

BIG LOTTERY BASIS 2 BUSINESS PLAN

For the Infrastructure Network Suffolk Project:

"Creating and Embedding a Learning Culture in Suffolk's Third Sector Frontline Organisations"

Number: BAS/3/010306108

Partners: This project has ten partners, led by SAVO



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Document History

Issue	Date	Changes
1	27/04/2009	Submitted for Big Lottery approval
2	19/05/2009	Additional details provided at request of Big Lottery
3	24/11/2009	Infrastructure Network Suffolk replaces One Voice Suffolk

Glossary

Throughout the document a number of acronyms are used and although they are explained first time round, this section provides a quick guide to what they mean.

It should also be noted that the term “Third Sector” is used for voluntary and community organisations, charities, social enterprises, cooperatives and mutuals, and replaces the old term of Voluntary and Community Sector (VCS).

ACRE	Action with Communities in Rural England
BME	Black and Minority Ethnic
CEO	Chief Executive Officer
CTTLS	Certificate to Teach in the Lifelong Learning Sector
ICT	Information Communication Technology
INS	Infrastructure Network Suffolk – (previously known as One Voice Suffolk) the consortium brought together with the help of the Government’s Change Up funding. The members of the Consortium include county infrastructure partnerships, local infrastructure partnerships, volunteer centres and other relevant voluntary and community sector bodies that take on infrastructure roles.
LIPs	Local Infrastructure Partnerships. There are six Third Sector partnerships in Suffolk, usually, but not always, matching district or borough councils areas. They perform the normal council for voluntary action functions such as funding and general advice to voluntary and community groups, representation and partnership roles etc. All six LIPs in Suffolk are partners on the Basis 2 Project.
LSC	Learning and Skills Council
MECAN	Minority Community Action Network
NAVCA	National Association for Voluntary and Community Action
NCVO	National Council for Voluntary Organisations
NLDC	Neighbourhood Learning in Deprived Communities - discrete funding stream from the Learning and Skills Council to support community learning projects, first steps learning etc. (usually non-accredited)
PAT	Portable Appliance Testing
PCDL	Personal and Community Development Learning, The Learning and Skills Council’s funding stream for community and non-accredited learning (formerly known as Adult and Community Learning). NLDC funding is a discrete part of PCDL funding
PQASSO	Practical Quality Assurance System for Small Organisations
PTTLS	Preparing to Teach in the Lifelong Learning Sector
SAVO	Suffolk Association of Voluntary Organisations (lead partner for this project)

Executive Summary

BRIEF SYNOPSIS OF THE INFRASTRUCTURE NETWORK SUFFOLK BASIS 2 PROJECT

“Creating and embedding a learning culture in Suffolk’s frontline organisations”

This project will aim to develop the skills, knowledge and learning of staff, trustees and volunteers within Suffolk’s Third Sector frontline organisations.

The project will work to strengthen the sustainability of frontline organisations through raising the quality of their work and their ability to successfully apply for funding.

It will further help to strengthen infrastructure organisations with funds for staff training and development.

The Basis 2 Project meets two key priorities in the Infrastructure Network Suffolk (INS) Business and Development Plans:

- develop consistent levels of learning and workforce development opportunities
- develop quality standard systems to ensure high standards of delivery.

The Basis 2 Project aims will be achieved by:

- providing frontline organisations with learning resources (target 8 course/subject outlines and resources and one practical toolkit a year)
- stronger, more coherent and frequent funding and development advice services (each Local Infrastructure Partnership (LIP) will receive £3,500 a year to do this)
- development of a county-wide trainer network to recruit and up-skill more Third Sector trainers (50 members in the Trainers Network by the end of the project)
- develop a conference fund whereby INS members and project partners will receive costs to attend relevant conferences throughout the lifetime of the project on the understanding that they feedback relevant information to frontline organisations
- development of a funding network and funding mentors who can be matched with beneficiary organisations (100 members of the Funding Network, 50 funding mentors and 50 good practice funding bids completed by the end of the project)
- development of briefings and support for frontline organisations in a variety of relevant quality standards (50 organisations mentored through relevant quality standards by the end of the project)
- Each project partner receives £1,000 a year to train their staff in developing new skills, knowledge and expertise to help Suffolk Third Sector frontline organisations
- 1000 different frontline organisations helped by the end of the project through attending courses, receiving funding advice, quality standards, help etc.

Lead Partner: Suffolk Association of Voluntary Organisations (SAVO)

Project Officers: Robin Hodgkinson (SAVO) and Simon Waldron (SAVO & Suffolk Learning Consortium)

Main Partners:

- All 6 LIPs (Babergh Communities Together, Ipswich Council for Voluntary Service, Mid Suffolk Action in Partnership, Suffolk Coastal Resource Network, Waveney Community Forum & West Suffolk Consortium for Voluntary Organisations)
- Suffolk ACRE

- Suffolk Learning Consortium
- Young Suffolk.

Lottery Grant: £474,815 (five year project)

A Project Steering Group made up of partner representatives and meeting quarterly will oversee the running of the project and will ensure that targets and milestones are reached. Each partner has clear roles to play within the project:

- SAVO will be writing the toolkits and course resources, oversee the project website including the management of the Funding and Trainer Networks, programme relevant events, run PQASSO quality standards briefings and mentoring schemes as well as ensure that project reports are written to the agreed time scales
- The six Local Infrastructure Partnerships (LIPs) will undertake funding and development work in their areas, host a number of events and gain feedback on the project from frontline organisations
- Suffolk Learning Consortium will feed in relevant information on accreditation issues, adult tutor training initiatives, Learning Champions work etc.
- Suffolk ACRE will provide advice and guidance and will collate and analyse the major learning and skills survey amongst Suffolk frontline organisations in Year 4 of the project
- Young Suffolk will provide a gateway to reach children and young people's organisations and undertake quality standards work each year mentoring frontline organisations through their own "Lite" quality standards.

A delivery plan, budget and cash flow plan has been developed to ensure that the work is accomplished and adequate financial resources are provided.

The key beneficiaries of the project are:

- the project partners who will be developing the skills of their staff and gaining sustainable resources to support the frontline organisations in their geographical or specialist areas
- at least 1,000 frontline organisations who will receive support, advice, skills training and mentoring support to develop themselves, become more sustainable and equipped to develop their own services.

The Project will reach many new groups, particularly in the more remote rural areas and will help organisations in the various stages of their development e.g. new groups forming, groups employing paid staff for the first time etc.

In Year 5 a new five year business plan will be written to build on the achievements of this project.

Organisation Summary

SAVO - Lead Partner

Mission, Vision and Values

Our Vision is of “A sustainable, effective and dynamic Suffolk Voluntary and Community Sector”.

Our Mission is “To support, inform, represent and develop the Voluntary and Community Sector in Suffolk”.

SAVO's Values

We have identified the following seven values that set out our approach and shape our activities.

SAVO is committed to pursuing and promoting:

- Equality of opportunity
- Equal respect for everyone
- The value of the Third Sector in Suffolk
- Innovation and creativity
- The diversity of the sector and appropriate responses to their needs
- High quality standards in all work
- Our integrity and independence.

Strategic Aims and Objectives

SAVO's strategic aims and underpinning objectives are:

Aim 1 **To entrench SAVO's role as a centre of excellence and to enable Suffolk's Third Sector to prosper and grow.**

Objectives: Ensure SAVO is a robust Third Sector infrastructure organisation for Suffolk operating within recognised quality standards, with effective governance and management that allows us to provide high quality support services in clearly defined areas of work.

Ensure our quality support services are clear, practical and relevant to the individual groups and that we constantly monitor and evaluate our services to ensure standards are maintained or improved.

Aim 2 **To identify, develop and maintain meaningful and effective partnerships across the public, private and voluntary sectors.**

Objectives: Use SAVO's charitable remit for championing and representation to promote the value and purpose of Suffolk's Third Sector organisations.

Build on our reputation at a local, regional and national level, to actively seek out and support partnership development at both strategic and practical levels.

Represent and advocate as both a Third Sector infrastructure organisation in our own right and as a facilitator for the wider Sector.

Strengthen understanding of the importance of governance and accountability in partnership working, using the Compact in Suffolk as a basis.

Make links and enter into partnerships for the benefit of SAVO as an organisation, to ensure resources are utilised and duplication avoided.

Aim 3 To increase the numbers of people volunteering and improve the quality of the volunteering experience.

Objectives: Ensure through the Suffolk Volunteering Federation, working with a range of partners, that volunteer-involving organisations are given guidance, training and support to manage and develop volunteers according to their individual needs and aspirations.

Improve, through this support, the quality, effectiveness and responsiveness of volunteer management.

Aim 4 To support the Third Sector in Workforce Development through the provision of information and services

Objectives: Address the practical and strategic needs of the Third Sector's workforce through the continued development of the Third Sector Learning Consortium. This encompasses the encouragement of collaborative workforce ventures, support and provision of accreditation and qualification support, information and guidance on workforce matters.

Develop and expand SAVO's own learning and skills work (the Get SORT&D! project) for staff, trustees and volunteers of Third Sector groups on a local, regional and national level to incorporate both accredited and non-accredited learning in a variety of formats including face to face learning, e-learning and toolkits.

Aim 5 To develop a sustainable financial model from a variety of sources to maintain our independence and further our objectives.

Objectives: Ensure that longer term funding is secured and income generation is increased and diversified to ensure less reliance on short-term project funding.

Explore the opportunities for developing enterprises that give value to SAVO's products, publications and intellectual property rights.

Develop a robust staffing and accommodation strategy to ensure resources are available to support our work and managed in a way that enables sustained employment of staff members, together with best practice employment for short term staff.

Balance the needs of organisational and income generation strategies, with the resources available to stakeholders in order to ensure that smaller, less resourced groups can afford our services.

Aim 6 To use market intelligence to play a strategic role in setting Suffolk's agenda.

Objectives: Develop SAVO's research capacity to help organisations plan services better and improve their efficiency and effectiveness.

Provide the evidence and arguments for increasing the Third Sector's strategic and operational role in Suffolk's life.

Aim 7 To act as change makers and forge alliances to achieve change.

Objectives: Understand the national, regional and local perspective and how this relates to the environment in Suffolk.

Help the Third Sector to address and respond to changes, such as procurement, legislation and best practice.

Listen to the concerns of the Sector to determine the big issues we want to campaign for and to encourage good practice in all aspects of management and development within organisations.

Become a critical friend to all organisations, supportive in times of trouble and offering motivation and leadership when groups become complacent.

Aim 8 To improve marketing, communication and information sharing both within the sector and to the outside world.

Objectives: Ensure SAVO has a comprehensive understanding of the role and methods of communications, including targeting and accessibility of communications.

Explore and incorporate examples of best practice and ensure the effective collection and dissemination of information, data and opportunities into one central hub.

Explore and utilise the developing opportunities afforded by new technology.

Aim 9 To increase work with communities of special interest and those which are commonly excluded.

Objectives: Embrace the development of a more coherent partnership with others through MECAN.

Gain, through data collection and research, a better understanding of the demographic, cultural, community and economic changes occurring within the county and the impacts these can have on Suffolk's wider agenda.

Play a key role in enabling individuals, communities and organisations to participate in Suffolk's civil society and encourage the building of social capital by empowering people, engaging people and promoting self-help, skills building and action.

Legal Status

SAVO is a Registered Charity (No. 1091039) and a Company Limited by Guarantee (No. 4354379). SAVO owns 100% of the shares in a company, SAVO Enterprises.

Services and Activities

The project is being led by Suffolk Association of Voluntary Organisations (SAVO). Formed in 1992, SAVO has delivered infrastructure services across the county including:

- **Learning and Skills Development** through accredited and non-accredited courses in organisational and personnel management, business planning, interpersonal skills, trustee and committee skills, health and safety subjects; publishing toolkits and e-learning on policies and procedures, staff management, minute taking, the media, risk assessment etc – this includes writing a 12 module e-learning programme on trusteeship for the National Governance Hub.

All these courses and resources are still running and available today - over 1,000 people a year attend courses. Groups can access one to one support as well. SAVO is an approved National Open College Network Centre

- **Representation** - providing and facilitating Third Sector representation on a wide variety of local, county, regional and national bodies including Local Strategic Partnerships, Suffolk County Council, Mental Health partnerships, the county PCDL Partnership, NCVO and National LSC Working Together Steering Group. SAVO is the Compact Champion for Suffolk and last year SAVO's Partnership Manager won a national Compact award.
- **Information Services** through the SAVO, Suffolk Learning Consortium and Suffolk Volunteering Federation Websites, regular magazines (Suffolk VOLLIES), Newsletters (Members Briefing) and e-briefings on partnership (PIVOTAL).
- **Lead Partner** of the Suffolk Volunteering Federation and the Suffolk Learning Consortium as well as providing the secretariat for Infrastructure Network Suffolk (Suffolk's ChangeUp Consortium).
- Acting as a gateway for funding via the Suffolk Learning Consortium for NLDC funding and NIACE Capital funding. The Consortium also runs a Learning Champions project and brokers work around Train to Gain.
- Running discrete projects; i.e. Criminal Records Bureau (CRB) checking service.

All these services are available to Third Sector organisations across the county.

Management Structure and Roles and Responsibilities

SAVO Management Structure (see Appendix 1)

SAVO's Trustee Board, which meets 4 times a year (plus an away day), comprises of trustees with three of SAVO's senior managers - the Chief Executive, Training Manager and Corporate Services Manager in attendance.

There are also Suffolk County Council observers at councillor and senior officer levels. Amongst the trustees are a former senior manager at East Suffolk MIND, an author of books and resources on learning and skills monitoring and evaluation and a former Director of Voluntary Services Overseas (VSO) in Kazakhstan.

SAVO's Honorary Treasurer is a specialist charity accountant. The Trustee Board discusses SAVO's strategic direction, key policies, projects, finance and personnel.

The trustees are also expected to sit on at least one of the following sub committees that each meet four times a year. These committees undertake more detailed scrutiny of their particular areas and make recommendations to the Trustee Board.

- The **Performance Management Committee** monitors progress on the business plan, reviews new projects and develops SAVO's monitoring and evaluation processes - administered by the Training Manager
- The **Governance Committee** reviews policies and procedures and looks at staffing and governance issues - administered by the Corporate Services Manager
- The **Finance Committee** reviews and discusses the future budget and receives detailed management accounts every three months. They also scrutinise the Annual Report and Accounts before they go to the Trustee Board. The Committee is administered by the Corporate Services Manager.

On this Basis 2 Project the Training Manager will be reporting to the Performance Management Committee and to the Trustee Board. It is proposed that one of the Trustees on the Committee would sit on the Basis 2 Project Steering Group to ensure that there is a governance presence.

SAVO's Senior Management Team comprises five senior managers who meet on a monthly basis to discuss recent and future developments. The Chief Executive meets on a monthly basis with the Chair to discuss progress. SAVO holds team meetings with all the staff every two months.

In 2008 SAVO passed its Investors in People assessment for the third time in a row and both staff and trustees have worked to ensure that SAVO meets all the standards relating to both Levels 1 and 2 of PQASSO.

SAVO's Partnership Work

SAVO works with a wide range of partners from the statutory and Third Sector. Currently it is running an InfoLink volunteering project and a migrant workers' project with Suffolk County Council, a Health Trainers' project with NHS Suffolk and Ipswich CVS and sits on a number of LSC partnerships including the Suffolk PCDL Partnership (SAVO's Training Manager is the chair) and the regional Learning Consortium Partnership.

As the secretariat for Infrastructure Network Suffolk (INS), SAVO has a good working relationship with all INS members, including the partners on this Basis 2 Project.

SAVO has run a wide range of learning and skills projects in the past including several lottery-funded projects both county-wide and in the Waveney area of the county, which concentrated on running courses and one to one support sessions with Third Sector frontline organisations.

A two year Jobcentre Plus capacity building project allowed us to work with specific groups and develop a series of practical toolkits to help organisations develop their policies and procedures and staff management processes.

Various LSC funded projects helped us to develop our expertise in writing e-learning programmes and create and manage the Suffolk Learning Consortium. All the projects we have managed have delivered on the targets set and passed relevant audit inspections.

The lessons we have learnt from all these projects are:

- To ensure that the targets you set for a project are realistic and that "contingency time" is factored in
- To recognise that projects can take time to get started and become embedded in the Third Sector consciousness
- To recognise that writing resources such as toolkits and e-learning programmes takes time and to ensure that you have the "reader" in mind
- To ensure that you have monitoring systems in place before the project starts.

Basis 2 Project Partners

Babergh Communities Together

Area of Operation:

Babergh District (South Suffolk)

About:

Babergh Communities Together provides advice, guidance and practical help to voluntary and community groups throughout the district of Babergh. Regular funding and development surgeries are held throughout the district and groups have access to events, workshops and training.

Babergh Communities Together also runs **Volunteer Centre Babergh** which promotes volunteering across the district and offers advice and support at locations in Sudbury, Hadleigh and the Shotley Peninsula area.

Services:

- We recruit potential volunteers from across all sections of the community and provide practical support for volunteers too
- We offer 1-2-1 help, advice and support in setting up new groups
- Free Funding & Development Surgeries for Third Sector Groups
- Relevant briefings and events covering key issues for the Third Sector
- Resources for hire, including digital equipment, room hire and photocopying
- Representation of Third Sector groups within Babergh at a strategic level
- Publishes a quarterly newsletter.

Membership:

Babergh Communities Together does not charge for membership. Full Membership is open to any organisation, statutory or voluntary or individual wishing to support local infrastructure development, and offers voting rights at AGMs and EGMs.

Network memberships is open only to voluntary and community groups or statutory bodies offering a community-based service and offers access to newsletters, e-bulletins, loan of equipment and being kept informed as to what's going on around the county and in the district.

Ipswich and District Council for Voluntary Service

Area of Operation:

Ipswich and surrounding area

About:

Ipswich and District Council for Voluntary Service (ICVS) was formed by voluntary and community groups from in and around Ipswich in 1959. ICVS is part of a national network of more than 350 CVS.

ICVS has a vision to see a vibrant and sustainable Third Sector and voluntary and community action in Ipswich. As an organisation they want to see the sector engaged and recognised for its contribution and expertise in tackling social exclusion, promoting health, reducing health inequalities, building strong and safe communities and an institution of social capital.

Above all ICVS wants to celebrate how the Third Sector in Ipswich and district enables enjoyment of the arts, provides a range of volunteering opportunities, enables people to contribute and help themselves and their communities, recognises needs and does something about it.

Services:

- Services and Support: promote the effectiveness of local voluntary and community groups by providing them with a range of services, including funding, development, governance and budgetary advice.
- Liaison: As a focal point for the local Third Sector, ICVS encourages networking between individuals and groups within the sector and between local groups and the statutory and private sectors. ICVS helps different groups to organise their own networking activities.
- Representation: aims to enable the views of local groups to be represented early enough to make a difference.
- Development work: aims to work with community and voluntary groups to recognise need and make a Third Sector solution happen for people in Ipswich and the right support services accessible to local groups. ICVS runs a hub, offering low-cost office space in the centre of Ipswich, fully equipped and serviced.
- Strategic Partnerships: ICVS aims to work in partnership with our One Ipswich Partners to shape the delivery of services and empower local groups to take part in partnerships for regeneration, neighbourhood renewal, health and social care, learning and other initiatives.

Mid Suffolk Action in Partnership

Area of operation:

Mid Suffolk

About:

MAP is the working name of the Mid Suffolk Voluntary Organisations Forum. Its role is to attempt to improve the effectiveness of voluntary organisations working in the Mid Suffolk area by the provision of advice, training, practical support and information.

MAP also manages the Red Gables Resource Centre which provides permanent accommodation for voluntary organisations. Local groups can book and use the communal facilities in the form of meeting rooms and counselling rooms at Red Gables.

Services:

- Training courses and events - including funding surgeries
- Newsletter - distributed quarterly
- Red Gables Resource Centre - desk space and meeting rooms can be hired out at an affordable rate.
- Gardens - available for Third Sector organisations to hold events in. A marquee is also available for hire and fundraising stalls.
- MAP Trailer Project - an exhibition trailer is available for Third Sector groups, equipped with a television, DVD player and other facilities, for use at events or as a facility for rural outreach work.

Suffolk ACRE

Area of operation:

Suffolk wide

About:

Suffolk ACRE (Action with Communities in Rural England) is a charity and company limited by guarantee incorporated in 1997. It was established in 1937 to work with communities in Suffolk.

Its mission is to tackle the economic, social and environmental needs of communities in Suffolk by forging effective partnerships between communities and agencies and promoting communal self-help.

It is Suffolk ACRE's aim to help communities in Suffolk to identify and tackle their needs through community action. Suffolk ACRE's role is to support community groups and voluntary organisations to undertake self-help activities and enable communities to take ownership for their own well-being.

Services:

- Business Support Services (including village halls, community buildings, social enterprise and funding advice)
- Community Engagement and Consultation Support (including Parish Plans, Rural Housing and Good Neighbour Schemes)
- Insurance for community groups, community buildings and Parish Councils
- PAT electrical testing
- Hire of fully accessible minibuses
- Hire of Hearing Induction Loop
- Hire of Resource Centre Rooms, Equipment and UK Online centre ICT Suite
- Good Neighbour Scheme Toolkit.

Training:

Accredited and bespoke training courses:

- Business Planning
- Community Development
- Community Involvement and Planning
- Consultation Techniques
- ICT
- Training in specialist areas including:
 - Village Hall / Community Building management
 - Project development and management
 - Funding.

Rural Advocacy - Gathering information about rural need to inform the policies of other agencies, and to develop activities to help to tackle those needs.

Suffolk Online - Suffolk Online offers specialist Database and Website Development with fully trained in-house database and web developers. It also offers ICT Support packages to Third Sector organisations within Suffolk.

Venue Specific Transport - An extensive list of accessible transport at a reasonable cost, from regular trips to and from Day-care Centres and Respite Care, to airports trips and holiday destinations across the country.

Kickstart - a ground breaking initiative aimed at tackling the rural isolation and disadvantage experienced by people of all ages living in rural Suffolk, when trying to access training and employment but without accessible transport. It is a moped loaning scheme which gives rurally isolated people aged 16-65 the opportunity to get out of the 'No transport, no training, no job, no money' cycle.

Suffolk Coastal Resource Network

Area of Operation:

Suffolk Coastal District

About:

The Suffolk Coastal Resource Network is a network of Third Sector infrastructure organisations that provide a range of services for front-line voluntary and community organisations in the district.

Set up as a result of a needs analysis as part of ChangeUp in 2004, the Network works closely with the Suffolk Coastal Local Strategic Partnership in the district as part of their community engagement agenda.

From this alliance, funding is currently available for a key worker to undertake funding and development work within the district on a part-time basis. The VCS Development Coordinator also arranges training sessions, networking events and one to one support for voluntary and community groups.

SAVO is the lead partner within the Network, which is chaired by the CEO of Suffolk ACRE.

The key objectives for the SCRN are to:

- Develop the Third Sector to deliver key service outlines
- Co-ordinate the support for the Third Sector from key agencies
- Increase the participation of Suffolk Coastal citizens in informal and formal volunteering
- Facilitate and support the production of parish plans to identify needs and solutions.

Suffolk Learning Consortium (SAVO lead-body)

Area of operation:

Suffolk wide

About:

The Suffolk Learning Consortium was formed in April 2008 to create a Third Sector Learning and Skills Consortium, involving Third Sector organisations and other learning agencies, to co-ordinate learning and skills activities across the county, and now has over 100 members.

The Consortium is led by a Steering Group of 15 members:

- Age Concern Suffolk
- Anglia Care Trust
- CSV Media
- ICVS

- Lowestoft College
- Meridian East
- Optua
- SAVO
- Suffolk ACRE
- Suffolk College
- Suffolk Connect
- Suffolk Local Infrastructure Partnerships
- Suffolk Volunteering Federation
- Young Suffolk
- WEA

Services:

- Learning related Information, Advice and Guidance
- Course development and accreditation
- Regular news updates on learning in the Third Sector
- Co-ordination of bids for funding
- Co-management of NLDC Funding (with Suffolk County Council)
- Resources for learning delivery
- Third Sector County Champion for NIACE E-Guides, IfL and Train to Gain
- Learning Champions training.

Waveney Community Forum

Area of Operation:

Waveney

About:

Waveney Community Forum is a Council for Voluntary Service assisting voluntary and community groups by offering one to one support, training and networking opportunities, and by providing information and advice.

Waveney Community Forum manages various projects working in partnership with key bodies including the 4 Towns Bus and a BME Mental Health worker. It also manages The Crossing learning centre in Lowestoft, and carries out pieces of research work relating to the sector.

Waveney Community Forum sits on various partnerships representing the Third Sector and giving it a voice at key strategic forums. The Forum also promotes activities both in Lowestoft and rural areas such as arts, heritage, local sourcing (of food, etc.) for people who live in Waveney and those who visit.

Services for VCOs:

- VCO support: Support services direct to local voluntary and community groups relating to funding, training and capacity building, planning, governance, policies and procedures, and relevant developments in the wider Third Sector
- Representation: Being a champion for the Sector on partnerships and strategic groups, and enabling and encouraging representation of the Voluntary Sector
- Grant programme: Manages a Small Grants programme on behalf of NHS Great Yarmouth and Waveney
- Strategic Partnership: Working with the statutory sector to make Waveney a better place to live

- **Liaison:** Encouraging networking between members of the Third Sector to share good practice.

Other Services:

- Managing the Waveney Rural Community Partnership, providing opportunities for organisations in the rural areas to work together, supported by a Community Development team
- Four Towns Bus, operating as a mobile youth facility in the evenings in the market towns and larger parishes of Waveney, and providing a mobile community resource centre for agencies and groups to use in the daytime
- Black and Minority Ethnic Community Development service, helping to reduce mental health problems amongst these groups of people
- The Crossing, offering help to improve life skills and employment opportunities
- PAT electrical testing service to voluntary groups and small businesses.

West Suffolk Consortium for Voluntary Organisations

Area of operation:

West Suffolk

About:

West Suffolk Consortium for Voluntary Organisations is a network of various representatives from the Third Sector infrastructure operating in the West Suffolk area. The consortium consists of the following organisations:

- Bury St Edmunds Volunteer Centre
- HAVO
- The Voluntary Network
- Haverhill and District Volunteer Centre
- Babergh Communities Together.

Services:

We offer funding surgeries, training events and the loan of equipment through our partners. We also provide a representational voice at a local level. Each organisation produces its own newsletters and publications. Membership is free and entitles groups to access information about what's going on in the West of the county.

Young Suffolk

Area of operation:

Suffolk wide

About:

Young Suffolk is the only county-wide infrastructure organisation in Suffolk for the voluntary and community youth sector. It promotes and meets the needs and aspirations of young people under the age of 25 by strengthening and supporting the work of the member organisations that directly deliver services to young people.

It is the Independent Voice of the voluntary children and young people's sector in Suffolk.

Services:

- Guidance, information, practical help

- Updates on local and national issues and a filtering, navigating service
 - Access to funding
 - Sharing of resources and training
 - A forum and voice for its members
 - Council meetings 4 times a year
 - Partnership opportunities with the statutory and voluntary sectors
 - A database that reflects the diversity and range of its membership
 - Newsletter: 'Young Suffolk Network' packed with information and published 4 times a year
 - Stop Press bulletins every 2 weeks and regular FLASHeMAILS to flag up important information that requires a more immediate response
 - Opportunities to volunteer via V
 - Opportunity to be part of the Young Suffolk Volunteer Partnership (Young People's Volunteer Support)
 - Young People's Involvement - Encouraging and supporting the participation of young people at all levels
 - Website
 - Quality standards.
-

Project Background

Developing the learning and skills of Third Sector groups has always been a high priority within SAVO and within a number of the Basis 2 partner organisations.

Since the inception of Infrastructure Network Suffolk (INS) and the development of local infrastructure partnerships across the county the number of Third Sector frontline organisations wanting assistance with skills development, funding advice and sustainability issues has grown.

The number of frontline groups on infrastructure organisation databases and mailing lists has expanded enormously in the last five years. As these groups begin to understand and appreciate the value of having a variety of infrastructure services, so they have requested more help and advice.

At the same time funders are expecting more professional services, evidence of management skills, quality standards and good governance from the Third Sector groups they fund.

The INS Business and Development Plans include key strategic objectives relating to skills development amongst frontline organisations, developing services around funding and development advice and quality standards. The plans also acknowledge two key themes which have emerged from recent research reports.

- 1) The need for consistency of service across the county in terms of advice, support, information and learning and skills. Evidence suggests that there are still inequalities between levels of service in urban and rural areas, with both having specific needs.

Many county-wide organisations have their bases in Ipswich and BME groups in particular highlighted the need for the same level of services to be available outside Ipswich and Lowestoft.

- 2) There were also areas of the county, mainly very rural, where infrastructure services were still to make an impact. Whilst groups based in market towns reported reasonable awareness of infrastructure services, this was not always the case elsewhere.

With 42% of the total Suffolk population living in rural areas, significant numbers of whom are suffering forms of deprivation e.g. 40% of people in Suffolk with limiting long-term illness, 39% of all adults in Suffolk with no qualifications etc, it is vital that rural voluntary and community groups are better supported and trained.

Whilst the last three years have seen giant strides in developing infrastructure across the county, several LIPs are in the early stages of development and still working towards meeting the needs of their frontline organisations.

Groups who have undertaken training or received one to one support are better prepared in terms of finding and managing funding. This is evidenced by results in the Suffolk Coastal area: Suffolk Coastal Resource Network in 2007 saw 44 groups at its funding surgeries, 32% of whom were successful with funding bids (a total of £72,598). Analysis of figures for 2008 shows an 8% increase in success rates.

In Suffolk the County Council's Third Sector Funding Management Group is looking at all methods of funding including grants and contracts. Whilst there is a place for grant-funding, Third Sector organisations need to become contract-ready, with appropriate quality systems / policies in place.

In keeping with national drivers, local councils are pushing quality standards. Equipping organisations with the skills, systems and knowledge to meet such quality criteria is an important element underpinning the project.

According to the National Workforce Hub's Third Sector Skills research (2008), which resonates with the Suffolk experience, well-managed organisations attract and keep effective and motivated staff, trustees and volunteers leading to improved services and impact.

The advent of the Suffolk Learning Consortium has provided the Third Sector in Suffolk with an important learning and skills champion. Through its representative role on national, regional and county learning bodies, other learning agencies such as statutory bodies and colleges are more aware of the roles the Third Sector can play in delivering and accessing learning.

The Consortium has also been able to bring in new sources of funding into Suffolk, particularly around capital funding and it has helped a number of frontline organisations to work on regional learning projects.

A number of research reports have helped to develop a clear focus for the Basis 2 Project. These include:

- The Suffolk Workforce Development Strategy consultation, and a county Third Sector Skills Audit (2007), highlighting areas of weakness and leading to the creation of the Suffolk Learning Consortium. This emphasised the need for more training in management, planning and quality evaluation skills.
- Suffolk ACRE Rural Services Survey (2008) – shows that rural services across the county such as post offices, shops and pubs continue to decline.

It is essential that as much management support and training as possible is brought to bear to preserve, sustain and develop groups to deliver these essential rural services in the future.

- A representation research project (Voluntary and Community Sector Representation in Suffolk 2007) looking at people's experience of working with the statutory sector and other partnerships, highlighting the need for better networking skills and advice.
- A Suffolk BME research project (Minority Community Action Network (MECAN) Project Report February 2008) looking at issues BME groups encountered in working with local infrastructure groups and vice versa. Again the need for more training and outreach work in rural areas was recommended.
- The 'Deprivation in Rural Suffolk – Highly-deprived areas and the rural share of deprivation' report (November 2007) concluded that existing standard measures such as the Index of Multiple Deprivation failed to recognise the significant percentage of people experiencing deprivation issues living in rural Suffolk.
- A One Ipswich Report entitled "Ipswich Ward Community Profile" (July 2008) provided ward level statistical profiles covering population, ethnicity, employment, economy, education and young people, crime and health and well-being and unmet needs. The detailed statistical evidence is informing training workshops, community engagement, funding and development required in Ipswich.
- A 2008 Suffolk report on Social Enterprises highlighted the need for training, funding advice and networking skills.

There is also the evidence and experience of INS organisations. LIP leads now have PTTLS teaching qualifications but they have limited time and resources to develop training materials and handout resources, but want to develop this further.

Providing a central "bank" of training courses, resources, handouts and toolkits will save time, effort and costs, enabling them to focus on delivery of help to groups in their areas.

Strategic Context

The Basis 2 Project's main aims are to:

- develop the skills, knowledge and learning of staff, trustees and volunteers within Suffolk Third Sector organisations
- improve and strengthen the sustainability of frontline organisations, through raising the quality of their work and their ability to successfully apply for funding.

The project will be delivered by a partnership of county and local infrastructure organisations, supported by other Infrastructure Network Suffolk members and led by SAVO.

These aims will be achieved by:

- strengthening the skills of INS project partner organisations so that they can cascade their knowledge to frontline organisations

- providing frontline organisations with learning resources to increase their knowledge and skills of running an organisation
- providing stronger, frequent and coherent funding and development advice services to frontline organisations
- creating a funding network within the county for the benefit of those involved in fundraising, including a funding mentoring service led by experienced fundraisers
- gaining a coherent annual picture of Suffolk's Third Sector training needs to shape future provision, service and response from infrastructure groups
- developing a county-wide trainer network to recruit and up-skill more Third Sector trainers
- enabling sector personnel to gain accredited qualifications and for organisations to engage with qualification-approved centres to accredit their own courses
- ensuring that organisations take advantage of national learning initiatives e.g. Train to Gain, Skills for Life, Learning Champions
- assisting frontline organisations to improve the quality of their work and enable them to access appropriate quality systems resulting in better services and strategies for improvement
- ensuring synergy between INS learning strategies and the work of the Suffolk Learning Consortium.

The project will be Suffolk-wide and will take place during a period when the county will be experiencing major administrative boundary changes (decision in July 2009, implementation April 2011).

A major focus of the project will be to ensure that emerging and established groups in rural areas and groups that are currently not involved in training initiatives receive the support they need to develop their sustainability.

The specific project outcomes are:

- 1) 1000 frontline organisations to receive higher quality funding / management / development advice by April 2014 from Infrastructure Network Suffolk members thereby improving their capacity building and sustainability.
Infrastructure Network Suffolk to collate data to produce a major sustainable five year business plan 2014 onwards.
- 2) Increased professionalism in good funding development / advice / mentoring across Suffolk by creating a funding network (100 members), including funding mentors, developing good practice funding bids (50) to raise standards and increase success rates / diversity of funding amongst frontline organisations.
- 3) Production of sustainable resources for Infrastructure Network Suffolk members (40 course outlines, tutor notes and resources, production of five practical toolkits on governance, management, planning topics) to train and support frontline organisations to improve and develop sustainable services for their beneficiaries.
- 4) Developing workshops / mentoring on different quality standards, helping 50 organisations to achieve appropriate quality standards and to train up Learning Champions within frontline organisations to improve their standards and best practice in service delivery and develop a more skilled Third Sector workforce.

By the end of the project:

- Local infrastructure organisations will have trainer notes, course outlines, resources and handouts to be able to continue delivering courses and one to one sessions with Third Sector groups across the county.
Each local infrastructure organisation should be programming a regular training programme of courses, funding and development surgeries, conferences, some of these events generating income to sustain the programmes and allow for work to modify and update resources
- Both frontline and infrastructure organisations will be more skilled and experienced about applying for funds, obtaining grants or entering and sustaining contracts and service level agreements.
Because they are more knowledgeable about both funding sources and how to write good applications, they should be more sustainable organisations, developing longer-term funding prospects and building their financial reserves
- There will be a funding network incorporating funding mentors across the county who are able to help smaller and less experienced groups with finding and applying for funds
- Many frontline organisations will be developing their workforce (staff, trustees and volunteers) through accessing affordable or free training and resources (including e-learning programmes) – some of these organisations will have a trained Learning Champion amongst its personnel to ensure that learning needs are met and that learning and staff / volunteer development is embedded in the organisation's culture
- There will be a strong, well-informed Third Sector trainer network that keeps in touch via virtual and face to face meetings, with trainers who have relevant teaching qualifications and are able to offer support when needed.
Many of these trainers, including trainers within local infrastructure organisations, will have specialist knowledge or subject areas which they can share with groups across the county
- The Third Sector, through the Suffolk Learning Consortium, will be playing an active and important role in government learning initiatives such as Train to Gain (or its successor), not only in ensuring that Third Sector organisations' staff, trustees and volunteers are accessing such initiatives, but also ensuring that the Third Sector is delivering Train to Gain courses
- Local infrastructure and frontline organisations will be actively working to a variety of quality standard systems, ensuring that they are constantly striving for improvement
- Local infrastructure and frontline organisations will have developed the skills, knowledge and experience to aid working alongside the new Suffolk local government structure.

These meet many of the concerns that were expressed in both the various research projects (highlighted in the previous section) undertaken in Suffolk in recent years, as well as feedback from individual groups as to their needs.

Because all the partners are in touch with individual organisations on a regular basis, we have been able to reflect their needs within the project. During the five year project we will be working with a wide range of frontline organisations (at least 1,000 over the lifetime of the project), that cover both a very wide spectrum of interest and that are in different stages of development.

These include:

- Community / Voluntary groups who are just starting up – they will need help with their formation (one to one support, starter pack, volunteer management advice, committee skills, networking contacts, funding advice and signposting to the key partners e.g. Suffolk Volunteering Federation for volunteer issues, Young Suffolk for specialist advice to groups working with children and young people, Suffolk ACRE for insurance or specialist funding advice for village halls). Local Infrastructure Partnerships are key first points of contact as they have specialist locality knowledge.
- groups moving from purely voluntary status to employing staff – help with employment matters, personnel management, sustainability and funding issues
- groups who get into difficulties – advice, help with business planning etc.
- groups diversifying their income streams or commencing trading activities (assistance with structures and legal issues)
- groups in rural areas – where they might feel isolated, cut off from support mechanisms – often these groups may be involved in the development of local parish plans and need support to acquire the skills and resources to implement the plans
- groups in urban areas who need best practice in networking and partnership skills so that they can engage in the planning and implementation of neighbourhood projects
- BME and faith groups – this project would link in with the BME MECAN network project which is developing a network of BME and faith groups across the county and the Basis (refugee council) project which is working on developing and enabling new refugee community groups
- other hard-to-reach groups such as refugees, women's groups etc.
- groups who wish to engage with the proposed new local area community boards so that they have a "voice".

One of the strengths of Infrastructure Network Suffolk is that it brings together all the main Third Sector infrastructure organisations within the county and thus through collaboration and partnership working we can provide a very strong service to the county through this Project.

Although there are some training providers (such as Suffolk County Council) that might currently deliver some training to the sector, because of the close links that the Basis 2 Project partners now have with statutory partners, this is usually complementary rather than competing provision.

Another strength is that one of the Basis 2 partners, Suffolk Learning Consortium has strong regional links with the other Third Sector consortia in the region. The Consortium Co-ordinator (who is also the Co-ordinator for the Basis 2 Project) meets regularly with regional partners to exchange information and resources.

The Consortium also has close links with the local Learning and Skills Council and is already participating in initiatives around Train to Gain, Learning Champions and adult teaching qualifications.

The Basis 2 Project Manager is currently chair of the Suffolk PCDL (Personal and Community Development Learning) Partnership and is a member of the county's Adult

Learning and Skills Executive, as well as sitting on the county's NLDC (Neighbourhood Learning in Deprived Communities) funding working party.

This will greatly assist in ensuring that the Basis 2 Project complements and enhances other learning and skills projects.

Several of the Basis 2 Project partners represent the Sector on a wide range of bodies such as Local Strategic Partnerships, county youth bodies etc - these are all vital contacts in ensuring that the project reaches groups most in need. Young Suffolk, for example, one of the partners in this project, is the only specialist children and young people's infrastructure organisation working across the County.

With the support of the Big Lottery BASIS 1 funding Young Suffolk is fast emerging as a critical element of the development of the children and young people's Third Sector, providing vital links to the Suffolk Children's Board Partnership and Suffolk Children's Safeguarding Board. Young Suffolk's inclusion in this programme ensures a generic approach to Third Sector infrastructure development in the County.

Sustainability

As can be seen in the section above relating to what will be achieved by the end of the project, the sustainability of this project has been carefully thought through and will, throughout the project, be a key issue to review constantly. A key project aim is to help frontline groups to help themselves by building the skills, knowledge and expertise of their workforce (staff, volunteers and trustees / management committee members).

By emphasising the need for organisations to develop a learning culture, it is intended that organisations will ensure that their knowledge and skills are constantly refreshed and that as new personnel join, the learning is passed on.

Emphasis has also been placed on ensuring that the partners themselves begin to develop sustainable modes of delivering their work. Whilst the work in this project concentrates on delivering the resources and events at no cost to frontline organisations, the partners at the same time should be looking at developing courses and events that will provide them with sustainable income.

SAVO, for example, in developing the practical toolkits has started talks with national organisations such as NCVO and NACVA to see how the toolkits could be developed for the "national stage" (i.e. outside Suffolk), generating income to sustain and revise existing toolkits and develop new subject areas.

Project Delivery

Our Market

In the last section we detailed the types of organisations this project will target.

Overall we will be working with at least 1,000 Third Sector frontline organisations over the duration of the project. This probably represents about 15 - 20% of the Third Sector groups in Suffolk - current estimates suggest there are over 6,000 Third Sector groups in the county.

Some of these would not want or need to access learning and skills support – they may be very small or very large and can access support from national or regional bodies.

This project though will reach a significant number of people and importantly because it is a county-wide project, reach geographical areas (particularly rural) and types of groups that have not accessed support before.

Our marketing and communications strategy (described later on in this Business Plan) outlines key principles of how we want to be open and accessible to all groups and individuals. Whilst many of our resources will be available on the web, we recognise the need to utilise all forms of communication to ensure that our message gets across and groups can access our services.

The Work Areas

Training Resources

The Project Steering Group will consult partners as to the eight training courses / resources and one toolkit to be developed each year. A website will be created giving access to project partner organisations to download the resources which can be used in running courses or for development sessions with individual groups. The course resources will comprise:

- course outlines giving a range of possible structures and subject matter
- handouts which can be downloaded and photocopied
- PowerPoint slides
- template forms or good practice case studies which can be used by frontline organisations.

The subject areas for the 1st year will be:

- Starting up your voluntary organisation or community group – an overview
- Committee roles and responsibilities and committee skills
- How to be a good chair – the chairing role and chairing skills
- How to be a good treasurer
- How to write a simple but effective business plan
- Recruiting and managing volunteers
- How to write a good funding application
- Events management – how to organise events

Future subjects will include:

- Methods of monitoring and evaluating the work you do
- Working with the media
- Minute taking
- Developing the right policies and procedures
- How to plan and deliver a project
- Speaking and presentation skills
- Finding the right group structure for you – charities, companies, CIC's, etc.
- Managing paid staff: - Recruitment and selection
Induction
Conducting staff appraisals

Dealing with difficult staff
Staff training and development.

Other subjects will be added as the project develops and feedback is collected from the partners and frontline organisations.

The practical toolkits will go into greater depth in particular subject areas and will include:

- introduction to the subjects
- legal aspects and current legislation (if applicable)
- clear guidance on what must be done (e.g. to comply with legislation) and what is good practice
- “How to” sections
- Tools that can be used including specimen policies, forms, etc.

The subject for the first year’s toolkit will be **Starting and Developing a Voluntary or Community Organisation** and future subjects will include **Getting ready for delivering public services** and **Partnership Working**. Toolkits will be available to frontline organisations in both paper copies and on the web.

Target: 8 course outlines and one toolkit per year.

Funding and Development Work

Each Local Infrastructure Partner organisation will be given £3,500 a year for developing their funding and development work, submitting plans before the start of each year as to how the money will be spent.

Half the payment will be given at the start of each year, the other half at the start of the 7th month, subject to a satisfactory progress report.

In the first year the following work will be undertaken:

Babergh Communities Together

- Increase number of normal one to one funding and development support with Third Sector organisations in Babergh by 20%
- Workshops in the Babergh District for Parish Councils and community groups on ‘taking parish plans to the next steps’ (working in partnership with Suffolk ACRE)
- Two half days sessions on specific funding and development for village halls
- Running training sessions on Writing Good Funding Applications
- Specialist 1 to 1 support to Third Sector organisations in Babergh on three specific topics: charity registration, developing a fundraising strategy and business planning.

Ipswich and District Council for Voluntary Service

- 50th Anniversary Event - Celebrating 50 years of community action and raise awareness of voluntary and community action happening in the Ipswich area, to include an exhibition and 6 bite size training sessions
- 3 Volunteer network events - To enable individuals with volunteer recruitment support responsibilities to meet, share best practice, and raise knowledge re specific issues, e.g. refugee, supported volunteering

- 3 ICVS Network Events - As above, providing an opportunity to highlight relevant issues that will impact on the Third Sector of Ipswich
- 2 Diversity Workshops - To raise awareness of the diverse needs of the Ipswich community.

Mid Suffolk Action in Partnership

- Hold 7 Development Workshops to raise awareness of Third Sector related subjects on funding and management, to include networking, sharing best practice and information packs
- Event to celebrate community action in Mid Suffolk and to showcase support available through MAP
- Production of useful information for distribution at Funding and Development Surgeries and to further assist with subsequent 1-1 advice and guidance.

Suffolk Coastal Resource Network

- Workshops in Coastal for Parish Councils and community groups on 'taking parish plans to the next steps'.
- Two half days sessions on specific funding and development for village halls
- One half day Introduction to Finance course
- Two courses in Completing Application Forms
- One course in Managing Risk
- Additional one-to-one support for issues arising on capacity building of Third Sector groups.

Waveney Community Forum

- Procurement and Commissioning workshops and information packs (1 Rural, 1 Lowestoft)
- Tendering and Contract Negotiation training (Lowestoft)
- General Fundraising skills training for Third Sector organisations, to cover funding other than grants to give a wider funding mix (2 Rural, 1 Lowestoft)
- Specialist 1-1 support to Third Sector organisations to write fundraising strategies and business plans (across Waveney)

West Suffolk Consortium for Voluntary Organisations

- Training for Third Sector groups on funding skills and development to embed learning and improve quality of bids being submitted (Forest Heath, and St Edmundsbury)
- Specialist 1-1 support to Third Sector organisations to assist with project development and inward investment (Forest Heath and St Edmundsbury)
- Resources for fundraising i.e. Directory of Grant Making Trusts, Voluntary not Amateur, licences for Funderfinder, etc.
- Accredited training for 10 Third Sector groups on governance and training needs for their organisations, (Forest Heath and St Edmundsbury).

Trainers Network

A website will be created for Third Sector trainers to access and sign up as members. The website will provide news bulletins on useful information and resources and will link to the Suffolk Learning Consortium and Institute for Learning (IfL) websites. News will include:

- briefings on adult learning teaching qualifications and where courses are running
- Briefings on Continued Professional Development (CPD) work including how to record CPD activities
- New teaching resources etc.

An annual conference / briefing session will be held.

Target: 50 members of Trainers Network by the end of the project.

Funding Network

Similar to the Trainers Network, with a website containing useful information and briefing papers on events and funding opportunities.

In addition there will be a directory of funding mentors with details of their expertise and good practice funding applications. Partners will collect these examples obtaining permission from the original applicants to use them. In some cases details of a confidential nature may be omitted.

Target: 100 members to include 50 mentors, mentoring a total of 200 frontline organisations. Development of 50 good practice funding bids by end of the project.

Quality Standards Work

During Year 1 a survey will be undertaken to determine the extent to which Third Sector frontline organisations use existing quality standards and what standards they would be interested in working on in the future. (£1,500 allocated for this piece of work)

Some of the quality standards work will be ongoing.

- Young Suffolk will provide introductory training sessions for frontline organisations in association with the Local Infrastructure Partnerships, focussing on the Young Suffolk Lite Quality Standards. It will make available three training sessions each year. (£1,000 per year)

It will also provide mentoring support for two Local Infrastructure Partners each year in order that a member of their staff can be trained to support an organisation through the Lite Quality Standard (£500 per year).

- SAVO will receive £1,000 a year to deliver a number of briefings across the county on the PQASSO quality standard and mentor a number of organisations to achieve level 1 or 2 during the lifetime of the project. One SAVO member of staff is a qualified PQASSO mentor and another is a qualified Peer Reviewer.

Other quality standards work in the 1st year:

- Suffolk Passport - There have been some initial discussions with local funders to ensure Third Sector organisations applying for grant funding are 'fit for purpose' in order to quality for a grant.

It is envisaged that a 'Suffolk Passport' could be held by Third Sector groups to instantly prove to funders that they have the appropriate policies and procedures in place and are working to a certain agreed standard.

An initial research project is required within Year 1 to determine the feasibility of this scheme, which could be rolled out for the County Council's grant fund, the Suffolk Single Gateway. (£1000 has been allocated to this).

Other quality standards briefings and information sessions will be held each year across the county and the survey in Year 1 will help to determine the programme for this in future years.

Target: 50 organisations mentored through relevant quality standards by the end of the project.

Training

Each partner will receive £1,000 a year to contribute towards the training of their staff who work with frontline organisations.

The money must be used for training that contributes to partner staff providing frontline organisations with a quality service, such as a member of staff obtaining an adult teaching qualification or an Institute of Fundraising qualification or attending courses and briefings to develop their expertise in particular subjects such as employment or charity law.

Each partner will be expected to provide evidence of how the training money has been spent each year. The money can also be used to commission particular training courses for partner staff where this is felt to be of value. Examples of how some of the partners will spend the money during the first year include:

Babergh Communities Together

£1,000 to be spent on specialist courses for staff relating to "first line management", particular types of "fundraising" and "volunteer management" so that the knowledge gained can be used in development sessions with frontline organisations.

Ipswich Council for Voluntary Service

£1,000 to be spent in the first year on the Chief Executive accessing and attending more advanced courses on planning, change management and project management so that she can then run courses locally for frontline organisations in these subjects.

Mid Suffolk Action Partnership

£1,000 to be spent on the training and development of the Partnership Development Officer in order to provide effective support to frontline organisations.

This will include tools for development work, being a development worker, fundraising skills and business planning.

Suffolk Association of Voluntary Organisations

£1,000 will be spent on:

- SAVO's Training Field Officer undertaking a PTLLS course to develop her teaching practices and qualifications in delivering courses for frontline organisations
- SAVO's Training Manager attending briefings on the PQASSO 3rd edition so that he will be able to mentor organisations in the latest edition of this important quality standard framework.

- SAVO's Training Manager to embark on a CTLLS teaching qualification to ensure that SAVO complies with the latest adult teaching qualification framework.

Suffolk Coastal Resource Network

£1,000 to be spent on The Open University Course Winning Resources and Support, which is the distance learning route to the Institute of Fundraising's Certificate in Fundraising Management, for the SCRN Third Sector Development Co-ordinator.

Suffolk Learning Consortium

£1,000 to be spent on the Project Officer completing an NVQ Level 3 in Information, Advice and Guidance, and development work in preparing for MATRIX accreditation.

Waveney Community Forum

£1,000 to be spent on resources to equip their community development officers with the skills to deliver specialist support to Third Sector groups in general fundraising skills, funding strategies and business planning.

West Suffolk Consortium of Voluntary Organisations

£1,000 to be spent on training for Funding Advisor to enable them to deliver specialist support to Third Sector groups in general fundraising skills, funding strategies and business planning.

Young Suffolk

They will use this funding to provide its staff team with Preparing to Teach in the Lifelong Learning Sector (PTLLS) qualifications, ensuring compliance with training qualifications required to access LSC funding for training courses to front-line providers. It will also be used to train staff in the new Independent Safeguarding Authority Vetting and Barring Scheme.

Also to bring Young Suffolk staff up to date with the implication of the new Charity Act with particular reference to the new Charitable Company structure. Each of these areas is vital in order that important information may be disseminated to the Third Sector, supporting work with Children and Young People in Suffolk.

Conference / Briefings Fund

Local infrastructure organisations and all INS members will be able to access funds to attend conferences and briefings of relevance to other INS members and frontline organisations such as funding and policy briefings, conferences etc.

The funds will be given out on the understanding that those attending write a short report and provide information which can then be circulated to partners who can then cascade it down to other organisations.

Applicants can claim for conference fees (if applicable), travel costs, accommodation costs (if necessary) etc. Individual applications to this fund will be processed and approved by the Project Manager and Co-ordinator up to £250. Over this sum will require Project Steering Group approval.

Amongst the conferences already identified for Year 1 are:

- DSC Charity Fair in London (April 2010)
- NAVCA National Conference
- Volunteering England Annual Conference
- National Youth Agency Annual Conference

- National Council for Youth Services Annual Conference
- The COMPACT National Conference
- COVER regional events
- Institute for Learning Regional Briefings
- EECETT (East of England Centre for Excellence in Teacher Training) meetings
- NIACE E-Guides Annual Conference etc.

Development of a new five year Business Plan

In Year 4 of the project a major survey will be undertaken amongst Third Sector frontline organisations to determine the success of the project, the current state of skills development within the organisations and future learning and skills needs.

This will be collated and analysed by Suffolk ACRE, one of the Basis 2 partners that have the software and expertise to undertake this work. A report will be written and the findings will then be reflected in a five year business plan written in Year 5 covering the 2014-2019 period.

A Project Delivery Plan can be found in Appendix 2.

Equality Principles

All the project partner organisations are committed to equality and this project is underpinned by equality principles.

Whilst our constituency covers the whole of the Third Sector in Suffolk, and any Third Sector organisation can call upon the services of this project, a major focus is on promoting accessibility, helping groups who are newly formed or just starting to employ staff, groups in rural areas who feel cut off and excluded from the main voluntary activity taking place in towns, BME and migrant communities and groups who have previously not accessed services offered by local infrastructure organisations.

In developing this project we recognise that people within the Third Sector are of different ages, ethnic cultures and beliefs, able-bodied and disabled, highly skilled to low-skilled, professional and experienced in managing Third Sector organisations to just starting out and to all of these people we want to offer the same welcoming and approachable service that is developed according to their individual needs.

Work already undertaken by many local infrastructure organisations has focused on helping new groups to become established and in trying to make inroads into very rural and isolated areas of the county.

This work will continue with this project in order to reduce disadvantage and exclusion.

Project Resources

Staffing Resources

No new posts are being created for this project within SAVO as this project is both part of and a natural development of the existing work undertaken by the two current post holders.

Project Manager

Robin Hodgkinson, the Project Manager, who will be working at least 1.5 days a week on the project, has been SAVO's Training Manager for many years, responsible for devising and running courses across the county for frontline organisations on organisational and personnel management topics.

He has written and devised a number of Third Sector practical toolkits and e-learning programmes, including the national trustee e-learning course, and is therefore the obvious person to undertake the authoring of course outlines and toolkits.

In recent years he has been involved in representing the Suffolk Third Sector on learning and skills bodies and is currently chair of Suffolk Learning Consortium and the Suffolk Personal and Community Development Learning (PCDL) Partnership.

He is a qualified PQASSO peer reviewer and has also been trained as a Third Sector Investors in People mentor, so he is well-placed to oversee the quality standards work within the project.

For some time he has been discussing with local infrastructure partnerships how SAVO's training courses can be delivered at a local level and this project allows this development to take place.

Robin has also project-managed all SAVO's previous Lottery-funded learning and skills projects as well as other projects funded by JobCentre Plus and the Learning and Skills Council. He will be line-managed by SAVO's Chief Executive.

The Project Manager's activities are as follows:

- Write the initial Business Plan and the Business Plan in Year 5 (in consultation with partners)
- Develop questionnaires and skills surveys
- Oversee writing of progress reports to funders and steering groups
- Write and / or co-ordinate writing of course outlines, resources, handouts and toolkits
- Co-ordinate trainer and funding networks
- Co-ordinate applications from INS members to the Conference fund scheme
- Co-ordinate work on quality standards
- Co-ordinate payments to partners and others, monitor expenditure with SAVO's Corporate Services Manager and co-ordinate any admin procedures.

Project Co-ordinator

Simon Waldron, who will be the Project Co-ordinator, who will be working two days a week on the project, is SAVO's Information Officer and Suffolk Learning Consortium Co-ordinator.

He is a very experienced website designer, a trained Learning Champions tutor and sits on a number of Third Sector workforce development working parties within the region. He currently runs and updates the Suffolk Learning Consortium website and therefore designing and administering the project website, the trainer and funding websites is something he is qualified to do and will help to ensure that there is synergy between all the different sites.

He is also responsible for the design and layout of all the current toolkits and e-learning programmes, including the national trustee e-learning course and so is best placed to design the new toolkits and course outlines.

He is an experienced co-ordinator and minute taker and will ensure that all information resources are well managed. He is line managed by SAVO's Training Manager.

The Project Co-ordinator's activities are as follows:

- designing the layout and look of the course materials and toolkits
- designing the questionnaires and monitoring forms
- collating the monitoring data
- managing website information and cascading information down to partners
- writing and producing the project brochures and co-ordinating publicity for the project through the partners down to frontline organisations
- writing and designing materials and information for the trainer and funding networks
- attending the BASIS 2 Project Steering Group and taking minutes
- assisting the Project Manager in reporting to the INS Consortium Group and Suffolk Learning Consortium Steering Group.

Management and Reporting Processes for the Project

As outlined in previous sections, SAVO has a robust structure of supervision and reporting processes through the Senior Management Team, the Trustee Committees up to the Trustee Board. This will continue throughout the duration of the project.

Steering Group

A Basis 2 Project Steering Group will be created for the project and will meet four times a year. Membership comprises:

- Project Manager
- Project Co-ordinator
- 3 of the partners (2 from Local Infrastructure Partnerships and 1 other partner)
- 1 SAVO Trustee

It is envisaged that the 2 local infrastructure partnership (LIP) representatives (drawn from the 6 LIPs) will serve one year in rotation so that each LIP lead will serve at least one year on the Steering Group.

The main roles and responsibilities of the Project Steering Group will be to:

- monitor the progress, effectiveness and milestones of the Project and to take action if progress is not on target
- monitor the work undertaken by partners and the Project's lead officers
- determine work programmes for the following year
- comment on and approve major project reports (such as the annual Lottery monitoring form, the business plan in Year 5 etc.)
- approve certain expenditure such as larger claims on the Conference budget
- discuss and approve plans for the marketing of the project
- receive budget and financial monitoring reports.

SAVO Trustees and SAVO's Performance Management Committee will be appraised of the project's progress through representation on the Steering group from a SAVO Trustee and the Project Manager; the Suffolk Learning Consortium Steering Committee through the Project Manager and Project Co-ordinator and the LIP Leads and the wider INS Consortium through the partners.

In addition there will be an annual meeting of Basis 2 partners to come together to review progress, not only on the Basis 2 project, but on the Basis 1 projects throughout the county as well. In this way we can ensure that work on the projects is not duplicated, but complement and enhance each other.

The project finances will be managed by SAVO's Corporate Services Manager who has extensive experience of managing project finances, and also provides the secretariat and financial management for Infrastructure Network Suffolk which is funded through Capacity Builders. From April SAVO will be working with an Access Horizons accountancy system which contains an excellent monitoring and reporting procedure.

SAVO has in place a full range of employment and other policies including Health and Safety, Diversity and Equal Opportunities, Health and Wellbeing, Recruitment, Induction, Disciplinary and Grievance, Harassment and Learning and Development.

SAVO also has a Green Policy, detailed Financial Regulations and policies relating to learning in accordance with its status as an Open College Network Approved Centre, including Disability Discrimination and Malpractice policies. A Compliments, Complaints and Suggestions Policy is currently being written, expanding on the current Complaints Policy.

The Steering Group will ensure that any partners working with direct access to vulnerable adults or young people have the relevant policies in place. Monitoring and evaluation systems specifically designed for the project will be in place by the start of the project in July 2009.

Partnership Working and Stakeholders

SAVO will:

- administer the project steering group
- provide and collate the project monitoring forms and report to the INS Consortium Group, Suffolk Learning Consortium and the Big Lottery
- provide financial services and monitoring
- develop questionnaires / surveys to monitor the project and receive feedback from frontline organisations and INS members

- co-ordinate the development of course resources, toolkits
- link with the regional BASIS project
- publicise the project
- co-ordinate the trainers and funding networks
- manage website information
- ensure that Suffolk Learning Consortium activities / projects have synergy with BASIS 2 activities.

Young Suffolk will

- dovetail their own quality standards work in with the quality standards work activities in this project
- provide their expertise and specialist knowledge in working with children's and young people's organisations in developing the project.

Suffolk ACRE will

- Ensure that existing BASIS I projects' objectives dovetail with this bid
- Contribute materials/expertise to the proposed training/resource library, and case studies to the funding good practice library, particularly in specialist areas eg community buildings and community planning
- Use the proposed resources to develop new training courses / workshops for particular sectors such as Village Halls and Parish Plans.

Local Infrastructure Partners (Babergh Communities Together, Ipswich Council for Voluntary Service, Mid Suffolk Action in Partnership, Suffolk Coastal Resource Network, Waveney Community Forum and West Suffolk Consortium for Voluntary Organisations) will deliver key aspects of the project including:

- running training, development and funding events and surgeries in their geographical areas for frontline organisations
- utilising the resources provided by the project
- monitoring the effectiveness of their work locally
- attending conferences, seminars and events and feeding the information across the county and within their area, where appropriate
- publicising the project locally
- publicising funding opportunities and information of importance to frontline organisations
- providing their expertise and any specialist knowledge in developing the project
- undertaking skills audits and surveys to ensure that development work with frontline organisations is relevant, timely and at the appropriate level
- ensuring that their staff and volunteers are trained appropriately to deliver services to frontline organisations.

Other INS members may be called upon for their expertise e.g. Suffolk Volunteering Federation for volunteering advice and connecting up with county, regional and national volunteering initiatives and research and ISCRE for BME network activities and publicity of the project.

Frontline Organisations (our beneficiaries) will be asked to:

- feedback on the support they have received
- suggest areas of training and the development needs they require so that this can be fed into the project plan in future years.

They would be expected to respond to annual skills questionnaires and to the major research funding and skills project to be undertaken in Year 4 and which will inform Year 5 activities and the next five year INS development business plan.

In previous work undertaken, all the main partners have found that beneficiaries are keen to seek assistance from infrastructure groups on management, funding, planning, monitoring and evaluating, quality and development issues.

As mentioned in previous sections, it is important that support work offered by local infrastructure partners can assist organisations at various stages of their development, from groups starting up, to those moving from voluntary status to employing staff, groups who want to diversify and groups who need support in developing their sustainability.

It is not envisaged at this stage that volunteers would be involved in the project.

Partner Agreements have been drawn up and signed by all the partners and they are attached to this Business Plan.

Advantages of involving the partners in this project

- Added value of working collaboratively
- Peer support to provide mentoring
- County-wide and local partners working together
- Infrastructure organisations working on Basis 1 projects are all involved in this Basis 2 project and can thus avoid duplication of work
- Having all the Local Infrastructure Partnerships (LIPs) involved means that the whole geographical area of the county is covered
- LIPs can gather local intelligence from frontline organisations to feed into the project
- Involving Suffolk ACRE and Young Suffolk means that particular kinds of groups they work with such as social enterprises, village halls and youth organisations will benefit from the project
- Involving other INS members in mainstream activities will help raise their profile
- All the partners are involved with a number of key local or county partnerships and networks such as Local Strategic Partnerships, Suffolk County Council, NHS Suffolk and a variety of learning and skills partnerships.

Project Costs & Financial Appraisal

Project Budget

An outline of the Budget is shown below:

Revenue costs	Total project costs - include VAT where applicable					Project Total £
	Year 1 £	Year 2 £	Year 3 £	Year 4 £	Year 5 £	
Salaries, National Insurance, pensions	24,139	25,240	26,036	26,856	27,700	129,971
Freelance fees – Conference attendance fees	5,000	5,000	5,000	5,000	5,000	25,000
Recruitment	0	0	0	0	0	0
Training	11,000	11,000	11,200	11,400	11,400	56,000
Travel and other expenses	2,000	2,100	2,200	2,300	2,400	11,000
Accommodation and utilities	3,089	3,182	3,277	3,376	3,477	16,401
Marketing and communications	6,000	6,000	6,000	6,000	6,000	30,000
Evaluation	2,000	2,000	2,000	6,000	2,000	14,000
Business plan development	20,000	0	0	0	5,000	25,000
Professional and legal fees	588	0	0	0	0	588
Other - LIPs Funding work	21,000	21,000	21,500	21,500	22,000	107,000
Other - Trainer and Funding networks activities	2,000	4,000	4,100	4,200	4,200	18,500
Other - Quality Standards/other work	5,000	5,150	5,305	5,464	5,628	26,547
Total revenue costs	101,816	84,672	86,618	92,096	94,805	460,007
Overheads						
Staff	1,770	1,823	1,878	1,934	1,992	9,397
Accommodation	803	827	852	878	904	4,264
Utilities	158	163	168	173	178	840
Other* Audit	58	60	61	63	65	307
Total overheads	2,789	2,873	2,959	3,048	3,139	14,808
Capital costs						
Total capital costs	0	0	0	0	0	0
Total project costs	104,605	87,545	89,577	95,144	97,944	474,815

(A full copy of the Budget, and Cash Flow forecasts, can be found in Appendix 3)

All costs in the budget are based on a project start date of 1st July 2009, which will be the formal commencement of the five year project.

N.B. This project is solely a revenue project and does not contain any capital costs. The budget figures were very carefully costed before the project application form was submitted, so there are no significant changes to the budget.

Project Expenditure

Salaries, NI and Pensions

(1st year: £24,139)

The 2 members of staff are employed by SAVO that for many years has linked its pay structure to the National Joint Council Salaries Agreement for Local Authorities' Administrative, Professional, Technical and Clerical Services pay scale.

The starting points for the Project Manager will be point 42 and the Project Co-ordinator will be point 29. The Project Manager is employed 11.25 hours a week on the project and the Project Co-ordinator is employed 15 hours a week.

The calculations take into account annual increments and projected cost of living increases of 3% per year over the course of the project. The on-costs included are employers' National Insurance and a pension contribution of 7% of gross salary.

As the project starts after one quarter of the financial year, calculations are based on 9 months of a year at one rate and three months of the year on the next rate. A breakdown of these costs for each project staff member is provided below:

PROJECT MANAGER (SAVO Training Manager)

Roles:

- Write both the initial Business Plan, and the one in Year 5 (in consultation with partners)
- Develop questionnaires and skills surveys
- Oversee writing of progress reports to funders and steering groups
- Write / co-ordinate writing of course outlines, resources, handouts and toolkits
- Co-ordinate the Trainer and Funding Networks
- Co-ordinate applications from INS members to the Conference fund scheme
- Co-ordinate work on quality standards
- Co-ordinate payments to partners and others, monitor expenditure with SAVO's Corporate Services Manager and co-ordinate any admin procedures.

Reports to:

- Basis 2 Project Steering Group
- INS Consortium Group
- Suffolk Learning Consortium Steering Group
- Line Manager - SAVO's Chief Executive
- As SAVO is the Lead partner, the Project Manager will also need to report to SAVO's Performance Management Sub-Committee and Trustee Board.

Costs:

Total hours worked by this person	Annual salary for total hours worked	Annual NI contribution	Pension contribution	Hours worked on this project	Number of hours you want us to fund
37 / week	£36,219	£3,989	7%	11.25 / week	11.25 / week

PROJECT CO-ORDINATOR (SAVO Information Officer & Suffolk Learning Consortium Co-ordinator)

Roles:

- designing the layout and look of the course materials and toolkits
- designing the questionnaires and monitoring forms
- collating the monitoring data
- managing website information and cascading information down to partners
- writing and producing the project brochures and co-ordinating publicity for the project through the partners down to frontline organisations

- writing / designing materials / information for the Trainer and Funding Networks
- attending the BASIS 2 Project Steering Group and taking minutes
- assisting the Project Manager in reporting to the INS Consortium Group and Suffolk Learning Consortium Steering Group.

Reports to:

- Basis 2 Project Steering Group meetings and the Suffolk Learning Consortium Steering group meetings
- Line Manager - Project Manager.

Costs:

Total hours worked by this person	Annual salary for total hours worked	Annual NI contribution	Pension contribution	Hours worked on this project	Number of hours you want us to fund
37 / week	£25,195	£2,581	7%	15 / week	15 / week

Conference Attendance Fees

(£5,000 per year)

Within the Business Plan Project Delivery Section we have already identified a wide range of conferences and briefings that the project partners and INS members have identified as important to attend.

A budget of £5,000 has been allocated per year and this will be closely monitored. Some of the expenditure will be identified and allocated at the beginning of each year, but a proportion will be held till at least half way though the year to cater for conferences and briefings that are programmed later in the year and that we are not aware of before each year starts e.g. briefings on new government initiatives or policies, new legislation.

Partners will be able to claim conference fees (if applicable), travel costs etc and as part of the funding agreement they will be expected to complete a project report which will be sent to other partners to then communicate to frontline organisations.

Training

(1st year: £11,000)

Each project partner can utilise £1,000 per annum for training for their staff relevant to supporting frontline organisations. It will also allow some courses to be specifically commissioned for partner staff.

Partners will report back at six monthly intervals on what they have spent the money on so far to monitor this budget heading. Small increases have been budgeted for years 3 & 4 for inflationary purposes.

Travel and Other Expenses

(1st year: £2,000)

Travel is calculated at approx £1,100 staff travel and £900 for project steering group meetings – venue, travel for steering group members, report production. The staff travel is calculated on paying staff 40p a mile at 250 miles per month (11 months + one month staff holidays). Small increases at roughly 5% a year have been factored in.

Accommodation and Utilities

(1st year: £3,089)

Accommodation and utilities are the proportion of the individual's costs related to the time spent by the two posts on this project i.e. 30.4% and 40.5% of their total hours per week.

Marketing and Communications

(£6,000 per year)

Marketing and Communications includes costs of producing two project brochures a year, website costs, costs of marketing and information for the Trainer and Funding Networks.

Evaluation

(Normally £2,000 a year)

This covers the cost of producing and mailing surveys, postage costs and time spent on partner evaluation returns and compiling the six monthly reports. In Year 4 there will be a major Third Sector survey to evaluate the project impact and collect data to inform the next business plan.

An extra £4,000 has been added to the figure for Year 4 to cover this major evaluation survey - £1,500 for partners to work on the survey structure and distribute the survey, £2,500 for Suffolk ACRE who will collate the results and write the survey report.

Business Plan

(Lead in payment: £20,000 and Year 5 Payment: £5,000)

The £20,000 in Year 1 is a lead-in payment to cover working with partners on the writing of the business plan and the drawing up of partnership agreements.

In Year 5, following the Year 4 survey, the 2014 - 2019 business plan will be written and £5,000 has been placed in the budget for this purpose.

Professional and legal fees

(1st year only: £588)

Professional fees will provide for a legal opinion to be obtained, if required, of our legal powers to deliver the grant and any associated professional and legal fees consequent from the project's establishment.

Other - LIP's Funding work

(1st year: £21,000)

Each Local Infrastructure Partnership (LIP) will be given £3,500 a year (with small inflationary increases in years 3 & 5), to develop funding work in their local area. Details of how they will spend the money are outlined in this business plan.

Each LIP will receive £1,750 at the start of each year and then the balance at the beginning of Month 7, following a satisfactory six monthly report on progress.

Other - Trainer/Funding Network Events, Funding mentor services

(1st year: £2,000, future years £4,000+)

There will be a small sum of money allocated to funding and trainer network events which will be held within the county each year to include the cost of venue, refreshments and guest speakers. From Year 2 onwards money has been budgeted for paying funding mentors for mentoring inexperienced fundraisers.

Quality Standards

(1st year: £5,000)

This budget heading will be spent on quality standards work – Young Suffolk “Lite” quality standards for children and young people’s groups, SAVO delivering PQASSO briefings and mentoring, developing information sheets, resources and providing support by partners to groups wanting to gain particular quality standards.

The first year’s budget has been allocated as follows:

- £1,500 to Young Suffolk for “Lite” Quality Standards work
- £1,000 to SAVO for PQASSO briefings and mentoring groups
- £1,000 to researching the idea of a “Suffolk Passport” for groups to demonstrate to funders that they have the necessary management and quality systems in place to manage a grant
- £1,500 for a quality standards survey amongst Third Sector frontline organisations in Suffolk.

The detail of expenditure in Years 2-5 will be partly dependent on the findings of the quality standards survey which is being undertaken in Year 1 and will be allocated according to the needs identified in the survey’s findings.

The allocations for Young Suffolk’s “Lite” Quality Standards and SAVO’s PQASSO briefings and mentoring groups will continue at a fixed level throughout each of the five years.

Overheads

(1st year total: £2,789)

All overheads are calculated on the proportion of SAVO’s overall support costs which are related to this project.

Staff

(1st year: £1,770)

This has been based on a figure of £147.50 per month in Year 1 and 3% inflationary increases in future years. This relates to:

- the line management of the Project Manager by the Chief Executive (very small allocation).
- financial management of the project including time spent by the Corporate Services Manager in producing financial reports for the Steering Group and time spent by the Finance Assistant in coding expenditure and paperwork relating to the payment of cheques.
- Admin staff involved in photocopying and sending out mailings and taking bookings for certain events.

Accommodation

(1st year: £803)

This has been calculated on the basis of a contribution towards the accommodation costs of the Chief Executive, Corporate Services Manager, Finance Assistant and administrative staff. Years 2-5 include inflationary increases on Year 1 costs at 3%.

Utilities

(1st year: £158)

This has been calculated on the basis of a contribution towards the utilities costs of the Chief Executive, Corporate Services Manager, Finance Assistant and administrative staff. Years 2-5 include inflationary increases on Year 1 costs at 3%.

Other - Audit

(1st year: £58)

This has been calculated as an estimate of the contribution to the legal and governance costs associated with the Project. Years 2-5 include inflationary increases on Year 1 costs at 3%.

Project Income

The income for the project comes entirely from this Big Lottery Basis 2 grant. The target is to reach at least 1,000 organisations over the course of the five years of the project. It is felt that this is a realistic number as it is estimated that there are between 4,500 and 7,000 Third Sector organisations operating in Suffolk.

Other funding

This Basis 2 Project is in addition to work undertaken by both the lead partner and the other partners and thus as a discrete project it will not be funded from other sources.

Financial Planning

Appendix 3.1 shows a cash flow forecast for the project: the first year is given as a monthly breakdown, years 2 - 5 a three monthly breakdown.

We have included an income stream of our grant money based on what we intend to request on a quarterly basis in our payment schedule.

Value Added Tax

SAVO is not registered for VAT and therefore is unable to recover any VAT on expenditure. All costs in the budget include, where appropriate, non-recoverable VAT.

Financial Management

SAVO has a well established financial procedure which is robust, practical and efficient.

For this project a number of new codes will be created within a new restricted fund and these will match the headings contained within the project budget. The Project Manager, as a member of the SAVO Senior Management Team, is allowed to initiate expenditure and this generates the coding paperwork. Payment is authorised by the Chief Executive and he and one of the three trustees is authorised to sign cheques.

In terms of the different budget headings, many of them are already fixed as to how much and when payments are made. The salaries for the project staff will be allocated on a monthly basis to the restricted fund salaries budget, payments to the LIPs for funding work will be split into two: 50% at the start of the year and 50% at the beginning of the 7th month of the year, subject to a satisfactory report and Project Steering Group approval on the 1st six months' work.

The £1000 allocation for partners' staff training will be given at the start of each year and partners are expected to demonstrate at the end of the previous year how the money has been spent. Other money that has already been agreed e.g. Young Suffolk's Lite Quality Standards work will be paid at the start of the year. Those budgets which have more flexibility (e.g. the Conference Fund budget) will be closely monitored to ensure that there is no over or under expenditure.

SAVO's new accounts system: Access Horizons will provide monthly breakdowns of the project's income and expenditure. These will be closely monitored by the Project Manager and SAVO's Corporate Services Manager. The Project Steering Group and SAVO's Finance Sub Committee will see and review the figures on a quarterly basis.

If any major queries or difficulties arise, SAVO can call upon the services of its Honorary Treasurer who is an experienced senior charity accountant or its auditors, Ensors, who are likewise experienced charity accountants.

Marketing and Communication Strategy

This strategy has been developed for this project in the knowledge that the most important issues are the relationship of the people employed by the Basis 2 partners and other Infrastructure Network Suffolk members and the voluntary and community frontline organisations that they will be supporting with advice and information.

The Marketing and Communication Strategy sets out how the Infrastructure Network Suffolk members intend to communicate effectively internally and externally with its audiences. It will identify the key messages the partners need to communicate, the target audiences for that communication and the methods that will be used.

A priority for the strategy will be to ensure that the partners and staff have the information they require to do their work effectively. The strategy also recognises that effective communication is a two-way process; it is about giving but also receiving information. It is also about taking ownership of how information is received, perceived and interpreted.

The strategy will therefore actively seek feedback, comment and information from staff, partners, service users, funders and stakeholders to enable us to monitor, evaluate and deliver services that are needed.

Definition

Marketing and Communication for this project refers to all written, spoken, electronic and visual interaction that it has with its partners and external audiences. These include:

- Publications and promotional material, e.g. newsletters, leaflets, posters, displays, internal meetings, staff bulletins and minutes, etc.

- PR and publicity campaigns, leaflets, flyers
- Consultations, surveys and questionnaires
- Advertising and sponsorship
- Internet, web pages, email, correspondence and telephone
- Marketing and promotions
- Media contact
- Learning events
- Seminars, conferences and road-shows
- Meetings and networks
- Handouts for courses and briefings.

Principles

This Marketing and Communications Strategy will adhere to the following standards:-

Clarity	In plain English, easy to read and understand
Consistency	Immediately identifiable with consistent branding
Customer focus	Encourages feedback
Collaboration	Shares information and best practice with partners
Accessibility	The project partners, through their staff, are easily accessible by telephone, by correspondence and through the use of IT
Integrity	Honesty about what we feel we can deliver and about what we actually deliver
Inclusion	Always takes account of the diversity of the communities we serve.

Key Strategic Aims

The Marketing and Communications Strategy will support the Partners' vision, aims and objectives through the BASIS 2 Project and promote its policies, activities and values.

The key strategic aims are:

External

- Promote a positive image of the project to service users, funders and stakeholders
- Increase sector understanding, awareness and satisfaction with the services provided by the project
- Ensure key stakeholders are aware of the project's vision and objectives
- Promote and advertise the project's services
- Obtain regular user feedback on the project's services and performance
- Promote the project as taking a leadership role in Suffolk's Third Sector
- Promote the project within the sector as a best practice example of a partnership employing staff to support the Third Sector across Suffolk
- Promote the project commitment to furthering equality of opportunity and social inclusion
- Establish a clear brand identify for the project.

Internal - to ensure that:

- The staff within the partner organisations know and understand the project's objectives and planned strategic direction, linked to performance management and the business plan implementation
- Partners' staff are fully informed of the project's activities and performance
- Staff views and concerns are encouraged, listened to and addressed as appropriate by management
- Partners' staff are given prompt and regular feedback on management meetings and decisions
- A culture is developed for the project where people see communication as a joint responsibility and a two way process
- There is an environment of openness, honesty, consistency and clarity of communication, where decisions and direction of travel are trusted and the reliance of rumour is reduced and removed.

Responsibility

The Partners within the project will have joint responsibility for its Marketing and Communications Strategy. They will work closely with the staff and partners to develop communication skills and capacity across all partner organisations.

At the same time, the staff will be responsible for ensuring effective communication in their areas and the consistent application of the agreed corporate identity, which will be based on our values and business plan.

Training

Training programmes in internal and external communication will be provided to support the strategy.

Year 1 Priorities

The following Marketing and Communication activities have been identified for the first year of this project:

- Agree a working title (which is meaningful to our clients) for the project
- Reconfigure the Infrastructure Network Suffolk website (to ensure DDA compliancy), providing a new section to serve this project which will include the following sub-sections:
 - Project Management (Steering Group Agendas, Minutes, documents, etc.)
 - Funders Network (through a link to an existing INS website)
 - Trainers Network (through a link to the Suffolk Learning Consortium website)
 - Learning and Workforce Development news and information (through a link to the Suffolk Learning Consortium website)
 - Toolkits, course outlines, trainer materials, handouts and other resources available to partner organisations to utilise and distribute, where appropriate
 - Links to other platforms, and member's only section.
- Publish two Newsletters containing content from all partners

- Organise an event to publicise the project and provide a much needed networking opportunity.
-

Monitoring and Evaluation

All partners recognise the importance of monitoring and evaluating the project and rigorous processes will be introduced.

Monitoring and evaluation will form a key element of the Project Steering Group's work and at each quarterly meeting a report will be written and discussed to cover:

- progress towards project targets and milestones
- progress on relevant areas of the project including issues such as website hits to the various areas including the Funding and Trainers' Networks, use of project resources and materials etc.
- progress on developing toolkits and course resources.

As partners will be expected to provide monitoring and evaluation returns every six months, the Steering Group Meetings after every six month period will receive more detailed reports covering:

- numbers of new groups accessing funding and development surgeries and the broad subject matter covered in these sessions
- courses and briefings run in the period, and groups attending these events
- quality standards briefings and mentoring work
- trainer and funding network events and, from Year 2, funding mentoring interactions
- use of project resources and materials
- quality feedback from partners' interactions with frontline organisations (where appropriate)
- longer term monitoring (from end of Year 1) of funding and development surgeries and other interactions measuring the progress frontline organisations have made, the funding they have gained etc
- suggestions via partners from frontline organisations on new resources and events required.

Thus vital data will be captured on all areas of the project. By monitoring not just the initial encounters but charting frontline organisations' progress, we will be able to respond to changing needs and demands.

As the Project Steering Group has direct links to other networks including the LIP Lead Network, the Infrastructure Network Suffolk Consortium and the Suffolk Learning Consortium, others can feed in advice and expertise on ensuring that continuous monitoring and improvements are made to the project.

The six monthly reports will also highlight if project staff and partners are on course for meeting the project targets and milestones. If a partner or one area of the project gets into difficulties, the Project Steering Group will take action to support the organisation concerned to rectify this situation. This may be resolved through mentoring and peer support or another partner taking on some additional work.

In recognition of the fact that the majority of the partners in the Basis 2 Project are also involved in Basis 1 projects, there will be an annual conference / briefing where all the Basis projects will be discussed and analysed to ensure there is synergy between them and that work is not being duplicated.

Although some baseline evidence exists in terms of courses run, information on the impact of funding and development advice on frontline organisations, the Basis 2 partners recognise that this information is not consistent and therefore the evidence gleaned from Year 1 of the Basis 2 Project will help to give more consistent baseline evidence from which future years of the project can be measured.

For example, by analysing funding and development interactions with frontline organisations we will be able to collect more reliable data on the most common subject areas that groups need support on, thus allowing us to tailor our resources (such as toolkits, course outlines and handouts) on the topics most needed.

In addition to the ongoing monitoring throughout the project, there are three specific monitoring and evaluation pieces of work within the Basis 2 Project.

- 1) In Year 1 we want to measure the frequency and impact of frontline organisations undertaking quality standard frameworks. Information gleaned will include:
 - What quality standards / quality marks frontline organisations already use or are working towards
 - Their depth of knowledge on quality standards
 - What quality standards frontline organisations would like to undertake in the future
 - What quality standards funders require or are likely to require in the future as pre-requisites for giving grants or awarding contracts to frontline organisations
 - What support the Basis 2 project could give in helping organisations to achieve these standards.

This information will help to shape our quality standards work in Years 2 - 5. The research will be undertaken and collated by project staff with partner support.

- 2) In Year 4 of the project a major survey will be undertaken involving all partners and many frontline organisations to measure:
 - The state of the Third Sector in Suffolk in terms of skills, learning and development needs
 - The impact of the Basis 2 project on frontline organisations in raising skills levels, networking support, funding and development advice
 - What skills, learning and funding areas are needed by frontline organisations in the future.

All project partners will be involved in designing and distributing the survey and the results will be collated and analysed by one of the project partners, Suffolk ACRE, who will submit a detailed report on the findings.

Suffolk ACRE, through its work on parish plans, has the relevant IT software and expertise to undertake this work. They estimate that the work they undertake will cost around £2,500 and other money has been allocated in the project budget to pay for the partner support in collecting the evidence.

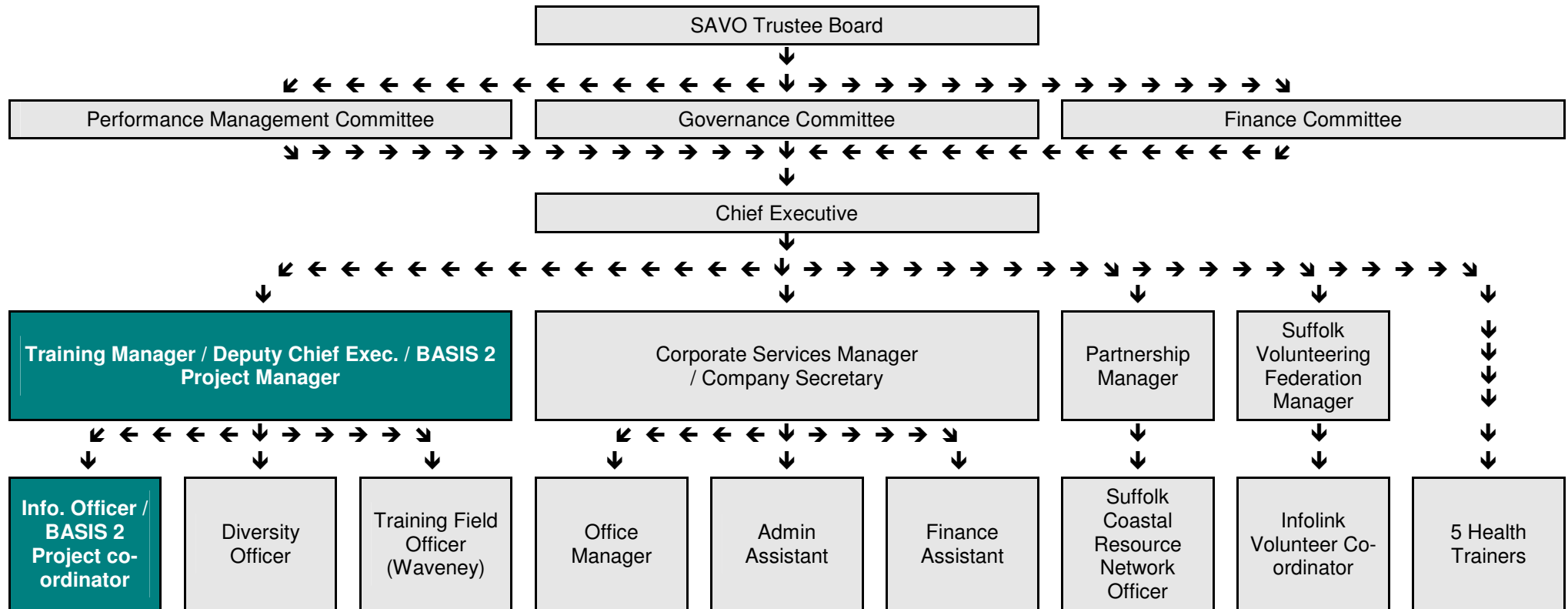
This survey would therefore measure the longer term impact of the Basis 2 project and the results will help to shape the next 5 year business plan which will be written early in Year 5 of the project.

- 3) In Year 5 of the project a skills audit of staff within partner organisations (and particularly the staff working directly with frontline organisations) will be undertaken to ascertain the development of their skills, learning and knowledge over the project's lifetime and the extent to which the partner organisations have developed good practices in becoming "learning organisations". This survey will be undertaken by the project staff.
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Risk Analysis

A copy of the Risk Analysis can be found in Appendix 4.

Appendix 1 - SAVO Management Structure



The Posts in **BOLD** are the two posts that are working on the Basis 2 Project.

Appendix 2 - Project Delivery Plan

Project Delivery Plan - Year 1

MONTH	MILESTONE 1	MILESTONE 2	MILESTONE 3	MILESTONE 4	OTHERS/COMMENTS
PROJECT OUTCOMES by end of project	1000 Frontline organisations to receive high quality funding / management / development advice thereby improving their capacity building and sustainability. INS to collate data to produce 5 year business plan 2014 onwards	Increased professionalism in good funding / development advice across Suffolk by creating a funding network (100 members), including funding mentors (50), developing good practice funding bids (50) to raise standards	Production of sustainable resources for INS members (40 course outlines, tutor notes & resources, production of 5 toolkits) to train and support frontline organisations to improve/develop sustainable services for their beneficiaries	Developing workshops/ mentoring on different quality standards, helping 50 organisations to achieve standards and to train up Learning Champions within frontline organisations to improve their standards & best practice & develop a more skilled VCS workforce.	
YEAR 1 MONTHS 1- 3	LIPs spending plans/ targets agreed. Monitoring and evaluation forms sent out. All partners commence work. Project Website set up	Funding Network action/operational plan written and agreed. Develop forms for recruiting mentors. LIPs start increased funding work in their areas	1 st course outline written. Work on structure for 1 st toolkit.	Timetable for 1st year's quality standard worked on and actions begun. Young\Suffolk plan their "Lite" Standards work and SAVO plan their PQASSO briefings.	1 st Steering Group meeting held. Terms of reference ratified
MONTHS 4 - 6	Publicity on project sent out. Website for project in operation. Project Briefing event.	Funding Network site created	2 further course outlines written. Revision completed on existing toolkits	Quality standards work starts. Suffolk "passport" research project commences	Steering Group meeting held. Partners complete progress work at the end of Month 6
MONTHS 7 - 9	Course outlines and materials uploaded. Accredited courses and providers information uploaded on the site	Work on recruiting Funding Mentors and members starts. Identify 5 good case study funding applications	Total of 6 course outlines written. 1 st draft of toolkit circulated for comments	Draft quality standards questionnaire designed and circulated	Steering Group meeting receive & approve 6 months progress report

MONTHS 10 - 12	Further information uploaded on to site and brochure sent out. Trainer Network website set up and running. 150 organisations worked with in total for Year 1	2b) Publicise Funding Network and attract 20 initial members, including 10 funding mentors. Create 5 good practice funding bids. Funding mentors meeting.	3b) 8 course outlines and handouts written. Current toolkits revised and 1 new toolkit written.	4b) Reviewed current state of orgs and what quality standards they have/are interested in. Suffolk "Passport" research project completed. Produce action plan for Years 2 - 5	Steering Group meeting. 12 month monitoring returns completed Full partner meeting held to review all Basis projects.
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MILESTONES and **OUTCOMES** highlighted in bold

Project Delivery Plan - Year 2

MONTH	MILESTONE 1	MILESTONE 2	MILESTONE 3	MILESTONE 4	OTHERS/COMMENTS
YEAR 2 MONTHS 13 - 15	Ongoing. Trainer Network publicity and information circulated.	Ongoing publicity, recruitment of members and mentors and finding good case studies	2 new course outlines written. Structure worked out for 2 nd toolkit	Ongoing quality standards work. Workshops on other quality standards programmed.	Steering Group meeting
MONTHS 16 – 18	Ongoing. Brochure sent out	Ongoing publicity, recruitment of members and mentors and finding good case studies. Funding Network event	2 new course outlines completed	Workshops commence. Mentoring work with organisations.	Steering Group meeting. 6 month progress reports from partners by end of period
MONTHS 19 – 21	Ongoing. Trainer Network event held	Ongoing publicity, member and mentor recruitment and finding good case studies	2 new course outlines completed. Draft toolkit circulated for comment	Workshops continue	Steering Group meeting receive & approve 6 months progress report
MONTHS 22 - 24	Ongoing. Brochure sent out. Further 175 groups worked in total with during the year. (Running total for project: 325)	2c) Running total of 50 Funding Network members, including 20 funding mentors. 15 good practice funding bids written.	3c) 8 course outlines and handouts written. 1 new toolkit written. (Running total: 16 courses, 2 toolkits)	4c) Created workshop programme on different quality standards and provide mentoring. 12 organisations worked with.	Steering Group meeting. 12 month monitoring returns completed. Full partner meeting to review all Basis projects

Project Delivery Plan - Year 3

MONTH	MILESTONE 1	MILESTONE 2	MILESTONE 3	MILESTONE 4	OTHERS/COMMENTS
YEAR 3 MONTHS 25 – 27	Ongoing work	Ongoing publicity, recruitment of members and mentors and finding good case studies	2 new course outlines written. Structure worked out for 3 rd toolkit	Ongoing quality standards work	Steering Group meeting
MONTHS 28 – 30	Project Brochure sent out.	Funding Network event	2 new course outlines completed	Ongoing quality standards work	Steering Group meeting. 6 month progress reports from partners by end of period
MONTHS 31 – 33	Ongoing work. Trainer network event held.	Ongoing publicity, recruitment of members and mentors and finding good case studies	2 new course outlines completed. Draft toolkit circulated for comment	Ongoing quality standards work	Steering Group meeting receive & approve 6 months progress report
MONTHS 34 – 36	Project Brochure sent out. 1b) Courses attended, advice & development work given to 175 organisations throughout the year (Running total: 500 organisations). Trainers Network established and running with 25 members	2d) 75 Funding Network members, 30 funding mentors, 30 good practice funding bids completed	3d) 8 course outlines and handouts written. 1 new toolkit written. (Running total: 24 courses, 3 toolkits)	4d) Workshop programme running and 25 organisations mentored	Steering Group meeting. 12 month monitoring returns completed Full partner meeting held to review all Basis projects

Project Delivery Plan - Year 4

MONTH	MILESTONE 1	MILESTONE 2	MILESTONE 3	MILESTONE 4	OTHERS/COMMENTS
YEAR 4 MONTHS 37 - 39	Survey of VCS Organisations designed and questionnaire agreed	Ongoing publicity, recruitment of members and mentors and finding good case studies	2 new course outlines written. Structure worked out for 4th toolkit	Ongoing quality standards work	Steering Group meeting
MONTHS 40 - 42	Project Brochure sent out. Survey/questionnaire sent out.	Funding Network event	2 new course outlines completed	Ongoing quality standards work	Steering Group meeting. 6 month progress reports from partners by end of period
MONTHS 43 - 45	Follow-up work to survey carried out. 1 st draft of report completed. Ongoing work. Trainer network event held.	Ongoing publicity, recruitment of members and mentors and finding good case studies	2 new course outlines completed. Draft toolkit circulated for comment	Ongoing quality standards work	Steering Group meeting receive & approve 6 months progress report
MONTHS 46 - 48	Brochure sent out. 1c) Major survey of VCS organisations to measure funding progress, levels of learning and skills, skills development & organisation sustainability. Report written.	2e) 100 Funding Network members, 45 funding mentors, 40 good practice funding bids completed	3e) 8 course outlines and handouts written. 1 new toolkit written. (Running total: 32 courses, 4 toolkits)	4e) Workshop programme running and 40 organisations mentored	Steering Group meeting. 12 month monitoring returns completed Full partner meeting held to review all Basis projects

Project Delivery Plan - Year 5

MONTH	MILESTONE 1	MILESTONE 2	MILESTONE 3	MILESTONE 4	OTHERS/COMMENTS
YEAR 5 MONTHS 49 - 51	5 Year Skills and Funding Development County Business Plan written (1 st draft)	Ongoing publicity, recruitment of members and mentors and finding good case studies	2 new course outlines written. Structure worked out for 5th toolkit. Revision of older toolkits and courses as required	Ongoing quality standards work	Steering Group meeting. Ratification of new Business Plan
MONTHS 52 – 54	1d) 5 Year Skills and Funding Development County Business Plan completed Business plan circulated. Skills audit amongst INS members undertaken.	Funding Network event	2 new course outlines completed	Ongoing quality standards work	Steering Group meeting. 6 month progress reports from partners by end of period
MONTHS 55 - 57	Ongoing work. Trainer network event held. Skills audit report written.	Ongoing publicity, recruitment of members and mentors and finding good case studies	2 new course outlines completed. Draft toolkit circulated for comment	Ongoing quality standards work	Steering Group meeting receive & approve 6 months progress report
MONTHS 58 - 60	1e) Courses attended, advice & development work given to total of 1000 organisations. Trainers Network has 50 members. 1f) Skills audit amongst project INS members undertaken.	2f) 100 Funding Network members, 50 funding mentors, 50 good practice funding bids completed	3f) 8 course outlines and handouts written. 1 new toolkit written. Revision of previously published resources and toolkits. (Running total: 40 courses, 5 toolkits)	4f) Workshop programme completed and 50 organisations mentored	Steering Group meeting. Final project report written. Project ends.

Appendix 3 - Budget

Revenue costs	Total project costs – include VAT where applicable					Total for project	VAT recoverable from total	Funding from other sources	Requested from Big Lottery Fund
	Year 1	Year 2	Year 3	Year 4	Year 5				
	£	£	£	£	£	A £	B £	C £	(A-B-C) £
Salaries, National Insurance, pensions	24,139	25,240	26,036	26,856	27,700	129,971	0	0	129,971
Freelance fees – Conference attendance fees	5,000	5,000	5,000	5,000	5,000	25,000	0	0	25,000
Recruitment	0	0	0	0	0	0	0	0	0
Training	11,000	11,000	11,200	11,400	11,400	56,000	0	0	56,000
Travel and other expenses	2,000	2,100	2,200	2,300	2,400	11,000	0	0	11,000
Accommodation and utilities	3,089	3,182	3,277	3,376	3,477	16,401	0	0	16,401
Marketing and communications	6,000	6,000	6,000	6,000	6,000	30,000	0	0	30,000
Evaluation	2,000	2,000	2,000	6,000	2,000	14,000	0	0	14,000
Business plan development	20,000	0	0	0	5,000	25,000	0	0	25,000
Professional and legal fees	588	0	0	0	0	588	0	0	588
Other* - LIPs Funding work	21,000	21,000	21,500	21,500	22,000	107,000	0	0	107,000
Other* - Trainer network and Funding network events/mentoring	2,000	4,000	4,100	4,200	4,200	18,500	0	0	18,500
Other - Quality Standards/other work	5,000	5,150	5,305	5,464	5,628	26,547	0	0	26,547
Total revenue costs	101,816	84,672	86,618	92,096	94,805	460,007	0	0	460,007
Overheads									
Staff	1,770	1,823	1,878	1,934	1,992	9,397	0	0	9,397
Accommodation	803	827	852	878	904	4,264	0	0	4,264
Utilities	158	163	168	173	178	840	0	0	840
Other* Audit	58	60	61	63	65	307	0	0	307
Total overheads	2,789	2,873	2,959	3,048	3,139	14,808	0	0	14,808
Capital costs									
Equipment purchase	0	0	0	0	0	0	0	0	0
Land purchase	0	0	0	0	0	0	0	0	0
Construction or refurbishment	0	0	0	0	0	0	0	0	0
Professional and legal fees	0	0	0	0	0	0	0	0	0
Other*	0	0	0	0	0	0	0	0	0
Total capital costs	0	0	0	0	0	0	0	0	0
Total project costs	104,605	87,545	89,577	95,144	97,944	474,815	0	0	474,815

Appendix 3.1 - Cashflow

Cashflow - Year 1

	Mar-Apr	Jul	Aug	Sep	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	Jun	TOTAL
Expenditure														
Salaries	0	2,011	2,011	2,011	2,011	2,011	2,012	2,012	2,012	2,012	2,012	2,012	2,012	24,139
Conference costs	0	0	0	1,000	0	1,000	0	1,000	0	1,000	0	1,000	0	5,000
Training	0	11,000	0	0	0	0	0	0	0	0	0	0	0	11,000
Travel	0	300	100	100	300	100	100	300	100	100	300	100	100	2,000
Accommodation	0	257	257	258	257	258	257	258	257	258	257	257	258	3,089
Marketing	0	300	300	800	400	400	400	800	400	400	500	800	500	6,000
Evaluation	0	0	0	0	0	0	300	500	0	300	300	300	300	2,000
Business Plan	20,000	0	0	0	0	0	0	0	0	0	0	0	0	20,000
Professional Fees	0	0	0	588	0	0	0	0	0	0	0	0	0	588
Funding work	0	10,500	0	0	0	0	0	10,500	0	0	0	0	0	21,000
Networks	0	200	0	300	200	0	300	200	0	300	200	0	300	2,000
Quality Standards	0	2,000	0	0	0	500	0	1,000	0	500	0	1,000	0	5,000
Total Revenue	20,000	26,568	2,668	5,057	3,168	4,269	3,369	16,570	2,769	4,870	3,569	5,469	3,470	101,816
Total Overheads	0	227	228	228	228	227	228	228	227	228	228	227	285	2,789
Total Expenditure	20,000	26,795	2,896	5,285	3,396	4,496	3,597	16,798	2,996	5,098	3,797	5,696	3,755	104,605
Income														
Big Lottery Basis 2	20,000	34,976	0	0	11,489	0	0	24,892	0	0	13,248	0	0	104,605
Total Income	20,000	34,976	0	0	11,489	0	0	24,892	0	0	13,248	0	0	104,605
Funds Brought Forward from previous period	0	0	8,181	5,285	0	8,093	3,597	0	8,094	5,098	0	9,451	3,755	0
Surplus (Deficit) of Income for period	0	8,181	-2,896	-5,285	8,093	-4,496	-3,597	8,094	-2,996	-5,098	9,451	-5,696	-3,755	0
Funds Carried Forward to following period	0	8,181	5,285	0	8,093	3,597	0	8,094	5,098	0	9,451	3,755	0	0
% Big Grant v Expend (cum)	100%	131%	118%	100%	121%	108%	100%	113%	108%	100%	113%	105%	100%	100%

Cashflow - Years 2 & 3

	YEAR 2					YEAR 3				
	Jul-Sep	Oct-Dec	Jan-Mar	Apr-Jul	TOTAL	Jul-Sep	Oct-Dec	Jan-Mar	Apr-Jun	TOTAL
Expenditure										
Salaries	6,310	6,310	6,310	6,310	25,240	6,509	6,509	6,509	6,509	26,036
Conference costs	1,250	1,250	1,250	1,250	5,000	1,250	1,250	1,250	1,250	5,000
Training	11,000	0	0	0	11,000	11,200	0	0	0	11,200
Travel	525	525	525	525	2,100	550	550	550	550	2,200
Accommodation	796	795	796	795	3,182	820	819	819	819	3,277
Marketing	1,500	1,500	1,500	1,500	6,000	1,500	1,500	1,500	1,500	6,000
Evaluation	600	400	600	400	2,000	600	400	600	400	2,000
Funding work	10,500	0	10,500	0	21,000	10,750	0	10,750	0	21,500
Networks	800	800	1,200	1,200	4,000	1,000	1,000	1,000	1,100	4,100
Quality Standards	2,500	650	1,000	1,000	5,150	2,500	805	1,000	1,000	5,305
Total Revenue	35,781	12,230	23,681	12,980	84,672	36,679	12,833	23,978	13,128	86,618
Total Overheads	704	703	703	763	2,873	725	724	725	785	2,959
Total Expenditure	36,485	12,933	24,384	13,743	87,545	37,404	13,557	24,703	13,913	89,577
Income										
Big Lottery Basis 2	36,485	12,933	24,384	13,743	87,545	37,404	13,557	24,703	13,913	89,577
Total Income	36,485	12,933	24,384	13,743	87,545	37,404	13,557	24,703	13,913	89,577
Funds Brought Forward from previous period	0	0	0	0	0	0	0	0	0	0
Surplus (Deficit) of Income for period	0	0	0	0	0	0	0	0	0	0
Funds Carried Forward to following period	0	0	0	0	0	0	0	0	0	0
% Big Grant v Expend (cum)	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%

Cashflow - Years 4 & 5

	YEAR 4					YEAR 5				
	Jul-Sep	Oct-Dec	Jan-Mar	Apr-Jul	TOTAL	Jul-Sep	Oct-Dec	Jan-Mar	Apr-Jun	TOTAL
Expenditure										
Salaries	6,714	6,714	6,714	6,714	26,856	6,925	6,925	6,925	6,925	27,700
Conference costs	1,250	1,250	1,250	1,250	5,000	1,250	1,250	1,250	1,250	5,000
Training	11,400	0	0	0	11,400	11,400	0	0	0	11,400
Travel	575	575	575	575	2,300	600	600	600	600	2,400
Accommodation	844	844	844	844	3,376	870	869	869	869	3,477
Marketing	1,500	1,500	1,500	1,500	6,000	1,500	1,500	1,500	1,500	6,000
Evaluation	600	1,000	2,600	1,800	6,000	500	500	500	500	2,000
Business Plan	0	0	0	0	0	0	1,000	2,500	1,500	5,000
Funding work	10,750	0	10,750	0	21,500	11,000	0	11,000	0	22,000
Networks	1,000	1,100	1,000	1,100	4,200	1,000	1,100	1,000	1,100	4,200
Quality Standards	2,500	964	1,000	1,000	5,464	2,500	1,128	1,000	1,000	5,628
Total Revenue	37,133	13,947	26,233	14,783	92,096	37,545	14,872	27,144	15,244	94,805
Total Overheads	747	746	746	809	3,048	769	768	769	833	3,139
Total Expenditure	37,880	14,693	26,979	15,592	95,144	38,314	15,640	27,913	16,077	97,944
Income										
Big Lottery Basis 2	37,880	14,693	26,979	15,592	95,144	38,314	15,640	27,913	16,077	97,944
Total Income	37,880	14,693	26,979	15,592	95,144	38,314	15,640	27,913	16,077	97,944
Funds Brought Forward from previous period	0	0	0	0	0	0	0	0	0	0
Surplus (Deficit) of Income for period	0	0	0	0	0	0	0	0	0	0
Funds Carried Forward to following period	0	0	0	0	0	0	0	0	0	0
% Big Grant v Expend (cum)	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%

Appendix 4 - Risk Analysis

DESCRIPTION	IMPACT	PROBABILITY	EXISTING CONTROLS	ACTION REQUIRED	LEAD
GENERAL					
Local Government Boundary Changes within Suffolk	Could result in reconfiguration of infrastructure services within the county. Majority of Local Infrastructure Partnerships (LIPs) linked to district/borough council boundaries. LIPs may need to reconfigure	HIGH - Boundary Commission proposals under consultation prior to Secretary of State decision in July 2009. Any changes will occur in April 2011. If a change of Government occurs in 2010 elections, there is a possibility of the status quo being preserved.	All infrastructure organisations are keeping a close eye on the developments.	When decisions reached at national government level, meetings to be held and action plans drawn up	ONE VOICE SUFFOLK
Health and Safety Risk Assessment	Accidents, legal claims, potential loss of staff time (due to illness)	LOW	Robust health and safety and other related policies in both lead and partner organisations.	Regular monitoring Risk assessment done for each new activity introduced	ALL PARTNERS
Lone working	Health and safety issues Personal safety and security compromised when staff working with individuals on courses or funding and development surgeries	MEDIUM (nature of work by partners may require lone working travelling to isolated rural areas, travelling at night etc)	Robust personal safety policies and guidelines Regular supervision and monitoring to assess personal risks	Training in personal safety to be given to staff Regular supervision and monitoring	ALL PARTNERS
Long-term staff sickness	Delays in completing project milestones, possible need to replace member of staff if absence is prolonged. Legal implications of undertaking such actions. Extra financial costs in employing someone to cover long-term staff absence	LOW / MEDIUM	Robust personnel policies to cope with this, particularly in all partner organisations. Monitoring and supervisory systems	Contingency plans to be drawn up Regular supervision to ensure good mental health of staff Checks on staff holidays and sickness records Adopt good work/life balance measures.	ALL PARTNERS

DESCRIPTION	IMPACT	PROBABILITY	EXISTING CONTROLS	ACTION REQUIRED	LEAD
PARTNERSHIP ISSUES					
Partners unable to work constructively in partnership	Could result in confusion for both partners and service users Parts of the county are not covered by project	LOW	Regular LIP Lead meetings Good project planning. Careful monitoring by Project Steering Group	Continued monitoring of project partners' satisfaction levels. Ensuring all partners agree project workplans	PROJECT STEERING GROUP
Individual partner trustee boards/committees disagree with particular policies/actions etc	Delays in completion of project outcomes Disagreements between partners Mission and project drift Partner disengagement	LOW	Ensuring all partners' trustee boards are aware of the project and its implications for each organisation. Trustees kept abreast of project aims and progress	Ensure mid-year and annual progress reports on the project are circulated to the partners and encourage partners to share these with their trustee boards.	ALL PARTNERS
One partner fails to carry out agreed workplan / meet targets	Possible delays to other parts of the project. Partner dissatisfaction	LOW / MEDIUM	Regular LIP Leads meetings Clear work plans Targets agreed well in advance and, where necessary, slippage time factored in. Careful monitoring by Project Steering Group.	Project Steering Group meetings scheduled every three months. Progress reports to be written every six months, allowing time to develop contingency plans to ensure end of year targets reached.	PROJECT STEERING GROUP
Failure to retain high quality of staff either within lead organisation or partners	Could disrupt project or result in elements of the project being put on hold as a new person starts	MEDIUM Although currently there is stability within existing posts, any reconfiguration of the LIPs as a result of boundary changes may lead to staff redeployments	Line managers experienced in managing and motivating people Ensure effective and full induction process. Clear appraisal/ supervisory systems to manage changes.	Quarterly Project Steering Group meetings to closely monitor targets and ensure partners bring new staff up to speed very quickly	PROJECT STEERING GROUP

DESCRIPTION	IMPACT	PROBABILITY	EXISTING CONTROLS	ACTION REQUIRED	LEAD
EXTERNAL FACTORS					
Changes in levels of core or other funding to partner organisations	Could diminish partner effectiveness and time in working on the project	HIGH	Partners have at least 12 months guaranteed funding and time to work on funding strategies. Continued willingness of statutory funders to work with the Third Sector	Partners to be aware of each other's funding and to assist with advice and funding ideas where possible	ALL PARTNERS
External agencies given contracts to undertake infrastructure work	Unlikely, but infrastructure work could be taken away from LIPs	LOW	Project emphasis on consistency and good quality of work to cover the whole county	Constant monitoring of effectiveness of the services provided by LIPs. Flexibility of approach so that areas in difficulty can be targeted	ALL PARTNERS
PROJECT WORK					
Failure to meet given targets	Possible delays in other project work being undertaken Possible funding delays or withdrawal of funding	LOW	Project brief and business plan have been realistically assessed	Constant monitoring and review of targets by Project Steering Group	PROJECT STEERING GROUP
Failure to develop and sustain quality services	Groups do not use infrastructure services as they perceive them as poor quality User and partner dissatisfaction	LOW	Quality a high priority in project brief and business plan Separate monitoring plan produced	Constant monitoring, looking at both groups who use infrastructure services and those who don't In Year 4, conduct major project review.	PROJECT PARTNERS
Failure to meet service users expectations	Disengagement of service users	LOW	Monitoring quality of work and developing consistency across the county a key element of the business plan	Constant monitoring of quality with feedback from service users. Developing a consistent and effective complaints procedure and monitoring system.	PROJECT STEERING GROUP

DESCRIPTION	IMPACT	PROBABILITY	EXISTING CONTROLS	ACTION REQUIRED	LEAD
FINANCIAL CONTROLS					
Budget and cashflow projections unrealistic	Project could run out of money Activities are postponed or curtailed	LOW	Project budget realistically assessed Inflationary increases budgeted for	Continuous monitoring of financial performance by Project Steering Group	PROJECT STEERING GROUP
Developing financial systems that are manageable and able to be monitored effectively	Financial systems for the project lack consistency and are difficult to work effectively, resulting in over-expenditure and delays in payment Funders become concerned about financial monitoring	LOW	All partners have developed robust financial systems. Lead partner organisation has new IT financial system which will allow for very accurate and precise reporting	Develop consistency of systems, with lead partner ensuring that financial records for the project are kept lawfully and efficiently Financial report to be a regular agenda item at Project Steering Group meetings	SAVO
Danger of fraud / unauthorised / illegal expenditure	Fraud Expenditure spirals out of control	LOW	Lead Partner organisation has financial systems in place that satisfy Charity Commission's financial controls	Constant monitoring Spot audit trails	SAVO