

Funding route map for community groups taking action on climate change.



alancaldwellassociates
For community planning, regeneration and a low carbon future

June 2013

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Introduction

About Scottish Communities Climate Action Network

Scottish Communities CAN is a network of community groups and associated organisations that facilitates community action on climate change, creates opportunities for partnership working and provides a shared vision and voice for communities taking action on climate change. Scottish Communities CAN's objectives are to:

- Facilitate community groups into climate action;
- Address barriers and challenges to the action on climate change;
- Provide a shared voice to communicate our shared vision to the wider world;
- Show good practice and innovation among community groups.

For more information about Scottish Communities CAN see www.scottishcommunitiescan.org.uk.



Acknowledgements

The first edition of this Route Map has been put together with the help of a small project steering group from Scottish Communities CAN and the wider assistance from inspirational individuals and community organisations across Scotland.

This Route Map was researched and written by Alan Caldwell from Alan Caldwell Associates www.alancaldwellassociates.co.uk

Thanks to Brick <http://www.brickbats.co.uk> for permission to use his illustrations first reproduced in the Re:sourcebook – planning for your community, written by Alan Caldwell and published by the Joseph Rowntree Foundation <http://www.alancaldwellassociates.co.uk/resources>.

JARGON BUSTER

- **Accountable Body:** an organisation with recognised management systems and legal status to receive public funds, employ staff etc.
- **Aim:** the change you intend to achieve through your project and which stems directly from the needs of those who will benefit from your project.
- **Asset:** land, buildings or services that are financially viable and benefit your community.
- **Audit:** a systematic examination of an organisation, project, programme or plan.
- **Beneficiaries:** those who benefit from your project and the work of your organisation.
- **Business Plan:** sets out all aspects of an organisation's plan and programme of work for a defined period of time or sets out all aspects of a specific project – to gain support from partners and funding to implement the business plan.
- **Capital receipt:** a single payment received by your organisation from the sale or lease of land, buildings or social enterprise in your ownership.
- **Community based:** actively involving local people and organisations.
- **Consultants:** self-employed professional individuals or organisations.
- **Development Trust:** an independent community organisation that is owned and managed by the local community to address a range of economic, social, cultural and environmental issues within their community. They aim to reduce dependency on grant support by generating income through enterprise and the ownership of assets.
- **Economy:** the way a community is organised in order for people to work at different jobs and provide for their needs.
- **Evaluation:** an assessment, after a project or programme has started, of the extent to which objectives have been achieved, how efficiently they have been achieved, and whether there are any lessons to be gained for the future.
- **Feasibility Study:** the work that will test and develop ideas that could eventually become fully fledged projects, programmes or organisations.
- **Goal:** make clear what you hope to achieve within say 5-10 years.
- **Governance:** the rules and practices by which your organisation ensures it is well run.
- **Holistic approach:** a view of regeneration that is more than a sum of its parts. Taking into account economic, social, environmental and cultural issues in a community and how they inter-relate.

- **Income:** revenue generated from land, buildings, social enterprise (e.g. renewable energy project) or joint venture project involving your organisation.
- **Monitoring:** regular collection and analysis of input, output and outcome data, along with information concerning problems being tackled.
- **Objective:** the result a project is intended to achieve within the short term (say two years), for example to create additional jobs for local people.
- **Operational Plan:** like a business plan but sets out in detail how a project or programme of work is going to be achieved by the organisation undertaking the work.
- **Options Appraisal:** considers the range of alternatives about how your project could be delivered to meet the needs you have identified in your community. It shows how the option you have agreed on is the most appropriate one.
- **Outcomes:** are all the changes and effects that actually happen as a result of your work. The outcomes you hope to see are all the specific changes that will help you to achieve your aims.
- **Outputs:** activities and actions that will happen and help to deliver outcomes.
- **Programmes:** a range of activities, actions and projects grouped together to achieve a particular outcome(s).
- **Project Officer:** a person employed by an organisation to assist them and progress their projects and actions.
- **Projects:** individual components of an overall programme, plan or scheme that will benefit your community.
- **Project Plan:** sets out all stages of the development of a project and what it will take to make it happen.
- **Milestones:** show the steps that can measure the progress of your project towards the intended outcome.
- **Resilience:** the ability of your community to cope with the challenges of our changing climate and the challenges this will bring.
- **Stakeholder:** an individual, organisation, group, agency or business with an interest in the future of your community.
- **Steering Group:** a smaller group providing leadership and direction for your project, programme or organisation.
- **Social Enterprise:** is a business set up for social benefit, reinvesting profit in their community rather than for the benefit of individual shareholders and owners.

- **Sustainable Development:** activity that achieves mutually reinforcing economic, social, environmental and cultural benefits without compromising the needs of future generations.
- **Social Return on Investment:** a way in which an organisation can look at what it does, measure the difference that activity makes to people's lives, and tell a robust story about that difference.
- **Timeline:** is a way of displaying a series of events and tasks in chronological order.
- **Vision:** a vision gives your community direction and an overall philosophy. It builds consensus and provides a shared picture of the future. A vision generates community energy and commitment to take the actions needed to bring about lasting change.
- **Workshops:** meetings that are structures for the active involvement of participants.

Section 1. About the funding route map

What is this Route Map?

This Route Map has been developed to help local communities to finance projects that are important to them and take action on climate change. It covers the themes of energy, transport, food, waste, land use and community engagement. In making such projects happen the Route Map encourages community organisations to diversify their sources of funding and move towards greater financial, as well as environmental resilience. While this approach is economically sensible it will help community organisations to grow in confidence, increase their independence and achieve so much more.

This Route Map is structured around eight key questions:

- What makes a good project?
- How can you access the best support and advice for your project?
- How do you plan effectively to make your project happen?
- How do you identify and assess the different funding options and choose the ones best suited to your project?
- How do you find the right funding partner that suits your project?
- What are the best ways to work with your chosen funding partners?
- What is the best way to organise yourselves to make your project happen?
- How should you manage your project to ensure long-term success?

This Route Map:

- **Is** a practical source of ideas and suggestions, it is **not** intended to offer ready-made answers or solutions.
- **Is** designed to help you to think through issues, it is **not** intended to offer ready-made answers or solutions.
- **Is** a starting point, it is **not** an end in itself.

This Route Map is only one tool to help you in your work. You are encouraged to make contact with those who can support you and to learn from the experience of other communities. This Route Map points you to other organisations, web sites and publications that you may find helpful.

We hope you find it useful.

Who should use this Route Map?

This Route Map has been prepared to support community led organisations taking action on climate change. First and foremost it is written for the community leaders involved in this work. You may already be involved in the Steering Group or local organisation leading the work, or considering setting up a group to make a project happen.

It is also intended to offer guidance to those working with the Steering Group or community organisation. This includes project staff, Local Authority officers and staff from partner agencies.



How to use this Route Map?

This Route Map is designed to be a working document and you are encouraged to dip in and out, focusing on the stages that interest you. This Route Map is only available online. This will help us to keep the costs of production down, the content up to date, encourage communities to add their experience and tips, and make sure it is easily available to all.

We would encourage you to add your thoughts, suggested improvements and stories about your projects. We want the Route Map to be a resource that local communities can help to shape and develop. You can add your experiences, case studies, comments and suggestions at <http://www.scottishcommunitiescan.org.uk/funding-route-map>.

The Route Map is divided into sections around these key questions. Each section is structured as follows:

- **The Principles:** setting out why this stage is important and what it is for.
- **The Practice:** exploring what this stage actually is, what is involved and who is involved.

- **The Big Issue:** highlighting the central issue of this stage.
- **The Wicked Issues:** alerting you to the things that can go wrong, how you might avoid them and how you might deal with them if they happen to you.
- **Key Challenges:** setting out the challenges you are likely to face.
- **Guidance Skills and Contacts:** to help you with your work.
- **Self Evaluation Checklist:** to help you review your work. Feel free to amend and develop the checklist to suit your circumstances. It can be completed by an individual or as an exercise for your community organisation. You may also find it useful to complete it with your partners (including funders).
- **Links:** where it is useful to refer to another section in the Route Map a reference is included in the body of the text. Useful web links are also included throughout.
- **Illustrations:** are included to 'lighten' the document and emphasise important points.
- **Inspirations:** the Scottish Communities CAN is encouraging inspirational projects and organisations from across Scotland to log a short case study including what skills and experience they can offer for peer-to-peer learning. See <http://www.scottishcommunitiescan.org.uk/funding-route-map>.

Crowd Sourcing – an invitation to contribute

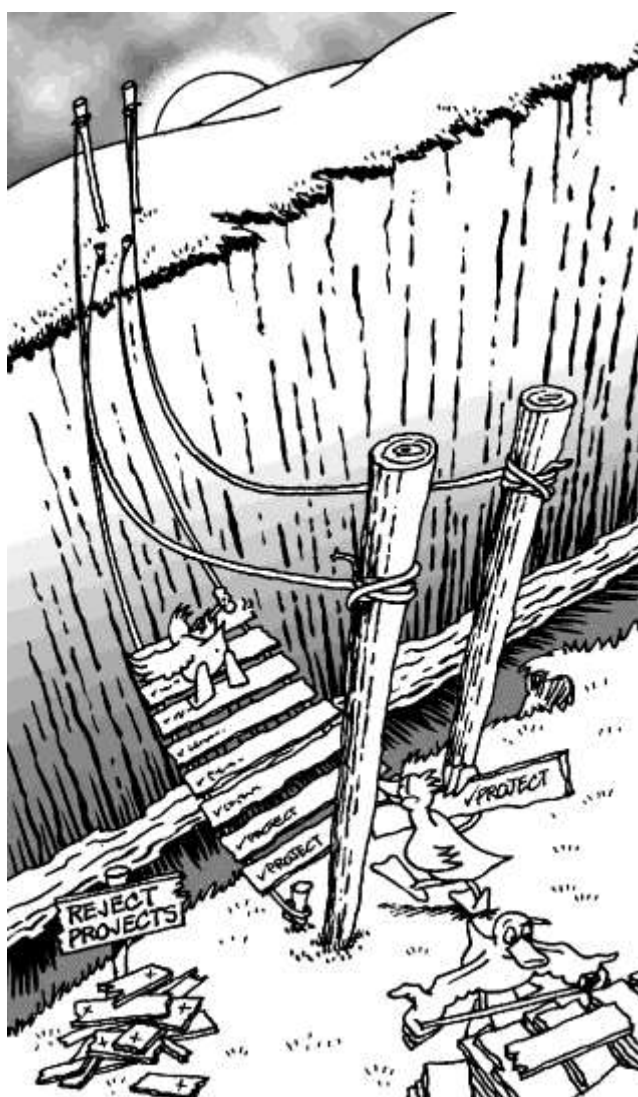
This Route Map is a working document. It is intended to review and update the Route Map as communities test it. If you have comments, suggestions, case studies or contributions to make please make these at <http://www.scottishcommunitiescan.org.uk/funding-route-map>. As this is a web based publication it can be easily updated and amended. Please tell us your experiences and help to create a great resource for communities like yours.

Section 2. Identifying your project

This section will consider how to identify a project that will directly benefit your community and, where appropriate, provide ongoing financial benefits for your organisation and community.

The Principles

Choosing the right project is crucial. The right project will generate a commitment from your community. It will generate enthusiasm and a willingness to volunteer to help make it happen. The right project will bring benefits to your community in obvious, easy to see ways. If your project is also about creating a community asset it should bring financial as well as social benefits.



The right project will fit with your overall vision (saving carbon or adapting to our changing climate) and overall plans for your community. It is easy to generate a wish list of projects. Placing your projects in the context of your overall vision and plan for your community will help you to make good decisions. It will help you to judge whether or not a project will help to achieve your vision. It will help you to prioritise your projects and show funders where they fit in the bigger picture.

Even if your group or organisation is entirely focussed on a single project it is always helpful to show how it fits into a wider vision for your community.

The Practice

People can see projects as physical things involving buildings and land. They envisage new houses, new workspaces or a new roof on the village hall. Projects can, however, cover a wide range of actions that will

help you to achieve the vision for your community. Project types and examples include:

Advice:	Receiving advice on reducing household energy bills.
Planning:	Preparing an energy descent plan for your community.

Financial:	Creating an investment fund for new projects from the income from a community wind turbine.
Physical:	Creating new allotments for community food growing.
Feasibility:	Testing the idea of a community hot-desking hub to reduce commuting.
Research:	Undertake an audit of local skills or a survey to gauge support for a community cinema.
Organisational:	Establishing a new group to run the new community recycling business.
Promotional:	Develop a local branding for crafts, food and produce.
Skills and People:	Set up a training course on permaculture.

Projects can be easily prioritised to help you focus on what is most important and to use scarce resources wisely. Keep it simple by categorising projects under now, soon or later. Deciding on the right category depends on the degree of difficulty of the project, the availability of resources and its sheet significance to your vision.

Make sure you choose and prioritise your project as a group and in consultation with the wider community. This will build support and flush out problematic projects before you have spent too much time and energy on them.

The Big Issue

Are you driven by a wish list or by strategic thinking? Some communities spend a great deal of time developing their vision and overall plan (see Guidance, Skills and Contacts below). While this is not essential, it is crucial that you have a clear idea of your vision and how your project will help you to achieve this vision. Remember, funders will want to see how your project fits in the bigger picture.

If you want your project to be an asset, raising funds for your community in the future, it is critical that you take a strategic approach. Assets can very quickly become liabilities and require careful planning and consideration.

The Wicked Issues

- **Being led by others:** this is all too common, especially in young groups. Simply choosing projects and priorities because they fit with the view of others (e.g. funders and government) is a high-risk strategy. Their rules can change very quickly cutting off the funding stream to your projects and leaving you red faced. Being able to seize funding opportunities is a skill to be encouraged, but only when this is guided by your vision and overall plan. There is a balance to be struck.
- **The 'early win' project:** this can give your work a real boost. A simple, easy to achieve project can help generate commitment and a feeling that things can actually change. They can, however, be more trouble than they are worth unless they also help to achieve your vision and overall plan. When you are just starting out it is easy to stray into 'contentious' projects. You will be amazed at how 'hot under the collar' communities can get about seemingly minor issues. Choose carefully!



- **Competing projects:** if you haven't spent any time agreeing your vision and setting out an overall plan you will have no way of judging the merits of competing projects. One project may be backed by vocal, well-organised, articulate community members while another is supported by folk less comfortable putting their idea across in public.
- **Managing expectations over timescales:** projects inevitably take much longer than expected. When you are an active volunteer on that project you will understand the reasons behind this. Others in your community may not! Be aware that people will expect you to make things happen quickly and without good communication, may lose faith in the project and organisation if they don't understand the reasons for any delays.
- **Scrutiny and criticism:** be aware that if your project owns land or buildings; earns income; or employs staff you will be under scrutiny by your community, and some may criticise. Some volunteers have been accused of 'feathering their own nests', and some projects have been criticised for taking grants to employ staff. Being able to show clearly how a project benefits the community; why it has been selected (clear vision and plan); and having good governance in place to guide volunteers will really help you in your work.

The Key Challenges

Challenge 1: How do we identify projects?

You may, of course, be really confident that a project has all the attributes to benefit your community. It may have overwhelming support in your community and can be easily achieved by your group. Community food projects often seem to fall into this category while community energy projects (especially wind turbines) can stir up a hornet's nest. Remember, even if a project starts out with broad community support circumstances can change. It is always helpful to be able to clearly show that:

- You have developed a clear vision to guide your work and show what you want your project, programme or community to be like in the future.
- You have thought about the changes you want your projects to bring about and how they help to achieve your vision.
- You are confident that you have everything that you need (or know how to get it) to make your project successful, and that you are not 'biting off more than you can chew'.
- You can easily measure the progress you are making to know when it has been successful (or when to step in to change tactics).

- You consulted your community inviting people's thoughts on all aspects of your project and your work (see 3 below).

Challenge 2: How do we prioritise projects?

Prioritising projects is about being realistic and practical. This is a task for your Steering Group. Prioritising should be reached through debate and discussion rather than a technical scoring method. You can decide whether a project can be done now, soon or later by asking the following questions:

- Just how significant is this project to realising our vision?
- How difficult will it be to actually make this project happen?
- Is it technically complicated?
- Is it something we can do ourselves or will we need the help of others?
- Are the others that we need going to be onside or will it take time to persuade them?
- What resources will it require and how available are they?

This sort of simple project planning and prioritising can save you days of wasted effort and build a well-informed and committed team to make it happen.



Challenge 3: How should we involve the wider community?

Once you have identified and prioritised your projects this is a crucial time to involve your wider community to test and develop your ideas. Be prepared to be flexible, accommodate the views of other while showing the thought you have put into your project ideas. It may be that your project idea already came from a community meeting of some sort. In this case take the opportunity to report back on the progress you have made and the planning you have undertaken.

You may decide to run a series of events to reach particular groups or areas in your community. You may decide that a major community event is more appropriate. Once again, planning and preparation is key and you can easily access good advice on holding a successful event (see Guidance, Skills and Contact below).

Challenge 4: How to choose a community asset?

Communities are being encouraged to take on the ownership of land and buildings; to develop community energy projects; and to deliver services and businesses to make them more financially resilient. In addition to all of the guidance above in 1,2 & 3, considerable extra care needs to be taken to identify a good, community asset project.

The principle of a community asset is that it will benefit a community financially as well as socially and environmentally. To choose a viable community asset you will need to carry out a comprehensive feasibility and business planning process. Guidance on this can be found in Section 4.

Guidance, Skills and Contacts

What skills do you require?

- Administration skills to organise events.
- Community development skills to involve people and organisations.
- Facilitation skills to run meetings and events.
- Project development skills.
- Negotiation and mediation skills.
- Strategic thinking.

Where can we find the help and information we require?

- For general project development advice have a look at the Development Trusts Association Scotland's publication, 'Inspiring Change'. There is a helpful DVD and publication that gives great, hands on advice on how Comrie Development Trust has approached this work.
<http://www.dtascot.org.uk/content/publications>.
- For inspiration from other communities have a look at the case studies on the Climate Challenge Fund website Keep Scotland Beautiful.
<http://ccf.keepsotlandbeautiful.org>
- For any form of community energy project look at the wealth of information provided by Community Energy Scotland's
<http://www.communityenergyscotland.org.uk> including a range of helpful case studies.

Self Evaluation Checklist

	Comments	Check
Are you ready?		
Have you developed a clear vision to guide your work?		
Have you thought about the changes you want your project to bring about?		
Agreeing the priority projects?		
Have you held a discussion to prioritise your project ideas into now, soon and later?		
Are you confident you have everything you need to make your project happen?		
Do you have everything in place to measure your progress?		
Testing support for your project(s)		
Have you consulted your community about the project?		
Is your project a community asset?		
Are you aiming for a project that will benefit your community financially?		
If yes, have you agreed to progress a feasibility study and prepare a business plan?		

Section 3. Accessing the best support and advice

This section will ensure that communities are aware of the full range of support and advice available to them and how to decide where best to access the support your project requires.

The Principles

Accessing good quality support for your project and organisation can mean the difference between success and failure. There is a wealth of support, advice, information, good practice and case studies available to you if you know where to look and who to ask. This section will direct you to the most obvious places to access this.

The Practice

There are three general sources of support as follow:

- Directly from other community organisations that have been there and done it.
- From agencies who are funded to provide such support to communities.
- From consultants who have the practical experience of making projects happen alongside communities

Scottish Communities CAN believes that there is a wealth of knowledge, information, expertise and guidance within the community sector. Scotland's community organisations are a talented bunch and we are keen to promote a learning network between climate action communities. We are asking communities to add their thoughts to this Route Map and to establish a potential 'buddy system' where we can pair up experienced groups with those just starting out or with groups wanting to tackle a similar project. We are, however, aware that the one thing that community organisations don't have is a great deal of spare time.

To supplement the resources at a community level, there are a number of funded support organisations (by government and charitable sector). Some of these are member-based organisations (like the Development Trusts Association for Scotland) and others are sector specific (such as Community Energy Scotland). Some of them are government funded (such as Keep Scotland Beautiful) to provide support for specific funding programmes (in this case the Climate Challenge Fund). These organisations are fantastic sources of information, help and advice and many of them have development officers who can provide hands on support to guide your project. The great thing about these organisations is that they build a detailed understanding of lots of projects and community organisations. They are therefore a really useful point of contact for you to identify a community organisation that may be able to 'buddy' your project.

Consultancy support can be invaluable when you have a particular task that requires professional expertise. This might be a community needs survey; a feasibility study; a business plan; facilitating an important event; or completing a particularly demanding funding application. By its nature, consultancy support is paid and you can often access grants to cover such costs.



Researching and accessing support from different organisations and examples from other communities is a good challenge for the volunteers involved in your project and organisation. It helps to connect them with other communities and give them a feel for the work that is going on elsewhere.

The Big Issue

There are a myriad of organisations offering support to communities. In these times of austerity every organisation seems to have a consultancy wing offering their services to others. In Section 9 we have narrowed down your starting point for you with some tried and trusted organisations and information sources.

The Wicked Issues

- **Be clear about what you want:** unless you are clear it will be more difficult for support organisations to judge how much they can help you. Take time as a group to brainstorm the issues you want help on. What type of support are you looking for and how much do you want the support organisation to do for you? Is it technical questions to help you progress a funding application or general information to help your group develop. The more information you can give them when you contact them the more likely you are to access the right organisation to suit your requirements.
- **Led down a cul-de-sac:** some support organisations (and staff within these organisations) can direct you to what they know and understand rather than what you actually need. If you feel that the direction you are being taken is not giving you what you want, or is delivered in a way that doesn't suit your organisation then stop, reflect and start again (with another support organisation if required).

- **One size fits all:** similar to the cul-de-sac, some support can feel very formulaic. Once again, if you feel that advice is not being tailored to your requirements, pause and move on in a way that better suits your needs.
- **Asking others to do it for you:** sometimes support and advice becomes more like asking others to do your project for you. It may be tempting to try and get others to deliver some of the actual work when you are hard pushed for volunteers. While most support organisations will simply pull you up short on this, don't be tempted to hand over tasks to others that are better done by yourselves. If it really needs to be done by someone else, put together a brief and appoint a consultant to deliver the work for you.

The Key Challenges

Challenge 1: How do we identify the best sources of support and advice?

Our best advice, whether you are looking for free support or consultancy help, is to ask other communities working in your sector. They will tell you who has helped and who has hindered. To find communities who are working in your sector just check out some of the websites in Section 9, contact the Scottish Communities CAN or email our 'go to communities' for a starting point.

Challenge 2: What is the best way to work with a support organisation?

Most support organisations will be able to clearly define the help they can offer and the way they can deliver it. Keep Scotland Beautiful, Development Trusts Association and Community Energy Scotland, for example, all have development staff that will be willing to come and meet you.

Other community groups will be able to offer support and advice over the phone and by email and may be able to host a visit or match your volunteers with some of theirs to talk through a particular project. Remember every community organisation was in its infancy at one time and will remember how valuable peer support was in their development.

Choosing consultants is straightforward if you follow basic rules (in addition to asking other communities). The National Council for Voluntary Services has helpful advice here: <http://www.ncvo-vol.org.uk/directory-approved-consultants/choosing-consultant-managing-process>.

Guidance Skills and Contacts

What skills do you require?

- Research skills to identify good support (internet, e-bulletins, contacts etc).
- Negotiation and mediation skills to narrow down the right support for you.
- Presentation skills to put your project across well in writing and in person.
- Strategic thinking to identify long term (and short term) support partners

Where can we find the help and information we require?

- Register for regular bulletins from KSB, Rural Gateway, SCVO, DTAS, Sencot and the Scottish Community Alliance as starters for ten (see section 9 for websites and search for all available bulletins).

- The National Council for Voluntary Services has helpful advice here: <http://www.ncvo-vol.org.uk/directory-approved-consultants/choosing-consultant-managing-process>.
- Ask Scottish Communities CAN network to put you in touch with similar projects <http://www.scottishcommunitiescan.org.uk/contact-us/>.

Self Evaluation Checklist

	Comments	Check
What help do you want?		
Are you clear about the help and support you want (and need)?		
Have you discussed it as a group?		
Identifying the best sources of support?		
Have you identified and contacted other community organisations that may be able to help?		
Have you identified and contacted support organisations that may be able to help?		
Have you asked others for recommendations on consultants that may be able to help?		

Section 4. Planning for success

This section will provide guidance on the essential project, business and organisational planning required to find the money you require.

The Principles

Planning for success shows how you are going to move from vision to mission and development to delivery. What steps are you going to take to plan your project? How are you going to organise yourselves to deliver your project? How are you going to persuade others to support your project?

This will involve preparing a project plan, operational plan and business plan.



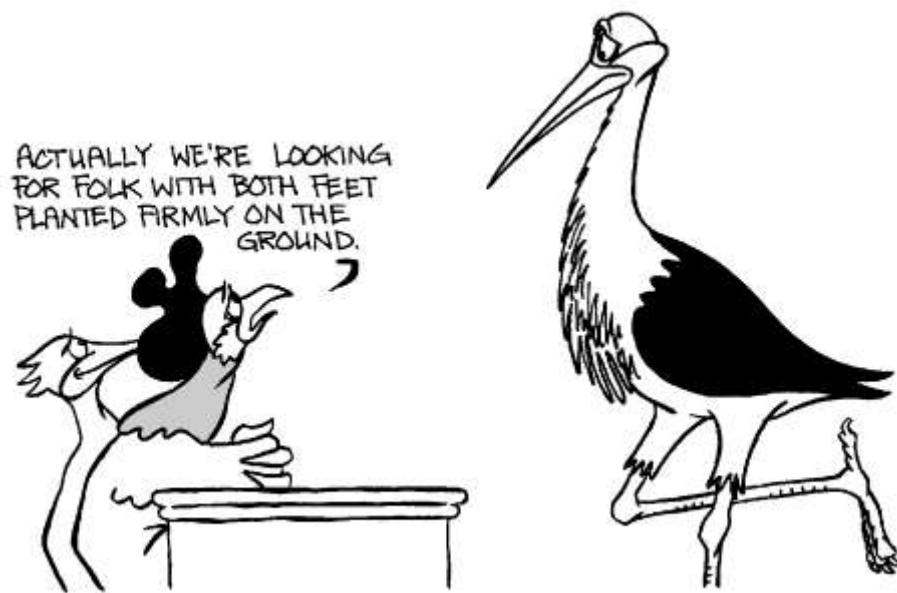
The Practice

Those within your organisation who know the project well are best placed to prepare your project plan. This is about sitting down and really thinking through the detail of each step for your project - how long it will take; what help you need from others;

what you can do yourselves; and what level of resources (people, money and equipment) you might need? Your project plan is a working document, a tool for you to use to test different ways of making your project happen.

As your project plan begins to shape up your Steering Group (or committee/board) can begin to look at how you are going to organise yourselves to make the project plan happen. Do you need a dedicated working group? Do you need outside help from consultants? Do you need to enlist specific skills from elsewhere in your community? What legal structure do you need to make your project happen (see Section 8)?

When you are clear about your project plan and your operational plan you can begin to craft your business plan. Your business plan will really get down to the detail of your project and take the reader through from your vision, to your mission as an organisation and through the smallest detail of the project you want to make happen. This is where detailed cash flows and funding breakdowns are shown. This is the tool that will get you the money you require.



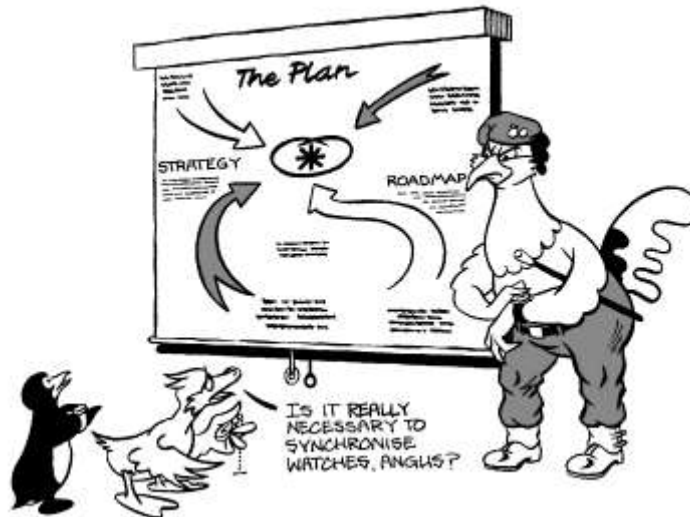
The Big Issue

This is all about planning - careful, detailed, painstaking and time consuming planning. This may not come naturally to your community, your steering group or the individuals involved. This is about finding those volunteers who have the skills and expertise to lead on this stage of your work. Without it you will have a mountain to climb. With it you will stand an excellent chance of raising the money you need and making your project happen.

The Wicked Issues

- **Not taking this seriously:** like most things in life it is better to plan and prepare. Often communities are eager to get going with a project and your wider membership may apply pressure to 'make things happen'. Taking time to really think the project plan through will pay off in the long run and avoid a great deal of wasted effort. While you have to remain light on your feet,

seizing opportunities that come along, don't skimp on the planning stage of your project.



- **Adapting someone else's ideas:** there is a balance to be struck between learning from others and falling for the trap of 'one size fits all'. It is a great idea to learn from other similar projects and to speak directly to those involved to avoid the pitfalls and speed up your project. There will be lots that you can replicate but always do the "Is this for us?" check. If you ever feel that the solution from elsewhere just doesn't quite fit your project or community, think of a more appropriate way of making it happen.
- **No training for the Steering Group:** you may be lucky and have volunteers who naturally want to plan and prepare. You may be even luckier to have volunteers with those skills who are experienced in doing this for community projects. Even if you have it is a good idea to access training for your whole Steering Group so everyone understands the importance of this stage and can comment on the planning work going forward.



- **Over-reliance on a few volunteers:** often a couple of people take it all on, whilst others look on in agreement, only to burn out and leave the project stranded as no one else knows what to do or what is going on?
- **Forgetting about the wider community:** during the planning stage don't forget about your membership and wider community. Those of you who are involved in the hours of planning will feel the effort and progress directly. Your community will just think nothing is happening. Communicate!



- **Not taking outside advice:** there is always a temptation to do things yourselves and often a resistance to pay for consultancy help. Preparing project, operational and business plans is demanding. This is recognised by a number of funding schemes that are designed to support feasibility studies (including consultancy time). The Big Lottery, for example runs a programme called Investing in Ideas that can award up to £10k for feasibility work (http://ask.biglotteryfund.org.uk/help/scotland/investing_ideas). Speak to the support organisations listed in Section 9 to get a better idea of any planning work they may be able to support and particular funding sources for your project.

The Key Challenges

Challenge 1: How do we develop our roles and responsibilities to deliver our work?

Now that you are entering the planning phase for your project you should be thinking about the following:

- What the Steering Group should be doing.
- Who should be involved and how you attract the right people.
- What roles and responsibilities are individuals going to take on to make things happen?
- What structure you need to make your project (and other work) happen.
- The training you require to develop your skills and knowledge for the work ahead.

As your project plan becomes clearer (see challenge 3) it will be easier to allocate roles and responsibilities but you should start thinking about this as individuals now. You might even consider holding a session facilitated by someone neutral to start the thinking on this.

Challenge 2: Being clear about your mission

Section 2 talked about the importance of having a clear overall vision for your work (e.g. saving carbon and adapting to our changing climate). It is equally important to have a clear mission for your organisation. This will say what you are going to do, who will benefit and how you will do it. This should be captured in a short, punchy statement that your funders will understand and enable them to see instantly what you are all about.

To put together your mission statement you should answer three questions:

- What function will the organisation perform?
- For whom does the organisation perform the function?
- How will the organisation go about performing the function?

Your mission statement is best put together through discussion in your Steering Group at a short session. You should only need an hour (an hour and a half at the most). More detailed guidance on how to run your session can be found in Section 6.1 of the Resourcebook - planning for your community (see Guidance, Skills and Contacts).



Challenge 3: Preparing your project plan

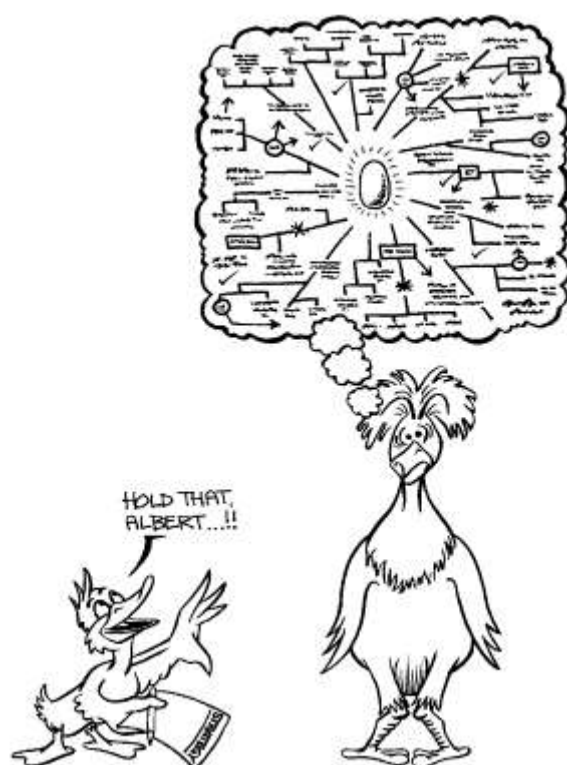
This is a working document that will be put together by those closest to the project, with the best understanding of what is involved. It will be used to help others in the organisation understand all that is involved, and to prepare the work ahead. See which volunteers (and staff if you are lucky enough to have them) are best placed to take on the initial work. They can draft in others as required. Your project plan will set out:

- A step-by-step approach from initial research through to cutting the ribbon.
- What research and survey work you will need to undertake.
- What resources (e.g. people, money, equipment) you will need to make it happen.
- What you can do yourselves and what help you need from others.
- Highlight the risks and propose how these might be managed.

Challenge 4: Preparing your operational plan

Your project plan will throw up all sorts of challenges, tasks, opportunities and barriers to making things happen. Your operational plan will set out just how you are going to organise yourselves to take advantage of the opportunities and overcome the barriers.

Being entrepreneurial is demanding. It combines the skills of good community development with sound business sense. To own land and buildings, create a community energy project or develop a social enterprise you have to understand the weight of responsibility that comes with taking this on. To borrow money you will have to display sound business planning, cash flow analysis and an appreciation of the working of credit panels and grant committees. This will require a steep learning curve for your members and the Steering Group (or committee/board). Do not underestimate the challenge you face and the demands this places on those involved.



This is why a good operational plan is crucial. If your organisation is tackling more than one project then it becomes even more important to organise yourselves well for the work ahead. An operational plan is, once again, best put together as a group so everyone has a chance to input and understand how it develops. It is likely to take more than one session and may be something that you consider bringing in outside help to facilitate and guide the work. Talk to support organisations about which they would recommend to organise and run these sessions.

Your operational plan will set out:

- How you will structure your organisation (working groups, main board, lead individuals etc.) and how each bit of the structure relates to the other?

- What skills you require, whether you have these already and what ones you will need to bring in from outside?
- What policies you might need (e.g. procurement, declarations of interest etc)?
- What legal structure (or structures) best suits your needs?

Challenge 5: Preparing your business plan

Your business plan is the document that will pull all the information relating to your project together in the one place. The project plan and operational plan will feed into your business plan. A high quality, comprehensive business plan will mean that you will have all the information at your finger tips to complete funding applications, brief partners and show your community how well organised you are. A good business plan does not guarantee success but a bad one guarantee's failure!

There are a number of guides around for preparing a business plan (see Guidance, Skills and Contacts).

Guidance Skills and Contacts

What skills do you require?

- Project development skills to understand the work involved.
- Presentation skills to write your plan.
- Financial planning skills to prepare the commercial case.
- Organisational development skills to determine the best structure for your project.
- Market research skills to test the market place.
- Strategic thinking to identify long term (and short term) support partners.

Where can we find the help and information we require?

- There are numerous business planning guides available. We suggest you start with:
 - http://www.biglotteryfund.org.uk/pub_business_plan_guide.pdf
 - <http://www.cbs-network.org.uk/news/new-guide-to-social-enterprise-planning/>
 - http://www.forthsectordevelopment.org.uk/documents/New_BusPlanGuide.pdf
- To understand how community strategic plans, business plans and operational plans fit together see <http://www.jrf.org.uk/publications/resourcebook-planning-your-community>
- Ask Scottish Communities CAN network to put you in touch with similar projects that have been through the business planning process <http://www.scottishcommunitiescan.org.uk/contact-us/>.

Self Evaluation Checklist

	Comments	Check
Preparation		
Have you acknowledged as a group the importance of planning and preparation?		
Do you all understand the difference between a project, operational and business plan?		
Have you assessed your training needs and prepared a training plan to gain the skills you require?		
Planning		
Have you all started thinking about your roles and responsibilities?		
Have you run a session to define the mission of your organisation?		
Have you begun to prepare your project plan?		
Have you run a session on roles and responsibilities with the knowledge of your project plan?		
Have you prepared your operational plan?		
Have you prepared your business plan?		
Keeping the community informed		
Have you remembered to keep the community informed regularly while you are busy planning?		
Have you made your business plan (and others) available to the wider community?		

Section 5. Choosing the best funding options (and funders)

This section will set out the full range of funding options from straight grant to loan finance and community share issues. It will help you to select the most appropriate option(s) for your project and identify the best funders to provide the money you need.

The Principles

This is all about identifying the best funding options for your project. By identifying the right funding options you will be able to target the most appropriate funders to support your project.

The Practice

There will always be good, smaller scale funding sources for community projects. Anyone with basic fundraising skills will be able to trawl the Internet and match your project to funding pots. For enterprising projects there are also a wide range of social lenders and those promoting and supporting community share issues. There are excellent, regular e-bulletins from support organisations that will keep you up to date with the latest funding sources (see Guidance, Skills and Contacts below).

Grant funding is all about matching your project to the correct fund. Grant funders have very clear criteria and guidance. If you find yourself trying to fit a square peg in a round hole” they are unlikely to be the funder for you.

For enterprising projects, seeking loan funding (sometimes mixed with grant funding), you need funders who are open to risk. This is a very different process from finding the correct grant funder. You will need to have carried out a robust feasibility study and prepared a strong business plan to get through the ‘credit committees’ of lending organisations and institutions. Finding a lender is much more about finding the right partner; a partner that shares your vision, understands your project and understands the risks involved. You will need to be prepared to open a dialogue with such funders in addition to understanding their criteria. This will take face-to-face discussions, ‘selling’ your vision and the commercial sense of your project.

If the local community is your target funder through a community share issue you will need a different set of skills again. In addition to a project with wide community support (community pub, bakery, village shop), a strong business plan and a clear offer to the shareholders, you will need excellent communication skills to win over your community.

Most community organisations have access to good fundraising skills one way or another. You can be lucky enough to have these skills on your board or committee. You might have connections in your community who can help you out on particular projects. Some may even have project staff to put in the legwork. For some major, specialised projects you may want to engage a consultant fundraiser. There are specific funding programmes (for example Investing in Ideas from the Big Lottery) that will support such work.

The different funding options available for your projects include:

Grants	Grants are the most common way that the public and charitable sectors support community projects.
Loan Finance	Increasingly common as communities become more entrepreneurial and are seeking to own and control community assets. Loan finance is available from the public, private and charitable sectors.
Contracts and Service Agreements	Community organisations are increasingly competing to win service level agreements or contracts to deliver services on behalf of another body (frequently a Local Authority).
Community Share Issues	Enabling a wide group of investors to create the capital to purchase a community asset (from a bakery or pub to wind turbine).
Joint Ventures	Increasingly common as communities become more entrepreneurial and enter into mutually beneficial projects with private companies. Particularly common in the renewable energy sector.
Legacies	If your community organisation has credibility (and often charitable status) it may attract legacies from individuals to support their good work.
General fundraising and membership subscriptions	All the usual ways of raising small sums of money and, crucially, building community support and goodwill.
Crowd funding	This harnesses the power of the crowd to fund new ventures and projects usually through internet sites (see Google search).
Philanthropy	Accessing skills and finance from a philanthropic individual or organisation.

The different funding streams available for your projects include:

Public Bodies	Organisations like Highlands & Islands Enterprise, Scottish Natural Heritage, Health Boards.
Central Government	Government programmes like the Climate Challenge Fund.
Local Government	Local Authorities often have small grant funds and dedicated funding advisors.
European Union	Often regarded as more trouble than it is worth, you should note that Social Enterprise is becoming a specific priority from 2014.
National Lottery	A major source of funding.
Charitable Foundations	Again a major source of funding and general support.
Company Giving	Often aligned to particular project types

	either through grants programmes, sponsorship, secondments and in-kind giving.
Banking Sector	Especially ethical institutions sharing our vision of a low carbon future.

The Big Issue

There will be funding options and funders to suit your project. However, without vision and proving the need for your project you will not be successful. No matter what level or type of project you are fundraising for, being able to show the wider inspiration for that project is critical. The more ambitious the project – the more relevant this is. Coupled with this inspiration you also need to identify the need in your community that your project will address.



The Wicked Issues

- **Public sector programmes change:** remember that public sector funding programmes are particularly liable to change. Short-term thinking is a hazard of life in the public sector. Criteria can change and funds are subject to the level of demand at any given time. Decisions can reflect the notion of sharing funds around rather than longer-term support. It is extremely difficult to build a long term, strategic project on public sector funding. Be especially wary of revenue funding for staff. Building momentum behind a big project with the benefit of support staff can be seriously undermined if this funding is removed.
- **Funders take odd decisions:** always expect the unexpected. Sometimes the strongest funding applications can fail. Try and keep your options open with as wide a range of funding sources as possible for your more ambitious projects.
- **Outcomes, outputs – no dialogue:** distinguish carefully between the funders who have a very mechanistic, measured approach to grant giving and

those who have a more 'partnership building' style. Both have their place, just don't confuse the two and adapt your fundraising to suit.

- **Risk averse:** for enterprising projects be very wary of funding sources that require endless lists of outcomes, outputs and milestones. Be cautious with those who are reluctant to have face-to-face contact. Risk is part of being entrepreneurial!
- **Beyond their ken:** when raising community share capital remember that this type of funding is likely to be beyond the experience of most folk in your community. You will need good, clear powers of persuasion and explanation.

The Key Challenges

Challenge 1: Completing successful applications

No matter what type of funding you are seeking there are three basic ingredients to successful fundraising. Firstly, find the right funder (and funding scheme). Secondly, fill out the form correctly. Finally, provide all the information that is required.

There will always be some factors that you can't control as the applicant. Most funding sources are oversubscribed and you have no control over the quality of other applications competing for the same pot. However, to give you the best chance of success there are some things that you can do.

Understand what the fund is looking for. If you find yourself having to contort your project to fit the criteria it is unlikely that your project will secure funding. Even more basic, make sure that your organisation and project are actually eligible for the fund. Check the guidance notes really carefully. You will soon get a feel for what a particular fund wants to support, e.g. innovative or tried and tested; job creating or job safeguarding; renovation or new build; charitable or income generating; revenue or capital.

Make sure your project objectives are clear and easily understood. Keep sight of what you are doing and why you are doing it. Show the need that your project meets, how it will deliver the desired results and how you will measure progress and know if it has succeeded.

Watch out for funding rules and specific guidelines. Understand what is eligible expenditure and what a fund regards as match funding and/or double funding. Some public and European funds cannot be used to match with each other. If you are considering public sector funding for an income generating project take advice on the dreaded 'State Aid' rules that restrict the level of public sector support that might offer a 'competitive advantage' to your project over another business.

Challenge 2: Choosing the right mix of funding and funders.

It is important to make sure you access the right type of funding for your project and, where appropriate, the right mix of different types of money.

Start by doing a simple assessment of each type of funding with your project. It may be obvious that this has to be a 100% grant funded project as the benefits are purely social, physical or environmental and it will not generate a capital receipt or revenue income. If it will generate revenue it may be appropriate to use a bank loan or have a

community share issue. If your project will enhance the value of land or buildings you may want to approach a charitable funder for an interest free loan to be commercially refinanced when you have done the work that increases its value.

You can then research the different funders that may back your project and offer the different types of funding that you have identified. Remember to check the likelihood of a funder being able to back your project by following the guidance in Challenge 1.

You should then have a simple matrix of likely funders and possible funding types suitable to your project. If it is a community owned turbine you might have a Big Lottery grant combined with a commercial bank loan and a community share issue. If it is a new 'Hot desking hub' to cut down transport emissions it might be a grant supported with a small loan serviced by letting space to employers wishing to promote locally based working. If it is an allotment it may be straight grant funding with the social, health and environmental benefits being return enough for everyone involved.

From here, test the relevance of each funding type in a bit more detail. Are your projections for the income generation really credible? Will the community pub or bakery (for example) really gain the support it would require for a community share issue? This will generate a target list of likely funders and the funding mix you want to secure. It will also help you prepare a convincing business plan or grant application.

It is a good idea to periodically review those funders (they sneakily tweak application forms etc.) so make sure the application form that you are using (and the guidance notes) are the most up-to-date versions. It is also a good idea to keep a funding tracker (of potential funders, who you have applied to, for how much, what the result was, any feedback etc.). This is useful for future reference particularly if funders will only fund one application from an individual organisation within any twelve-month period (or not at all if they have been successful with a previous bid).

Challenge 3: Encouraging local wealth and wider support

Remember, the best funder may be right under your nose in your local community.

You may be lucky enough to live in a community that might attract wealthy individuals and successful business people. If you have the confidence to take an enterprising approach to the future of your community they will recognise your entrepreneurial spirit and be more inclined to get involved with advice and possibly financial support. They might support a voluntary project (cinema club or music nights for example) and take an interest in some of your more ambitious projects. There are attractive tax relief schemes to encourage such investors and their advice and business acumen can be invaluable.

These individuals may be interested in getting others involved in your work. They might be willing to help you set up a local foundation linked to your organisation, to raise funds of all different types to support your work. Such local foundations are increasingly being established when a community has an income generating project (e.g. wind turbine) and needs a mechanism to distribute these funds in your community.

Local wealth can come in a different form through wider community share issues (see Section 6). In Dunbar, there has been a successful community share issue to support a local bakery (see <http://thebakerydunbar.org/how-to-invest/give-a-share/>). Projects like this are springing up all over the country.

Challenge 4: Measuring social benefit

This is increasingly important as both grant and loan funding partners look to measure the social benefits of projects. Charitable lenders who are open to loan funding may accept an element of social return in place of a proportion of financial return. The Scottish Government is particularly interested in measuring the Social Return on Investment (SROI). This is a tried and tested method by which an organisation can look at what it does, measure the difference that activity makes to people's lives, and tell a robust story about that difference. Forth Sector now run a specific website and support service for those organisations wishing to measure their social impact (see Guidance, Skills and Contacts below).

Guidance Skills and Contacts

What skills do you require?

- Administrative skills to organise events.
- Community development skills to involve people and organisations.
- Facilitation skills to run meetings and events.
- Business planning skills.
- Fundraising skills.
- Negotiation and mediation skills.
- Strategic thinking.

Where can we find the help and information we require?

- There are a number of regular bulletins that contain invaluable funding updates, news pieces and case studies. These include:
 - <http://www.localpeopleleading.co.uk>
 - <http://www.senscot.net/bulletins.php>
 - <http://www.dtascot.org.uk/content/learning/events/e-bulletin>
 - <http://www.ruraldirect.org.uk>
 - <http://www.scvo.org.uk/information/funding/>
 - http://www.senscot.net/docs/Contracts_SLAs_and_Grants.pdf
 - http://www.senscot.net/view_art.php?viewid=13268
 - <http://www.communityshares.org.uk>
 - <http://www.scvo.org.uk/information/funding-sources/company-giving>
- Most of the websites of support organisations listed in Section 9 will contain information on funding sources related to their area of work (energy, waste etc).
- For a basic starting point for advice on preparing a funding application see <http://www.grantnet.com/HelpfulReports/securingfunding.pdf>
- Funding e-bulletins – there are lots of Local Authority and regional e-bulletins that alert organisations about relevant funding streams for your area. It is worth contacting your local Community Learning and Development Officers to see if such lists exist in your area.

- For information and support on measuring the social impact of your project and organisation, Forth Sector have helped to set up a support service at Social Impact Scotland <http://www.socialimpactscotland.org.uk>

Self Evaluation Checklist

	Comments	Check
Preparation		
Do you understand the different funding options (loan, grant, community share etc) that are available to your project?		
Do you understand the different funding streams that are available for your project?		
Are you comfortable that your vision is clear enough?		
Choosing the right mix of funding options (and funders)		
Do you understand the full range of funding options available to your project(s)?		
Have you prepared a simple matrix of likely funders and possible funding types for your project(s)?		
Have you generated a target list of funders?		
Completing your funding applications		
Have you got all the relevant information from each funder you wish to approach?		
Are you completely confident that you understand the rules and guidance of each funder you are going to approach?		
Have you approached any support organisations for help and advice?		
Have you completed your funding applications?		
Capturing local wealth		
Have you considered the idea of a local share issue for your project?		
Have you approached any support organisations for help and advice?		
Measuring Social Benefit		
Have you considered measuring the social benefit of your project?		
Have you put a system in place to do this?		

Section 6. Working with your funders

Crucial to the success of your project is your working relationship with your funder(s). This section will help you to understand the different range and types of relationships different funding organisations require.

The Principles

Building relationships with your funders is critical to the success of your project. Good working partnerships with your funders can help you build leadership, vision and direction for your organisation and project. Your funders will share your vision and they can help share in the responsibilities of making things happen. Look for like-minded funders and spend time cultivating good relationships, just as you do with politicians, your local authority, your community and the organisations you work with.

The Practice

Building relationships helps you to understand the requirements and priorities of your funding partners.

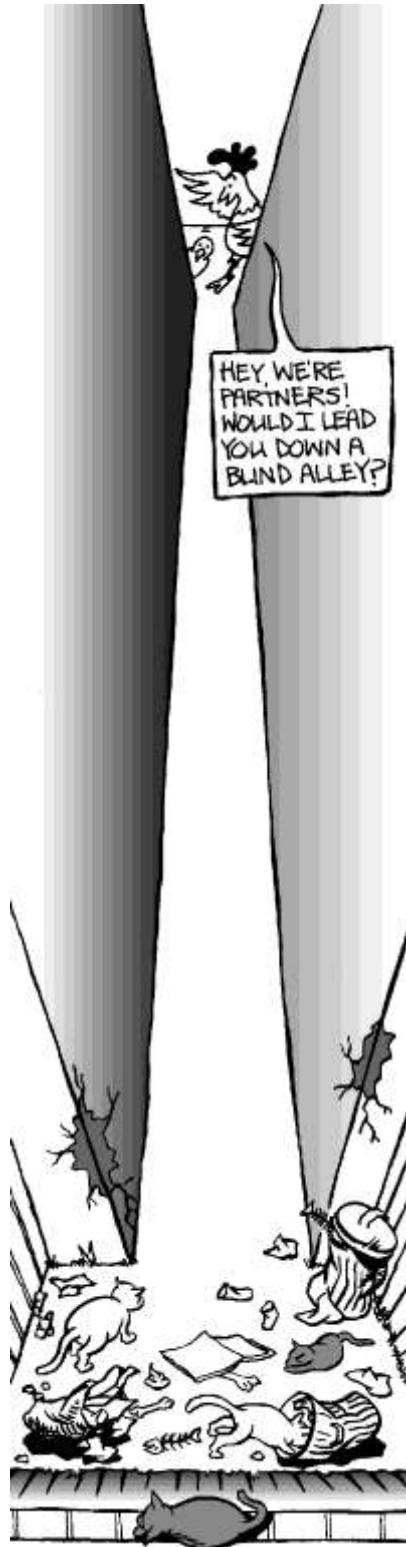
These relationships will be very different in their nature. Some funders will only offer limited communication other than their websites, keeping themselves at arms length from the communities they support. The larger funders will have sophisticated systems and processes dominated by outcomes and outputs. They may offer guidance on how to meet their criteria but will be less comfortable helping to develop a project idea. Others will be very open to face-to-face discussions and exploring the potential of projects together before working up a funding application. Some will be risk averse while others will promote innovation and revel in new, challenging projects. Some will prefer high quality written summaries of your projects, others will want to visit and see for themselves.

You should respect the way a funder has chosen to operate (they will have good reason for this) no matter how frustrating this may be. It is a good idea to develop a funding strategy that suits the funders you have identified for your project. Tailor your communication and relationships to the requirements of different funders.

Your board (or committee/ Steering Group) should develop the funding strategy and maintain an overview and understanding of progress as you move forward. It is highly likely that key individuals in your organisation will lead the actual relationships with funders. These will be the people who are driving the particular project and/or have the skills and personality to build these important relationships.

The Big Issue

Successful working relationships are built on confidence and momentum. Your funders will want to be associated with a project that knows where it is going, why it is going there and is building up a 'head of steam' to get there. Confidence rubs off on your funders. Promote your vision; explain your project; show how you have organised to achieve things; and explain how your community is getting behind your project.



The Wicked Issues

- **Changing personalities:** it is the ways of life that people move jobs and roles change. This can be particularly challenging when your contact is a senior person within the funding organisation. With more junior 'advisory staff' it can be frustrating to have to retrace old ground to bring them up to speed with your project and vision. You can minimise the risk of disruption by not relying too much on any individual, no matter how tempting. Keep your eye on your broader strategy for all funders and ensure your reporting and updates are distributed as widely as possible across your funders and within each funding organisation.

- **Changing rules and regulations:** be prepared for constant changing of rules and 'shifting goal posts'. Just as personalities change, so do rules. Funding schemes constantly reinvent themselves and change as trustees review their priorities and governments change their policies. Good personal relationships within funders can give you early warning of changes. As with changing personalities, keeping your eye on the broader strategy is the key.

- **Politics vs. Strategic Thinking:** funders take unexpected decisions all the time. Even after several decades of experience that shows that community projects need sustained and strategic backing, public sector schemes are guilty of withdrawing support just as a project is getting going. Often it's because they perceive that you have 'had your turn' or they are worried that they will be setting a precedent for others. Expect the unexpected at all times. Having good relationships on the inside of such funding schemes and with local politicians can give you some advance warning.

The Key Challenges

Challenge 1: Understanding your funders

Think carefully about who are going to be your 'ambassadors', approaching funders and representing your project. Match the skills within your organisation with particular relationships. There are seven broad categories of funder to build relationships with:

- **The focussed funder:** smaller charities or public sector grant funds with very specific rules, criteria and timeframes. Relationships with these funders are likely to be at arms length, conducted through the stated application process.
- **The strategic funder:** larger organisations that are really aiming to make a difference with the projects they support. The Big Lottery would be an example of this category. Relationships here are likely to be about ensuring you understand and can navigate the precise and demanding rules, guidance, outcomes and outputs. Establish direct contact with 'a case officer' and tap them for as much information and help as possible.
- **The government funder:** national (and European) funding schemes operating at all levels (from small projects to major infrastructure). Here relationships will be mainly with civil servants managing the schemes. Such schemes tend to have dedicated 'development officers' to help you prepare successful funding applications and provide general advice. Establish direct contact with this person.
- **The local funder:** local funding schemes through your Local Authority, CVS and charities will be small scale in the current climate. However, relationships here are very important. In addition to access to small pots of funding, developing a good relationship across departments in your Local Authority and with other local organisations can really help build confidence and momentum. Finding the right person within big organisations like Local Authorities can open lots of doors for you and be helpful in removing any barriers you come across. Networking is the key to identifying these individuals.
- **The risk funder:** loan and investment organisations operating within the public, private and charitable sector. Relationships in this category are absolutely critical. If you want to attract investment capital of any description you will have to build trust and respect between your organisation and your funder.
- **The innovative funder:** these are unusual and few and far between – but they are out there. These tend to be in the charitable sector and will be prepared to try new things, push the boundaries and are not afraid to fail if the prize is worth having. Ask your colleagues in community organisations in your chosen sector (food, energy etc) to help identify these funders.
- **The community funder:** on your doorstep, this is all about tapping into the wealth of your community. Acknowledging that some communities will find this easier than others, community share issues can happen anywhere. Your relationship with this funder, i.e. your community, is probably the most important of all to the success and credibility of your work.

Challenge 2: Communicating with your funders

Once again, draw inspiration and guidance from other community groups who will have experience of working with the same funders that you hope to attract to your

project. Be prepared to be very flexible in the ways that you build your relationships with these funders. This will include:

- **High quality applications:** being able to follow all the guidelines of a funding scheme and to 'sell' your project in writing. This is a given for all funders and particularly those who do not encourage face-to-face contact.
- **Site visits:** inviting potential funders on site, to see the project and meet the people behind your work is an excellent way to engage willing funders and to build strong working relationships.
- **Presentations:** having high quality, well-presented business plans for your project will help to build confidence and momentum. Simple, short, vox pop type film clips can be very effective to convey the enthusiasm behind your project.
- **Regular updates:** reporting on progress is critical at all stages of your project. A simple telephone call or email update on progress, as small milestones are achieved give funders a sense of what is going on with your work. When you have secured funding, regular monitoring and evaluation will be a requirement of your funding award.
- **Funding days:** for larger projects organising a specific day where you can invite a broad range of funders to your community can be a really effective way to build support. Not only do you meet individual funders but also you give them a chance to meet each other and get a sense that they are not in this alone. (See 'Inspiration' from Comrie Development Trust at the start of this section).
- **Early warnings:** funders hate surprises. Share difficulties you are facing with your projects. Most funders will be supportive in overcoming the obstacles your project will inevitably face. Don't wait until a problem becomes a crisis!



Challenge 3: You and your bank

The foundation of any successful organisation is a sound financial footing and a good relationship with your bank. If you are taking an enterprising approach then your

choice of banking partner is crucial. There are an increasing number of banks and financial institutions that work with social enterprises.

There are a number of ingredients you should be looking for in choosing your bank. It is important that they share your aims and principles. They must have a good range of products to match your saving and current account needs. They must be able to compete for your business in investment capital and loans to help you develop your projects. Crucially they must be accessible and interested in your work. If you cannot have a direct and open conversation with a senior member of the bank, think carefully about their suitability as a partner.

Guidance Skills and Contacts

What skills do you require?

- Research skills to understand how your funders work.
- Negotiation and mediation skills to work with your funders.
- Presentation skills to build an understanding of your project with your funders.
- Communication skills to keep them regularly updated on progress.
- Administration and planning skills to ensure you meet reporting deadlines.

Where can we find the help and information we require?

- An excellent resource on building relationships with your funders can be found through the National Council for Voluntary Organisations (NCVO) <http://www.fundingcentral.org.uk/page.aspx?sp=6300>. This excellent website is for English Organisations but provides great guidance and tips that you will find useful.
- Ask Scottish Communities CAN network to put you in touch with similar projects to discuss different approaches to building relationships with your funders <http://www.scottishcommunitiescan.org.uk/contact-us/>.

Self Evaluation Checklist

	Comments	Check
Preparation		
Do you understand the different characteristics of funders?		
Have you prepared a funding strategy to help guide your fundraising?		
Communicating with your funders		
Do you understand all the different ways you can build a relationship with your funders?		
Have you decided which ways are appropriate for the funders you want to target?		
You and your bank		
Have you chosen your bank to match your requirements and the values of your organisation?		

Section 7. Choosing the right legal structure

Depending on the project and funding option(s) that are right for you, this section will help you to assess and choose the best structure for your project and organisation going forward.

The Principles

This is all about selecting the right tools for the job. If you want to do a single project then one legal structure might do. If you want to deliver a number of projects you may need to create a family of legal structures. You may want the parent structure to be an open, democratic organisation like a Development Trust. You may want the parent to own a trading subsidiary to concentrate on the delivery of a commercial (or group of commercial) projects.

It is important that those who are managing your organisation are deeply involved in this process. They must understand the options and agree on the way.



The Practice

Choosing the legal structure for your project and organisation is a serious business and it is advisable to seek advice from an experienced regeneration practitioner and solicitor. There are helpful organisations and publications to guide you (see Guidance Skills and Contacts).

Having agreed your roles and responsibilities, set the mission for your organisation and begin your project and operational planning, you will be in a good position to choose the right legal structure for the work ahead. In doing so you need to ensure that your chosen structure:

- Reflects the principles and values of your organisation.
- Allows you to actually do what you want the organisation to do.

- Enables you to appoint staff and enter contracts. Protects the members and board members of the organisation if your project goes 'pear shaped'.
- Enables you to build the partnerships that you want.
- Allows you to raise the funds you will require from the different funders you have identified.

The Big Issue

Your chosen legal structure is a decision you make for the long haul. Projects take time and while you may choose a different legal structure to manage the project when it is up and running, your starting structure should be chosen because it best fits the work ahead. Remember this structure has to do what you want, when you want it to while offering you, as a volunteer, the best protection should things go wrong.

The Wicked Issues

- **Adapting someone else's constitution:** learning from the experience of others is to be encouraged. Simply taking their constitution and amending the name of the organisation will not help you. It may seem like a quick solution but it will come unstuck very quickly. You will miss out on the important process of thinking through the best structure for your organisation and all the benefits this will bring. It will mean that those involved in the organisation will have a very poor understanding of what their roles and responsibilities are. This is particularly alarming where company law governs your constitution and large sums of money are involved.
- **No training for the Steering Group (committee/board):** once again this is particularly alarming if company and/or charitable law governs your constitution. There is no substitute for being well briefed and informed, especially if you are taking on financial commitments.
- **Not taking outside advice:** this really is an area where you need to seek help from either an experienced regeneration practitioner who is used to setting up enterprising structures or a solicitor working in the Third Sector.
- **Ignoring the rules of your chosen structure:** once you have chosen the most appropriate legal structure make sure you familiarise yourself with your responsibilities under this structure. Company and charity law is serious stuff and you can be held personally (and collectively) liable if you don't take this seriously. Having said this, responsibilities are not onerous.

The Key Challenges

Challenge 1: Understanding the options.

By now you will have agreed the roles and responsibilities, agreed your mission, undertaken your project planning and started your operational planning. With this information in hand you should consider the following legal structures to assess which one(s) might be appropriate for your project. Remember to seek outside advice and support before making a final decision and to help you put the structure in place.

In no particular order, structures to consider include:

1. Voluntary Association (unincorporated association or partnership)

- **Description:** This has no legal status or recognition. Organisations and/or individuals agree to work together for a common purpose. A simple constitution or memorandum is often drawn up.
- **Pros:** There are no set up costs and no requirement to submit an annual return. There are no statutory procedures to follow apart from those set out in the constitution for the AGM etc. It is much less intimidating for those considering becoming a member or standing for election to the committee.
- **Cons:** It may seem less professional in the eyes of potential funders. It is not recognised in law as having a legal existence separate to the individuals involved. This means that any contracts or undertakings have to be entered into by the office bearers.
- There is a significant risk to the members of the committee that they could be personally liable for any debts and liabilities. Cannot employ staff so must rely on a partner organisation to do this for them. It is often not viewed as 'an accountable body' by public agencies so must rely on a partner to receive funds on their behalf.
- **Overview:** Good structure for smaller, uncomplicated projects that is more about voluntary effort than an enterprising approach.

2. Company Limited by Guarantee

- **Description:** Established as a legal company registered at Companies House and governed by company law. The company has a Memorandum and Articles of Association and is established on a 'not for private profit basis'.
- **Pros:** Limited liability (usually £1) for members of the company. Company is a clear legal entity separate from the people involved in it. It can employ staff and enter contracts to buy land or buildings in its own name.
- **Cons:** There are formal registration and ongoing procedures (e.g. filing annual returns, notifications of changes to Directors etc.). There are various statutory requirements in company law regarding running meetings and making decisions. Directors are likely to require training to equip them for their roles and responsibilities in the company. A company structure is more intimidating for those considering becoming involved or putting themselves forward as a director. Setting up and running costs are higher than for a voluntary association.

- **Overview:** A popular structure for Development Trusts across Scotland in recent years (and many also apply for charitable status).

3. Charitable Status

- **Description:** If all the objectives of the organisation are charitable they can apply to become a charity. Companies and other kinds of organisation can apply for charitable status.
- **Pros:** Charities are recognised as having both credibility and status and have good fundraising potential. Certain activities are exempt from tax (particularly useful if you own land or buildings).
- **Cons:** They limit what you can actually do, to activities that are charitable by definition.
- **Overview:** Charities are good structures for worthy, community projects that will be funded predominantly from grants and local fundraising.

4. Scottish Charitable Incorporated Organisation (SCIO)

- **Description:** This new (as of April 2011) legal form is designed to mimic all the characteristics and flexibility of the charitable guarantee company structure (including the ability to have wholly owned trading subsidiaries to run commercial projects).
- **Pros:** All the pros of a charitable guarantee company structure but being regulated solely by OSCR, offering streamlined reporting requirements and associated costs.
- **Cons:** All the cons of a charitable guarantee company but with an additional con that it is not (at present) eligible to register an interest under the Community Right to Buy section of the Land Reform (Scotland) Act 2003.
- **Overview:** Likely to become the preferred structure for Development Trusts when (it is surely only a matter of time) it becomes eligible under the Community Right to Buy.

5. Community Interest Company

- **Description:** This is a type of company that could be either a company limited by guarantee or a company with shares. The name of a CIC always ends in Community Interest Company or CIC, rather than limited, so it is easily recognisable. This type of company was developed specifically for social enterprises and is intended to cover a situation where an organisation carries on trading activities, but is intended to operate for the benefit of the community.
- **Pros:** A CIC can employ staff and enter contracts to buy land or buildings in its own name. It has an 'asset lock' which means that if the CIC is wound up any surplus must be paid or transferred to a charity or another company with an 'asset lock'. A CIC is often non-profit distributing in terms of its memorandum and articles. If the intention, though, is that it should pay

dividends, then the dividends have to fall below the “dividend cap” as set by the Secretary of State - currently 5% over Bank of England base rate, with a further requirement that the aggregate dividends for any financial year must not exceed 35% of the profits for that year. Dividends paid to charities or to other CICs do not count for the purposes of the dividend cap.

- **Cons:** A CIC cannot have charitable status, even if its objects are charitable. If there is a prospect of charitable status then you may decide the benefits of this rule out this option. It has all the cons of a company limited by guarantee.
- **Overview:** If you want an organisation primarily geared to trading for the benefit of your community and you don't require charitable status then this option may be worth considering.

6. Community Benefit Society

- **Description:** These used to be called Industrial and Provident Societies and are similar to Co-operatives in how they work (another structure you might consider). The key difference between the two is that Community Benefit Societies are set up to benefit the community whereas Co-operatives Societies are set up to benefit their members. The body which currently regulates Community Benefit Societies is the Financial Services Authority (although this will change when it is abolished).
- **Pros:** The main advantage is the ability to undertake a share issue without the expense and complex regulatory framework of a public share issue. This allows you to raise share capital for a project. The current limit on any individual is currently £20,000 of withdrawable share capital. There are a number of model rules (this is the name of the governing document) that have been developed for community share issues relating to energy, food and housing projects (see Guidance, Skills and Contacts).
- **Cons:** If you are satisfied that you can fit in with the details of an established model rules then that is fine. If not registration is very expensive compared to company legislation. This structure will be less familiar (although this is changing) to some funders, accountants and other professionals. Changes to the 'rules' are time consuming and expensive.
- **Overview:** If you have a well-defined project that would suit a community share issue then this could be an option for you. They are increasingly being used for retail, pub, energy and food projects. Remember if you want to raise share capital for the benefit of a smaller group of members (rather than the wider community) a Co-operative Society may be an option.

7. Trading Subsidiary

- **Description:** For the purpose of this Route Map we are focussing on the definition of a trading subsidiary as a non-charitable trading company structured as a company with shares and wholly owned by the parent company.
- **Pros:** It allows trading activities which fall outwith the charities tax exemption and provides a separate 'compartment' from the point of view of exposure to risk (i.e. your commercial activities will not threaten the parent charity). It

allows a separate board to be built up, composed of people with the relevant skills and experience for the job to be done. It is a clear legal entity and provides limited liability up to the value of the shares that are held. In most cases shares will be fully paid up, so there will be no liability for members if the company goes into liquidation.

- **Cons:** Are the same as a company limited by guarantee plus the withdrawal of share capital can be difficult.
- **Overview:** Useful to undertake trading activities for charitable companies and providing a separate compartment to reduce risk.

8. Partnership Agreement/Joint Venture

- **Description:** A legally binding agreement between two or more parties can be for any purpose and can take numerous forms. Joint Ventures between communities and commercial companies are increasingly common around energy projects). Most Joint Ventures like these are now established as Limited Liability Partnerships.
- **Pros:** Sets out a clear Partnership Agreement between a social enterprise/community organisation and their commercial (or public sector) partners in relation to a certain project. They are very flexible and enable the social enterprise/community organisation to be within the same company structure as their commercial (or public sector) partner with all the safeguards this brings.
- **Cons:** This is essentially a 'for profit' structure.
- **Overview:** May be appropriate for particular projects (renewable energy being the most common) where the community wants a partnership agreement with, most likely, a commercial operator.

Health warning! The descriptions given above are a starting point to help your understanding of the different legal structures you might want to consider. This really is an area that you should seek outside help from an experienced regeneration practitioner and/or a solicitor working with third sector organisations (see Guidance, Skills and Contacts).

Challenge 2: Choosing the right structure

You should now be able to narrow down the options that apply to your situation by matching your project requirements with the different legal structures. If you are looking to set up a Development Trust then you might want to set up a SCIO. If you also have a main 'commercial' project you might look to set up a wholly owned trading subsidiary to lead that project. If you want to raise share capital for a community energy project you may choose to set up a Community Benefit Society and so on.

Once you have narrowed down your options make sure you talk this through with the most appropriate support organisation and then engage professional support to help you constitute your chosen structure.

Guidance Skills and Contacts

What skills do you require?

- Research skills to identify and advance potential organisational structures.
- Presentation skills to explain these structures to your community and the volunteers involved in your project.
- Analytical and decision making skills to decide on the most appropriate structure.
- Good judgement to know when to seek advice from solicitors with expertise in this area.

Where can we find the help and information we require?

- The Development Trusts Association Scotland has a 'Start-up toolkit' on organisational structures including establishing trading subsidiaries <http://www.dtascot.org.uk/content/publications>.
- For Community Share Issues see http://www.uk.coop/sites/storage/public/downloads/practitioners-guide_0.pdf & <http://www.wessexca.co.uk>
- Ask Scottish Communities CAN network to put you in touch with similar projects to discuss different approaches to building relationships with your funders <http://www.scottishcommunitiescan.org.uk/contact-us/>.

Self Evaluation Checklist

	Comments	Check
Preparation		
Have you realised the importance of taking external advice on choosing a legal structure?		
Have you agreed your roles and responsibilities; set the mission for your organisation; and begun your project and operational planning; you will be in a good position to choose the right legal structure for the work ahead?		
Have you spoken to other communities to get their advice and experience?		
Choosing your legal structure		
Do you understand the different options available to you?		
Have you narrowed down the options for your situation?		
Have you spoken with the most appropriate support organisations and found other community groups who have used these structures?		
Have you engaged experienced, professional support to help you set up the agreed structure?		
Informing the community		
Have you consulted your community about your chosen structure so they know what is going on?		

Section 8. Managing your project and asset

Ensuring the long term success and viability of your project is critical. This section helps you to ensure long term financial as well as social and environmental sustainability. It also sets out the challenges of managing income from community assets.

The Principles

This Route Map encourages community organisations to diversify their sources of funding and move towards greater financial, as well as environmental resilience. Scottish Communities CAN wishes to encourage you to aim high and bring meaningful change in your community. Raising funding is only one part of the journey. When you have delivered your project you will have to continue to manage it to ensure long-term success. If your project is an asset that will generate a capital receipt or revenue income you will be faced with the problem (albeit it a good problem) of managing and utilising these funds for the benefit of your community.

The Practice

Whatever your project is you will have to manage it in a businesslike manner while retaining all the qualities of a community based approach. This is a huge challenge. If you own land or buildings, or take on a loan to develop a social enterprise or energy project, you will need all the business skills required of a commercial venture. You will, however, have the additional responsibility of keeping your community and membership closely involved and informed. Strategic decisions may require membership support before you can proceed. Entrepreneurs are renowned for being focused, driven individuals. You have to bring the same qualities to create an entrepreneurial organisation that understands when to delegate management decisions and when to seek strategic support.

Your board of management will have developed to reflect the skills and experience required when taking on complicated and financially demanding projects. A training programme to help volunteers acquire these skills will have helped you reach this point as your project becomes more complicated and demanding.



The Big Issue

Community capacity is the biggest issue in managing your project and community asset. It will have taken time (and usually years not months) to get to a point where community assets are up and running. This will have taken its toll on the volunteers who will have driven the project until this point. Addressing this is the single greatest challenge your organisation is likely to face.

The Wicked Issues

- **Business vs. community:** this is a constant tension in community-based enterprises. Community projects rely on the support and involvement of local people to succeed. This democratic structure can, however, be cumbersome when you need to make fast moving decisions. The key is delegating powers with agreed limits and ensuring your wider membership and community understands what they are. Be transparent at all times!
- **No development funding:** it can (and usually does) take a number of years to finally make a community asset project happen. Just when you need revenue funding for staff to support the volunteers you may well be at the end of a 3-year cycle of funding. Showing how (and when) you will become financially sustainable will help attract continued funding. Following the advice in Section 6, working with your funders, will increase your chance of securing ongoing funds.
- **Maintaining community support:** communities are fickle. Broad support is difficult to maintain over long periods of time. People lose interest and often don't appreciate the endless days of volunteering that it takes to make things happen. They may fail to recognise the complexities of projects and the sheer time things take to happen. Experience shows that when the project starts to deliver the community comes back onside.



The Key Challenges

Challenge 1: Organise yourselves to be businesslike

Usually the first Steering Group, committee or board will be a collection of motivated individuals who share in the idea of making a project (or vision) happen. Once this 'group' has settled and everyone has a good idea of the work ahead, it is a good idea to undertake a skills audit (see Guidance Skills and Contacts below) to help you identify strengths and weaknesses of the current group of volunteers. This records both the skills available and the skills required at any given time. Reviewing the skills audit on a regular basis will help you to identify gaps and target volunteers who might help you plug the gaps.

Further down the line, when your project is coming on stream and making greater demands on those involved, the skills audit will help you strengthen your organisation for the work ahead. It is also likely that some original members of your group will have moved on and you will need to attract 'new blood'. Again, the skills audit can really help you to identify new people with the right experience.

Your Operational Plan (see Section 4) will set out how you will organise yourselves to deliver each stage of your projects and develop a financially sustainable organisation. Depending on your project you may need:

- On the ground maintenance and support staff and/or volunteers (e.g. to cut the grass and provide caretaker and security for the land or buildings you have bought).
- Administrative and development staff/volunteers to run your project (e.g. for a hot-desking' office hub).
- A project management group to oversee the progress of the project and identify strategic issues for the future.
- An advisory group of local professionals to draw on experience and skills within your community on an "as and when' basis. This avoids asking volunteers for any long term commitment and encourages volunteering knowing they are not going to get 'roped into' a committee and regular meetings.
- Consultancy and contractor involvement in delivering your project and then managing and maintaining it to a high standard.
- A legacy group who will manage, reinvest and advise on the distribution of income and capital receipts earned by your projects.

It is never too early to plan for your work ahead, inevitably you will have to adapt and change, but early thinking will always pay off.

Challenge 2: Renewing your volunteers

Being a volunteer led organisation you will inevitably have a turnover of people willing to give up their valuable time, no matter how good your projects are. As long as you can keep a core of volunteers with a long enough collective memory of how projects have developed, such turnover can be a good thing.

You should always be open to new people and new projects. This is the lifeblood of any community organisation. You may find as you develop the projects that will become community assets sap energy and you lose a connection with the wider community simply because of the energy these projects require.

Make sure to reconnect with your community on a regular basis. Use your AGM to generate new ideas for projects and establish working groups to help develop the

thinking on these ideas. If you are lucky the next wave of volunteers will be 'brought on' by their enthusiasm for these new projects.



Challenge 3: Managing income for the long term

As communities become more entrepreneurial and assume control of community assets, they are learning to manage large incomes or capital receipts for the benefit of local people. This money may come from owning land and buildings; running social enterprises and developing community energy projects.

While creating an income stream is a positive step, it does create its own challenges. You may need to create separate legal structures (see Section 8) to manage the funds. Your community is unlikely to have experience in managing large sums of money. People may be fearful of the effect on voluntary activity across your community and exactly how the funds will be distributed and to whom.

Throughout this Route Map we have talked about the importance of an overall vision and the need to have an overall plan in place that will help you chart a course from where you are now to where you want to be.

Having such a 'community plan' in place becomes invaluable when income begins to flow from your hard work creating community assets. This plan will help you guide the allocation of money to support particular projects and groups. While it is early days the following guidelines are emerging unclear about this sentence:

- Local fund: allocating an annual sum to support local groups and projects. Maybe a new football strip for the local team or some equipment for the local playgroup. In one community a small grant is made each year to help support the local community centre that struggles to make ends meet while keeping rental charges low for local groups.

- Core costs: supporting the ongoing revenue of your organisation to achieve financial sustainability.
- Project costs: developing funding for the next wave of projects and community assets.
- Investment fund: making loans to support small business ventures in your community.

Generating an income does generate problems – but then isn't this a 'problem' that your community would like to have?

Guidance Skills and Contacts

What skills do you require?

- Organisational development skills to create an effective organisation to manage your project.
- Business and project management skills to ensure continued success.
- Financial planning and bookkeeping skills to keep the money in order.
- Strategic planning skills to anticipate and avoid pitfalls.
- Monitoring and evaluation skills to report on progress to funders and partners.

Where can we find the help and information we require?

- This is an area that you are highly likely to need to access training tailored to the needs of your project unless you are fortunate enough to have these skills among your volunteers. An excellent starting point is the Social Enterprise Academy <http://www.theacademy-ssea.org/programmes/enterprise>.
- For training courses directly related to your project theme (food, energy etc) please contact the organisations listed in Section 9.

Self Evaluation Checklist

	Comments	Check
Preparation		
Has everyone involved realised the importance of adopting a businesslike approach to managing your project and community asset?		
Have you undertaken a skills audit to identify any skills gaps in your current board?		
Have you put in place any training that volunteers feel is required?		
Management tools and tasks		
Have you reviewed your operational plan to identify all the management tasks you have to stay on top of?		
Have you appointed the staff, consultants and contractors your project(s) require?		
Have you set up the necessary project working groups?		
Have you tapped into local skills and experience through an 'advisory group'?		
Volunteers		
Have you reconnected recently with your community and looked for more volunteers to match the skills you need?		
Managing your income		
Are you planning ahead for the income that will start to flow from your community asset(s)?		
Are you putting in place the required training for volunteers to manage this income?		
Are you putting in place the appropriate legal structures to manage this income?		

Section 9. Sources of support, information and advice

This section lists all the sources of information, advice and guidance referred to in this Route Map.

General

- Development Trusts Association Scotland <http://www.dtascot.org.uk>
- Community Business Scotland Network <http://www.cbs-network.org.uk>
- Community Enterprise in Scotland <http://ceis.org.uk>
- Community Enterprise Ltd <http://communityenterprise.co.uk>
- Evaluation Support Scotland <http://www.evaluationsupportscotland.org.uk>
- Firstport <http://www.firstport.org.uk>
- Forth Sector <http://www.forthsector.org.uk>
- Local People Leading <http://www.localpeopleleading.co.uk>
- Just Enterprise <http://www.justenterprise.org/index.php?current=one>
- Keep Scotland Beautiful <http://ccf.keepsotlandbeautiful.org>
- Scottish Community Alliance <http://www.localpeopleleading.co.uk>
- SCVO / Rural Direct <http://www.scvo.org.uk/http://www.ruraldirect.org.uk>
- Senscot <http://www.senscot.net>
- Social Impact Scotland <http://www.socialimpactscotland.org.uk>
- Social Enterprise Academy <http://www.theacademy-ssea.org>
- Social Enterprise Scotland <http://www.socialenterprisescotland.org.uk>
- Social Firms Scotland <http://www.socialfirms.org.uk/home/home.asp>

Energy

- Community Energy Scotland <http://www.communityenergyscotland.org.uk>
- Energy Saving Trust Scotland <http://www.energysavingtrust.org.uk/scotland/>

Food

- Community Food and Health Scotland <http://www.communityfoodandhealth.org.uk/funding/funding-sources/>
- Nourish Scotland <http://www.nourishscotland.org.uk>
- Scottish Allotments and Gardens Society <http://www.sags.org.uk>
- Federation of City Farms and Community Gardens <http://www.farmgarden.org.uk/farms-gardens/your-region/scotland>

Land use & Woodland

- Development Trusts Association Scotland <http://www.dtascot.org.uk>
- Scottish Community Land Network <http://www.communityshares.org.uk>
- Community Woodlands Association <http://www.communitywoods.org>

Waste

- Community Resources Network Scotland <http://www.crnscotland.org.uk>
- Zero Waste Scotland <http://www.zerowastescotland.org.uk>

Community Engagement

- Development Trusts Association Scotland <http://www.dtascot.org.uk>
- Keep Scotland Beautiful <http://ccf.keepscotlandbeautiful.org>

Finance

- Community Shares: <http://www.communityshares.org.uk>

Peer-to-peer learning

- Comrie Development Trust, current CCF exemplar for income generating schemes: <http://comriedevelopmenttrust.org.uk>
- Fintry Development Trust <http://www.fintrydt.org.uk>
- Fife Diet <http://www.fifediet.co.uk>
- Moffat CAN <http://moffatcan.org>
- Low Carbon Communities <http://lowcarboncommunities.org>
- Scottish Communities CAN <http://www.scottishcommunitiescan.org.uk/our-members/>
- Sustaining Dunbar <http://sustainingdunbar.org>

Publications

- Start Up Toolkit: a comprehensive guide to legal structures.
<http://www.dtascot.org.uk/content/publications>
- Guide to Setting Up a Trading Subsidiary: a guide for development trusts that are registered charities and planning to become involved in trading activities that are non-charitable.
<http://www.dtascot.org.uk/content/publications>
- Cultivating Enterprise: a toolkit for starting enterprising development trusts and community organisations.
<http://www.dtascot.org.uk/content/publications>
- To Have and to Hold: guide to asset development for community and social enterprises. <http://www.dtascot.org.uk/content/publications>
- Better to Borrow: a booklet on how development trusts use loan finance to achieve community goals. <http://www.dtascot.org.uk/content/publications>
- Community Share and Bond issues: can a share or bond issue be straightforward and beneficial?
<http://www.dtascot.org.uk/content/publications>
- Resourcebook: encouraging communities to plan effectively for their future.
<http://www.alancaldwellassociates.co.uk/resources>

Current funding advice - Energy

- Community Energy Scotland funding advice.
<http://www.communityenergyscotland.org.uk/support>
- Community Energy Toolkit.
http://www.communityenergyscotland.org.uk/assets/0000/4278/Community_Renewable_Energy_Toolkit.pdf
- Community Benefit from Commercial Renewable Energy Development.
http://www.communityenergyscotland.org.uk/register/community_benefits
- CARES Case studies
http://www.communityenergyscotland.org.uk/projects/cares_case_studies
- CARES Loan Scheme
http://www.communityenergyscotland.org.uk/support/cares/cares_loan

Current funding advice – Community Funds

- Investing in your community: a guide to managing community funds.
http://www.communityenergyscotland.org.uk/publications_and_guides