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Information Sheets

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The 9 step process

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Advice Sheet 5 – Prioritising and planning action
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Advice Sheet 7 – Finalising your plan

Step 8 — Implementing and monitoring your plan

Advice Sheet 8 – Implementing and monitoring your plan

Step 9 — Reviewing your plan

Advice Sheet 9 – Reviewing your plan

Topic Sheets

ACRE has produced a range of Topic Sheets that provide further guidance and information about particular topics you may wish to consider and address as part of your Community Led Plan.

These have been put together in partnership with organisations with expertise related to the topic. All Topic Sheets can be downloaded from the ACRE website: **http://www.acre.org.uk/our-work/community-led-planning/Resources/Community+Guidance**

INDEX

Information Sheets

INFORMATION SHEETS

INTRODUCTION

Use this for…

Familiarising yourself with the ACRE Community Led Planning Toolkit.

See also…

Information Sheet B – What is Community Led Planning?
Information Sheet C – How to produce a Community Led Plan
Information Sheet D – Community Led Planning and government policy
Information Sheet E – Support for Community Led Planning
Information Sheet F – Community Led Planning checklist

Introduction

Members of the Rural Community Action Network (RCAN) have supported communities across England to play an active role in determining the future of their local area for decades. Since the late 1970s they have developed and refined a process whereby people can come together, research local needs and expectations and put together a plan of action for improving their community. This process, referred to as Community Led Planning (CLP), has been undertaken by approximately 4,000 communities to date[1] and is recognised by government as a means by which people can take action and exercise influence over the issues that make a difference to their lives.

This toolkit, put together by Action with Communities in Rural England (ACRE) draws on the experience of RCAN members to provide communities with a simple to navigate, step-by-step guide to producing a high quality Community Led Plan. First written in 2006 by RCAN members in the South East region, the second edition has been radically updated to capture the most recent advances in recommended practice.

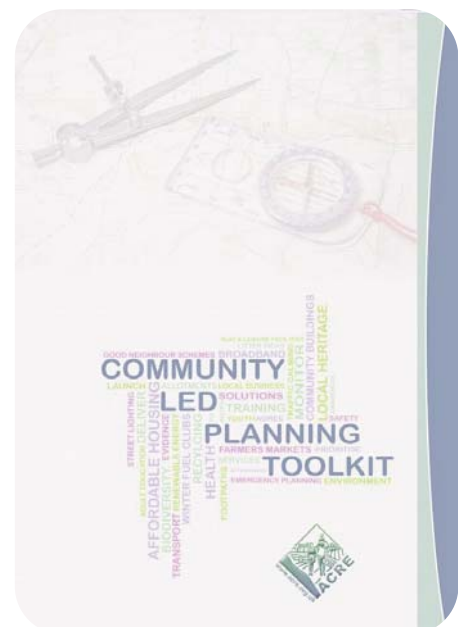There are three main sections to this toolkit:

Section One

Comprises *Information Sheets* that introduce Community Led Planning; explaining the steps required to undertake a plan, the support available to communities and the relevance of current government policy.

Section Two

Includes *Advice Sheets* that explain what communities should look to do at each step of a Community Led Plan and complimentary *Resource Sheets* which provide practical guidance about how to undertake specific tasks.

Section Three

Offers a suite of *Topic Sheets* that introduce specific topics (or issues) that can be addressed in any Community Led Plan.

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[1] ACRE (2008) Survey of Community Led Planning

The toolkit is best used by communities in conjunction with professional support offered by RCAN practitioners. RCAN practitioners are able to explain and elaborate on information contained in the toolkit and provide practical advice where needed. This might include, for example: help generating funding to produce a plan, guidance on the selection and use of appropriate consultation techniques and the brokerage of relationships with local authorities and service providers.

See also: *Information Sheet E – Support for Community Led Planning*

Complementary guidance for local authorities wishing to make the most of Community Led Planning is also available from the ACRE website. *'Making the most of Commmunity Led Planning: a best practice guide for Local Authorities'* can be downloaded here http://www.acre.org.uk/our-work/community-led-planning/Resources/Local+Authority+Guidance

WHAT IS COMMUNITY LED PLANNING?

Use this for…

Understanding what Community Led Planning is and what it can do for your community.

See also…

Information Sheet C - How to produce a Community Led Plan
Information Sheet D – Community Led Planning and government policy
Information Sheet E – Support for Community Led Planning
Information Sheet F – Community Led Planning checklist

Introduction

Community Led Planning (CLP) is a step-by-step process that can empower your community to take action and make your local area a better place. By following the guidance in this toolkit, different people should be able to come together, develop a shared understanding of the features and characteristics of your community and ultimately agree upon a range of actions that can be delivered for the benefit of everyone locally. CLP is also the perfect way to prepare your community to take advantage of new 'rights' announced by the Coalition Government, including Neighbourhood Planning.

If you choose to develop a Community Led Plan for your area, you will be following in the footsteps of over 4,000 other communities that have produced similar plans since the late 1970s. These plans have assumed different names over this period, including Village Appraisals, Parish Plans and Market Town Healthchecks but their defining principles and benefits for communities have remained the same. This Information Sheet provides a brief introduction to this unique approach to community empowerment.

Principles

There are three core principles that define CLP and distinguish it from other methods of community engagement. These are detailed below.

Plans are owned, managed and led by your community
You might be familiar with consultations typically undertaken by local authorities and other service providers whereby people in your community are asked for their views on largely pre-determined projects or programmes. CLP is different. It provides your community with the opportunity to set its own agenda and bring about positive change without the need to wait on others to get things done.

To make the most of CLP, your community must lead on the management and delivery of a plan, working closely with your parish and town council (where you have one). This will allow people in your community to develop a sense of ownership for the plan and take responsibility for making it work.

Everyone in your community should have an opportunity to get involved and have their say
CLP also relies on your community to involve different people, groups and organisations in the development of a plan. This will allow you to produce a high-quality plan that has the support of everyone locally and goes on to deliver actions that are based on a sound understanding of local needs and expectations.

To ensure that this happens, your community will need to attract interest in the plan's production, recruit volunteers to get things done, use a mix of consultation methods to speak to everyone locally and come to collective decisions about what actions should be pursued.

Actions are based on evidence and address a range of different issues important to your community
CLP can be used by your community to address a range of different social, economic, environmental and cultural issues. You could produce a plan to achieve anything you want (within reason!) from organising regular litter picks, buying a defibrillator for a community building, setting up a homework club, through to proposing the development of new housing.

The CLP process offers a structured process whereby your community can research and identify the most important local issues and use this evidence to develop a detailed plan of action for bringing about specific improvements.

Benefits

Where your community has produced a Community Led Plan that embraces the above principles, you will find that your community benefits in the following ways.

Your community will grow stronger and more cohesive
In our modern world, the way that we live and relate to those around us is changing. Our increasing mobility, the internet and new forms of consumption have radically altered the friendships, relationships and dependencies that we form with other people. In many ways, this has meant that we have become more distant from those around us; especially other people in our immediate neighbourhood.

CLP can help to renew local community spirit. If your community chooses to develop a plan, everyone in your local area will be able to get together, learn about each other and work towards common goals. This can be fun and incredibly rewarding. It will also make your local community stronger and more cohesive as people from all walks of life become more able and willing to help one another out, seeing the benefits of cooperation rather than isolation.

Your community will be become more resilient and better able to take action to meet its own needs
The places in which we live are also changing, largely as the result of broader transformations in the economy, the environment, our culture and the institutions that govern us. In recent years for example, the downturn in the global economy has seen steady disinvestment in some neighbourhoods which have witnessed a decline in business, jobs and public services. Climate change is also exposing some places to higher risk of natural hazards such as flooding. Depletion of the earth's natural resources is already starting to make it more expensive to travel between places and heat our homes.

Producing a Community Led Plan will allow your community to become more resilient to such changes by taking action to improve circumstances locally. Whilst you may not be able to alter the course of history with your plan, you can bring about a whole range of improvements that make life better for everyone in your local area. For example, in rural areas where small businesses are finding it hard going, you might be able to stimulate demand for the products or services that they offer by making your community more attractive to tourists. Where young people are finding it difficult to stay in your local area because of house prices, you may want to investigate the need for new affordable housing development. And if the rising cost of fuel is a concern you may want to look into bulk-buying heating oil or consider local renewable energy generation. Ultimately, the way that your community responds to change will depend on the enthusiasm, creativity and resourcefulness with which you approach your plan.

WHAT IS COMMUNITY LED PLANNING?

Your community will be better prepared to take advantage of new government policies and get its voice heard

The government has also introduced new 'rights' that your community can use to pursue projects and outcomes that you would like to see happen locally. This includes a right to plan new land use development, a right to express an interest in the delivery of services and a right to bid for the ownership and management of community buildings and facilities.

A Community Led Plan will allow your community to consider whether or not to take advantage of these new rights. In considering the needs and expectations of everyone locally, you may identify discrete actions (such as the need to build new affordable housing or the purchase of a community facility to stop its sale on the open market) which would benefit from statutory recognition. Your use of these rights is also more likely to be successful because you will have already secured the support and backing of your community and have a wealth of evidence to demonstrate the need for the action(s) you propose.

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

What's involved?

So, if you're interested in producing a Community Led Plan for your area, what do you need to do?

Over the years, members of the Rural Community Action Network (RCAN) have developed and refined a step-by-step process with achievable milestones to help communities prepare a Community Led Plan. This typically takes communities about 18 months to put together.
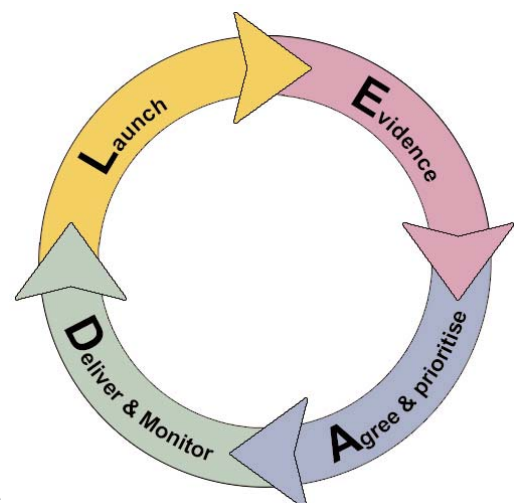
In recent years we have come to call the Community Led Planning (CLP) process 'LEAD'. This summarises the 4 key stages involved in undertaking any Community Led Plan:

Launching the plan

Evidencing local needs and aspirations

Agreeing and prioritising actions

Delivering and monitoring actions

In *Information Sheet C,* you will see what is expected of your community at each of these stages and what resources are available to you in the rest of this toolkit.

See also: *Information Sheet C – How to produce a Community Led Plan*

Your community need not work through these stages unaided. Members of the Rural Community Action Network (RCAN), parish and town councils and local authorities can all help you with the development and implementation of your plan in different ways. *Information Sheet E* sets out the support you can expect from these organisations.

See also: *Information Sheet E – Support for Community Led Planning*

HOW TO PRODUCE A COMMUNITY LED PLAN

Use this for…

Understanding what you need to do to produce a Community Led Plan.

See also…

Information Sheet B – What is Community Led Planning?
Information Sheet D – Community Led Planning and government policy
Information Sheet E – Support for Community Led Planning
Information Sheet F – Community Led Planning checklist
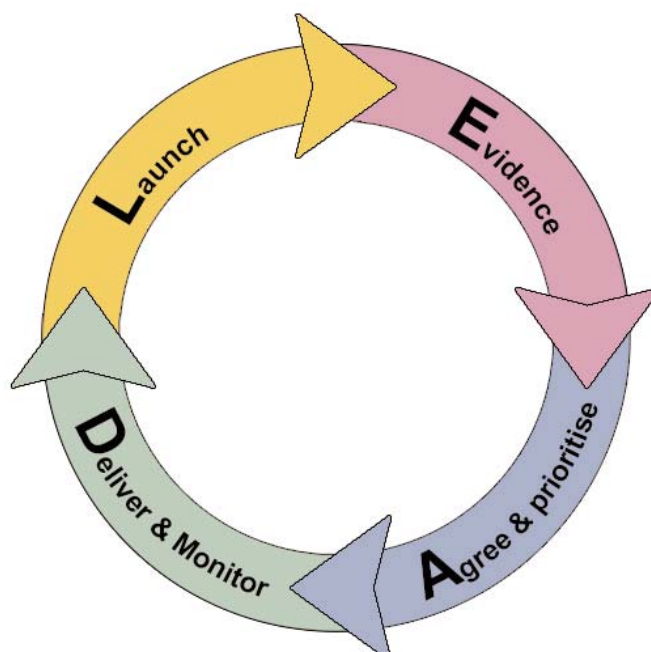
Introduction

Producing a Community Led Plan should be a rewarding and worthwhile experience. In putting together a plan you will discover new things about your local area, get to know other people better and bring about a number of tangible improvements for your community.

The guidance featured in this toolkit shows you how to put together a good quality Community Led Plan that will deliver many benefits for your community. It draws on the experience of the Rural Community Action Network (RCAN) members who have supported this unique approach to community empowerment since the late 1970s. This Information Sheet introduces the body of the toolkit, which outlines a step-by-step process that your community will need to negotiate should it wish to take on the challenge of producing a plan.

LEAD – a framework for Community Led Planning

There are four key stages involved in CLP which can be defined as 'LEAD'. LEAD is a simplification of the step-by-step guidance provided in this toolkit showing the lifecycle of any plan. On average it takes about 18 months to work through these stages to the point of delivering and monitoring actions.

The table below shows the individual steps that constitute each step of the LEAD framework. Your community will need to work through each of these in turn to produce your plan.

Stage	ACRE 9 step process
Launch the plan	Getting started
	Establishing the steering group
	Taking stock and planning ahead
Evidence local need and aspirations	Understanding your community
Agree and prioritise actions	Prioritising and planning action
	Drafting your plan
	Finalising your plan
Deliver and monitor actions	Implementing and monitoring actions
	Reviewing your plan

Launch the plan

The impetus for starting any Community Led Plan should come from within your community. It is recommended that you kick start the process with a launch event where people can find out what can be achieved with a plan, how it's put together and the work involved. Steps 1 – 3 of the toolkit show you how you can launch your plan, inspire people to get involved, set up a leadership structure for taking things forward and scope out the work ahead.

Evidence local needs and aspirations

Having launched your plan, you will need to develop an understanding of local needs and aspirations. Using Step 4 of this toolkit, you should be able to research existing facts and information to identify key issues, features or trends for your local area. This should lead to a discussion with the rest of your community about how they experience life locally; what they value in the present and what they think could be improved in the future.

Agree and prioritise actions

The next stage of your Community Led Plan is to make sense of the evidence you have collected and use this to plan and prioritise future action. Steps 5 – 7 show you how you can analyse this, discuss it with members of your community and begin to identify priority actions (or projects) that will improve your local area. This will need to be written up and presented to a range of different stakeholders for approval.

Deliver and monitor actions

Ultimately, your community will need to lead on the delivery and monitoring of actions proposed in your plan. These may be undertaken in isolation, or with the support of other organisations and service providers where needed. This shouldn't be a problem if you have taken time to prepare your plan along the lines advised in the previous stages. You may even choose to go on to completely or partially review your plan in a few years time to make sure your community has achieved everything and whether there are new actions that you wish to pursue. Again, Steps 8 and 9 show you how to do this.

COMMUNITY LED PLANNING AND GOVERNMENT POLICY

Understanding the relationship between Community Led Planning and current government policy.

See also…

Information Sheet B – What is a Community Led Plan?
Information Sheet C – How to produce a Community Led Plan
Information Sheet E – Support for Community Led Planning
Information Sheet F – Community Led Planning checklist

Introduction

Producing a Community Led Plan will allow your community to develop a range of different actions that address social, economic, cultural and environmental concerns. Many of these actions can be delivered by your community using volunteer effort alone. Others may need formal recognition or support from your local authority.

This Information Sheet shows you how you can make the most of current government policy to implement actions from your Community Led Plan that require formal recognition or support from your local authority. It looks specifically at a number of rights introduced as part of the Localism Act, 2011 that you can use to get things done and influence outcomes locally.

Localism and Community Led Planning

In 2011, the Coalition Government passed legislation called the Localism Act. This introduced a range of measures intended to reduce the power of the state and provide greater opportunities for local communities to determine their own future and do more to help themselves. Importantly, a number of community rights were introduced with the aim of allowing citizens to shape the future of their neighbourhoods; by proposing new development, taking over the delivery of local services, and bidding to take ownership of community buildings, assets and public land.

The government stopped short of formally endorsing Community Led Planning (CLP) as government policy. However, senior government officials, including the Minister for Decentralisation, recognise it as best practice for preparing communities to take action locally and use the rights introduced as part of the Localism Act.

Ultimately, a Community Led Plan remains one of the best approaches for bringing people in your community together, researching local needs and aspirations and agreeing upon a range of actions that will benefit everyone in your area. The Localism agenda provides new opportunities for making sure that actions in your plan get delivered where they require formal recognition or support from your local authority.

Making the most of the Localism rights
As you work through the process of producing a Community Led Plan using the guidance in this toolkit, you will begin to identify a number of different actions that could improve conditions for people locally. Many of these actions can probably be undertaken by your community using volunteer effort alone. For example, organising a litter pick, setting up a youth club or creating a community oil buying group.

For other actions requiring formal recognition or support from your local authority, you may decide that you wish to use one or more of the new rights, introduced as part of the Localism Act as outlined below.
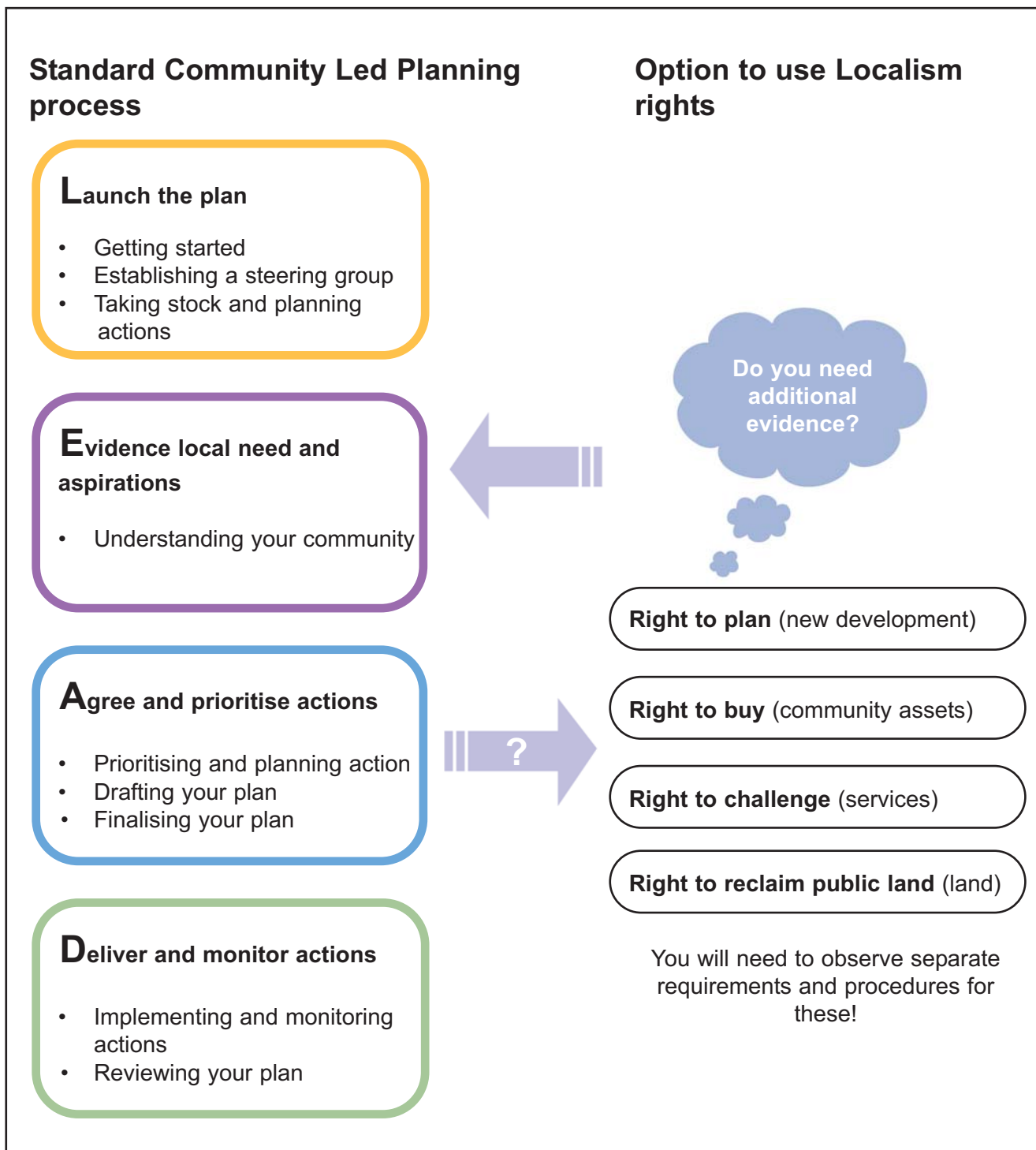
The Localism rights

Right to plan – *allows to you propose new development for your area*

Should your community identify the need to build more housing, business premises, shops or other land use development for your area you can prepare either a Neighbourhood Plan (NP) or Community Right to Build Order (CRtBO).

There are different requirements for producing either a NP or CRtBO. However, they can both be used to get outline planning approval for new development which is additional to that already specified in your local authority's area-wide planning strategy.

For more information see:
http://tinyurl.com/introneighbourplanning

Right to buy – *allows you to express an interest in acquiring property, such as buildings and land for the benefit of your community should they come up for sale*

Where your community is concerned about the loss of a village shop, pub or any other type of building or land used by your community, you can put it on a list of community assets maintained by your local authority. Should the asset come up for sale on the open market, your community will be contacted and given a limited period of time in which to put forward an offer to acquire it.

For more information see:
http://tinyurl.com/righttobuyconsultation

Localism rights

Right to challenge – *allows you to express an interest in taking over the running of a local authority service*

If you feel your community could take on the responsibility of delivering a public service (such as a library) in your area, you can lodge an expression of interest with your local authority which could trigger a procurement exercise. If the service goes to procurement, you can bid to run the service.

For more information see:
http://tinyurl.com/righttochallengeconsultation

Right to reclaim (public) land – *allows you to find out what land is publically owned and ensure that this is being used for beneficial purposes*

If you are concerned about under-used land in your area, then you can find out whether it is in public ownership. If it is, you can request it is sold so that it can be bought back into use.

For more information see:
http://tinyurl.com/righttoreclaim

COMMUNITY LED PLANNING AND GOVERNMENT POLICY

We believe that the Localism rights are best utilised as part of a Community Led Plan. By considering the broader needs and aspirations of your community, you will be better prepared to agree and prioritise a range of different actions that will be welcomed and supported by everyone locally. This is better than starting off with a pre-defined agenda where other people are expected to get behind your cause.

The diagram below shows you how you can incorporate any of the Localism rights into your Community Led Plan should this be desired.

How a Community Led Plan could lead to use of the Localism rights

Standard Community Led Planning process

Launch the plan

- Getting started
- Establishing a steering group
- Taking stock and planning actions

Evidence local need and aspirations

- Understanding your community

Agree and prioritise actions

- Prioritising and planning action
- Drafting your plan
- Finalising your plan

Deliver and monitor actions

- Implementing and monitoring actions
- Reviewing your plan

Option to use Localism rights

Do you need additional evidence?

?

Right to plan (new development)

Right to buy (community assets)

Right to challenge (services)

Right to reclaim public land (land)

You will need to observe separate requirements and procedures for these!

If you follow the process recommended above, it will allow you to evidence local needs and aspirations and get the rest of your community on side before using any of the Localism rights.

We recommend that you speak to your nearest Rural Community Action Network (RCAN) member if you think your community may want to use any of the Localism rights as part of a Community Led Plan. They will be able to explain the additional work that your community will need to undertake and signpost you to specialist advice where needed.

Remember, your Community Led Plan can still be very effective without having to rely on any of these new government policies. If you don't have an obvious need to use the Localism rights, then there's no need to put in extra work to pursue them!

SUPPORT FOR COMMUNITY LED PLANNING

Use this for…

Identifying who can help you to produce a Community Led Plan.

See also…

Information Sheet B – What is Community Led Planning?
Information Sheet C – How to produce a Community Led Plan
Information Sheet D – Community Led Planning and government policy
Information Sheet F – Community Led Planning checklist

Introduction

For your Community Led Plan to be effective, your community must lead on its development. Working together over a period of about 18 months, you will need to launch the plan, research local needs and aspirations, agree upon a range of different actions and ensure their delivery. This may sound like a lot of work, but help is at hand to make sure the efforts you put in are not wasted and result in tangible improvements for everyone locally.

This Information Sheet provides a summary of the organisations that can support your community to develop a high quality plan.

Rural Community Action Network (RCAN) members

RCAN members (also known as Rural Community Councils) are charitable local development agencies which support and enable community initiatives, mainly in rural areas.

RCAN members typically help communities to identify their own needs and work with them to develop projects that address a range of different social, economic, cultural and environmental issues.

There are 38 RCAN members that operate across England at a county level. To find your local RCAN member, and for more information visit the Action with Communities in Rural England (ACRE) website: **www.acre.org.uk/rcan**

Your first port of call, if thinking about producing a Community Led Plan should be your local RCAN member. With their experience of supporting Community Led Planning (CLP) since the late 1970s, they will be able to help you get started and provide impartial guidance and support throughout the process as outlined in this toolkit.

Support offered by RCAN members can include:

- Explaining the CLP process and providing up-to-date copies of the toolkit and other resources to get you started

- Putting you in touch with other CLP groups

- Helping you to launch your plan at a public event

- Advice on how to set up an appropriate leadership structure

- Assistance with grant applications and fundraising

- Showing you how to research local needs and aspirations, by considering existing facts and information and using a mix of different consultation methods to speak to everyone locally

- Helping you understand the information you have gathered about your community

- Brokering contact with local authority officers and other professionals who may be able to help you design and deliver specific actions

- Recommending ways to reach agreement on the actions your community wishes to pursue

- Providing you with copies of existing plans to help you write up your own

- Ongoing assistance with the delivery of actions, particularly where your community needs the support of external organisations, or has chosen to work with other CLP groups to get things done

- Helping you to monitor progress

- Reminding you when to review your plan and showing you how to do this.

Parish and town councils

Parish and town councils are statutory bodies – an elected tier of local government with a democratic mandate to represent and act on behalf of their residents. They are much smaller and more local than local authorities.

Parish and town councils have a limited budget available (called a parish precept) which they can use to promote the wellbeing of the community they represent. Typically, they devote funds to the improvement of local facilities such as community halls, recreation grounds, allotments, play areas and bus shelters.

Sometimes they fund local services via grants to community organisations, for instance, community transport or good neighbour schemes. Recent government legislation also means that parish and town councils can work with their community to devise neighbourhood plans to argue for land use development locally.

Many communities are represented by either a parish or town council, especially in rural areas. To find out whether there is a parish or town council near you, visit the National Association of Local Councils (NALC) website: **http://www.nalc.gov.uk/**

Ideally, your community should produce a Community Led Plan in close partnership with your parish or town council. Elected by your community and with a budget to spend for local benefit, they are in a good position to lend weight to your plan and mobilise resources to make things happen. Of course parish and town councils will also benefit from supporting your plan. It will allow them to improve their relationship with your community and become more responsive to meeting local needs and aspirations. Indeed, many parish and town councils go on to use the Community Led Plan as their business strategy for determining future work. Support offered by parish and town councils can include:

- Lending weight to your plan and increasing its status with external stakeholders

- Helping with the management and administration of your plan

- Contributing towards the costs of developing and implementing your plan, drawing on the parish precept where needed

- Ensuring that your Community Led Plan continues to be delivered and held up as the vision for your community after it has been finalised or in instances where volunteer effort has waned.

SUPPORT FOR COMMUNITY LED PLANNING

Local authorities

The majority of your community's services are managed by local authorities. Although they operate at a larger spatial scale from that of your parish or town council, they are still directed by elected representatives who make decisions about how local taxes should be spent.

There are different types of local authorities to be found across England, each with different functions as shown in the table below. You may be served by one of more of these.

Types of local authority and their functions

	Unitary councils	County councils	Metropolitan councils	District / borough councils
Education	•	•	•	
Housing	•		•	•
Planning applications	•		•	•
Strategic planning	•	•	•	
Transport planning	•	•	•	
Passenger transport	•	•		
Highways	•	•	•	
Fire	•	•		
Social services	•	•	•	
Libraries	•	•	•	
Leisure and recreation	•		•	•
Waste collection	•		•	•
Waste disposal	•	•		
Environmental health	•		•	•
Revenue collection	•		•	•

To find the local authorities that serve your community, visit the Directgov website:
http://www.direct.gov.uk/en/Dl1/Directories/Localcouncils/index.htm

INFORMATION SHEET E

You should seek to involve local authorities in your Community Led Plan from an early stage. Many local authorities actively support CLP as a means by which they can involve communities in local decision making, including planning policy, the design of services and the management of community assets (see Information Sheet D –Community Led Planning and government policy). If you work with local authority officers during the development of your plan, they may be able to help you design and implement specific actions. You may even end up changing some of their policies!

Support offered by local authorities can include:

- Attendance at launch events to explain how Community Led Planning links in with the work that they do

- Providing you with existing facts and information to help you better understand your local area

- Working with RCAN practitioners to advise on the use of different consultation methods

- Outlining requirements for the development of specific actions, particularly where this relates to planning decisions or service provision

- Responding to draft plans and making suggestions for improvement where needed

- Supporting and resourcing the delivery of specific actions where agreed

- Using information from your plan to inform broader council policies

COMMUNITY LED PLANNING CHECKLIST

Use this for…

Checking your community's progress towards producing a Community Led Plan.

See also…

Information Sheet B – What is Community Led Planning?
Information Sheet C – How to produce a Community Led Plan
Information Sheet D – Community Led Planning and government policy
Information Sheet E – Support for Community Led Planning

Step 1 – Getting started

☐ Made contact with your nearest Rural Community Action Network (RCAN) member, parish or town council and local authority

☐ Held an initial event to attract community interest in the plan and explore future action

☐ Made contact with a range of volunteers who might be able to help out in different ways

Step 2 – Establishing your steering group

☐ 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 3 – Taking stock and planning the way ahead

☐ Made sure that you have enough funding, volunteers, information and support needed to continue with your plan

☐ Produced a simple project plan that will help you to undertake Steps 4-7

☐ Started to use the evaluation form provided in Resource Sheet 3/3

Step 4 – Understanding your community

☐ Understood the different elements that contribute to the wellbeing and sustainability of your community

☐ Gathered existing facts and information about your community

☐ Consulted members of your community using a mix of different methods to find out how they experience the local area and what they think could be improved

Step 5 – Prioritising and planning action

☐ Made sense of the information you have gathered about your community

☐ Tested your findings with members of your community and prioritised some key issues that your plan will address

☐ Begun to scope out various actions that will feature in your final plan

INFORMATION SHEET F

Step 6 – Drafting your plan

☐ Drafted a final plan document that draws on the evidence you have gathered so far to clearly communicate the purpose and intentions of your plan. This should include an action plan which tells readers how specific issues will be addressed, by whom, with what resources and by when

Step 7 – Finalising your plan

☐ Checked to make sure everyone is happy with your plan document, including local groups and organisations expected to help with its delivery

☐ Launched your plan to gain maximum recognition and support

Step 8 – Implementing your plan

☐ Revisited your action plan and made sure that everyone understand the work that needs to be done

☐ Agreed that either your steering group or parish/town council will monitor progress being made toward the implementation of actions in your plan

☐ Sought to maintain the momentum of your plan by staggering the delivery of actions, celebrating achievements as they happen, engaging with local media and supporting and recruiting new volunteers

Step 9 – Monitoring and reviewing your plan

☐ Understood why and when to review your plan

☐ Re-visited Steps 1-8 of this toolkit and thought about how you can review your plan, building upon previous efforts and taking shortcuts where possible

STEP 1 — GETTING STARTED

Advice Sheets

| 1 | Getting started |

Resource Sheets

1 / 1	Who might be interested in a Community Led Plan
1 / 2	Preparing for your first event
1 / 3	Volunteering hints and tips
1 / 4	Feedback and skills form

STEP 1	GETTING STARTED

Purpose

This step outlines how you can 'kick-start' a Community Led Plan in your community.

What's involved

Making contact with people who can help you, organising an initial event to attract wider community interest and ensuring that you have enough support to take the plan forward.

Useful resources

Resource sheet 1/1 - Who might be interested in a Community Led Plan?
Resource sheet 1/2 - Preparing for your first event
Resource sheet 1/3 - Volunteering hints and tips
Resource sheet 1/4 - Feedback and skills form
Local resources - contact your Rural Community Action Network (RCAN) member for details

Introduction

The prospect of starting a Community Led Plan can be daunting. The plan is likely to take up to 18 months to produce and its success will depend largely on your ability to get everyone involved. However, if you follow the 9 'steps' outlined in this toolkit, the whole process should be manageable and hopefully fun too!

It's important that you get your Community Led Plan off to a good start. Some simple preparation can make all the difference. This step provides some pointers about how you can do this.

Making contact with people who can help you

If you are thinking about undertaking a Community Led Plan in your community, it is recommended that you make contact with the following organisations at the earliest possible opportunity:

Rural Community Action Network (RCAN) members
Aross England, there are 38 RCAN members – charities which specialise in helping community groups undertake Community Led Plans. You should contact your local RCAN member at the earliest possible opportunity to let them know of your intentions to produce a plan for your community. They will be able to discuss the Community Led Planning process with you in more detail, let you know if you can benefit from funding or support from your local authority and help you with your first event. In some cases, they may also have local resources for Community Led Planning that you may wish to use. Please see the contacts list at the back of this toolkit to find your nearest RCAN member.

Parish/town councils
Most good Community Led Plans are undertaken in partnership with the local parish or town council. Sometimes, they may even be initiated by one. This partnership is often very productive, as the parish or town council can use its position within the community to mobilise resources to make things happen. For this reason, they should be involved in the process from the beginning.

See also: *Information Sheet E - Support for Community Led Planning*

The first event

Having made contact with your nearest RCAN member and parish or town council, it is essential that you attract interest from the wider community in the possibility of producing a plan for the local area. Without enthusiasm and desire from a good cross-section of the community, it will be difficult to gain sufficient momentum to undertake a thorough and inclusive plan.

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

A good way to 'launch' a Community Led Plan is at a public event where people can learn about the process and consider getting involved. Often an officer from your RCAN member will be happy to attend this and provide advice and support where needed.

There are several reasons why public events are a good way to launch a Community Led Plan:

- They can be an effective way of getting people's attention, especially if publicised well beforehand
- They are a chance to discuss what a Community Led Plan for your area might involve and the potential benefits it could bring
- They are an opportunity to make contact with other key stakeholders – particularly officers from your local authority who will need to be engaged throughout the process
- They can be used to gather initial ideas about issues that your community may wish to address over the course of the plan
- They allow you to coax people into getting on board and helping out!

To find out how you can plan for your first event, see: *Resource Sheet 1/2 – Preparing for your first event*

Getting people on board

Following your first event, it is important that you keep in touch with everyone that attended and approach potential volunteers of different backgrounds who might be able to help out in many different ways. This will put you in a good position to create your steering group which is considered in Step 2.

See: *Resource Sheet 1/1 – Who might be interested in a Community Led Plan*
    Resource Sheet 1/3 – Volunteering hints and tips
    Resource Sheet 1/4 – Feedback and skills form

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

- **Made contact with your nearest RCAN member, parish or town council and local authority**

- **Held an initial event to attract community interest in the plan and explore future action**

- **Made contact with a range of volunteers who might be able to help out in different ways.**
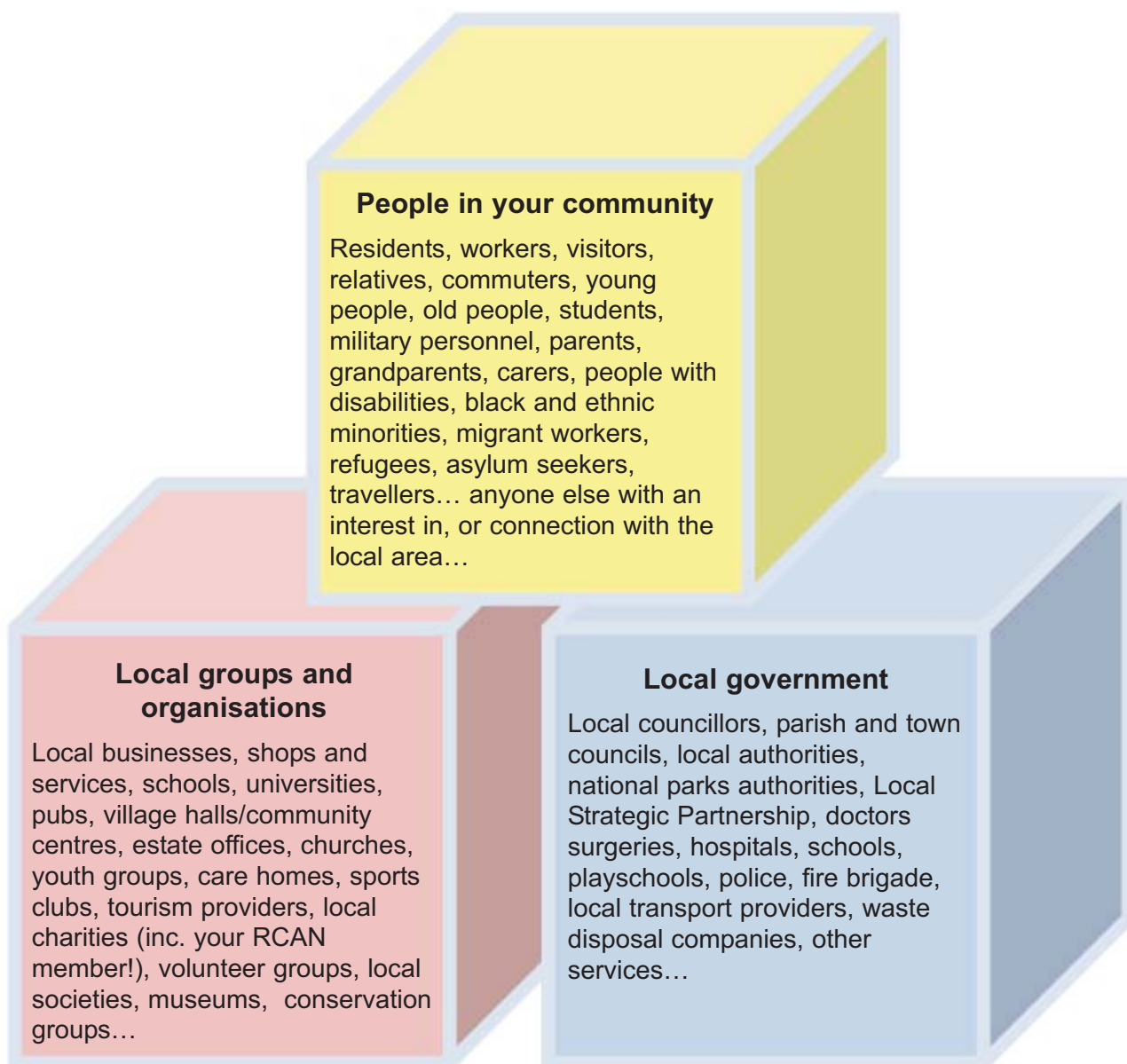
!

STEP 1

WHO MIGHT BE INTERESTED IN A COMMUNITY LED PLAN?

Use this for…

Thinking about who might have an interest in your Community Led Plan and who might be able to help you along the way.

See also...

Information Sheet E - Support for Community Led Planning
Resource Sheet 1/3 – Volunteering hints and tips

People in your community

Residents, workers, visitors, relatives, commuters, young people, old people, students, military personnel, parents, grandparents, carers, people with disabilities, black and ethnic minorities, migrant workers, refugees, asylum seekers, travellers… anyone else with an interest in, or connection with the local area…

Local groups and organisations

Local businesses, shops and services, schools, universities, pubs, village halls/community centres, estate offices, churches, youth groups, care homes, sports clubs, tourism providers, local charities (inc. your RCAN member!), volunteer groups, local societies, museums, conservation groups…

Local government

Local councillors, parish and town councils, local authorities, national parks authorities, Local Strategic Partnership, doctors surgeries, hospitals, schools, playschools, police, fire brigade, local transport providers, waste disposal companies, other services…

STEP 1   PREPARING FOR YOUR FIRST EVENT

Use this for…

Planning a public event to launch your Community Led Plan.

See also…

Resource Sheet 1/1 – Who might be interested in a Community Led Plan?
Resource Sheet 1/3 – Volunteering hints and tips
Resource Sheet 1/4 – Feedback and skills form
Resource Sheet 3/1 – Funding advice

Start with a bang!

Holding a public event is a great way to launch a Community Led Plan. If you prepare well, it can interest the wider community in the prospect of producing a plan, attract potential volunteers and provide you with the momentum needed to take things forward.

Remember officers from your Rural Community Action Network (RCAN) member or, in some cases, your local authority may be available to help you facilitate the event.

Content

To make the most out of your first event, you need to think carefully about its purpose and what you hope to achieve. Consider how you will:

- Introduce the Community Led Plan. What is it? What can it do for your community? What is involved?
- Provide everyone with a chance to discuss the prospect of having a Community Led Plan for the area
- Use the event to make contact with key stakeholders, particularly officers from your local authority
- Make a note of people's interest in the plan and what skills they might be able to contribute to any future work.

Format

There is no one particular format of public event that groups should adopt. It is up to you to decide what suits your community best. However, you might like to think about the following possible options. Please treat these as a rough guide rather than an exact template.

Open meeting

Open meetings are more like a traditional meeting, held in a community building at a time during the week when most people can attend.

Groups that use open meetings often ask a number of key people to provide presentations.

Possible speakers could include:

- Officer from your RCAN member (to introduce Community Led Planning)
- Someone from the instigating group (to explain why a plan might benefit the community)

- Parish or town council member (to get their views)

- Someone from another community that has already produced a plan (to talk about their experiences)

- Local authority officer (to explain how they value and support Community Led Planning groups).

At an open meeting, it is still important to get everyone's feedback. You should consider:

- Allowing time for questions after each presentation

- Using break-away discussion groups

- Using more interactive methods, for example 'have your say boards'. Your RCAN member should be able to advise you on such methods.

At the end of the meeting, you may wish to use a feedback and skills form to find out whether people would like to see the Community Led Plan progress and whether they would like to get involved in the future.

See: *Resource Sheet 1/4 – Feedback and skills form*

'Have your say boards'

'Have your say boards' are a quick and easy way of getting a feel for what people think about the local area at the first event.

Display sheets of paper with the following headings: social and community, transport and access, economy and environment.

Give people post-its and ask them to write about their likes, dislikes and suggestions to put on the headed sheets.

Make a note of peoples comments. They will be useful for planning future consultation with the community. See Step 3.

STEP 1	PREPARING FOR YOUR FIRST EVENT

Open day

Open days are more informal events usually held over a day or half day. The idea is that people can drop-by at a time convenient to them and chat about the prospect of producing a Community Led Plan. This type of event is particularly good for groups looking to 'piggy-back' onto existing events.

In contrast to the open meeting format, it will probably not be possible to provide presentations so you will need to think about presenting information in other ways such as:

• Displays
• Stalls with explainers
• More interactive methods – speak to your RCAN member for ideas.

You will also need to provide opportunities for feedback, for example you may like to use:

• 'Have your say boards'
• Comment boxes
• More interactive methods – speak to your RCAN member for ideas.

To attract people to the event, you may like to organise a parallel activity, for instance a 5 a-side football game for youngsters or anything else you can think of.

As with the open meeting, it is important that you make note of everyone who attended, and whether they would like to get involved in the future.

See: *Resource Sheet 1/4 – Feedback and skills form*

STEP 1 | VOLUNTEERING HINTS AND TIPS

Use this for…

Recruiting and retaining volunteers; essential for progressing with any Community Led Plan.

See also…

Resource Sheet 1/1 – Who might be interested in a Community Led Plan?
Resource Sheet 1/2 – Preparing for your first event
Resource Sheet 2/3 – Example terms of reference for working groups

It won't work without volunteers!

To get a Community Led Plan off to a good start, it's important that you recruit and retain volunteers from all walks of life. Indeed, without volunteers it would be very hard to do anything at all!

This resource sheet provides some general pointers about how you can work with volunteers in an effective way.

What kind of volunteers does a Community Led Plan need?

Anyone can volunteer to get involved in a Community Led Plan. This need not be a formal commitment, nor need it take up much of people's time. Ultimately, it is about making the most of the skills, knowledge and interests that people in your community already have, without burdening certain individuals with unwanted levels of responsibility.

Different people should be encouraged to help out in different ways depending on their interests and availability. This might include:

- Acting as a point of contact for all enquiries relating to the plan
- Designing posters for events
- Speaking to people about their views and opinions
- Delivering questionnaires
- Supervising a children's litter-pick competition
- Making tea and cake for meetings
- Counting of votes at meetings
- Babysitting.

In practice however, the list is endless. It is up to your community to decide what needs doing, and who might be able to help.

It is also worth thinking about what local businesses, clubs and other organisations can contribute to your plan. For example, a local company might be able to provide printing at cost or the local scout group might be happy to deliver leaflets and questionnaires. Remember that they too are likely to benefit from the process!

Things to consider

Recruitment

It may be appropriate to recruit volunteers throughout the course of a plan, as and when specific tasks arise. However, if you have a good understanding about the skills, knowledge and interests that exist in your community from the start, it will be much easier to approach potential volunteers at a later stage. Using a feedback and skills form at the first event is a good way of documenting this. You may choose to recruit volunteers via word of mouth, local advertising (e.g. community newsletter, posters etc) or even by approaching existing community groups and organisations.

See: *Resource Sheet 1/4 –Feedback and skills form*

Diversity

Recruit volunteers from all walks of life. Remember that people can contribute in many different ways, however big or small. Encouraging a mix of volunteers to get involved will allow you to make the most of the different skills, knowledge and interests that exist in your community and will result in a stronger plan.

Task specification

When working with volunteers, it is important that everyone knows what they are doing and the levels of responsibility involved. This should be open to negotiation with individual volunteers. Clarity at the start will avoid confusion later!

Induction

Make sure that volunteers know how their efforts contribute to the overall plan and that they are confident in the task they have chosen to undertake. If possible, introduce them to other people who are working on the plan, especially those working on related tasks or with similar interests.

Training

Think about whether specific volunteers need training to help them with any given task. This may be formal or informal. Speak to your nearest RCAN member to find out whether there are any existing training opportunities you can take advantage of.

Health and safety

Take all reasonable steps to minimise health and safety risks to volunteers. Look after each other!

Insurance

It is not normally necessary for volunteers undertaking a Community Led Plan to take out insurance. However, in some situations you may wish to consider taking out public liability cover. This protects groups against claims from members of the public for death, illness, loss and injury caused by negligence. See **http://www.businesslink.gov.uk** for further information and speak to your local RCAN member officer.

Involve volunteers in decision making

It is likely that volunteers will want to have a say in how the plan progresses. Make sure that you listen to them and appreciate their views and comments or otherwise they may not get involved again!

Recognition and praise

It is important that volunteers are given both recognition and praise. If this is carried out in a genuine way people will feel valued and proud of what they are doing and more likely to continue doing it.

FEEDBACK AND SKILLS FORM

Use this for…

Producing a handout to use at your first event that will allow you to ascertain support for the plan and identify potential volunteers.

See also…

Resource Sheet 1/2 – Preparing your first event
Resource Sheet 1/3 – Volunteering hints and tips

Suggested template:

Name: _____

Phone: _____

Email: _____

1. Do you think a Community Led Plan for [name of community] is a good idea?

    ☐ Yes

    ☐ No

    ☐ Don't know

2. Are there any particular issues that you think a Community Led Plan for [name of community] should address? Please specify below

3. Would you like to get involved in this Community Led Plan (in any capacity)?

    ☐ Yes

    ☐ No

    ☐ Don't know

4. The success of this Community Led Plan will rely on the efforts of everyone in your community regardless of prior experience/background. If you would like to get involved in this Community Led Plan, it would be very helpful if you could indicate any skills/knowledge that you might be able to contribute below:

Skills/ Knowledge/Interests	A little	A lot
Keeping people informed (chatting, asking for help, telephoning)		
Local knowledge (local contacts, knowledge of local history)		
Organising events (administration, delegating, planning)		
Publicity (dealing with the media, writing articles)		
Audio visual (photography, video, film)		
Artistic skills (graphic design, making displays)		
Office skills (typing, data entry, letter writing, photocopying, minute taking)		
Contact point (member of another local group/organisation)		
Children and young people (understanding of young people, contact at school/club etc, babysitting)		
Catering (cooking, mobilising volunteers)		
Analysing information (e.g. questionnaire and interview data)		
Project management (setting timescales and targets)		
Chairing (helping meetings run smoothly)		
Book keeping (keeping accounts, setting a budget)		
Distribution (knocking on doors, delivering flyers)		
Listening to people (interviewing, reporting peoples ideas, facilitating group sessions)		
Finance (securing funding, budgeting)		
Presentation skills (visiting groups, public speaking)		

Anything else? Please tell us!

5. Would you like to be kept informed about developments relating to this Community Led Plan?

☐ Yes please

☐ No thanks

Thank you for attending the event today and for completing this form

STEP 2 — ESTABLISHING THE STEERING GROUP

Advice Sheets

| 2 | Establishing the steering group |

Resource Sheets

| 2 / 1 | Suggested steering group roles |

| 2 / 2 | Model constitution for steering groups |

| 2 / 3 | Example terms of reference for working groups |

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
Chairperson	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.	The role of the chairperson can be time consuming with work in between meetings and support for others on the steering group. Ideally, the chairperson should not be a parish councillor, so the Community Led Plan is seen to be owned by the community.
Secretary	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.	The secretary should be prepared to spend some time arranging meetings and typing up minutes thereafter. 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.
Treasurer	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
Volunteer co-ordinator(s)	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.	This role will suit individuals that are good communicators who enjoy motivating others. 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).
Publicity co-ordinator	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.
Bridging co-ordinator	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.

STEP 2

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.

1. Name
A. The group's name is [name of community] Community Led Plan Steering Group; hereafter referred to as the steering group.

2. Purpose
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.

3. Carrying out the purpose

A. In order to carry out the purpose, the steering group will have the power to:
    i. develop a strategy, budget and programme for delivering the Community Led Plan
    ii. coordinate community consultation activities
    iii. use evidence from the consultation to prioritise and plan future actions that will benefit the community
    iv. oversee the drafting and the finalising of the Community Led Plan
    v. work with partners identified in the action plan to:
        a. coordinate the implementation of actions specified in the Community Led Plan
        b. take responsibility for monitoring and reviewing progress

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.

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.

STEP 2

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

STEP 3   TAKING STOCK AND PLANNING AHEAD

Advice Sheets

3	Taking stock and planning ahead

Resource Sheets

3 / 1	Funding advice
3 / 2	Creating a simple project plan
3 / 3	Template evaluation form

STEP 3	TAKING STOCK AND PLANNING AHEAD

Purpose

This step recommends some simple actions that you can take to think about how your plan will progress over the coming months.

What's involved

Taking stock of the resources, information and support that you have at your disposal and planning the way ahead.

Useful resources

Information Sheet E – Support for Community Led Planning
Resource Sheet 1/3 – Volunteering hints and tips
Resource Sheet 3/1 – Funding advice
Resource Sheet 3/2 – Creating a simple project plan
Resource Sheet 3/3 – Template evaluation form
Local resources – contact your Rural Community Action Network (RCAN) member for details

Introduction

Now that you have attracted interest in the plan and set up a steering group to oversee the process, you will probably be keen to press on with the job of identifying issues of local importance which can be addressed by your community. However, before you do this, it's advisable that you spend some time doing a bit of preparation; taking stock of the resources and support that you have at your disposal and thinking about how you can make best use of these over the coming months.

This preparation needn't be arduous. Below are some pointers that will help you to think about how you can move your plan forward.

Taking stock of what you've got

The success of your plan will depend on the ability of your community to make the most of the resources, information and support available to it. At this stage it is worth making sure that you can account for the following:

Contact with volunteers
Probably the most important resource that will sustain your plan are the volunteers who can drive the process forward and help to undertake specific tasks as needed. Although you should by now have a steering group in place, it's important that you continue to maintain contact with everyone else in the community, to recruit and retain as many volunteers as possible.

Hopefully your first event will have attracted a number of potential volunteers. If not, there's still time to get more people involved. Using the hints and tips contained in Resource Sheet 1/3, you can still devise other ways of recruiting volunteers as your plan progresses.

See also: *Resource Sheet 1/3 – Volunteering hints and tips*

Access to funding

One of the impressive features of Community Led Plans is that they require relatively little initial investment to make them work. Often communities undertaking plans find that they only need a modest sum of money to produce their plan, covering expenses such as the hire of rooms for meetings, resources that might be needed for consultation with the community and the publication of the final plan. Once plans are completed however, they can be used to lever in significant external funding and support for the actions they propose.

If you haven't already done so, now is the time to think carefully about how you might seek to raise funds sufficient to cover the costs of developing your plan. Using Resource Sheet 3/1, have a go at putting together a simple budget that will account for likely income and expenditure.

See also: *Resource Sheet 3/1 – Funding advice*

Support

Remember, your community shouldn't be working in isolation to produce the plan! Make sure your steering group has developed a close working relationship with your parish/town council, as they have a vested interest in supporting the plan's development and any actions your community proposes. Likewise, there is also merit in contacting relevant officers at your local authority at this point. They should be able to help you access information and facts about your area and will also want to be kept informed about the plan's progress. Last but not least, if you have any questions or concerns about what to do next, officers from your Rural Community Action Network (RCAN) member will be more than willing to help. Put these contacts to good use and you should have no problems producing a high-quality, effective plan.

See also: *Information Sheet E – Support for Community Led Planning*

STEP 3 | TAKING STOCK AND PLANNING AHEAD

Planning ahead

If you're happy that you've got the resources, information and support you need, you're ready to start thinking about putting these to best use and moving forward.

Developing a project plan
Creating a simple project plan is a good way of setting out the work that needs to be done over the coming months; certainly to the point of finalising the plan (Step 7). This needn't be anything overly complicated or time-consuming. Rather a project plan should be seen as a practical tool that can help you to think through what needs to be done when, and by whom. It can also help you to clarify the next steps of the plan with everyone involved; especially those on the steering group.

Using Steps 4 to 7 outlined in this toolkit and Resource Sheet 3/3, try putting together a simple project plan, thinking carefully about all the tasks that you think will need to be done to get it to the stage of publication.

See also: ***Resource Sheet 3/2 – Creating a simple project plan***

Monitoring and evaluating progress
Some organisations that provide funding for Community Led Plans require community groups to monitor and evaluate their plan's progress to make sure that key quality criteria are met. However, rather than being just a bureaucratic requirement, the process of monitoring and evaluating can actually be very beneficial to any community group undertaking a plan as it can help to make sure that things stay on track and ensure that the outcomes that everyone desires are achieved. Groups that have undertaken some form of monitoring and evaluation are also much better prepared when it comes to reviewing their plan at a later date (Step 9).

Included in this toolkit are some practical resources that can help you to monitor and evaluate your Community Led Plan as it progresses. In the index section you will find a simple checklist that you can use to make sure you have done everything that's needed for each of the 9 steps. It is also recommended you use the template provided in Resource Sheet 3/3 which allows you to assess progress as you go along, requiring supporting evidence and comments.

See also: ***Resource Sheet 3/3 – Template evaluation form***

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

- **Made sure that you have enough funding, volunteers, information and support needed to continue with your plan**

- **Produced a simple project plan that will help you undertake steps 4-7**

- **Started to use the evelation form provided in Resource Sheet 3/3.**

!

STEP 3	FUNDING ADVICE

Use this for

Thinking about how you can finance the development of your plan.

See also...

Resource Sheet 2/2 – Model constitution for steering groups
Resource Sheet 3/2 – Creating a simple project plan

The basics

Although Community Led Plans represent excellent value for money, allowing communities to get many things done using volunteer effort alone, they still involve some expenses that need to be budgeted for and carefully managed.

It is up to your community to decide who will take responsibility for managing the plan's finances. In some cases, it may be appropriate for your parish or town council to manage these as part of their routine business. Alternatively, your steering group can perform this role if it has a written constitution such as the one provided in Step 2.

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

Financial management should be seen as part of the overall planning process for your plan. This need not slow things up, but it must be able to tell you whether you will have enough money in the bank to cover the costs of the things that you want to do!

In discussion with members of your plan's steering group, think carefully about how you expect your income to match up with any expenditure. You can do this using a budget template like the one shown overleaf.

Remember, planning ahead can save you time and effort in the long-run. Get a good understanding of your potential sources of income and expenditure now, and it will be much easier to raise the money you need and press ahead with work without delay.

Potential sources of income

There are a number of ways that your community can raise funds to cover the cost of developing your plan:

Grants

Grants are sometimes available to groups undertaking Community Led Plans. These can be national schemes such as Awards for All (see: **http://www.awardsforall.org.uk**/) or local schemes such as those run by some local authorities. Before applying to any scheme, it is important to think carefully about whether you are ready to accept a grant (i.e. have a constitution, bank account etc), know what you want the money for and how much you will need and are prepared to spend some time filling out the relevant paperwork and making your case. Speak to your Rural Community Action Network (RCAN) member to find out what grants you can take advantage of locally.

Parish/town council precept

Many communities are able to use part of their parish or town council's precept to fund their plan. The precept is money that can be raised through the local council tax to spend on improving the wellbeing of the local community. Parish and town councils calculate and decide their precept on an annual basis. If you involve your parish or town council in the planning process, you should have no problems arguing for funding from them!

Fundraising

Fundraising can be an excellent source of cash and a great way to demonstrate local interest and support to other funders. Some activities, such as raffles or cake sales can be very easy to organise. Others, such as sponsored fun runs or local plays might be more time consuming. Remember, the money that you expect to raise should always exceed the cost of whatever you choose to do.

Sponsorship

As your plan will have a high profile in your community, local businesses or benefactors may see value in sponsoring the work that you are doing. This may be in the form of money, but it could also be help in kind. For instance, local shops might be willing to provide refreshments at any events you are planning or the local newspaper may be willing to offer free advertising space.

Volunteering time in-kind

Last but not least, remember that the time volunteers contribute to the plan should also be valued. Often it can be useful to point this out to potential funders to demonstrate the value that can be added to their contribution.

Potential expenditure

The overall cost of developing your Community Led Plan will vary depending on the size of your community, the proposed consultation techniques and the design and format of your final report. Some plans have made do with a few hundred pounds, but most have needed £1,000 or so. Some typical costs for a Community Led Plan are shown in the budget template overleaf.

Producing a simple project plan can help you to factor in any potential expenditure into your own budget. By agreeing the different tasks that need to be carried out over the next few months between members of your steering group, you will gain a much more accurate idea of the costs that you can expect along the way.

See also: *Resource Sheet 3/2 – Creating a simple project plan*

Another good way of finding out how much everything might cost and the expenses involved is to contact a similar sized community in your area that already has a plan. Your Rural Community Action Network (RCAN) member should be able to put you in touch.

Further advice

For further advice about funding contact your RCAN member.

Another source of information is the Cash-online website, a resource set up to inform small charities and community groups about financial management. See: http://www.cash-online.org.uk

STEP 3 | FUNDING ADVICE

Template budget

Alpha Beta Community Led Plan Budget, 2011-12

Income

	Expected	Actual	Notes
Parish Council Precept	1,000		
Stall at village fun day	200		
Sponsorship from local shop	100		
Donations	50		
	£1,350	**£**	

Expenditure

	Expected	Actual	Notes
Village hall hire	160		8 Steering group meetings (1.5 hrs), 1 open day (4hrs)
Flyers	100		1,000 copies, 1 page, black and white
Collection boxes	15		Could make own
Stall at village fun day	20		Dependent on weather
Questionnaire printing	250		1,000 copies, 5 pages, black and white
Planning for Real model making	140		Costs could be saved by involving local school
Refreshments	40		Purchase from local shop
Out of pocket expenses for volunteers	200		
Printing of the plan	100		100 copies, 10 pages, colour
Website	75		Domain name and hosting
	£1,100	**£**	

Balance

	Expected	Actual	Notes
	£1,100	**£**	

STEP 3 | CREATING A SIMPLE PROJECT PLAN

Use this for

Deciding what needs to be done when, by whom and with what resources over the next steps of your plan.

See also...

Resource Sheet 3/1 – Funding advice
Resource Sheet 3/3 – Template evaluation form

Why create a project plan?

Many steering groups have found it useful to put together a simple project plan to help them think through the next steps of their Community Led Plan. This can save groups time and effort in the long run by making sure that everyone knows exactly what needs to be done when, by whom and with what resources.

It's up to your steering group to decide how much time to spend planning the work ahead. This will depend on how ambitious you want to be!

Below are some pointers for producing a simple project plan along with a template shown overleaf that you can adapt for your own use.

1. Decide what needs to be done
To start with, it is important that members of your steering group have read and understood the remaining sections of this toolkit. Think about how you can structure the work of your plan around the steps outlined. These should be thought of as broad objectives which frame everything else that you do.

2. Decide how you will do it
It is up to your community to decide how you will work towards each step of your Community Led Plan. This should be based on your aspirations for the plan, the local context and the resources that you have at your disposal. When planning this work, you will probably end up with a sequence of tasks that are often dependent on one another. Using the template provided overleaf try to think about each task in turn, mapping out who will be responsible for making it happen, when it needs to be done by and the resources that will be required (making sure all costs are reflected in your budget).

See also: **Resource Sheet 3/1 – Funding advice**

3. Do it!
This is the important part. Refer to your project plan frequently to make sure that you are on track. In some cases, you may need to change some of the tasks proposed as you learn from experience. This is quite alright, so long as you keep your sights on the bigger picture. Also, remember to keep everyone up to date with what's happening and evaluate progress as you go along.

See also: **Resource Sheet 3/3 – Template evaluation form**

Step/task	Who	Resources needed	Complete by																									
			2011												**2012**													
			J	F	M	A	M	J	J	A	S	O	N	D	J	F	M	A	M	J	J	A	S	O	N	D
Step 3: planning ahead																											
Compile a contact list of everyone that can help out with the plan	AE				▒																						
Secure parish council sponsorship	JF				▒																						
Organise social event to raise additional funds	NC/RN	Hire of village hall, refreshments				▒	▒	▒																			
Step 4: understanding your community																											
Research local history	JB					▒	▒																				
Research census data	MH						▒	▒	▒																		
Contact local authority to find out what plans already exist for the area	MH						▒	▒	▒																		
Create discussion forum on Parish Council website	DC																				▒	▒	▒				
Create graffiti wall for young people to write ideas on	AS	Plywood and paint needed																			▒	▒	▒				
Design questionnaire and send to all households, businesses and organisations	W. Group	Printing of questionnaire (x 1,000)																			▒	▒	▒				

STEP 3 — CREATING A SIMPLE PROJECT PLAN

Step/task	Who	Resources needed	2011 J	F	M	A	M	J	J	A	S	O	N	D	2012 J	F	M	A	M	J	J	A	S	O	N	D
Step 5: prioritising and planning action																										
Collate and analyse results from the consultation	MH/LR	In-kind time										▓	▓													
Publish results of the consultation in newsletter and on parish council website	AE	Printing of newsletter												▓												
Hold open meeting for people to discuss and vote on ideas for action	RN/MH	Hire of village hall, refreshments													▓											
Step 6: drafting the plan																										
Draft plan, to include what the plan is about, evidence of local needs and priorities and action plan	AE/MH/JB														▓	▓	▓								
Send draft to members of the community and interested organisations for comment	AE	Printing of draft plan (x 100)																	▓	▓					
Make changes to draft based on comments	AE/MH/JB																				▓				

STEP 3 | TEMPLATE EVALUATION FORM

Use this for

Making sure that your plan is of the highest quality, by recording what you've done along the way.

See also...

Information Sheet F – Community Led Planning Checklist

Why use this evaluation form?

For Community Led Plans to be effective they need to be produced to a high standard. Whilst the 9 steps detailed in this toolkit are designed to help you achieve this, it is advisable that you spend some time reflecting on what you have done well, and what needs to be improved as you go along.

The template evaluation form provided below lists the key features of a high quality Community Led Plan. As you complete Steps 1-7, it is recommended that you record any work that you have done which demonstrates the 'quality' features of your plan. Not only can this help you to make your plan better where needed, you can also use it as evidence to inspire confidence in the organisations that fund or support the work you are doing.

Suggested template

[Name of community] Community Led Plan Evaluation Form				
Assessment criteria	**Yes**	**No**	**Evidence and comments**	**Signed**
Key organisations involved in the plan's development				
Rural Community Action Network (RCAN) member				
Parish/Town Council				
Local authority departments				
Other (please specify)				
Effective governance structure in place				
Representative steering group formed				
Purpose of steering group agreed				
Steering groups operations and responsibilities clearly defined				

Assessment criteria	Yes	No	Evidence and comments	Signed
Work planned, monitored and evaluated				
Budget produced				
Simple project plan produced				
Progress monitored using checklist				
Progress evaluated using evaluation form				
Local information and facts about the area researched				
Captured any existing information that tells you about the wellbeing of your community				
Existing plans and strategies for the area considered				
All sections of the community involved				
First event held to attract community interest				
Volunteers from all walks of life recruited				
Different consultation activities used				
All sections of the community involved in consultation activities (including those who do not usually get involved in community activities)				
Action plan adequately reflects community needs and aspirations				
Local information and facts about the area are considered in the action plan				
All contributions and feedback from the community are used to inform the actions proposed and presented in a way that is accurate and accessible to all				
Actions prioritised				
Actions clearly state who is expected to do what by when				
Action plan well publicised and publically available				
Actions link to local government strategic plans where possible				

Advice Sheets

| 4 | Understanding your community |

Resource Sheets

4 / 1	Community wellbeing and sustainability
4 / 2	Researching existing facts and information about your area
4 / 3	Tips for consulting your community
4 / 4	Example consultation methods

STEP 4 UNDERSTANDING YOUR COMMUNITY

Purpose

This step guides you through the process of gathering evidence about your community so you are well informed when it comes to developing your plan's actions.

What's involved

Researching the wellbeing and sustainability of your community in its entirety, by making the most of existing facts and information and consulting everyone locally.

Useful resources

Resource Sheet 3/3 – Creating a simple project plan
Resource Sheet 4/1 – Community wellbeing and sustainability
Resource Sheet 4/2 – Researching existing facts and information about your area
Resource Sheet 4/3 – Tips for consulting your community
Resource Sheet 4/4 – Example consultation methods
Local resources – contact your Rural Community Action Network (RCAN) member for details

Introduction

Developing an understanding of your community is an essential part of producing a Community Led Plan. If you are able to gather information about how your community is changing and how people experience life locally, you will be in a much better position to say how it can be improved.

This step is designed to help you undertake some initial research that will allow you to identify the key issues for your community. It shows you how you can consider the wellbeing and sustainability of your area by making the most of existing facts and information and consulting with everyone locally. This will equip you with evidence that can be used to plan and prioritise future action which is detailed later in Step 6.

The importance of understanding your community

If you live or work in your community, you will no doubt already have some good ideas about its strengths and weaknesses and how things can be improved. However, it's essential that you back this up with evidence gathered and discussed by members of your community.

Spending time developing a more detailed understanding of your community at this stage will reap benefits in the long run. Plans that are well researched are much more likely to be successful, resulting in long lasting improvements that benefit everyone. This is because the actions they propose are:

- based on a evidence of local needs and aspirations rather than the assumptions of a few people
- linked in with other work that is being done in the area
- supported by a diverse mix of individuals, organisations and service providers.

Taking shortcuts at this stage can result in poor quality plans that lack the support of the majority of the community and therefore fail to achieve their aims. This also brings with it the danger of splitting the community and possibly causing long-standing resentment amongst those who didn't have an opportunity to get involved and whose voices weren't heard.

What do I need to find out?

One of the virtues of undertaking a Community Led Plan is that it can address a huge diversity of local issues. Ultimately it is up to your community to decide which ones are the most important, but getting to this stage will require a thorough assessment of local needs and aspirations. Only once you have identified the main issues for your community should you start planning and prioritising actions for addressing them. This is discussed later in Step 5.

A useful starting point is to think about the many different things that contribute to the wellbeing and sustainability of your community. In other words, what makes your local community a place where people want to live, prosper and be happy, both now and in the future.

Resource Sheet 4/1 takes a detailed look at the various social, economic, environmental and cultural elements that contribute to the wellbeing and sustainability of any community. Use this to think about how you can gather information about your own community relating to each of the elements described.

See also: *Resource Sheet 4/1 – Community wellbeing and sustainability*

How do I gather the information I need?

To develop a detailed understanding of your community's wellbeing and sustainability, you will need to start by gathering existing facts and information about your area and then consult with everyone locally. This will not be a five minute job and needs to be carefully planned.

See also: *Resource Sheet 3/2 – Creating a simple project plan*

Gathering existing facts and information
Gathering existing facts and information about your local area is the best way to begin thinking about how you take your plan forward. Depending on what you are able to find, this can confirm some of the key features of your community and show you how it is changing.

Undertaking this initial investigative work is useful for two reasons. Firstly, it can help you to bring together different members of your community, stimulating and informing discussion about the key issues locally and what can be done about them. Secondly, the evidence gathered can be used in your community's final plan, to support and justify any actions that you propose.

Resource Sheet 4/2 shows you how you can make the most of existing facts and information in more depth, showing you where you can find this information, what to look for and how to use it to best effect.

See also: *Resource Sheet 4/2 – Researching existing facts and information about your area*

STEP 4 | UNDERSTANDING YOUR COMMUNITY

Consulting your community

Why?
Consulting with members of your community is probably the most important part of producing any Community Led Plan. It will prove invaluable to the development of any actions because:

- People in your community know the local area best
- It is important to understand that people may experience your local area in different ways
- It is an opportunity to bring the community together and create a better understanding of each others needs
- It can allow your community to take greater ownership of the plan and generate support for the actions that you will eventually go on to implement
- New people get involved in community life
- Existing facts and information can be double checked.

What to ask?
As previously mentioned in Resource Sheet 4/1, there are many elements that contribute to your community's well-being and sustainability. When consulting with your community you will need to find out:

- How your community has changed in the past, what people value in the present and what they would like to see happen in the future.
- What works well, what could be improved, what would make community life better
- What people think about the existing facts and information you have already gathered. For example, if the last census indicated that 30% of your community's population was over the age of 60, what do people in your community think about this?

See also: ***Resource Sheet 4/3 – Tips for consulting your community***

What methods to use?
You can be quite creative in the ways you choose to communicate with members of your community. Many different methods can be used. For example, questionnaires, maps and models, focus groups and even video diaries. It is important that you don't just rely on a questionnaire because:

- Different groups within your community are likely to engage better with different methods. Try to pitch your chosen methods so that you get a range of different people involved – see Resource Sheet 1/1
- It will provide you with a breadth and depth of information, e.g. hard evidence such as statistics; soft evidence such as case studies, people's perceptions or opinions.

Resource sheet 4/4 will help you to decide which consultation methods are most suitable for use in your community. It provides an explanation of each consultation method outlining, what's involved, the resources and time you might need and who in your community they are best used with.

See also: ***Resource Sheet 4/4 – Example consultation methods***

Keeping track of progress

At all stages in your consultation, remember to keep in touch with everyone in your community, letting them know what's happening, how they can get involved and what your steering group will do with the evidence collected (see Step 5). People are much more likely to get involved and stay involved if they can see that the work is well organised and going to make a difference.

Finally, make sure you keep a record of the different people and/or groups who participate in your consultation as it progresses. You might want to create a simple check list to make sure nobody has been missed out (see Resource Sheet 1/1). The check list will also provide you with evidence that your consultation is credible. This will be vital later on when you are asking for support from other groups, organisations and service providers to implement the actions that you have identified and included in your plan.

If done well, you can expect your plan's consultation to involve over 70% of your community!

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

!

- **Understood the different elements that contribute to the wellbeing and sustainability of your community**

- **Gathered existing facts and information about your community**

- **Consulted members of your community using a mix of different methods to find out how they experience the local area and what they think could be improved.**

STEP 4

COMMUNITY WELLBEING AND SUSTAINABILITY

Use this for…

Thinking about the different elements that contribute to the wellbeing and sustainability of your community.

See also…

Sustainable Rural Communities Toolkit (http://tinyurl.com/SustainableRCtoolkit)
**Cumbria Sustainable Communities Workbook
(http://tinyurl.com/CumbriaSustainableCommWorkbook)**

Community wellbeing and sustainability

A sustainable community needs to have the right balance of economy, social interaction and environmental considerations. At its heart will be a good sense of wellbeing: an understanding of the need for a vibrant economy, an awareness of the social make-up and value of the diversity within the community and an understanding and commitment to live within the environmental limits of the area.

The wider context for sustainable communities is that of sustainable development which has been widely defined as, "meeting the needs of the present without compromising the ability of future generations to meet their own needs."

Hopefully, discussion around these issues will enable you to develop a better understanding of your community; how it is changing, what features and characteristics are valued at the moment, and how it should continue to develop and prosper in the future.

A good way of looking at many of the aspects that we associate with wellbeing and sustainability is to use Egan's Wheel[1]. Egan's Wheel sets out 8 interdependent elements of a sustainable community.

Egan's wheel: elements that make a sustainable community

1 Egan J (2004) Skills for Sustainable Communities, ODPM, London

How to assess your community's sustainability and wellbeing

Egan's Wheel can be used as a tool for assessing sustainable communities. By using this wheel your community can build up a picture to understand what may need to be done to underpin its future sustainability.

For each of these 8 characteristics of a sustainable community, your community can explore the following questions:

- What change has taken place in the past?

- What key features and characteristics do people like or dislike at the moment?

- What changes would people like to see happen in the future?

Egan's Wheel can provide the basis for exploring the sustainability of communities. The Sustainable Rural Communities Toolkit, developed in Devon and also adapted by Action with Communities in Cumbria, poses a number of questions under each of 8 similar characteristics.

See also: ***Sustainable Rural Communities Toolkit***
(http://tinyurl.com/SustainableRCtoolkit)
Cumbria Sustainable Communities Workbook
(http://tinyurl.com/CumbriaSustainableCommWorkbook)

Both of these resources pose a number of questions that you can ask to appraise the sustainability and wellbeing of your community, looking at the different elements set out in the wheel. We recommend taking a look as there may be some questions that you would like to use that will help you to find out how your community is changing, what characteristics and features people value at the moment and what should happen in the future.

The following is an example of how you might use the wheel, and the resources signposted above, to explore the transport and connectivity of your community.

In the Sustainable Communities Toolkit, a key element of a sustainable community is described as:

- Well connected sustainable communities benefit from transport services and communications which minimise carbon consumption whilst linking people to jobs, schools, health and other services.

To investigate whether this is the case, your community could seek to answer these recommended questions:

- Is the community well served by conventional public transport services (bus and/or train)?
- How electronically connected is the settlement (broadband etc)?

You can seek to answer these questions by examining existing facts and information and consulting everyone locally as discussed in Advice Sheet 4. As you begin to explore responses to each question, you should be able to make a judgement as to whether this element of your community is doing well, or if there are concerns or issues that you would like to address as part of your Community Led Plan.

STEP 4	RESEARCHING EXISTING FACTS AND INFORMATION ABOUT YOUR AREA

Use this for…

Making best use of existing facts and information to identify features of your community that warrants further investigation and discussion by your community.

See also…

Resource Sheet 4/1 – Community wellbeing and sustainability
Resource Sheet 4/3 – Tips for consulting your community
Resource Sheet 4/4 – Example consultation methods
CLP Toolkit Topic Sheets - contact your Rural Community Action Network (RCAN) member for details

It is important to gather and consider existing facts and information about your area to help develop and take your Community Led Plan forward. Gathering this type of information can help to identify different features and characteristics that are significant or unique in your local area. The data and information can also help to identify changes in the community and the local area over time.

You can collect facts and figures from a variety of different sources, for example, your local authority. Another source of information is the Evidencing Rural Need (**www.rural-evidence.org.uk**) website. This provides summary information on rural issues and shows the real socio-economic picture of a rural community. A community profile has been developed for communities throughout England and is structured around the eight issues set out in Egan's Wheel (Resource Sheet 4/1 – Community wellbeing and sustainability) that have been identified as important for a sustainable community.

You can use the information presented in the community profile to identify key features and characteristics of your community which you may want to investigate further and discuss with other people locally. This information, and data from other sources will help you plan actions for the improvement of your area which are better informed and more likely to benefit everyone locally.

How do I gather facts and information?

Using Egan's Wheel, each component can be used as a guide for researching your local area.

See also: *Resource Sheet 4/1 – Community wellbeing and sustainability*

The following table sets out each component and signposts to where relevant data and information can be found. It also poses some example questions you could ask to gather the relevant information to support your Community Led Plan.

Component	Where can you find information?	Example questions you could ask?
Governance	Association of parish councils website Local Authority Rural Evidence website (**http://www.rural-evidence.org.uk/home/**)	How many people are involved in local decisions? How many seats on the parish or town council are filled?
Transport and Connectivity	Local Authority Transport Plan Rural Evidence website (**http://www.rural-evidence.org.uk/home/**) Local Transport Forums	How many cars are there in the local area? How far do people travel to work/nearest supermarket/town centre? To what extent are other means of transport alternative to the private car available?
Services	Rural Evidence website (**http://www.rural-evidence.org.uk/home/**) Local Authority NHS Trust or equivalent	How far away are you from your nearest job centre/secondary school/GP surgery? How does this compare with other communities in our county?
Environmental	Local authority Local Plan Rural Evidence website (**http://www.rural-evidence.org.uk/home/**) Local environmental/climate change/green groups Environment Agency	How much does the community recycle? Is there a flooding risk?
Equality	Local authority Local Plan Rural Evidence website (**http://www.rural-evidence.org.uk/home/**)	Are there any areas of deprivation in our community? How many households are in fuel poverty?
Economy	Local authority Local Plan Rural Evidence website (**http://www.rural-evidence.org.uk/home/**) Local Economic Partnership Local Federation of Small Businesses/Chamber of Commerce Office for National Statistics website	How many working people live in the community? Do retired people outnumber the economically active in your community? How many small businesses are there in the local area?

STEP 4

RESEARCHING EXISTING FACTS AND INFORMATION ABOUT YOUR AREA

Component	Where can you find information?	Example questions you could ask?
Housing and the Built Environment	Local Authority Local Plan Rural Evidence website (**http://www.rural-evidence.org.uk/home/**) Land Registry	Is there any affordable housing in your local area? Is there any social housing?
Social and cultural	Local Authority Rural Evidence website (**http://www.rural-evidence.org.uk/home/**) Local charities/volunteer groups Sports clubs/societies and events	How many people live in our community? How is the demographic of our community changing? How many societies, clubs and events are there in the area?

Use this for…

Thinking about how you will consult members of your community.

See also…

Resource Sheet 4/1 – Community wellbeing and sustainability
Resource Sheet 4/2 – Researching existing facts and information about your area
Resource Sheet 4/4 – Example consultation methods

This resource sheet expands on the guidance in Advice Sheet 4 – Understanding your community and highlights some of the key issues you should consider when undertaking a community consultation. It should be used as an aid to your planning. All communities are comprised of a wide range of people of different ages, backgrounds and skills. Everyone in the community has a right to be involved and have their say, however you may have to make allowances or take into consideration the differing needs of certain sections of the community, if you want to be as inclusive as possible. If you have any questions about the approach you should take with your consultation then talk it through with your community development worker.

See also: *Resource Sheet 4/4 - Example consultation methods*

Top Tips

• Use a different range of consultation methods
• Take the consultation to different groups don't expect everyone to come to one place
• Try to involve different people in different ways
• Plan your consultation thoroughly and choose methods based on your existing knowledge of your community.

Key Questions to Ask

Before beginning any consultation you should always ask yourself these questions, the answers will help you decide what methods and techniques to use:

• Who are we consulting?
• What about?
• Why?
• Whose consultation will it be?
• Do people (and you) understand the issues?
• When should it be done?
• How long will it take?
• Who interprets and sees the results?
• Are there any comparable results?
• What might happen as a consequence?

Things to think about

When consulting with your community it is important to start with the assumption that everyone wants to contribute and have their say but that you may need to adopt different techniques to involve various sections of the community. Think about how you can be inclusive, bear in mind that people might not get involved due to a variety of reasons, for example:

• They don't have enough time

• They can't access the venue

• The method you are using discourages them

• Stigma or discrimination against a particular group, e.g migrant workers

• An assumption that their view is not going to be taken seriously.

Think about the different techniques you could use and which ones are the most appropriate for the people you want to involve. The following are commonly used:

• Questionnaires

• Planning for Real

• Parish walk

• Idea walls/banks/boxes

• Interviews/focus groups

• Video diaries and web forums.

See also: *Resource Sheet 4/4 - Example consultation methods*

Remember!

• Make it fun and interesting

• Don't ask leading questions

• Make sure you feedback to people

• Act on the results

• Keep people informed.

Acknowledgements

Thanks to ACT- Action with Communities in Cumbria, Humber and Wolds RCC and Action in rural Sussex

STEP 4

EXAMPLE CONSULTATION METHODS

Use this for…

Choosing suitable methods to consult different people in your community.

See also…

Resource Sheet 4/3 – Tips for consulting your community

Communities are made up of people of different ages, backgrounds and skills and it is important to recognise this when gathering information from them. People will engage in different ways and everyone should be given the opportunity to express their views. There are a range of different consultation methods that communities can use to capture the views and expectations of everyone locally.

This Resource Sheet will help you decide which consultation methods are most suitable for use in your community. It provides a brief explanation of each consultation method outlining their strengths and weaknesses, the kind of people they are best used with and the resources and time required.

Consultation method (description)	Strengths	Weaknesses	Best used with	Resources/ time needed	How to
Surveys Structured way of asking questions to understand peoples' behaviour, views and opinions	You can gather information in a consistent, structured way Because all respondents have to answer the same questions you can easily compare responses	It can take time to design, deliver, collect and analyse surveys It's also easy to ask unnecessary or leading questions!	People who have time and inclination to fill out forms	Surveys can be conducted on paper or electronically to save costs You will need to allow plenty of time to think about the questions to ask and how these will be analysed You may also want to pilot your survey to make sure it is easy for participants to use and generates the right kind of information	Spend time planning your survey, thinking carefully about the information you want to find out, how to structure your questions and how you will analyse the results Pilot your survey with a small number of people Distribute your survey, either by hand, or electronically stipulating a date by which it must be returned Analyse results and look for patterns and inconsistencies in the data
Model making (Planning for Real) People are encouraged to comment on 3D models of your community expressing their likes, dislikes and views for future action	Interactive and visual way of involving a wide range of people Can be undertaken alongside existing community events	It can take time to make the models People tend to comment on the physical aspects of your community	This is a great method of engaging a wide range of people who like to participate in a more 'hands on' way Think about getting younger people to make the models	You will need to have a Planning for Real kit (**http://www.planningforreal.org.uk/**) or model making materials. Making the model can be fun, but takes time You will need a venue (preferably away from wind and rain!) Facilitators are best used to run the event (speak to your Rural Community Action Network member for details)	

STEP 4 — EXAMPLE CONSULTATION METHODS

Consultation method (description)	Strengths	Weaknesses	Best used with	Resources/ time needed	How to
Neighbourhood walks Walking around your community, people are asked to comment on and discuss positive and negative features of interest	Good for starting your plan's consultation and establishing key issues of interest. Visual references can serve as good prompts for discussion and allow more varied issues to surface	Discussion may gravitate towards physical aspects of the community. Could exclude people with mobility difficulties. It can be difficult to capture everything that's said	People who like to get outside and talk	Neighbourhood walks are relatively easy to organise and shouldn't require too many resources. You might need pen and paper or equipment such as a smart phone to record what's said	Plan route. Publicise the walk. Devise a method of capturing what is said or discussed. Undertake walk. Review notes taken from the walk and look to see if there are any key themes or issues that warrant further investigation
Idea walls/ banks/ boxes An opportunity for people to post comments and suggestions in their own time. They can be used at events or in public places over a period of time	Quick and easy to use. If used in public places, you might get comments from people who don't have the time or inclination to get involved in other consultation activities	Takes time to gather responses. The detail of the suggestions might be limited so best used alongside other consultation methods	People who are likely to turn up at public meetings or frequent places where they are displayed	Materials for display purposes. Allow enough time to gather and analyse responses	Decide what you want people to comment on. Do you want to invite general comments about your community or do you want them to think about a particular aspect of it. Produce display materials which clearly state the scope of views and comments sought. Allow enough time for comments and suggestions to be posted. Collate and analyse results, looking for patterns

Consultation method (description)	Strengths	Weaknesses	Best used with	Resources/ time needed	How to
Interviews/ focus groups A recorded conversation with individuals or groups to explore pre-defined issues or topics. Can be structured with pre-defined questions or take the form of a more fluid and open discussion	Particularly effective for exploring how different people experience your community. During the course of an interview or focus group participants can be invited to expand upon issues of interest	Whilst data collected is rich in detail, it can take longer to analyse. Because responses are likely to be highly personalised, it's important that you seek to ensure participant's anonymity when feeding back information to your community	Interviews can be used with most people, however some might feel more comfortable to talk about things than others. Can be used to target specific grops in your community	Its best to hold interviews and focus groups in places where people feel comfortable and where conversations can be easily recorded (i.e. no loud background noises!). Recording equipment	Think about who you want to speak to and what you want to talk about. Select participants. Agree a time and venue with participants and let them know how you will use their responses. Undertake interview/ focus group making sure this is recorded. Reflect on the interview/ focus group making a note of
Video diaries People record their thoughts and opinions on video. These can be played back to the rest of your community at a public event	This can be a dynamic way of getting people involved, allowing people to express their thoughts or opinions in their own time	You'll need to think carefully about who you want to record video diaries. Some people might be uncomfortable about speaking on camera or having this played back to the rest of the community. Time consuming	People who are used to the internet and feel comfortable about sharing their views publically	Video camera or smart phone, projector or large screen TV. Venue for showcasing video diaries to the rest of your community (if desired)	Thank about what you want participants to talk about during their video diaries. Select participants and provide them with clear guidance about what they should and should not be prepared to talk about. Make sure they have equipment needed for recording their dairies. Review video diaries before public screening. Hold an event to play video diaries back to your

STEP 4   EXAMPLE CONSULTATION METHODS

Consultation method (description)	Strengths	Weaknesses	Best used with	Resources/ time needed	How to
Internet forums and social media An opportunity for people to share ideas and discuss topics of interest online. These can be pre-defined or user generated	Anyone with access to the internet can take part Conversations are automatically recorded and easily analysed Can be integrated with your community's website	Excludes people without access to the internet May attract inappropriate posts if not well moderated	Young people, people with limited time	Internet access Basic knowledge of how to set up forums/ use social media Time to promote and moderate the forum	Set up forum or chose appropriate social media platform Encourage members of your community to access the forum and share their views Stimulate discussions to keep them alive Analyse comments and feedback received

RESOURCE SHEET 4/4

STEP 5 — PRIORITISING AND PLANNING ACTION

Advice Sheet

5	Prioritising and planning action

Resource Sheet

5 / 1	Analysing quantitative and qualitative data

5 / 2	Prioritisation techniques

STEP 5 PRIORITISING AND PLANNING ACTION

Purpose

This step shows you how to prioritise and plan actions that will improve your local area.

What's involved

Making sense of the information you have already gathered, discussing this with members of your community and agreeing on some priority actions that will need to be carefully planned.

Useful resources

Resource Sheet 4/1 – Community wellbeing and sustainability
Resource Sheet 5/1 – Analysing quantitative and qualitative data
Resource Sheet 5/2 – Prioritisation techniques
Local resources – contact your Rural Community Action Network (RCAN) member for details

Introduction

By now you will have gathered a lot of information about your community's wellbeing and sustainability, having taken into consideration existing facts and information along with the views and expectations of everyone locally.

This step is about how you can use this information to prioritise and plan actions that will improve your area. It shows you how to make sense of the data you have collected, discuss the findings with the rest of your community, and make some informed decisions about what actions to take forward and how these will progress.

Making sense of the information you've already gathered

Groups that have spent time considering existing facts and information about their area and made efforts to consult everyone locally will almost certainly end up will a mountain of data that has been captured in different ways. Some data might be numerical, some might be notes or quotations taken during interviews or meetings, and some might even be pictures, drawings or models! Making sense of this can be a tricky business and will take time. However there are a number of things that you can do to make your data more coherent and easier to understand.

A good starting point is to categorise your data according to the elements set out in Resource Sheet 4/1 which together comprise community wellbeing and sustainability. For instance, you could gather all your data that refers to the local environment into a discrete folder or code it by a certain colour. How you do this is entirely up to you and depends on the way you prefer to organise things. However, the goal should be to break the data down into more manageable chunks.

See also: *Resource Sheet 4/1 – Community wellbeing and sustainability*

Once you have categorised your data, you will need to look for common themes or issues that are referred to. In doing this, you may find there is general agreement or even contradictions. It's important that you tease out the detail of this in your analysis. For instance, local census statistics may have alerted you to high levels of unemployment locally. This might marry up with survey feedback that identifies people's concerns about finding work locally, or pictures taken during a photo survey that shows empty commercial properties as a part of town that could be improved. Conversely, you might have taken notes during a focus group with school leavers that

suggested many of them want to look for work or go to university elsewhere. Essentially, good analysis should result in a story about the themes or issues that you have identified, demonstrating different perspectives or opinions where they exist.

To save time, you may wish to task volunteers with analysing different parts of the data and get them to report back to you.

Resource Sheet 5/1 provides more detailed information about the different types of data you could come across, and how you can analyse and interpret this to best effect.

See also: ***Resource Sheet 5/1 – Analysing quantitative and qualitative data***

Testing your findings and prioritising actions

Once you have undertaken some basic analysis of the data collected, you should look to test your findings with the rest of your community and begin to prioritise some actions.

The best way to approach this is to summarise the data you have collected into a short report. This should briefly explain the information that was gathered and flag up particularly interesting themes or issues that were identified. Again, you can structure this using the elements set out in Resource Sheet 4/1. As a rule of thumb, aim for no more than one page per element – anything more and people are likely to be put off reading the report!

When the report is finished, it needs to be drawn to the attention of everyone locally. This is an opportunity for you to test the results, discussing these with other people to develop a clearer idea of what actions need to be in your final plan. Ideally this can be done at a public meeting or event where people have an opportunity to share their views and ideas. However, you may wish to do this via an online forum or survey if you think this is likely to engage a larger proportion of your community.

Regardless of the method you use to discuss the findings with your community, you should broadly seek to answer the following questions:

• Are people in general agreement with the evidence presented?
• Is there anything missing?
• Are there any themes or issues that should be adddressed as a matter of priority in the plan?

Resource Sheet 5/2 suggests some techniques that you can use to facilitate answers to the last question, particularly if you are using a public meeting or event.

See also: ***Resource Sheet 5/2 – Prioritisation techniques***

STEP 5 PRIORITISING AND PLANNING ACTION

Planning actions

Once your community has agreed to the findings of the summary report and identified some priority issues, you will then need to work out how these can be translated into some practical actions. These should be 'SMART' and demonstrate the following characteristics:

Specific   The action is well defined and clear to everyone involved

Meaningful   The action is valued and supported by members of your community

Appropriate The action is based on an understanding of the evidence you have already collected and the difference it will make to everyone locally

Realistic   The action has considered the skills, knowledge, resources and support available

Timed   The action is envisaged to be completed within a clear time frame

To begin planning your SMART actions, it's recommended that you undertake some further investigative work. For each action consider the following questions:

- Looking at the evidence collected so far, what do we want to achieve?
- What steps do we need to take to get there?
- Who will be responsible for getting things done?
- Who else needs to be involved?
- What resources are needed and how will these be obtained?
- How long is it likely to take?

For all actions, think carefully about whether you need to involve officers from you local authority or other service providers. They can provide technical advice, explain existing strategies for your area and might even be able to offer some kind of support for the work you want to pursue.

See also: *Resource Sheet 3/2 – Creating a simple project plan*

If you're able to answer the above, you're ready to move onto Step 6 which shows you how to draft your final plan document which will detail the various actions you propose.

> **By the end of this stage, it is recommended that you have:**
>
> - **Made sense of the information you have collected about your community**
>
> - **Tested your findings with members of your community and prioritised some key issues that your plan will address**
>
> - **Begun to scope out various actions that will feature in your final plan.**

!

STEP 5

ANALYSING QUALITATATIVE AND QUANTITATIVE DATA

Use this for…

Making sense of the data you have collected about your community.

See also…

Resource Sheet 4/1 – Community wellbeing and sustainability

Step 4 recommends you spend time gathering existing facts and information and consult as many people as possible to develop a better understanding of your community. Having done this, you've probably ended up with a large amount of data that's presented in different ways.

This Resource Sheet outlines the two main categories of data that you're likely to capture as part of your plan and explains how it can be put to good use.

Different types of data

There are two types of data that you will have gathered about your community; quantitative and qualitative. They are both equally important and can be used in different ways.

Quantitative data (numbers)

Much of the information you have collected about your community is likely to be numerical. This might be drawn from census data or consultation activities (such as questionnaires) where responses can be easily counted. Essentially, quantitative data can provide you with some seemingly hard evidence that might be representative of the broader needs and expectations of your community.

Quantitative data can be useful for:

*   Identifying changes that have happened in your community over time (e.g. census statistics between the years of 1991 and 2011 might show that the number of people living in your community has changed significantly and there are now more residents aged 65 and over)

*   Comparing the characteristics of your community with other places (e.g. in your community profile report[1], you might find that your parish or ward ranks higher in terms of deprivation than other areas in your county, perhaps due to levels of unemployment

*   Showing the number of people that are in agreement or disagreement about characteristics or features of your community

*   Example: 30% of respondents to a questionnaire felt that public transport provision was inadequate. Of these respondents, 80% currently had no access to a car.

Be careful when looking for patterns in quantitative data. It's easy to make the mistake of taking statistics out of context or believing that that they speak the absolute truth without critically reflecting on how they were generated. For example, if you used a questionnaire, think carefully about how many people responded, whether they represent a good cross section of your community. If it's the case that the majority of respondents were white, middle class and over the age of 50, you might want to consider whether their behaviours, views and opinions can be generalised to represent the wider community!

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[1] Available from Rural Community Action Network (RCAN) members, see **www.rural-evidence.org.uk**

Qualitative data (text, audio, visual)

You're also likely to gather a large amount of qualitative data as part of your consultation. If you've undertaken interviews, focus groups, encouraged people to express their opinions using video diaries or undertaken neighbourhood walks you will have recorded things that are written, said or presented but can't necessarily be counted. This data is just as important as the information that can be counted!

Qualitative data can be useful for illustrating particular phenomena or characteristics of your community, for instance:

- Telling a story about how certain people in your community might experience something differently (e.g. how people without access to cars might find it more difficult to secure employment)

- Telling a story about how people view things in different ways and how this might be addressed as part of the plan (e.g. where some people have expressed concerns about the availability and affordability of homes locally, in contrast to others who are opposed to any new development)

- Illustrating or explaining quantitative findings (e.g. responses in a questionnaire suggested that there were not enough buses serving the community. A focus group with people interested in the bus service revealed that the problem was not the number of buses serving the community, but the times at which they called were not compatible with peoples travel requirements)

Be careful not to think of qualitative data as representative of your community. It will say a great deal about how particular people or groups of people might experience something, but their views might not be the same as other people in your community!

STEP 5 | PRIORITISATION TECHNIQUES

Use this for…

Identifying some simple techniques for gauging which issues or themes people in your community want to address as a matter of priority.

See also…

Resource Sheet 4/1 – Community wellbeing and sustainability
Resource Sheet 4/4 – Example consultation methods
Resource Sheet 5/1 – Analysing quantitative and qualitative data
Resource Sheet 6/1 – Action plan template

Having taken time to analyse information you have gathered about your community, you will need to discuss your findings with other people and reach agreement what should be done next.   You should aim to establish if the key issues and themes have been identified, to prioritise these and ensure that they are fed into the action plan and ultimately the final version of the Community Led Plan.

There are a number of tried and tested techniques for identifying and prioritising actions for your plan from the information you have already gathered. These are similar but subtly different from the information gathering consultation methods featured in Resource Sheet 4/4 – Example consultation methods.

See also: *Resource Sheet 4/4 – Example consultation methods*

The most important thing to remember, as with all other stages of your Community Led Plan, is to include everyone. If people have taken time to respond to the initial surveys and consultation they will be keen to ensure that their concerns are taken forward.

Deciding on an appropriate technique

You can use one of the consultation techniques suggested, a combination, or you may have ideas of your own but you should take into account:

- Which members of the community you are addressing and whether the technique will suit them. You will be familiar at this stage with the best ways to attract the attention of your community by considering what worked well at other stages of the consultation
- Whether the venue is appropriate for the activity
- That minority interests are important and the majority doesn't always rule
- That the community might have reached saturation point with questions, surveys and consultations, especially if the Community Led Planning process has taken longer and been more involved than expected. Try a different activity and make it fun.

Some suggested techniques

Agreement Continuums

You will need to set out the findings from your analysis as individual statements and discuss whether the community agree or disagree. Each statement can then be placed on a continuum line. This could also be done physically by asking individuals to move along an imaginary line one end being agree and the other disagree. Younger people would probably appreciate expressing their view in this way. An advantage of using this method is that results are immediately visible and can be discussed.

Dot Tally

A number of the flagged items are put on a flip chart/board and each individual puts dots next to the ones they for example, want to keep, like, want to discuss or explore further, want to prioritise. This technique can highlight quite quickly where the priorities might lay.

Pros/Cons

Ask the community to list the pros and cons of each of the flagged items and also to score each pro or con based on some weighting. This ensures that it is not just the greater number of either pros or cons that makes the decision but the weight of each is also taken into account.

Focus Groups

This technique can be used with small groups so, for instance, you could run a focus group for older residents at one of their meetings or attend the youth club to speak to a group of young people about the analysis and findings and whether they agree with the priorities identified.

Voting

Some RCAN members have electronic handset systems for voting which they can lend to communities. This can add a fun element to identifying the priorities and appeals to all ages. If the technology works correctly then immediate results are possible. However, there are other methods of voting i.e. using a ballot box, hustings and using voting tubes.

To conclude

At the end of the session(s) it will be necessary to have reached an agreement, or at least understood what your community considers the priorities to be. Remember you will have to work out how to turn them into practical actions. Return to Advice Sheet 5 – Prioritising and Planning Action for some advice on how to do this.

For further advice about prioritisation techniques contact your Rural Community Action Network (RCAN) member.

STEP 6   DRAFTING YOUR PLAN

Advice Sheet

6	Drafting your plan

Resource Sheet

6 / 1	Action plan template

STEP 6 | DRAFTING YOUR PLAN

Purpose

This step shows you how to draft your Community Led Plan for public consumption.

What's involved

Drafting a document that draws on the evidence you have gathered so far to clearly communicate the purpose and intentions of your plan.

Useful resources

Resource Sheet 4/1 – Community wellbeing and sustainability
Resource Sheet 6/1 – Action plan template
Local resources – contact your Rural Community Action Network (RCAN) member for details

Introduction

All Community Led Plans need to be written up in a way that clearly communicates their purpose and intentions. Producing a final document provides a lasting legacy for your plan, allowing everyone in your community and supporting organisations to know exactly what is envisaged for the future of your area and how you will get there.

This step shows you how you can effectively draft your Community Led Plan for public consumption. It provides some suggested content as well as an action plan template for recording the actions you propose in a clear and consistent manner.

What needs to be in it

You should think of your final plan document as if it were a story about your community. Essentially it should tell the reader what makes your community unique, how people value it and how it can be improved in the future. To get this across in the most effective way, it is recommended that you use the following suggested structure, adapting it as you see fit:

Title page
This can be as fancy or as glossy as you like but it should include the name of your community and the date your plan was produced. Remember anything in colour will cost more if you want to print copies later on. For the purposes of this step, mark the document as a 'draft' copy.

Introduction
This should very briefly introduce your Community Led Plan, explaining what it is, why your community chose to produce it, who was involved and how long it has taken to put together. It is also appropriate to acknowledge any support you received here, for instance from funders or your Rural Community Action Network (RCAN) member.

How we produced our plan
This should explain how you produced your plan from its launch through to agreeing the actions proposed (Steps 1-5). Particular emphasis should be given to how you went about researching your community by considering existing facts and information and consulting people locally. For instance, where did you get your information from, how did you seek the views and opinions of different people and groups locally and roughly how many people got involved?

Providing detailed information here will provide readers with much more confidence in your plan knowing that it's based on sound evidence and supported by members of your community. If you really want to impress you could even calculate the number of hours people have contributed to your plans development so far!

Our community
This section should provide some basic information about your community detailing the area covered, its history, key characteristics and relationships to other places. This will help readers to understand how your community is unique and set the scene for the issues you have identified. The inclusion of maps, photos and other illustrations can help enliven your document and make this section more interesting to read.

Issues we identified
This should expand on your earlier report (see Step 5) documenting the issues you found to be important to your community. Again, you can structure this using the elements of community wellbeing and sustainability which are explained in Resource Sheet 4/1.

For each issue, try to answer the following questions:
•   What is the issue?
•   What does your evidence say about the issue?
•   How do people in your community want to address the issue? Is everyone in agreement or were there different viewpoints that needed to be accommodated?

Try to write this up in a way that will make sense to someone who isn't familiar with your community. For instance, use simpler language, avoid jargon or names that are only known to your community and illustrate the various points you are trying to make with extracts from your data, e.g. facts and figures, quotes, diagrams and pictures.

See also: *Resource Sheet 4/1 – Community wellbeing and sustainability*

Actions we propose
This is the most important part of your document. It should set out, in detail, the specific actions your community has agreed to undertake to improve the wellbeing and sustainability of your area. These should relate to the issues raised in the previous section.

Resource Sheet 6/1 provides a template that you can use for this purpose. It is laid out as a table, allowing readers to see all of the actions proposed for your community, understanding what they set out to achieve, how they will be delivered, by whom, with what resources and by when.

See also: *Resource Sheet 6/1 – Action plan template*

STEP 6 | DRAFTING YOUR PLAN

Contacts

It is important to include the names of persons that can respond to and answer questions about the information included in the plan document. This could be a contact at your parish or town council or someone on your steering group.

How to write it up

Drafting your final plan document should be fairly straightforward if you have followed the advice in the preceding steps. Where you have a clear understanding of your community and reached agreement about priority actions you want to take forward, it's just a matter of presenting this in a clear and concise way.

It can however be quicker and easier to share responsibility for writing up the report between members of your steering group or with other willing volunteers. This is better than having one person spend lots of their time writing up the plan, only to be told by others to rewrite or amend large sections later on! Again, the trick here is frequent communication between those writing up the plan to make sure they know exactly what's expected of them, are happy with what's being written and are able to help each other out.

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

- **Drafted a final plan document that draws on the evidence you have gathered so far to clearly communicate the purpose and intentions of your plan. This should include an action plan which tells readers how specific issues will be addressed, by whom, with what resources and by when.**

!

STEP 6

ACTION PLAN TEMPLATE

Use this for…

Recording the actions you seek to implement in your Community Led Plan.

See also…

Resource Sheet 3/2 – Creating a simple project plan

Introduction

This Resource Sheet provides a template for summarising the actions proposed in your Community Led Plan. Enter each action into the table completing all fields as indicated. This will ensure that you have a useful summary in your final plan document which clearly communicates the purpose of each action, the issue it seeks to address and how you will achieve it.

Your community should continually refer back to this document to make sure the implementation of actions stay on track, as discussed in Advice Sheet 8. If you want to develop more detailed project plans for any of the actions listed, you may also wish to revisit Resource Sheet 3/2 which can be used for this purpose.

Theme (see Egan's Wheel)	Issue	Action	Outcome sought	Key milestones	Responsible person(s)/ organisation(s)	Resources needed	Expected completion date
Transport and connectivity	Some people find it hard to get to the local hospital in town	Set up transport scheme, either Link Scheme, good neighbour scheme, community transport or new bus timetable	Hospital appointments are kept	Set up working group / Meet the key agencies / Discuss issues / Agree deliverable solutions / Set up scheme / Publicise new services / Monitor usage	Parish council / District council / Bus company / Community transport association / Community development worker for advice	Time for meetings / possibly funding	1 year from start
Housing and the built environment	People told us that younger people are moving out of the village because they can't afford to buy a house	Investigate whether there is a need for more "affordable" housing in the village / Carry out a housing needs survey	Younger couples and families are able to live in the village and do not have to move away	Housing working group set up / Housing needs survey completed / Report produced	Parish council lead / District council / Rural housing enabler	Some funding to carry out a housing needs survey / Printing and stationery costs	1 year from start
Social and cultural	Older people said they wanted more things to do in the week	Establish the type of things they want to do and set up appropriate activities	More leisure time activities for older people	Meeting held with key people / Visit venues / Apply for funding from parish council / Buy equipment / Publicise the activity / Start	Community Led Plan steering group / Village Hall committee / Church / Local college / Any local groups / E.g. short mat bowls club, W.I.	Meeting room / Venue for activities / Possibly funding	1 year from start

STEP 7 FINALISING YOUR PLAN

Advice Sheet

7	Finalising your plan

STEP 7 | FINALISING YOUR PLAN

Purpose

This step shows you how to finalise your plan document.

What's involved

Making sure that everyone is happy with your draft plan document and then launching it to gain maximum recognition and support.

Useful resources

Resource Sheet 1/1 – Who might be interested in a Community Led Plan
Local resources – contact your Rural Community Action Network (RCAN) member for details

Introduction

By now you should have a draft document that details the purpose and intentions of your Community Led Plan. Before you put your plan into action it's important to check for one last time that everyone is aware of, and happy with its proposals. This shouldn't be a problem if you have made every effort to involve people and organisations before now!

This step provides some information that will help you to finalise your plan; checking this with everyone concerned and launching it in a way that will gain maximum recognition and support.

Agreeing the plan document

If you have consulted widely during the development of your plan, you should be confident that your draft document is an accurate and fair reflection of everyone's needs and expectations. However, it's advisable to provide members of your community with one last chance to comment on it. You might like to do this by making copies available for a limited time on your community's website, forum or newsletter. Where feedback is received, you will need to decide if it is appropriate to make revisions at this late stage, thinking about whether this would be beneficial to your community as a whole.

Depending on where you live, your local authority may also have procedures in place for receiving draft plans. Many will just want to see your plan before it is launched. Some may choose to provide you with feedback and suggest amendments to your proposals. And in a few cases, local authorities may require proof that you have met minimum quality criteria before they are willing to offer support for specific actions. Whatever procedures have been established in your area, they shouldn't come as a surprise if you have already involved your local authority in the development of your plan! Please refer to any guidance you have received from your local authority or if in doubt contact your nearest Rural Community Action Network (RCAN) member for more information.

Launching your plan

Once everyone is happy with your plan document, you should seek to launch it in a way that gains maximum recognition and support. You can do this by following the recommended actions below:

Finalise your plan document

To start with, make sure your plan is in a format that can be read, but not changed by readers. In the past, many communities have chosen to have copies of their plan printed for distribution.

In the age of the internet, however, it can be more cost effective to create electronic copies for download. If you do this, make sure the document has been put into a read only format such as PDF (Microsoft Word 2007 allows you to do this).

Set a launch date
Next, set a date for the launch of your plan. Think about when this is likely to grab people's attention – e.g. at weekends, during holidays or to coincide with other events in your community's calendar.

Decide what to do on the launch date
Many groups choose to hold some kind of public event to launch their plan. This is best arranged as a celebration of achievements to date and could include known public speakers that can champion your plan and help get your message across on the day. Ideally it should be as much fun as possible!

Interest people, groups and organisations in advance of the launch date
Try to interest as many people, groups and organisations as possible in advance of the launch, including local media. You can do this by contacting people direct or by publishing details on your community website and using social media such as Facebook and Twitter.

Launch the plan!
On the day, make sure that you clearly explain what your community's plan is about, how it was developed, the actions proposed and how you will deliver on it. And don't forget to mention what a big achievement it's been to finally launch the plan for everyone involved!

Let people know how the launch went
It's always a good idea to follow up on your launch with some good news stories about how the day went and provide contact details of someone who can answer questions about the plan.

!

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

- **Checked to make sure everyone is happy with your plan document, including local groups and organisations expected to help with its delivery.**

- **Launched your plan to gain maximum recognition and support.**

Advice Sheet

8	Implementing and monitoring your plan

STEP 8

IMPLEMENTING AND MONITORING YOUR PLAN

Purpose

This step shows you how you can implement and monitor the actions in your Community Led Plan.

What's involved

Understanding what needs to be done, having a group of people that can regularly check progress and keeping the rest of your community in the loop to maintain momentum.

Useful resources

Resource Sheet 6/1 – Action plan template
Local resources – contact your Rural Community Action Network (RCAN) member for details

Introduction

Having finalised your Community Led Plan, you now need to put it into action. Be prepared for this to take time. Depending on the actions you have proposed, it could take several years to achieve everything your community wants to achieve.

This Advice Sheet shows you how you can implement and monitor your plan's actions. To do this, you will need to be clear about what needs to be done, continually check progress and keep your community in the loop to maintain momentum.

Revisiting your action plan

If you have followed the guidance for producing a Community Led Plan as set out in Steps 1-7 of this toolkit, you should have a document which sets out a number of actions that can be undertaken for the improvement of your local area. Each action should state:

• the desired outcome

• how it should be delivered

• who needs to be involved

• the resources required

• an expected completion date.

See also: **Resource Sheet 6/1 – Action plan template**

It's worth revisiting this action plan on a regular basis to make sure everyone is clear about what needs to be done, especially those people or organisations who will be delivering the actions!

Monitoring

Before you start the ball rolling, you'll also need to decide how your community will monitor progress made towards the implementation of individual actions. This is particularly important for longer term endeavours which have a habit of losing their way over time if not sufficiently monitored.

ADVICE SHEET 8

Monitoring progress will allow you to:

- make sure work is being undertaken as originally specified in your action plan
- spot potential delays or extra costs before they become a problem
- re-direct the efforts of volunteers or resources towards actions most in need of attention
- give confidence to people in your community, funders and other supporting organisations that your plan is being well managed and is on track to deliver the changes sought.

Whilst your action plan should specify who is responsible for the delivery of specific actions, it is recommended that either your steering group or parish/ town council takes responsibility for monitoring the overall plan.

Your steering group or parish/town council should ideally meet every few months to monitor your plan. Prior to each meeting, a conversation should take place with those people, groups or organisations charged with the responsibility of delivering individual actions. As a group, you will discuss progress or any issues arising and be prepared to take remedial action if necessary. This needn't require a detailed reporting process - you just need to be aware of what's going on!

Maintaining momentum

As your Community Led Plan could take time to implement, it's important that you maintain momentum by keeping your community interested and making sure that the volunteers, groups and organisations charged with the delivery of actions feel supported and appreciated for their efforts. There are a few things that you can do to make sure this happens:

- Stagger the completion of actions. If you can achieve some quick wins to begin with, your community is more likely to have confidence in the implementation of longer-term actions.
- Communicate and celebrate achievements and milestones as they happen. There's no need to wait until your whole plan is finished to throw a party!
- Try to feature your plan in the local media or get people with a public profile involved where significant achievements have been made.
- Recruit new volunteers and encourage people to take on new responsibilities (particularly if you think the usual suspects are feeling overburdened or taken for granted).

Remember, your community is ultimately responsible for the implementation and delivery of your plan. No one else is going to make sure it works and derives benefit for your community!

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

- **Revisited your action plan and made sure that everyone understands the work that needs to be done**

- **Agreed that either your steering group or parish/town council will monitor progress being made toward the implementation of actions in your plan**

- **Sought to maintain the momentum of your plan by staggering the delivery of actions, celebrating achievements as they happen, engaging with local media and supporting and recruiting new volunteers.**

STEP 9 | REVIEWING YOUR PLAN

Advice Sheet

9	Reviewing your plan

STEP 9 | REVIEWING YOUR PLAN

Purpose

This step shows you how to review your Community Led Plan every few years to make sure it is up to date and responsive to the current needs and aspirations of your community.

What's involved

Knowing when to review your plan, what you will stand to gain from this and revisiting the previous steps outlined in this toolkit.

Useful resources

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

Introduction

Ideally, you should seek to review your Community Led Plan every few years to make sure it is up to date and responsive to the current needs and aspirations of your community. The timing of the review and the amount of work you put in will need to be determined by your community and should be considered in light of how successful your original plan was.

This step provides some general guidance that will help you to review your Community Led Plan. It looks at the benefits of reviewing a plan, the triggers for doing this and the work involved.

Why review your plan?

A review of your Community Led Plan can have several benefits:

- It is an opportunity to reflect on your original plan to see what it managed to achieve and what it didn't
- It is an opportunity to see if your community's needs and aspirations have changed significantly since you last produced your plan
- It is an opportunity for you to revisit actions from your previous plan and decide whether to pursue new ones that address current needs and aspirations
- It is an opportunity to reinvigorate local action and community spirit.

When to review your plan

A Community Led Plan can be reviewed at any time. There are no hard and fast rules as to when this should happen, but most communities tend to embark on the process every 2 - 5 years. As a rule of thumb though, a review should be considered if any or a combination of the following circumstances prevail:

- When interest in your original Community Led Plan has waned or where your community is struggling to deliver outstanding actions
- When you feel there have been significant changes to your community that need to be reflected in your plan
- When there are new opportunities (such as the availability of new funding, support or policy initiatives) that you could take advantage of.

How to review your plan

If you choose to review your Community Led Plan, it is
important to note that you will not be starting from scratch.
Much of the work your community put into developing the
original plan can be revisited, reused and revised to save
time and effort and make the process more manageable.

Broadly speaking, the process for reviewing a Community
Led Plan is the same as that followed the first time around.
We recommend that you re-read and follow Steps 1-8 of
this toolkit but take note of the following advice at each stage:

Launch the plan (Steps 1-3)

Check whether your community wants to review its plan
For a review of your Community Led Plan to work, you need to be confident that people want this to
happen and remain supportive of the process. Whilst it might not be necessary to hold another launch
event, it's important that you find ways to communicate your intention to review the plan and provide
people with ample opportunity to express their views or support.

Recruit new volunteers
Hopefully many of the people, groups and organisations that got involved in your plan previously will be
willing to lend a hand this time around. Although it's sensible to seek their involvement again, you
should also try to recruit new volunteers. This will help to reduce any over reliance on the usual
suspects and keep the dynamism of your plan alive.

Re-establish a leadership structure and plan ahead
Hopefully, the leadership structure that your community initially adopted is fit for purpose again.
However, it's advisable that you provide new opportunities for new people to get involved with the
planning and management of the review process.

Find out what resources, information and support are available to you
Given the time that's passed since you last produced your plan, it's worth doing a bit of research to see
if the resources, information and support you relied on before can still be used. It might be the case that
there are new opportunities you can take advantage of.

Evidence local needs and aspirations (Step 4)

Find out whether there are new facts and information about your community
It's likely that new facts and information have become available about your area. Search for this and
see whether you can identify any changes that have taken place which should be discussed by your
community. This should include new policies or strategies adopted by your local authority.

Revisit, re-use and re-design methods to consult your community
Again this is another area where you can save time and effort. Provided that you undertook a well
structured consultation in the first place using a variety of methods to speak to different people, you
should be able to repeat much of the exercise without having to re-invent the wheel. For instance, you
may be able to update and re-use the questionnaire that you used before or recycle existing resources,
documents, models and templates etc. One benefit of doing this is the opportunity to compare
responses over time to see how your community has changed.

STEP 9   REVIEWING YOUR PLAN

Agree and prioritise actions (Steps 5-7)

Consider what your plan achieved before and what you want to do about any outstanding actions
Hopefully your community achieved many of the actions proposed in your original plan.
However, it's not unusual for some actions to remain outstanding. Whilst remembering all those things your community previously achieved, you should also consider whether it's worthwhile continuing to pursue actions that are unlikely to be achieved or are no longer desirable.

Decide whether new actions need to be proposed
Based on an assessment of any new information that you have gathered about your community's needs and aspirations, you may decide that new actions need to be pursued. You should seek to prioritise and plan these as outlined in Step 5 of this toolkit.

Identify new opportunities to work with external organisations and influence broader policies
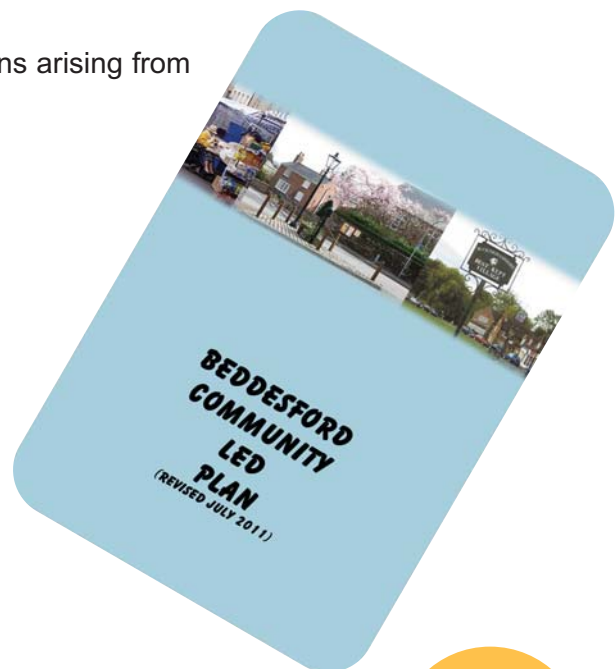The Government is introducing new policies that communities can use to shape the future of their neighbourhood. The Localism Act introduced in 2011 provides a range of different rights that you can use to propose new development in your neighbourhood, take over the delivery of services and bid to take ownership of community buildings, assets and public land. When reviewing your plan, think about whether you wish to make use of these new policies to deliver any new or existing actions in your plan.

Consider new ways to publicise your plan
You may wish to consider different ways of publicising your plan this time around, based on your previous experiences and making use of new technologies, e.g. internet, social media etc.

Deliver and monitor actions (Steps 8-9)
Look to implementing and monitoring any new actions arising from your reviewed plan in the same way as before.

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

- **Understood why and when to review your plan**

- **Re-visited Steps 1-8 of this toolkit and thought about how you can review your plan, building upon previous efforts and taking shortcuts where possible.**