

## Advice Sheets

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## STEP 2

## ESTABLISHING THE STEERING GROUP

**Purpose**

This step shows you how to set up a steering group that should be responsible for overseeing and coordinating your community's plan.

**What's involved**

Inviting people to get involved in a steering group, agreeing its purpose and deciding how it will operate.

**Useful resources**

**Resource Sheet 2/1 – Suggested steering group roles**

**Resource Sheet 2/2 – Model constitution for steering groups**

**Resource Sheet 2/3 – Example terms of reference for working groups**

**Local resources – contact your Rural Community Action Network (RCAN) member for details**

**Introduction**

Although a Community Led Plan belongs to everyone in your community, it will nevertheless need a group of dedicated individuals who can give up their time to make sure it stays on track and lives up to everyone's expectations.

This step shows you how you can set up a steering group that should be responsible for overseeing and coordinating your community's plan.

**What is a steering group?**

A steering group is essential for making sure that the Community Led Plan keeps going, even if interest begins to fade after the first event. Made up of people from your community, it should be responsible for leading your community through the process of producing a high quality plan following the remaining steps outlined in this toolkit.

Above all, the steering group needs to have a firm commitment to ensuring that the plan involves everyone in the community, especially those who might usually find it difficult to participate in community life. The steering group should also have a strong desire to see that actions actually occur, rather than obtaining the views of the community, producing a glossy document and then doing nothing.

**Who should be part of the steering group?**

Steering groups can vary in size, depending on the size of the community. However, many communities have found that between 8 and 15 people is about right.

The most important issue however, is that the steering group is representative of a cross-section of your community.

See the yellow box in:

**Resource Sheet 1/1 – Who might be interested in a Community Led Plan?**

You should also aim to include up to three local councillors on the steering group. As elected representatives of your community, they will be invaluable in linking your plan to the work of your parish or town council.

### **What kind of things can a steering group do?**

- Keep everyone in your community involved and informed at all stages of the plan
- Make links with organisations that can support your community's plan, most importantly your Rural Community Action Network (RCAN) member, parish/town council and local authority.

See also: **Information Sheet D – Community Led Planning and government policy**  
**Information Sheet E – Support for Community Led Planning**

- Develop a strategy, budget and programme for delivering the rest of the plan (Step 3)
- Coordinate community consultation (Step 4)
- Use evidence collected from the community consultation to prioritise and plan action (Step 5)
- Oversee the drafting and finalising of the plan (Steps 6 and 7)
- Work with partners identified in the action plan to:
  - coordinate the implementation of the actions specified in the plan (Step 8)
  - take responsibility for monitoring and reviewing progress (Step 9).

### **Setting up a steering group**

There is no single correct way of creating a steering group for your Community Led Plan. Essentially, you will need to decide what works best for your community. However, it is strongly advised that you consider the following:

#### **Holding an initial meeting**

Try to recruit people onto the steering group as soon as possible after your first open event whilst the plan is still fresh in everyone's mind. One of the easiest ways that you can do this is by inviting everyone that previously registered their interest in the plan to an initial meeting. Officers from your Rural Community Action Network (RCAN) member might be able to help you organise this.

#### **Agreeing the purpose of the steering group**

Make sure that everyone leaves your meeting knowing exactly what the steering group is responsible for and how it will communicate the plan's progress with the rest of the community.



## STEP 2

## ESTABLISHING THE STEERING GROUP

**Recruiting members and identifying key roles**

When agreeing who will be a part of the ongoing steering group, think carefully about whether initial volunteers are representative of a cross-section of the community.

Volunteers for your steering group may want to get involved in different ways. Think about the different roles that they could play.

See also: *Resource Sheet 2/1 – Steering group roles*

**Considering whether a constitution is necessary**

Many communities have found it necessary to adopt a written constitution for their steering group. This can help to clarify its purpose, reduces the risk of misunderstandings and also makes it easier to apply for funding.

See also: *Resource Sheet 2/2 – Model constitution for steering groups*

**Involving other people in working groups**

Not everyone who wants to get involved in the plan has to be on the steering group! You might decide that as the plan progresses it is necessary to set up separate working groups that can work on specific issues as they arise, such as designing and undertaking consultation activities and pursuing the implementation of actions specified in the plan etc.

See also: *Resource Sheet 2/3 – Example terms of reference for working groups*

**By the end of this stage, it is recommended that you have:**

- Formed a steering group that is representative of your community
- Agreed the purpose of the steering group
- Clearly defined how the steering group will operate.





STEP 2

SUGGESTED STEERING GROUP ROLES

*Use this for...*

Sharing the work between members of your steering group.

*See also...*

- Resource Sheet 1/3 – Volunteering hints and tips**
- Resource Sheet 2/2 – Model constitution for steering groups**

The work of a Community Led Plan steering group should be shared between all members. A useful way of making sure that this happens is to allocate specific roles to individuals, depending on their interests and availability.

Below are some suggested roles that you might feel are appropriate for members of your steering group. This is not an exhaustive list, nor is it meant to be prescriptive. Feel free to adapt according to your local circumstances.

Role	Whats involved	Things to consider
<b>Chairperson</b>	Making sure that the steering group functions properly, that there is full participation during meetings, all relevant matters are discussed and that decisions are reached.	<p>The role of the chairperson can be time consuming with work in between meetings and support for others on the steering group.</p> <p>Ideally, the chairperson should not be a parish councillor, so the Community Led Plan is seen to be owned by the community.</p>
<b>Secretary</b>	Supporting the chairperson by ensuring that meetings are effectively organised and minuted, providing administrative support where needed and communicating with other members of the steering group/working groups.	<p>The secretary should be prepared to spend some time arranging meetings and typing up minutes thereafter.</p> <p>Secretaries should view their role as an information and reference point for other members, making sure that everyone is aware of what's going on.</p>
<b>Treasurer</b>	Keeping an eye on the financial affairs of the Community Led Plan. This can involve, clarifying the financial implications of decisions to steering group members, keeping a record of accounts and drawing up a procedure for volunteers to claim back out of pocket expenses.	It is recommended that the treasurer is used to handling money and keeping accounts. Above all, they must be trusted by other members of the steering group.

Role	Whats involved	Things to consider
<b>Volunteer co-ordinator(s)</b>	Acting as the point of contact between the steering group, working groups (if used) and all other volunteers to make sure that everyone is aware of what is going on and what needs to be done.	<p>This role will suit individuals that are good communicators who enjoy motivating others.</p> <p>The time needed to work with volunteers over the course of the plan will vary, so it is important that this is identified at the stage of developing a project plan (Step 3).</p>
<b>Publicity co-ordinator</b>	Raising awareness of the Community Led Plan in as many ways as possible to attract interest and support for the process.	The publicity officer should be familiar with the local media and be able to present news of its progress in upbeat and interesting ways.
<b>Bridging co-ordinator</b>	Communicating with the parish/ town council, Rural Community Action Network (RCAN) member and appropriate local authorities at all stages of the plan to make the most of the support that they can offer.	This important role would be ideally suited to someone that is used to working with these organisations or would perhaps like to know more about them.



# MODEL CONSTITUTION FOR STEERING GROUPS

**Use this for...**

Drafting a constitution for your steering group.

**See also...**

**Resource Sheet 2/3 – Example terms of reference for working groups**

## Why use a constitution?

Many communities have found it necessary to adopt a written constitution for their steering group. This can help to clarify its purpose, reduces the risk of misunderstandings and also makes it easier to apply for funding.

## Suggested template

Below is a model constitution you can use, which can be adapted to meet local circumstances.

<b>1. Name</b>
A. The group’s name is [name of community] Community Led Plan Steering Group; hereafter referred to as the steering group.
<b>2. Purpose</b>
A. The purpose of the steering group is to oversee and coordinate the production of a Community Led Plan for [name of community]; working with members of the community, working groups, the parish/town council and local authorities to achieve this aim.
<b>3. Carrying out the purpose</b>
A. In order to carry out the purpose, the steering group will have the power to: <ul style="list-style-type: none"> <li>i. develop a strategy, budget and programme for delivering the Community Led Plan</li> <li>ii. coordinate community consultation activities</li> <li>iii. use evidence from the consultation to prioritise and plan future actions that will benefit the community</li> <li>iv. oversee the drafting and the finalising of the Community Led Plan</li> <li>v. work with partners identified in the action plan to:                 <ul style="list-style-type: none"> <li>a. coordinate the implementation of actions specified in the Community Led Plan</li> <li>b. take responsibility for monitoring and reviewing progress</li> </ul> </li> </ul>

#### 4. Membership

- A. The steering group will include between [X] and [X] members from the community to be elected by attendees at the first public meeting or co-opted thereafter.
- B. No more than 3 members will have a formal connection to the parish/town council.

#### 5. Responsible persons

- A. At the first meeting, the steering group will elect the following persons whose responsibilities will be defined in writing:
  - i. Chairperson
  - ii. Secretary
  - iii. Treasurer
  - iv. Publicity Officer
  - v. Volunteering Co-ordinator
  - vi. Community Co-ordinator

#### 6. Meetings

- A. The steering group shall meet every [X] months as a minimum.
- B. Members may act by majority decision. At least [X] members must be present at the meeting to be able to take decisions.
- C. Minutes shall be kept for every meeting.
- D. If members have a conflict of interest they must declare it and leave the meeting while this matter is being discussed or decided.
- E. Members may make additional rules to help run the steering group. These rules must not conflict with this constitution or the law.

#### 7. Finance\*

- A. Money and property must only be used for the purpose of the steering group's purposes.
- B. Members must keep accounts. Accounts can be seen by anybody on request.
- C. Members cannot receive any money or property from the steering group, except to refund reasonable out of pocket expenses.
- D. Money must be held in the steering group's bank account. All cheques must be signed by 2 members.

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MODEL CONSTITUTION FOR STEERING GROUPS

**8. Appointment of working groups**

- A. The steering group may appoint working groups to undertake any activities that contribute to its purpose.
- B. Working groups will be bound by the terms of reference set out to them by the steering group.
- C. Working groups do not have the power to authorise expenditure on behalf of the steering group.

**9. General**

- A. Changes to the constitution – can be made at meetings as specified in section 6 of this constitution.
- B. Winding up – any property or money remaining after payment of debts must be given to a registered charity.

**10. Setting up the steering group**

This constitution was adopted on [date] by the people whose signatures appear below. They are the first members of the steering group.

Signed	Print name

*\*You may wish to delete this section if you would like to nominate another organisation, such as your parish or town council, to manage the finances of your plan on your behalf.*



## EXAMPLE TERMS OF REFERENCE FOR WORKING GROUPS

### *Use this for...*

Writing terms of reference for working groups.

### *See also...*

***Resource Sheet 1/3 – Volunteering hints and tips***

***Resource Sheet 2/2 – Model constitution for steering groups***

### What is a working group?

Some communities decide to set up working groups which are responsible for helping the steering group to undertake specific activities as required.

Working groups can be set up to focus on any aspect of a Community Led Plan. For instance, if a group of people are interested in the history of the local area, they could form a working group to research this and provide information to the steering group for inclusion in the final document. Likewise, working groups might also be set up to engage with particular groups in the community or to investigate priority issues such as the need for better public transport.

Your community can set up working groups at any stage of the plan. Essentially, they are a great way of getting things done using an enthusiastic group of people that wouldn't otherwise get involved in the steering group.



### Terms of reference for working groups



Although working groups do not need a formal constitution, they will benefit from adopting terms of reference which clarify their purpose, set out what they hope to do and how they will do it.

On the next page is an example that you might like to base your terms of reference on.

# Alpha Beta Community Led Plan: Young Persons Working Group

## Terms of Reference

### Purpose

To engage with young people (under 18 years) in Alpha Beta to find out what they think about the local area and suggest actions that would be of benefit to them.

### Activities to be undertaken

- Making contact with young people under the age of 18 in Alpha Beta using a range of consultation techniques
- Evidencing the needs, ideas and aspirations of young people in Alpha Beta
- Presenting evidence of the young people in Alpha Beta to the steering group for consideration in the draft action plan.

### Requirements

- The working group will liaise with the steering group at all times
- The working group will meet at least every month to discuss progress
- The working group will demonstrate that they have engaged with a wide cross-section of young people living in Alpha Beta
- All financial expenditure in excess of £50 will be approved by the steering group. Receipted expenses for reimbursement must be passed to the steering group treasurer on a monthly basis with reasons for the expenditure clearly stated
- Evidence gathered should be presented to the steering group by 25 November 2010.

### Lead contact

- The lead contact for this working group will be:

Jo Bloggs, 01234 567891, joe.bloggs@clpmail.com