

# Setting up a New Group or Project

## Identifying Need and Starting a Steering Group

Community groups start with a conversation about how to fix a problem or with an idea to create something new. The people involved often feel very strong about the issue and may have direct experience of the problem. However, before you start to set-up your group you need to define your idea and assess if there is a need for it.

### What do you want to do?

Although this may look to be a simple question it is important you clearly define what you want to do. Ask yourself:

- What are the issues or problems you have identified?
- What is the effect of these on the community?
- What changes do you want to see?
- How will these will help solve the problems you have identified?
- What activities or services do you want to do to bring about these changes?
- Where are you going provide theses, are you going to operate locally or across the region?
- Who are going to benefit from your activity or service?
- How long will it take i.e. are there any short/long term priorities?

You will refine your answers as you work through the set-up process however, these are starting point from which you will establish the aims and objectives of your community group.

### What is already being done?

Duplicating what other groups are doing or have done in the past can make it more difficult to access support and funding. You need to make sure there are no organisations carrying out similar activities in your area. Ask:

- What services/organisations already exist to meet the issues or problems?
- Who provides these?
- How frequent are they?
- Who is eligible to use these services?
- Has this type of group been attempted before and failed, if so why did it fail?

Use various sources of information to find out what services/activities already exist such as online community directories, local newsletters, social media and simply asking people. Remember to take into account all types of social places (e.g. churches) as well as formal groups and organisations.

You may find that there are groups already providing the activities/services you wish to and that joining these would be far more effective than setting up a new organisation.

### Proving the need for your group

Once you have defined your idea it is important to find out if there is a need for it. Assessing your community/service users' requirements will help you understand if there is a need for your group.

Engaging with your community is an essential part of identifying need. You may find your initial aims and objectives get revised in the light of what people are telling you however, this ensures you are meeting the actual need in a way that is beneficial and driven by the community.

There are a number of different methods your group can use to gather this evidence including:-

- Community meetings
- Surveys and questionnaires
- Focus groups

Whichever engagement method you use the process should:

- Be inclusive i.e. carried out with the people and groups who will benefit from your groups activities, potential stakeholders who will support your ideas and other interested parties
- Be accessible, with barriers to participation in the engagement process being identified, understood and mitigated as much as possible
- Have a clear purpose which will assess the expectations and requirements of beneficiaries, stakeholders and supporters
- Be fit for purpose and relevant to the size and type of group you are looking to set up

See [Community Toolkit section Community Engagement](#) for more information

## Setting up a Steering Group

Once you have identified there is a need for your group, and you have the support of the community, you need to form a steering group or committee who will:

- Set up the legal structure of group
- Undertake a feasibility study
- Develop governing documents and policies
- Establish strategic and operational plans
- Set-up financial management processes
- Get funding

This group should ideally be made up of users of the proposed group, experts in specialist areas (finance, publicity, funding etc.), agencies and members of the community. The form below will help you check if you have the right mix of skills and experience in your steering group.

	Steering group have the skills	We need to find someone	We need to get external support
Leadership & planning to drive the group			
Experience and knowledge of issues the group is being set up to tackle			
Financial understanding to identify costs and establish financial processes			
Good verbal communications to speak at meetings and represent the new group			
Good writing skills for reports, funding applications and publicity			
Understanding of group legal structures and responsibilities of committees			
Research and analytical skills for carrying out/supporting a feasibility study			
Design skills for promotional material e.g. leaflets, posters, surveys			
Understanding of the wider community planning environment and local third sector			

## Financial Management

Financial management is not just about handling cash. It includes cost analysis, setting budgets, monitoring income and expenditure, preparing accounts and ensuring that all legal requirements relating to finance are complied with. Steering group members have a joint responsibility for ensuring there are sound and robust financial processes in place for the new group as well as the steering group itself.

## Developing Plans

Good planning will help you focus your resources and energy on what you need to do, rather than on what you like to do or spreading yourself too thin. They will also help you consider possible problems you may come across and how you can manage these if they occur.

A steering group should consider writing a plan for:

- the activities they need to do to set up the group (Start-up plan),
- how the group will operate (Business plan 1 to 5 years) and a
- the sustainability and growth of the organisation longer term strategic plan for (5 years +).

These plans should have specific goals, time frames and measurements of success. They will be used to check progress and evaluate if the group is achieving what it was set up to do and make any necessary changes where it is not.

## Potential Problems for a Steering Group

Being part of a steering group is very rewarding especially when you see the formal group established however, there is a significant amount of work to be undertaken by the steering group, who are volunteers and have other commitments in their lives. The steering group need to be realistic as to what they can do and the times scales they can do it in.

Key things to watch out for include:

- Not having enough people to be on, and support the work of the steering group
- Unrealistic goals due to enthusiasm for the project
- Getting bogged down in the planning process and lose enthusiasm
- Not clarifying roles and responsibilities
- Not having regular meetings or cancelling meetings if members are unable to attend.
- Not conveying the true state of project
- Creating a business plan to suit a funder
- Not carrying out regular evaluation of the project and checking if it is still feasible
- Not having a formal committee to take forward the operational running of the new group

Establishing a terms of reference will help overcome some of these problems by setting out how the steering group will run, the different roles in the group and act as a high-level plan of how the group will be governed.

## Terms of Reference Example

Group Name:

Date established:

Objective of group:

- What is the broad purpose/role of the group?

Members of group:

- Who are the members?
- Is there restriction on numbers?
- How can people join?

Governance of Group:

- How frequent will meeting be held and where will they be?
- Who will organise and chair the meetings?
- How will topics for the agenda be generated?
- Will non-members be invited to group meetings and if so, under what circumstances?
- Who will provide secretariat for the group?
- How and when will meeting papers be circulated?
- How will group members share information and resources?
- How will confidential materials and copyright issues be identified and dealt with?
- Will there be a web space for the group and if so, will it be password protected and who will be responsible for facilitating it?
- Will any sub groups be convened? If so what are they, who is responsible, how will the report back to the group
- How often will the group review the relevance and value of its work and the terms of reference?

Activities of group: *Although many of the tasks of the steering group will be done at the same time splitting them into pieces of work and identifying which steering group member is responsible for it will ensure activities are shared equally across the group.*

- Undertake a feasibility study
- Set up financial management processes
- Establish strategic, business and operational plans
- Develop governing documents and policies
- Set up the legal structure of group
- Get funding

Volunteer fatigue is a key issue for the sustainability of community groups, your steering group and formal committee will need enough people with time, skills and enthusiasm to set-up and run the project. If you are struggling to find people to commit to the steering group you need to go back to your community and ensue support to help set-up and run the community group is there.