

# GETTING STARTED GUIDE

Do you have an inspired idea that could make **a real difference** in your community?

Our **Community Development Team** are here to help you turn your idea into reality. We will work to enable you to have an effective and robust group ready to **start, grow and thrive**.

## What do you want your group to do? What does your community want and need?

- Decide on the group's **purpose** or **aims**.

*Purpose or aims mean the same but you will find the terminology differs. Your vision and mission statements describe your purpose and aims.*

- A **vision statement** helps to describe the desired future you are working towards.
- A **mission statement** is what you are going to do to achieve your vision. Not in detail (that comes later) but what is your primary focus.

**MIND's** vision statement is: *'We won't give up until everyone experiencing a mental health problem gets both support and respect.'*

**MIND's** mission statement is: *'We give advice and support to empower anyone experiencing a mental health problem. We campaign to improve services, raise awareness and promote understanding.'*

- Who are your beneficiaries?

*Who will benefit from what your group does?*

- What do you want to achieve? Decide on the impact you want to create.

*What would look like a "win" to you?*

- Where and how will you operate?

*Don't just think about today, what do you want to be doing in five years' time?*

## Choose a name for your organisation.

- Choose a name that is **distinctive, memorable** and **appealing**.
- Do not use a name that is misleading in any way.
- Do not choose a name already in use or very similar to an existing one.
- Check that there are no intellectual property rights on your proposed name.
- You can check if your proposed name is already in use by doing a simple search across all social media platforms and a Google search. Then check the Charity Commission website and Companies House.

**Write a mission and vision statement which aligns to your groups and aims or purpose.**

- Make a clear statement to members of your organisation and to external partners.
- Keep it short, clearly defined and powerful.

**For example:**

Community People's **vision statement** is: *'Active Strong and Connected Communities.'*

Community People's **mission statement** is to: 'Provide high-quality support to community groups, businesses, and individuals so they can make positive, lasting impact in and for their communities.'

**Useful Links:**

- [Create Charity Foundation Vision & Mission Statements](#)
- [Our mission - Mind](#)
- [17 Great Nonprofit Mission Statement Examples \[2024\]](#)

**Need: Is there a demand/need for what you want to do?**  
How do you know the service is needed?

Many groups and organisations are set up because of a person's/a group of people's lived experience. Lived experience is a powerful concept that acknowledges and respects the value of direct and personal encounters of a specific challenge or condition. It is rooted in asset-based approaches, which recognise strengths in communities and individuals, rather than a starting point of what is wrong. Funders like National Lottery Community Fund and Paul Hamlyn Foundation demand that the voice of the communities is central to all the work they fund.

**Useful Links:**

- [Illuminating asset-based working - Paul Hamlyn Foundation](#)
- [Lived Experience at Samaritans](#)
- [Developing our understanding of the difference co-production makes in social care - SCIE](#)

**Co-production:** this is a big word which you might hear a lot. Co-production is a very powerful tool to achieve change.

There are some great **toolkits** available to help you plan your journey:

- [Stronger Together: a Co-production toolkit from Ageing Better](#)
- [Mind: Co-production - deciding together](#)
- [Cheshire West Voluntary Action Local Voices Framework](#)



**Partnership:** Are there any other local groups who are already doing what you are proposing?

It might be a better idea to join with another group that aligns with your vision and mission and values. Also you may not get funding if another group in your local area is delivering the same or similar work to you. With increasing demand for services, funders are keen they don't duplicate work and waste precious resources.

- Do your research. Come along to one of our networking events or forums, search our members here or speak to your Community Development Coordinator.
- Do a search online including across social media
- Reach out to existing groups and projects and ask to meet with them



### **Choose the best structure for your organisation**

You need to choose a structure that fits with how your group will operate.

#### **These are the most common structures:**

- Charitable Incorporated Organisation (CIO)
- Unincorporated Organisation or Community Group
- Community Interest Company (CIC)

#### **Other structure options:**

- Charitable Company
- Charitable Trust
- Limited Company
- Community Benefit Society
- Co-operative Society

### **Do you intend to earn a wage?**

If you are thinking about earning a wage from the services your groups offers then you must take this into account when choosing a structure. Earning a wage is possible if you use a CIC structure. However, CICs have limited funding options as funders favour community groups and charities with a trustee board or committee.



### **Write a governing document**

This is the legal document that states your organisation's aims and says how it should be run. Templates are available for different the structures and the Charity Commission has a preferred template for forming a CIO [here](#).



### **Create your trustee board or committee**

To govern your new group, you will need to set up a governing body.

It is important that Boards and Committees are representative of the communities they serve by recruiting and retaining trustees from a diversity of backgrounds and lived experiences.

Community People is working to diversify its own Board, as part of our DEI strategy. We will also be launching a programme of free DEI training in November 2024 for all our members and the wider West Sussex VCSE sector. This will include sessions for Chairs and CEOs, Community Leaders embedding DEI at the heart of governance.

Think about the skills and experience required and recruit accordingly. You could undertake a skills audit.

- A Community Group must have a committee
- A CIO must have a Board of Trustees

You will need a **Chair, Secretary and Treasurer** as a minimum but based on our experience we would always advise at least 5 people.

In your governing document you can say how long trustee appointments should last, and whether trustees can be reappointed after their term ends. Otherwise, there are no set limits.

When recruiting your first board of trustees, aim to stagger the lengths of the first appointments so that the trustees tenure doesn't all change at once.

### **Useful Links:**

- [For charitable bodies | Getting on Board](#)
- [Trustee Recruitment Cycle](#)



**Open a bank account.** In order to get any funding, pay for insurance or volunteer expenses a new group will need a bank account.

- Set up an account in the name of the organisation.
- It is sensible to have at least two signatories who are unrelated.

**Get insurance.** You must get insurance for your organisation. The type depends on your group and your activities.

**Raise funds.** You can start to raise funds for your group as soon as you start the registration process to be a charity or CIC or if you have your committee and governing document set up for a community group.

[Further resources on funding and fundraising are available to groups here.](#)

**Create policies.** The policies you will need for your group depend on what your activities are. Funders and stakeholders will need evidence that your group is well set up, managed efficiently and protects those involved in the group.

Different funders ask for different policies.

**Policies should always be lived documents which everyone in your group has read and understood.**

#### **Essential policies to set up are:**

- Health and safety
- Equality, diversity and inclusion policy
- Financial Management
- Volunteer
- Confidentiality
- Data protection (GDPR)
- Grievance
- Complaints
- Safeguarding (Adults or Children dependent on the group)

#### **Other policies to consider depending on your group's activities:**

- Environmental
- Reserves Policy (If appropriate)
- Social Media Policy
- Conflict of Interest
- Rules and Code of Conduct for your organisation
- Gifts
- HR Policies (Dependent on staff or volunteer roles)
- Lone Working
- Whistleblowing

**Note: This list is not exhaustive.**

There is a lot of digital information out there which can be overwhelming. These are our recommendations of great websites which have a wealth of information for setting up a group:

- **Charity Set Up by NCVO** (National Council for Voluntary Organisations) You can become a member of NCVO for free if your group has a gross annual income of below £30,000 PA
- **The Resource Centre Brighton**
- **Gov.co.uk**

<b>Task</b>	<b>✓</b>	<b>Date Completed</b>
Decide on purpose or aims		
Choose a name		
Write vision and mission statements		
Assess need for your group's activities		
Research partnership opportunities		
Choose a structure		
Write a governing document		
Create your Trustee Board		
Open a bank account		
Obtain insurance		
Raise funds		
Create policies		

