

## Getting Started...

### Setting up a well run group or organisation

Start-up pack for new groups in Havering

March 2004

---



---

# *Getting Started*

---



---

# ***Getting Started***

---



## **Contents**

<b>Introduction: Why set up a group?</b>	<b>Page 5</b>
<b>Stage 1 – Getting started</b>	<b>Page 6</b>
<b>Stage 2 – Getting organised</b>	<b>Page 8</b>
<b>Stage 3 – Formalising the structure</b>	<b>Page 13</b>
<b>Stage 4 – Charity Registration</b>	<b>Page 16</b>
<b>Stage 5 – More Information</b>	<b>Page 17</b>
<b>How to get help:</b>	
<b>HAVCO</b>	<b>Page 19</b>
<b>LVSC</b>	<b>Page 21</b>
<b>Your Notes</b>	<b>Page 22</b>

---

# *Getting Started*

---



## **Introduction**

**This document has been produced with information current to its creation (March 2004). Due to the current environment, changes will occur on a regular basis. These changes will be advertised and documented in the Havco Newsletter and on its website at [www.havco.org.uk](http://www.havco.org.uk)**

---

# Getting Started

---



---

## Introduction: Why set up a group?

---

Most community groups are set up by local people or communities of interest who have identified a need for a particular activity or service in their area and are committed to doing something about it.

Starting a group means working together with people who share similar concerns and are aiming to solve a particular problem or meet a certain need.

Starting a group can be very rewarding, especially as it begins to take shape and develop. However, it is important to remember that the work involved takes lots of time, commitment and responsibility and often lots of patience. You will encounter problems and set backs at times and it is important that those of you involved work through any difficult times together. Developing a successful group is hard work but as you see your work and group having a positive impact the rewards are tremendous.

This pack is designed to help you through the process of setting up a group, in particular to ensure you are aware of all the responsibilities involved.



---

# Getting Started

---



## Stage 1 - Getting started

Running a group is a team effort, so a good way to start your group is to bring together a number of people who share similar interests and concerns. Meet and talk to each other about what you could do and how you could do it.

There are a number of questions you could ask yourselves about your group. It might help you to use the spaces below to write down some answers as you discuss

### 1. What type of organisation is it?

- Will it be a self-help group?
- Will it provide services and/or activities for others?
- Will it undertake campaigning work on issues of concern?
- Where will it operate?

### 2. Is there a need for the service?

- How do you know there is a need?
- Who needs it?
- How many people need it?
- What are the needs?
- Will your group meet these needs in full / in part?

---

# Getting Started

---



**3. Are there existing groups in your area providing similar services? If so:**

- Have you contacted these organisations? (HAVCO can put you in contact with groups doing similar work).
- Would it be better to work with an existing group? There is a lot of competition for funding and donors often look at whether similar services are already in existence!

**4. If you think a new group is necessary be clear about: -**

- What the advantages would be in setting up a new organisation?
- What would be different about your group?

**If you think a new group/organisation is necessary write down: -**

- The aims and purpose of the group/organisation – or what you want to do
- Who will benefit?

---

# Getting Started

---



## Stage 2 – Getting organised

Think about the structure and management of your organisation.

1. **How will the organisation be structured and managed? There is usually a core of three to four people who set up a group and later a Management Committee of between three to eleven people.**

- How many people will be involved in running the organisation?
- How often will you need to meet?

2. **How and when will you provide services?**

- Do you need premises to do this e.g. space in a local community centre
- How will you advertise your services and publicise your group

3. **Will the service be provided by volunteers or paid staff?**

- Will they need training – if so how will this be organised?

---

# Getting Started

---



## 4. Will finance be needed to provide a service?

- If yes, who will undertake the fundraising work and when will this begin?
- What information do you need about fundraising regulations?
- Where can you go for help?

## 5. You will need to produce a plan

Once you have thought about and discussed the points in stages 1 & 2 with others involved in the group, and written down your ideas and answers down on paper, you will then be well on your way to developing a formal plan for your group/organisation.

***Increasingly the Charity Commission and funders are requesting plans. Remember you can get help and support at any stage from HAVCO.***

**Identify some of the key points here.**

---

# Getting Started

---



---

## Setting up a management committee

---

### *What is a committee?*

You need to set up a committee of people who are going to be responsible for running a group and taking decisions, and ensuring your aims and objectives are followed.

The committee are a small number of people – maybe between 3 and 15 people – who will represent your group, are responsible for running your group, and who meet regularly to decide how to run your group and who will do what.

The committees are responsible – by law - for running a group and making sure it achieves what it sets out to do. This is very important. If something goes wrong, or if you lose money, then the committee could be held personally liable. It is very important that the people who are interested in joining your committee are aware of this. It is a good idea when you form your committee to have people who have particular skills in different areas - like finance, administration, publicity, previous experience on committees, and so on.

**Individual members may take on roles, such as chair, treasurer or secretary – but remember that the committee as a whole is legally responsible.**

Main responsibilities of the committee as a whole include:

- Ensuring that the organisation meets its objectives as set out in the constitution, and that it acts in the interests of the organisation's beneficiaries
- Ensuring that the organisation has enough resources to carry out its work, and that all resources and assets are well-managed and used to meet its objectives
- Regularly attending committee meetings, and taking decisions working jointly with other members of the committee
- Keeping up with the organisation's activities, and providing proper reports to members and supporters – particularly annual reports and accounts
- Ensuring that all the rules in the constitution are followed (e.g. elections, changing the constitution)
- Ensuring that the organisation meets all its legal responsibilities – such as Health and Safety, equal opportunities, insurance, and employment laws.
- Ensuring that all contracts – employment, tenancy agreements and so on – are complied with
- Ensuring that premises and equipment are maintained and insured

---

# Getting Started

---



## ***Roles of committee members***

A committee will include people with specific tasks. These people are called 'officers'. There are three tasks in particular – chair, secretary, and treasurer –, which should always be in place and are called 'Honorary Officers'.

Other committee members could take on other specific tasks if this is appropriate to your group. For example:

- Events
- Membership
- Publicity
- Fundraising

## ***How the committee is organised***

Your constitution should set out detailed rules over how and when committee members can be elected. These rules are usually standard. If you are a new group it will probably be a case of looking for volunteers to join the committee and agreeing between yourselves who will be committee members. However, in future years you may have a larger membership, and other members may want to take over responsibility and an election is the fairest way of deciding this.

Your group will have an Annual General Meeting (AGM) once a year. This is a meeting which all members are invited to, where the annual report and accounts are presented, and where the committee stand for election. Normally the members at the AGM will elect the Honorary Officers to the committee, and other committee members. Some committee members may wish to continue in their posts. This means for some committee members it may just be a case of re-electing them if there is no opposition.

Once elected the committee take legal responsibility for the organisation. Between AGMs, the committee will meet regularly – perhaps monthly, or less frequently (there will be a rule in your constitution about frequency of meetings) – to oversee the running of the group and take decisions. These meetings are sometimes called 'management committee' or 'executive committee' meetings. At their first new committee meeting, they may decide between themselves who will take on other specific tasks (e.g. publicity). Committee meetings must always be minuted, and should be carefully filed away (for more information on minutes, see a separate information pack on Minute Taking).

Other people may join the committee in an advisory capacity. For example, volunteers, local councillors or staff may join, or professional advisors. However, these people will *not* be legally responsible for decisions taken, which mean they will not have a vote. They are simply there to report back on detailed decisions, or to give advice.

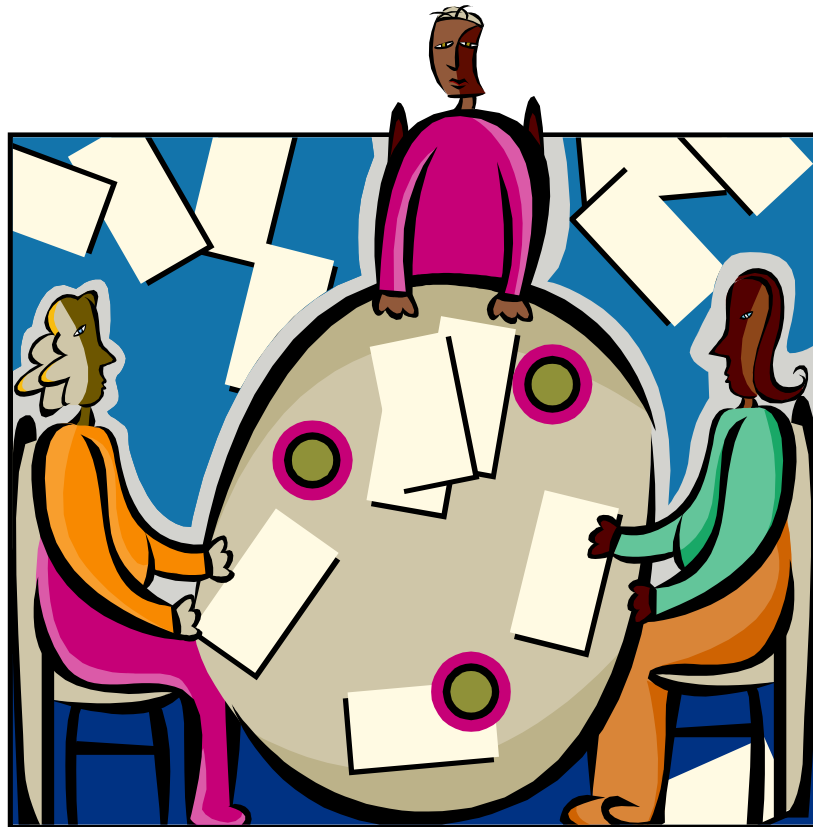
---

# Getting Started

---



A small group of committee members may want to meet from time to time to work in more detail on specific areas (e.g. programme of events or fundraising). These meetings are known as ‘sub-committees’, and they are a helpful way of delegating the more detailed work of the committee to members who are skilled or interested in particular topics. Some larger organisations may have a general sub-committee, often called ‘finance and general purposes’, which will look in more detail at the organisation’s activities. Remember, though, that all sub-committees must always report back to the main or executive committee for official ratification.



---

# Getting Started

---



---

## Stage 3 – Formalising the structure

---

If you want to set up an organisation, and especially if you intend to spend money, which has been granted or donated to you, then you need to be properly organised. Why?

- Because your group will be responsible for its activities and the money it spends, and there need to be rules in place to ensure everyone is clear about their responsibility
- So that the project can be run better, and the money is spent properly & efficiently

When you set up a group, there are two formal things you should have in place: a Governing Document or constitution and a Committee.

The legal structure - your Governing Document or Constitution (set of rules)

When you set up a group you need to work out exactly what you want to do and how you will do it. This involves setting out, formally, the objectives of the group, as well as rules such as how to elect your committee and accept new members.

You need a Governing Document

- So that everyone knows exactly what your organisation aims to do
- So that everyone knows how your organisation will be run
- So that everyone knows who is responsible for running your organisation
- To apply for money to run your group – Funders or Grant Givers will only give money to you if they are confident it will all be accounted for and spent properly

The normal type of governing document for a small group is a *constitution*. A constitution sets up an *association* - a group of people who come together, democratically, with a specific aim. This group of people (members) will decide on a committee, and the committee will then be responsible for running the organisation. Members can elect a new committee regularly.

*Remember...* once your group have agreed your constitution, *it is a legal document*. The committee, not the members, will be personally responsible for making sure the rules are followed.

### ***What is in a constitution?***

Your constitution will firstly tell you what your group is called, and what it aims to do. In a constitution the aims are known as 'objects'.

**The objects are the most important part of your constitution, because they will say what your overall aims are. Objects are not simply a list of your activities - there is an important difference between objects and activities.**

---

# Getting Started

---



- Your objects are your overall aims. To identify these, think about the overall *need*. What does your group want to achieve or improve?
- Your activities are more straightforward – these are the specific projects or services you want to set up, in order to achieve your aims.
- For example, let's say you wanted to set up an after-school club for children. Your activities would be 'provision of an after-school club'. However, this is not your object – your overall aim or *object* would be something like '*to advance the education of children under the age of 16*'.
- If you are working in a specific area, this also needs to be in your objects. It is a good idea to add 'and elsewhere' to your geographical remit, in case you go over the boundary!
- Remember that the constitution should be seen in the long term – so the broader your objects are to start with, the more flexibility you have to take on new initiatives in the future.

**If you want to register as a charity, then the Charity Commission will look carefully at your objects to make sure that what you want to do is charitable. For more details on what objects are charitable, please look at the Charity Commission's website [www.charity-commission.gov.uk](http://www.charity-commission.gov.uk) under Charity Registration. Staff at HAVCO can also help you with this.**

Your constitution will also set out more general rules, most of which usually apply to any group. The rules, which need to be included, are:

- **Powers** – what you can legally do to carry out your activities - for example, by raising money or hiring a building.
- **Membership** – who is eligible for membership, how people become members, and how people are disqualified (your group may have special rules on who is eligible to be a member)
- **Committees** – how and when the committee is elected, and which specific jobs need to be filled
- **Annual General Meeting** – once a year your organisation will have a meeting for all its members when the committee is elected and the annual report presented
- **Finance** – rules on preparing annual accounts
- **Changing the constitution** – the procedure for altering any of your rules – this should be at a general meeting with an overall majority
- **Dissolution** – the procedure for closing down your organisation

## **How do we adopt our constitution?**

Once you have your constitution, you need to have a meeting where the committee members sign it and date it. You must also take a formal record ('minutes') of this meeting. When this is done, the constitution is then officially 'adopted', and this means it is a legal document. From then on your group *must* be run according to what the constitution says. So for example, if you want to elect a new committee member, or if you want to change the constitution itself, you have to follow the rules in the constitution.

---

# Getting Started

---

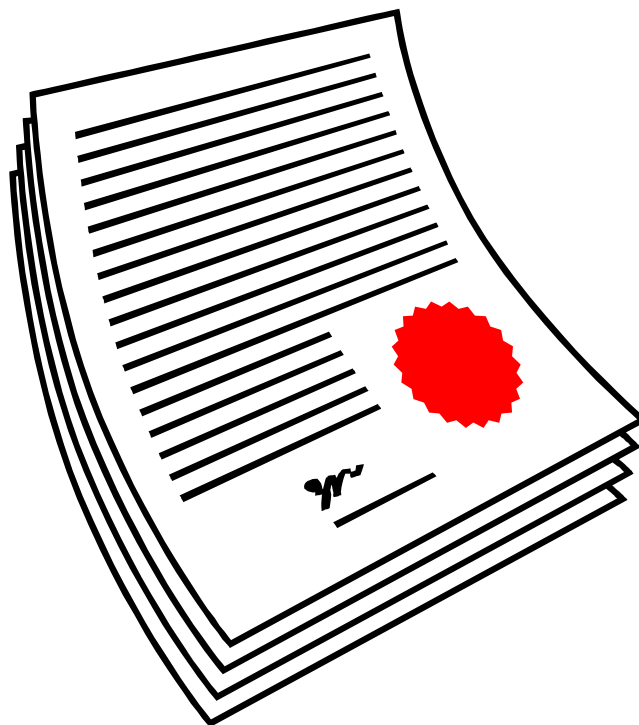


When you have adopted your constitution, file it away carefully. When you apply for funding, or if you want to register as a Charity, a copy of the signed constitution will need to be presented. Important documents like the constitution and minutes of meetings should be filed away separately.

## ***Model constitutions***

Constitutions look very complicated at first glance, because of all the administrative provisions. However, model constitutions are available, and the Charity Commission has their own model constitution. A model constitution contains all the standard parts such as elections, altering the constitution, dissolution, and so on. With a model constitution you need to insert the name of your organisation and the objects, and include any specific rules for your group (for example, you may have specific rules over who is eligible for membership). However, you need to carefully read through all of it, particularly the administrative provisions (election of officers, etc.) and make sure you are fully aware of their implications for your group. The Charity Commission produces many leaflets and in particular one explaining the responsibilities of Trustees and you are advised to request one for each Trustee to ensure they are clear and confident about their responsibilities from the beginning. The leaflets are free of charge and can be posted to you upon request. Information is also available on the Charity Commission website.

***Don't worry - remember that HAVCO is available to help you with your governing document.***



---

# Getting Started

---



## Stage 4 – Charity Registration

### *Why would your group want to register as a Charity?*

- Access to funding - many funders only accept applications from registered charities.
- An improved public image
- Financial benefits - relief from various taxes
- Information and advice from the Charity Commission
- You may have to, if your income is over £1,000 per year, if you have a permanent endowment, or if you occupy or use rateable property, *and* your group has exclusively charitable objects.

### *What are the restrictions?*

- A Charity has a duty to ensure all its activities and resources are used to further its charitable purposes.
- There are strict controls on political campaigning, trading, and trustees receiving financial benefits
- You must conform to accounting rules under charity law

### *What is a charity?*

- Charities exist for the **public benefit**. Benefits cannot be restricted to members, or one individual, and those responsible for running the organisation cannot normally financially benefit.
- Charities are not-for-profit or non-profit making
- The definition of a charity can be generally classified into four categories:
  - The relief of poverty
  - The advancement of religion
  - The advancement of education
  - Other purposes beneficial to the community

### *How do you register?*

The Charity Commission has an application form and a declaration by trustees. Your group's **objects** – your overall aims - are the most important factor in deciding whether your organisation is a Charity or not. However, the Charity Commission will also want to be confident that you will be able to achieve these objects. This means knowing what you want to do, and showing that you have or will have the resources to achieve it.

The application pack can be ordered direct from the Charity Commission. If you are interested in registering and you need help or advice it may be useful to book an appointment with the staff at HAVCO, who will be able to go through the application with you.

# Getting Started



## Stage 5 - More information

There are lots of changes in the community sector. The government has introduced new initiatives, which aim to tackle poverty and disadvantage at a local level. Community organisations play a key part in this. A key survival skill for start up groups is to get up to speed with local policy development. So keep the communication channels open between groups and the Community support organisations. The Havering Strategic Partnership (HSP) includes people representing public, private, community and voluntary organisations and has brought all existing plans for local services together and got as much agreement as possible to the overall plan, which is called the Community Strategy. The HSP provides an opportunity to ensure that the voice of people in Havering is heard. HAVCO has a place on the HSP in its role as one of the representatives of the voluntary and community sector. Through this we are able to act as a conduit for your views and comments to the Strategic Partnership. This is a way for your group or organisation to make your voice heard and to influence future plans and the future development of the Community Strategy. If you have views or comments you wish to express please contact HAVCO or attend one of our regular Voluntary Sector Forum meetings to learn more.

There are two types of community support organisations

<b>Borough Based Support</b>	<b>Cross-borough Community of interest support</b>
<ul style="list-style-type: none"> <li>• Race Equality Partnerships</li> <li>• Community Accountancy Projects</li> <li>• Councils for Voluntary Services</li> <li>• Volunteer Bureaux</li> <li>• Training and Employment Networks</li> <li>• Refugee Training Organisations</li> </ul>	<ul style="list-style-type: none"> <li>• Women's organisations</li> <li>• Lesbian, gay and bi -sexual</li> <li>• Elderly</li> <li>• Culturally specific</li> <li>• Supplementary schools</li> <li>• Research Skills</li> <li>• Trustee support</li> </ul>

The important role of community organisations now takes a higher place on the planning table. We all rely on your feedback in order to raise the voices of local communities to the highest level.

HAVCO actively supports local community organisation in a range of ways.

- Information and advice
- Regular newsletter
- Information to help put you in touch with other community support organisations
- Short courses & conferences
- Information on a range of funders
- Opportunities for voluntary sector managers to train to NVQ level 4 in Voluntary Sector Management
- Help with developing your Business Plan
- A Community Accountancy Service

---

# Getting Started

---



Once you have read the Getting Started Pack if you have additional questions please contact staff at HAVCO for help. We can offer direct help or if needed sign post you to other support organisations for further assistance.

We have a Community Library, with a range of information and reference books for new groups from self-help groups to social enterprise. We also have an internet ready computer for groups to use for internet or funding searches (by appointment) and use of photo-copier and a meeting room. Charges for this are much lower than commercial facilities and you have the added advantage of other staff at Community House who will try to help if you need it.

## **Useful Books**

- *Voluntary but not Amateur: a Guide to Voluntary Organisations and the Law* (Jacki Reason, Ruth Hayes, Duncan Forbes, - check for the latest edition, London Voluntary Services Council LVSC)
- *Just About Managing: Effective Management for Voluntary Organisations and Community Groups* (Sandi Adirondack, check for the latest edition, LVSC)
- *The Voluntary Sector Legal Handbook* (Sandi Adirondack, James Sinclair Taylor, Check for the latest edition, Directory of Social change - DSC)

## **Registering as a Charity**

- *Charitable Status: a Practical Guide* (Andrew Phillips, check for latest edition, Directory of Social Change)
- Groups who want to register, as a charity need to use the Charity Commission application pack *Starting a Charity and Applying for Registration*. Contact HAVCO, who can guide you through the process of application.

The Charity Commission also has a number of publications on different aspects of Charities:

- *Starting and registering a charity* CC21
- *Choosing and preparing a governing document* CC22
- *Responsibilities of charity trustees* CC3
- *Political Activities and Campaigning by Charities* CC9
- *Charity Accounts: The framework* CC51
- *Accounting for the Smaller Charity* CC54
- *The Carrying Out of an Independent Examination* CC56
- *Receipts and Payments Accounts Pack* CC57

These are available for from the Charity Commission

Charity Commission help line: 0870 333 0123 minicom: 0870 333 0125

These books and publications are also available for viewing at our Reference Library, along with many other titles.

---

# Getting Started

---



## HAVCO Charter

### Development

- To identify local need in the voluntary and community organisations
- To work with others to develop appropriate local action
- To work strategically to benefit all in the local voluntary sector

### Liaison

To effectively develop and maintain links with a wide range of voluntary and community organisations. These include user organisations and those representing the diverse communities which exist within the area.

In addition HAVCO's task is to promote cross-sector relationships including those with the relevant local authority departments, the health authority and other public agencies working in Havering.

### Enabling Representation

As an independent, non-party political organisation HAVCO has a particular role in enabling the local voluntary and community sector to present its views to local authorities and other public agencies.

We are involved in setting up local committees and forums to discuss how this can best be achieved.

### Services

HAVCO aims to be a key resource for the local community and voluntary organisations offering

- Funding information
- Employment/financial services and advice
- Legal/constitutional information
- Meeting space
- Training
- Office services
- Regular mailings
- General advice and guidance
- Bookkeeping and accountancy
- Help with Business Plans

---

# Getting Started

---



## Contact information

**By phone:** 01708 742881

**By fax:** 01708 744373

**By post:**  
Havco,  
Community House,  
19/21 Eastern Road,  
Romford,  
Essex,  
RM1 3NH



## By E-mail:

<a href="mailto:Kim.guest@havco.org.uk">Kim.guest@havco.org.uk</a>	- Kim Guest	- Director
<a href="mailto:Ann.baughen@havco.org.uk">Ann.baughen@havco.org.uk</a>	- Ann Baughen	- Children's Work Development Officer
<a href="mailto:Mortimer.jackman@havco.org.uk">Mortimer.jackman@havco.org.uk</a>	- Mortimer Jackman	- Finance Manager
<a href="mailto:Lynn.morris@havco.org.uk">Lynn.morris@havco.org.uk</a>	- Lynn Morris	- Health & Social Care Officer
<a href="mailto:Pam.macklin@havco.org.uk">Pam.macklin@havco.org.uk</a>	- Pam Macklin	- PSA Target Coordinator
<a href="mailto:Michael.dunlop@havco.org.uk">Michael.dunlop@havco.org.uk</a>	- Michael Dunlop	- Information Manager
<a href="mailto:Michelle.mack@havco.org.uk">Michelle.mack@havco.org.uk</a>	- Michelle Mack	- Training Coordinator
<a href="mailto:Lisa.witham@havco.org.uk">Lisa.witham@havco.org.uk</a>	- Lisa Witham	- Admin assistant (Training)
<a href="mailto:Mark.jordan@acecas.org.uk">Mark.jordan@acecas.org.uk</a>	- Mark Jordan	- ACE Project Manager
<a href="mailto:Joseph.yongo@acecas.org.uk">Joseph.yongo@acecas.org.uk</a>	- Joseph Yongo	- ACE Community Accountant
<a href="mailto:Dennis.opara@acecas.org.uk">Dennis.opara@acecas.org.uk</a>	- Dennis Opara	- ACE Community Accountant

---

# Getting Started

---



## Welcome to lvsc

### LVSC

#### London Voluntary Service Council

- LVSC strengthens voluntary organisations by providing services and a strong voice on policy issues that affect London
- LVSC supports voluntary organisations to work within the complexity of social policy in London
- LVSC acts as a conduit to ensure that the views of marginalised groups are represented
- LVSC targets second-tier organisations (organisations that provide services to other organisations rather than to individuals), groups which can't get help from a second-tier organisation of their own, black and minority ethnic groups, and other groups that experience discrimination

#### LVSC's priorities are:

- Liaison with the Greater London Authority (GLA) and its agencies
- Regeneration
- Sustainable development
- Social exclusion
- Community care
- Making affordable training available
- Improving employment practice in the sector

#### LVSC provides

- Up-to-date information on management and funding
- A library and information service
- Practical publications
- Short courses on generic management skills and computer literacy
- A co-ordinated voice to influence policy makers
- Fast and accurate interpretation of policy developments
- Opportunities to learn and share best practice
- Access to a range of networks

[www.actionlink.org.uk](http://www.actionlink.org.uk) the information reference which makes the connections you need.

London Voluntary Service Council  
356 Holloway Road  
London N7 6PA  
Telephone: 020 7700 8107  
Facsimile: 020 7700 8108

E-mail: [lvsc@lvsc.org.uk](mailto:lvsc@lvsc.org.uk)

---

# *Getting Started*

---



## NOTES