into account your objectives and capabilities, as well as factors external to your group, such as the changing legal environment, shifting social standards, etc.

By establishing the context that you're operating within, you should be able to set out a number of areas needing attention. These can then be used to prioritise the order in which you attack the next task.

Identifying risks

This stage of the process should involve committee members, staff (if any), volunteers, members, and other stakeholders, in an open environment. Ask

- What can happen?
- When, where, why and how might this occur?
- Who and what might be involved?
- What are the effects and who is affected?
- What are we doing about this now?

Analysing risks

Criteria are based on Likelihood and Consequence – i.e. what is the likelihood of the risk occurring and what is the consequence of that outcome?

Draw up a simple grid –

	Frequent	Probable	Occasional	Remote	Improbable
Catastrophic	High	High	High	High	High
Critical	High	High	High	Medium	Low
Marginal	High	Medium	Medium	Low	Low
Negligible	Medium	Low	Low	Low	Low

The ones that you need to give highest priority to are the ones on the top-left corner.

Don't be afraid of guessing; it's better than waiting until you know for sure, because then it could be too late.

Evaluating risks

The evaluation of risk will enable priorities to be established that equate to an appropriate level of risk. The next step involves determining what action is appropriate to treat each risk.

Managing risks

Treating risks involves making a decision about what will be done with the identified risks. Treatment should be appropriate to the level of the identified risk and generally any cost of treatment commensurate with the potential benefits.

Options include:

- *Accepting the risk*

  If the risk is minor, or the cost to avoid it beyond your capacity to pay, you may need to consider accepting the risk if it is core to your very existence. Be mindful of the consequences and don't just ignore them in the hope that they will never happen.

- *Avoiding the risk*

  Decide whether or not to proceed with any unacceptable risk or choose an alternative with acceptable risks that still meets your aims.

- *Reducing the risk.*

  Look at alternative solutions that reduce risk. Initially focus on "industrial" solutions such as improved lighting, safety barriers and resurfacing rather than those changes that require people to change their behaviour. Other solutions such as rules, policies or training can then be looked at to reduce risk.

- *Transferring the risk.*

  Risk transfer usually occurs through insurance. See **www.ourcommunity.com.au/typesofinsurance** for some information about the types of insurance your group might want to take out. Other alternatives such as contracts, use of sub-contractors, leases, personnel contracts, disclaimers and warning signs may be used to transfer risk.

Monitoring and review

It is recommended that you establish a regime of both monitoring (continual assessment of what has been implemented) and review (a periodic assessment of the effectiveness and environment).

By having a process in place you will be better able to protect your organisation from uncertainty.

RISK MANAGEMENT CHECKLISTS

Our Community has developed a number of risk management checklists – they're not definitive but they do provide examples of the type of risks that could be found at many locations and types of groups.

They should be used as a guide only – it's up to you develop your own risk management process and to build on these resources to ensure that you provide a safe environment for your members, friends and volunteers – and to protect you from insurance claims.

Click the link below, or go to **www.ourcommunity.com.au/riskchecklists**

General Checklists:

1. **Car Parks Checklist** (PDF 86.9kb)
2. **Event Management Checklist** (PDF 126.2kb)
3. **Fire Checklist** (PDF 89.9kb)
4. **Hall Hiring Checklist** (PDF 113.2kb)
5. **Kitchens Checklist** (PDF 100kb)
6. **Office Equipment Checklist** (PDF 113.3kb)
7. **Security Checklist** (PDF 95.7kb)

Checklists for Specific Categories

1. **Animal Welfare Checklist** (PDF 109kb)
2. **Arts and Culture Checklist** (PDF 166.3kb)
3. **Children and Family** (PDF 135.5kb)
4. **Community Business Checklist** (PDF 105.3kb)

5. **Education Checklist** (PDF 131 kb)

6. **Emergency and Safety Checklist** (PDF 108kb)

7. **Environment Checklist** (PDF 112.6kb)

8. **Faith and Religion Checklist** (PDF 104.4kb)

9. **Health, Community and Disability Checklist** (PDF 111kb)

10. **International** (PDF 98kb)

11. **Multicultural Checklist** (PDF 100.8kb)

12. **Older People Checklist** (PDF 92.3kb)

13. **Sport and Recreation Checklist** (PDF 108.7kb)

14. **Youth Checklist** (PDF 101kb)

CONSOLIDATING THE WINS:

Taking stock and moving on

ASSESSING PROGRESS
Keeping the team on target

The Takeaway: If you don't know where you're going, any road will get you there. During your planning process you should have set some key performance indicators. Now's the time to collect the numbers to assess your progress.

You need to be able to keep track of your group's progress – are you ahead or behind your schedule? – and you should aim to get this information in time to do something about it.

The best way to do this is to organise monitoring procedures that measure your performance on Key Performance Indicators (KPI).

You will need to track

- efficiency measures (which compare your inputs with your outputs), and
- outcome (or effectiveness) measures (which quantify the actual effect the organisation's efforts have on your objectives)

Efficiency

If you have both input and output measures you can use them to see whether you're improving over time.

Are you doing better this year, or this quarter, than last? Are you drifting back? Is the cost of recruiting a member going up or down? How much does it cost you to raise $100? What is your cost per client, or per meal, or per student?

Note, too, that this figure will help you in your fundraising; it's always better to say "Donate two meals" or "Provide a year's education for a child" than to say "Donate $10" or "Give $20 a month".

It's also a very good thing to have a common standard of measurement to be able to compare different programs, or different departments, or to compare your organisation with others in comparable situations.

Effectiveness

Efficiency measures help you manage your organisation; effectiveness measures – the measures that tell you how well you are succeeding at achieving your mission – help you shape and direct it.

Measurements should be

- *Meaningfully related to the goals of the organisation* – Don't measure things just because you can measure them.
- *Linked to the responsibilities of a particular person or section* – Someone should be able to act on the findings; otherwise, what's the point?
- *Acceptable to the organisation* – Which is why it's not a good idea to use the same measures for rating the organisation and for rating staff members' performance; that only leads to nervousness and resistance.
- *Timely* – If all your measurements take so long to collect and process that the organisation has moved on, they're not much help.
- *Cost-effective* – Measurement is a resources issue, and grants and funders aren't always willing to cover the costs. Review your measures regularly to be sure you're coming out ahead.
- *Comparable* – As far as possible you want to be able to compare your results across your organisation, with other organisations in your area, and with industry benchmarks.
- *Simple* – It's not always possible to have straightforward, immediate, and transparent measures, but that's the goal to aim for.

Deciding on your performance indicators should form part of the strategic planning process (see the section titled '**How Will You Do It?**'). Once you've decided on your mission, your goals, and your strategies, you design measures that let you track your progress towards them.

These measures then need to be built into your administrative procedures, your budgeting, your staff duty statements, and your planning review processes.

RECOGNISING CONTRIBUTIONS

Saying thanks

The Takeaway: Say thanks, sincerely, personally and often.

When you're working with volunteers and donors, you can't motivate them with the incentives we usually rely on. There's no money involved, and you can't really bring out any punishments, either.

Just about your only motivator is appreciation – showing people their contribution is serious, important, and valued. So don't skimp on saying thanks.

Serious

Taking volunteer work seriously means that you have to treat it with respect. This means

- *Providing resources.*
  Nominate a Volunteer Coordinator. Have them draw up a Volunteer Management Plan, and detail the resources needed (a computer? Some iPads? Refreshments? Food?)

- *Providing Guidance*
  Set up policies for behaviour standards, insurance coverage, health and safety issues, orientation, food and drink entitlements, hours, privileges, responsibilities, grievance process and dispute resolution, emergency procedures, and authorisations. Put them into a volunteer kit with contact numbers.

- *Providing training.*
  For more formalised organisations, you will want to have position descriptions for volunteer positions as well as paid work, with attention paid to training requirements. If the task needs special knowledge then this has to be provided, ranging from a quarter-hour orientation by someone who did it last year to sending someone off to a course.

- *Providing good working conditions.*
  Arrange refreshments, regular breaks, and a break room. Share the work around.

Important

Volunteer orientation must show why the organisation's work is important, both so they can answer questions and so they feel it's worthwhile.

Put your volunteers on your mailing list. Keep them informed of your group's activities by sending them your newsletters and updates. Keep them involved by offering them new challenges (often enough to make sure they feel included; not so often that you scare them off).

Valued

For grantseeking purposes, an average volunteer is worth something like $20-$25 per hour – more (much more) if they're offering up a professional skill or trade. That's what they're donating. If they've put in a day's work, you need to be $200 worth of grateful. Thank them.

Recognise volunteers and other donors – by name, if possible – in the project documentation.

Send them an appreciative letter – for those making a really big contribution, a hand-written (or at least hand-signed) letter – from the President/Chair. Give them a certificate. Engrave their name on a brick.

Hold celebrations to mark important milestones. It doesn't have to be elaborate, but you should provide some time for all your volunteers, funders and other supporters to come together to talk about the project and be praised for their efforts.

TOP 10 WAYS TO SAY THANKS

1. Special Mail

- Hand-signed or hand-written or personalised letters of thanks
- Christmas cards

2. Special Gifts

- Pen, tea towel, keyring, coffee mug, medallion, pin, cap, bookmark, football, mouse mat, etc.
- A ticket to your next event

3. Special Memberships

- Premium Membership (Silver, Gold, Platinum; Special, First Class)
- Donor's Circle, President's Club

4. Special Communication

- Individual email reports on their projects
- Copies of reports and evaluations

5. Special Recognition

- Framed certificates
- Commemorative plaques

6. Special Events

- Invitations to Christmas party, project launch, AGM
- Special seating at the grand final

7. Special Appreciation

- Ask for their professional advice
- Ask them to join the Management Committee

8. Special Privileges

- Individual hospitality at events
- Hand-written letters from satisfied clients

9. Special Attention

- Individual tours of the project
- Meetings with patrons or visiting dignitaries

10. Special Awards

- Create a special award to mark one or five or 10 or 20 years' service, or for this year's "most valuable" volunteer, or "most time contributed".
- At the top end, nominate your most valued volunteers for an award – Australian of the Year, perhaps (see **http://www.australianoftheyear.org.au/**), or an Australian Honour (see **http://www.itsanhonour.gov.au/**)

MAINTAINING FRIENDSHIPS
Keeping stakeholders in the loop

The Takeaway: If you think they MIGHT need to know then they DO need to know.

Your stakeholders are all the people and all the organisations that can help you, or can hinder you, or have to be consulted or informed or convinced or squared before you can proceed – funders, sponsors, bureaucrats, partners.

Cooperating with other agencies has many benefits. Having a widely-based consortium demonstrates that you've got wide acceptance in the community, access to necessary expertise, good project management skills, and fewer competitors, all of which are considerations that have considerable weight with funders.

Inner circle: partnering and auspicing

If your group is particularly small, lacking in resources or unincorporated then it may be able to use the help of a larger organisation.

If your group isn't eligible for a grant, for example, then you can sometimes remedy this by working with an organisation that is eligible.

Some organisations provide an umbrella for groups that aren't incorporated (receiving and passing on and vouching for the grant); others (such as the Australian Sports Foundation, the Australian Business Arts Foundation and the Foundation for Rural and Regional Renewal) may provide a tax-deductible pathway to get money to a group that doesn't have Deductible Gift Recipient (DGR) status – see **www.ourcommunity.com.au/dgr** for more about DGR.

Financial auspicing can run in tandem with many other forms of not-for-profit partnership – sharing of physical resources, mentoring, social entrepreneurship. All these can be worked out between the parties.

If you're in a partnership, it's important to have a comprehensive written agreement covering who does what when. Try to anticipate any hypothetical disagreements ahead of time, and draw up an agreement that's expansive enough to cover them. In the worst-case scenario, what happens?

See the Agreement Checklist **below**.

Middle circle: regulating and monitoring

The people who have to sign off on your progress – bureaucrats and funders – need to be included in a regular meeting schedule.

They need to be given written meeting papers, and minutes of reports received and decisions taken need to be kept, so that nobody can say later that they weren't informed.

You will also need to comply with any funding agreements you are subject to – this may involve submitting progress reports, financial acquittals and evaluations.

Outer circle: involved supporters

People who feel they're involved – members of the organisation, volunteers, people who have expressed an interest in your work and activities – should be informed of milestones, events and outcomes.

Keep a good list of stakeholders and send out regular updates by mail or email.

An e-newsletter is a great way of keeping your stakeholders up to date. Programs such as MailChimp (**http://mailchimp.com/**) and Campaign Monitor (**www.campaignmonitor.com**) provide an easy way of managing your lists and sending out regular updates.

Communication

When you're dealing with partners of any type, good communication is paramount. Problems can arise from something as simple as one partner forgetting to tell the other something they should have been told, right up to a total breakdown in communications.

Communication can be formal or informal:

- **Formal communication** – Partnership agreement, meeting agendas, meeting minutes, progress reports, etc.
- **Informal communication** – "touching base", over a coffee, via a quick phone call or email, providing a quick update of how things are going (though do make sure you have something meaningful to say).

Structure your communications according to the needs and wants of each stakeholder.

Honesty is also very important – the rule of thumb is, if you think they MIGHT need to know then they DO need to know.

AGREEMENT CHECKLIST

Make sure your Partnership Agreement covers off on all the following points.

1 - The Basics

- ❐ The partnership's purpose. For example: *"This is a partnership agreement between Smithville Contractors and the Main Street Hockey Club."*
- ❐ How each partner and the wider community will benefit from the agreement.
- ❐ The expected duration, or how the partnership will end (perhaps when a specified outcome is achieved). For example: *"This partnership will end on December 31, 2012."* Or *"This partnership will end after 20,000 children have participated in the program."*
- ❐ The resources each group will contribute, and how each party will draw on those resources. For example: *"The Grasstree Environment Group will contribute volunteer resources to the partnership, drawing on its members and their families."* Or *"Wendle and Son Lawyers will offer the partnership pro bono resources through the expertise and advice of staff member John Wendle Jr."*
- ❐ The responsibilities of each partner. For example: *"Grasstree Environment Group will be responsible for completing the on-ground work set out in the attached plan, including post-planting watering and maintenance, while Dinkum Nurseries will be responsible for supplying any materials, trees or other items needed to complete that work. Parties will jointly select any trees to be planted depending on available stock and the area in which the planting is taking place."*

2 - Procedures and People

- ❐ Specify the contact people in each organisation who will be responsible for project liaison.
- ❐ Specify the deputies in each organisation who will keep abreast of the partnership and step in if the contact person is unavailable or incapacitated.
- ❐ Specify the procedures for decision-making in the partnership.
- ❐ Lay out the governance structure. Are there any officially constituted temporary or permanent joint project committees, consultative committees, advisory boards, or similar agencies involved, or are matters handled directly between the designated representatives of each partner? If there are committees, how will they be constituted and what will their terms of reference be?

- ❒ Who is ultimately responsible for making decisions?
- ❒ Meeting details (frequency, time, location, personnel, and provisions for extraordinary meetings).
- ❒ Procedures to amend the partnership (such as changing the partnership model, the personnel involved or the length or scope).
- ❒ Ground rules for events organised within the partnership. (For example: *"Any volunteer activities will need to be approved by both parties, in writing, at least three days before the date scheduled"*.)
- ❒ How partners' names, logos and initials will be used (particularly in sponsorship-based partnerships).
- ❒ Rules on third-party involvement (such as working with a council or another business or community group).
- ❒ How your partnership will deal with the media (including who is allowed to speak to the media and how information will be communicated with the media).
- ❒ Any procedures covering volunteer management or risk management.
- ❒ Where expenditure is involved, a draft budget specifying the contributions to be made by each partner (and procedures for agreeing to budget variations, distributing profits, and who will be responsible for any unanticipated liabilities, costs or delays on partnership projects).
- ❒ Clear conflict resolution procedures. (Conflicts can be resolved through meetings or mediation; hopefully you won't have to use them, but having a procedure in place is vital to ensure conflicts are dealt with properly and to the satisfaction of both partners.)
- ❒ Any inappropriate behaviour that would lead to the agreement being terminated, or individuals losing their role. (For example: *"Any criminal behaviour by a partner or its staff/volunteers will result in the partnership being ended immediately"*.)
- ❒ Procedures for the termination of the partnership. (For example: *"The partnership may be terminated without cause by either party, provided that six months' notice is given."*)

3 - Reviewing and Evaluating

- ❒ How often the partnership will be evaluated (for example, after events, monthly, bi-monthly or a combination).
- ❒ The tools or methods that will be used to evaluate the partnership.
- ❒ How community feedback will be obtained.

PREPARING FOR TOMORROW
The importance of succession planning

The Takeaway: No one is around forever, and no one is irreplaceable. Don't wait for events to overtake you; build succession-planning into everything you do.

Community groups rely on unusual reserves of passion and commitment, and this makes them particularly vulnerable to the sudden departure of key people.

Your group needs to have plans, procedures and understandings in place to manage this.

The Management Committee

Committee members should turn over; if your Committee has been much the same for several years, there are questions to be asked. Are the members staying because you can't get new members, or because you can't muster the courage to ask the others to leave?

Long-standing Committees tend to stagnate. Times and contexts and environments change, and personnel need to change with them. You can still contribute to a group if you are not on the Committee – through serving on a sub-committee, volunteering, mentoring new or potential committee members, or providing specialist support.

The Staff/Volunteers

If your group employs staff, you need to keep an eye out for stagnation. CEOs can go stale, as well as Committees.

Even if everyone is still fired up and effective, you need to plan for their eventual departure. People move on, retire, die, change focus – sometimes quite abruptly.

CEOs themselves have to make the same decisions about the staff and volunteers they manage. How likely are they to stay on? How likely is it that they would leave without warning? How long in that job is too long? How easy is it going to be to fill that slot? Who's waiting in the wings?

The Process

Whether you're dealing with your Management Committee, or your staff, or your volunteers,

- You need to ensure that organisational information is passed on to newer members;
- You need a systematic method of recruitment for new people; and
- You need to manage the induction of those new people.

Documentation

Community groups have to ensure that that the loss of one key person doesn't mean the loss of all the organisational and operational knowledge they held.

This is particularly dangerous if the person concerned is at the top of the organisation. When a Committee member or a senior staff member is known to be leaving, a real effort must be made to extract their knowledge – their methods, their contacts, their procedures, their institutional memory.

The best way to ensure that knowledge isn't lost is to document as much information as possible, including having detailed position statements for all major staff positions and for all sub-committees. Filing systems should be useable and complete.

Recruitment

Recruitment discussions should start as early as a year before positions open, because;

- Good people are usually busy and often don't want to commit immediately (or can't); and
- Good or bad, the recruitment process may well take months and the successful candidate may need to give a lot of notice on top of that.

Induction

New appointees, committee members or senior staff need documentation, mentoring, and feedback. These should be standard elements of the recruitment process at all levels.

Prepare a well-organised folder of materials to give background, context and overall positioning of the organisation. This should include all or most of the following, as appropriate:

- Mission statement
- Constitution

- Strategic Plan
- Policy Manual
- Minutes of Committee meetings for the past year
- Annual Report
- A brief summary of programs (if the Annual Report doesn't have one)
- A brief summary of sources of donations and grants (if the Annual Report doesn't have one)
- Current year's budget
- Addresses and telephone numbers of Committee members
- A list of Committees, their terms of reference, their Chairs and their members.
- Copies of any newsletters
- The organisation's current brochures and flyers
- Recent relevant media clippings

Spend some time with the new member going through the orientation pack, answering any questions they may have. Assign them a mentor.

Succession Process (the Management Committee)

Set up an ad hoc group to review, revise and document succession procedures and to look a few years ahead at likely occasions. The sub-committee can

- Review the current Committee, assessing what if anything is missing.
- Ensure there is an orientation and screening process in place for new members.
- Prepare the Committee Member Information Pack for incoming members.
- Identify the qualities required in the next round of appointments.
- Monitor any changes in the organisation that might need changes in the Committee.
- Search widely and constantly.
- Identify potential candidates.

After the first year it may only be necessary to meet every year to check that all is in order and in readiness and to update the list of potential candidates. The ad hoc sub-committee can then be called together when an upcoming vacancy is flagged, and can

- Seek individuals with the skills or qualities needed to achieve your mission.
- Make candidates aware of exactly what their role will entail and how much commitment will be required if they become a Committee member.
- Invite potential Committee members to meetings.
- Keep existing Committee members updated on any developments.

Succession Process (the CEO)

Put in place an ad hoc sub-committee to analyse the organisation's needs and look for a new CEO when necessary. The sub-committee's tasks would include:

- consulting widely on organisational needs
- recommending selection guidelines and a search process to the Management Committee
- assessing applications and recommending an appointment (or developing a shortlist of candidates to be evaluated by the whole Management Committee).

The appointment of a new CEO should be the occasion of revitalisation, review and celebration, rather than wailing and gnashing of teeth as the machinery starts grinding to a halt.

Good succession procedures can ensure good things happen.

COMMITTEE SUCCESSION CHECKLIST

Have you ...

- ❐ Identified what qualities and skills your Committee needs now?
- ❐ Examined your organisation's Strategic Plan to ascertain what qualities and skills your Committee will need in the future?
- ❐ Decided how your Committee could better reflect the diversity of your members/clients/community?
- ❐ Considered setting up a recruitment sub-committee to oversee the task of filling Committee vacancies – and to keep on top of the process throughout the year?

  Cast your net wide in conducting your search for potential members, looking at:

  - ☐ People already associated with your group (members, donors, etc.)?
  - ☐ People associated with existing, retiring or past Committee members, sub-committee members, staff or volunteers?
  - ☐ People with interests that correspond with your group's aims?
  - ☐ Local community or business leaders?
  - ☐ People with appropriate skills who could fulfill your needs for greater diversity?
  - ☐ Professionals with skills you require?
  - ☐ People serving on Committee advisory committees?
  - ☐ People serving on other Boards or Committees?
- ❐ Spread the word that you are looking for new Committee members?
- ❐ Scanned newspapers and other media for stories about people who might suit your group?
- ❐ Lodged your vacancy on Our Community's free **Board Matching Service** (www.ourcommunity.com.au/boardmatch)?
- ❐ Built a "Prospect List", including information about potential Committee members' contact details and specific skills?

- ❒ Invited prospects to become involved in your group through sub-committees and one-off projects?
- ❒ Made a selection based on who can best serve your group's mission and future directions, and who can best provide the skills and expertise your group needs?
- ❒ Put in place and enacted screening procedures for potential Committee members?
- ❒ Thought carefully about your "pitch" before approaching potential candidates, taking into account your needs and those of the prospect?
- ❒ Adhered to the processes and procedures outlined in your organisation's constitution or rules in nominating and installing new Committee members?
- ❒ Followed up approvals by confirming the appointment and congratulating the new member?

ENDING THE PROJECT
Finishing up and deciding what's next

The Takeaway: You're now more experienced, more confident, and more competent. So what's next?

When you're approaching the end of one project you've got a bit of tidying up to do – and then it's time to start thinking about where you go from here.

Looking Back

Acquittal

You will need to have signed off for the receipt of all payments over the course of the project, and you will need an acknowledgement that you have received all the money payable under any grants or other contracts you have entered into.

You'll need to have all your financial records straightened out and stored safely – you'll have to keep them for at least five years.

Reporting

When your project is completed you'll have to report to your funders on how closely you have met the aims and objectives set out in your original application.

This document will have a considerable bearing on any subsequent applications your group makes to this funder, and it's worth spending some time on it. Include everything important that happened, even if they weren't in the original plan.

Dissemination

You will have learned a lot in the course of this project, and you will want that knowledge to be set down both for the benefit of your own group (people leave, new people come, knowledge is lost and has to be painfully recovered) and for the benefit of other groups in your community or in similar communities in other parts of Australia.

Talk it through with the team, identify the points you want to make, then put them up online, write them up for the local paper, and/or offer them to your funders for distribution. Think how much you would have appreciated it if someone had stopped you making the mistakes you did.

Looking forward

Hold an event to mark the completion of your project and to celebrate a job well done. Now, what's next?

It's time to put back into use all that you and your team have gained from this exercise. You're more experienced, more confident, and more competent than you were, and you ought to raise your sights accordingly.

PROJECT ACQUITTAL TEMPLATE

Available for download at **www.gardinerfoundation.com.au/programs/ssdc**

Strengthening Small Dairy Communities Grant Acquittal Report

Organisation	
Contact name	
Position title	
Postal address	
Phone	
Email	
Amount granted	
Project title	

1. Describe the outcomes of the completed project:

2. How is the project contributing to the strength and wellbeing of the district?

3. Briefly outline any changes that were made to the project as originally described in your application, and why these changes were necessary:

4. Did your organisation or project team learn any valuable lessons during the implementation of the project?

5. Please complete the following table showing the income and expenditure, including the Gardiner Foundation grant and any in-kind contribution:

INCOME	$	EXPENDITURE	$
Gardiner grant			
Other income (detail below)			
In-kind support			
TOTAL income:		TOTAL expenditure:	

Signed: .... Date:........................

Please attach a copy of any media or newsletter articles about your project. We welcome photos too, if you have them.

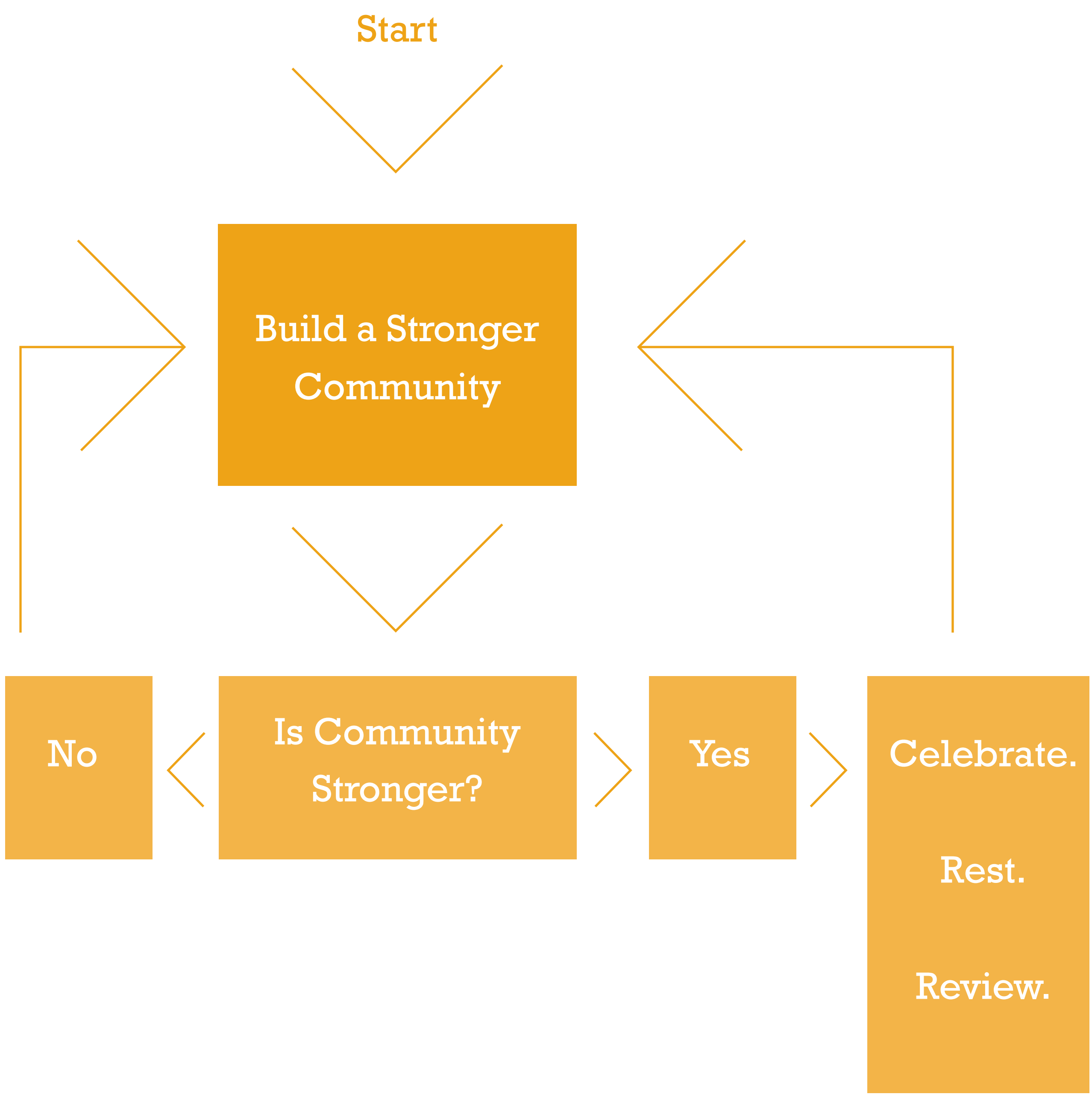
Please don't hesitate to call Kate on 03 9606 1919 if you have any queries about this report template.

The completed report should be emailed or posted to Kate Randall:

kate.randall@gardinerfoundation.com.au

Gardiner Foundation
Level 5, 84 William Street
Melbourne 3000

FURTHER ACTION ASSESSMENT



APPENDIX

GLOSSARY

A note on terms used in this Toolkit

In the community sector the same thing may have many different names, and some names may apply to many different things. To simplify matters a little in some places we've settled on using one name throughout. So in this Toolkit:

Chief Executive Officer (CEO)	means the (paid) head manager of the organisation – and covers	• Managing Directors • Executive Officers • Administrative Officers • Coordinators • Principals
Committee	means the governing body of a community group or not-for-profit organisation – and covers	• Management Committees • Boards • Boards of Directors • Councils
Committee member	means a member of a governing body – and covers	• Board Members • Directors • Trustees • Council Members
Community group	means any not-for-profit community-based organisation – and covers	• Not-for-profit organisations • Associations • Clubs • Cooperatives • Companies limited by guarantee • Nonprofits • Community organisations