

HANDBOOK FOR TRANSITION PROJECTS



This handbook is for members of the Board of Trustees and Core Group of Transition Chichester who are supporting project leaders, and for project leaders who want to access the information themselves.

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INTRODUCTION

Transition Chichester is a community of people ready to help project leaders to successfully deliver their projects. This handbook sets out what ‘must’ be done to deliver a Transition Chichester project (these items are underlined), and also gives guidance on things that may help the project be even more successful.

The great thing about delivering a project as part of the Transition Chichester network is that we can help in many ways:

- Project planning and budgeting
- Meeting health and safety requirements
- Recruiting volunteers to help you deliver your project
- Accessing resources through our strong local networks and credibility
- Providing the legal status needed to access many grant funds
- Public liability insurance
- Bank account
- Financial management (essential for reporting to donors)
- Communications support to share your message via our website, newsletter and email list of over 500 subscribers
- Inspiration, motivation and companionship to make delivering your project easier, more fun and more successful

TRANSITION CHICHESTER PROJECTS

All projects need the following things to be legally compliant, however the level to which you need to work is commensurate with the scale of your project, so a small project is likely to only need a very 'light touch':

- Data protection plan
- Risk assessment
- Insurance
- Disability and discrimination acts
- Child protection policy

Because you need to do these things to stay safe and legal, they are a requirement for all Transition Chichester projects. You don't need to do them alone as the Trustees have prepared a series of policies which should cover your needs. You will need to complete a Transition Chichester project questionnaire, so that we fully understand what you are planning to do and can tailor our support to your needs.

If your project is to be 'adopted' as a Transition Chichester project, you must present it to the Core Group. If they are happy for you to go ahead, they will consult the Trustees to ensure that your project complies with the legal requirements. Once this has happened, you can get started, and take advantage of all the support that TC can offer.

If your project is already up and running and you would like it to be 'adopted' by Transition Chichester we would be pleased to help you go through these three key steps above.

CREATING A GREAT PROJECT

1. PLANNING YOUR PROJECT

Great projects deserve a bit of planning and we think you will have a more successful and enjoyable project if you do the following things, even though they are not a requirement for Transition Chichester projects:

- Plan
- Budget
- Communicate
- Review what works well and improve as you go (monitoring and evaluation)

SMART planning is usually more effective because it helps you to be very clear about what you want to achieve and makes monitoring and evaluation much easier:

- Specific
- Measurable
- Achievable
- Realistic
- Time framed

If your project is designed to help other people in some way, you might want to start by consulting them to make sure that you really understand their needs and have come up with the best solution.

Once you have decided what you want to do, there are three simple steps that can help you deliver a successful project, but once again, these are not a requirement for Transition Chichester Projects.

1, Write down what success will mean for your project. Think about this in terms of the end result and create a SMART outcome for your project.

2. Then think about the things you will need to do in order for your project to be a success and achieve its SMART outcome. Include a method to measure whether you have been successful in your project design.

3. Now consider all the resources you will need to get those things done. Resources will include people power and things that you need, probably including a venue.

A GANTT chart will help you stay on track with the things you need to do. It is a simple spread sheet that puts the dates across the top and the activities on the left hand vertical. You need to think carefully about every activity you need to deliver, and then plot them into your GANTT.

A sample GANTT chart is included in the Annex to this handbook.

Think about any special concerns you may need to address, does your project involved children, elderly, people with disabilities? All public events must be accessible to people with disabilities and if children are not with their carers you will need to comply with strict regulations.

2. BUDGET

Once you know all the resources you will need for your project, creating a budget is a simple matter. Just list all the resources and how much they will cost! You may want to indicate when the money will be needed if you project is going to happen over an extended period of time. Your budget may look like this:

Description	Price	Units	Total	Jan	Feb	March	April
Venue hire	£50	2	£100		£50		£50
Catering	£5	20	£100				£100
Table cloths	£2	8	£16			£16	
Cutlery/ crockery hire	£15	1	£15				£15
TOTAL			£231		£50	£16	£165

If your project involves cash you must agree how income and expenditure will be recorded with the Transition Chichester Treasurer before you start your project. Once again, this only needs to be commensurate with the scale of your project and we have templates and people to help you make the financial management of your project as simple and easy as possible.

Similarly, if you need to raise funds to deliver your project, you must agree your fundraising activities with the Transition Chichester Trustees before you begin. Fundraising activities are governed by strict and complex legislation, so we will help you make sure that you are on the right side of the law. We may also be able to directly support you with fundraising and securing funds.

Be reassured that the money for your project will be ring-fenced, so that you know it will be there when you need it.

3. COMMUNICATE

Think about how you will get people involved. The Media Trust provides lots of advice on getting your message heard on their website. But a good place to start is by telling the Transition Chichester Core Group, and asking them to feature your project on the website and in mailings.

Please remember, YOU CANNOT describe your project as a Transition Chichester Project until it has been approved by the Core Groups and Trustees of Transition Chichester.

Follow the simple steps below to make sure your project benefits from all the support that Transition Chichester can offer you...

FORMAL REQUIREMENTS

1. DATA PROTECTION

It is probably easier not to collect personal data and just rely on the Transition Chichester mailing lists, but if you need to in order to deliver your project, then you must comply with the data protection act. Transition Chichester has a Data Protection Policy which you can access via the website. You will need to read this policy to familiarise yourself with its requirements.

Remember that if you collect any personal data for your project you must

- State what the data will be used for on any forms or other mechanisms you use to capture data about people.
- Only use the information for the purpose for which it was originally collected. If you want to use it for something else later, you must ask for permission at the time of gathering the information. For example, use a simple statement that asks "we would like to use this information to contact you at a later date" and give them an option to say "no thank you".
- Only ask for the information you need to know to carry out your activity
- If you keep the information for an extended period, let people know what information you have and give them an opportunity to update it.
- When you have completed the activity, destroy the data unless you have written permission from people to keep it and they know what you will use it for

For most purposes people should know:

- who holds the data and how to contact them
- what data you hold and how it will be used
- that you have their permission to hold this data and you will use it only for the purposes you said at the time they gave it to you
- that you are not recording any sensitive personal data (Check the Transition Chichester Data Protection Policy for details.)

2. RISK ASSESSMENTS

You must do this if you want to deliver ANY project, but we are happy to help you develop a risk assessment and risk management plan.

The Health and Safety Executive is responsible for health and safety regulation in Great Britain. They state that "The law does not expect you to eliminate all risk, but you are required to protect people as far as 'reasonably practicable'. Their guide) tells you how to achieve that with a minimum of fuss

Step 1: Identify the hazards

Step 2: Decide who might be harmed and how

Step 3: Evaluate the risks and decide on precautions

Step 4: Record your findings and implement them

Step 5: Review your assessment and update if necessary

Don't overcomplicate the process... If you run a small organisation and you are confident you understand what's involved, you can do the assessment yourself. You don't have to be a health and safety expert."

You can use this to prepare your risk assessment, and you must review your risk assessment on a regular basis, and at any time where there is a significant change to your project:

RISK	LIKELIHOOD	IMPACT	SCORE	MITIGATION	MITIGATION PERSON	ISSUE ACTION	ISSUE PERSON
e.g. fire	Score 1-3 1 – unlikely	How significant? Score 1-3 1 – very little impact	Add previous 2 columns together	Any score above 3 needs careful consideration. What will you do to prevent this from happening?	Who will carry out the mitigating action?	If it does happen on the day, what will you do?	Who will do it?

3. INSURANCE CHECK

Your risk assessment will help you to identify where you may need insurance cover, and we will work with you to check whether Transition Chichester has sufficient cover or whether we need a different solution.

Remember that signs in public places may need special insurance!

Generally if you are hiring a venue, it will be insured and you should ask what cover is available when you hire. Once you have checked with your venue, you can check with the Transition Chichester Trustees to see if you are covered under our insurance. If you are not covered, we will see if we can include your needs under our current cover. If we can't, we will look at the additional cost and let you know if we feel able to add your needs to the cover.

TRANSITION CHICHESTER PROJECT QUESTIONNAIRE

Before your project is 'adopted', we ask you to complete a project questionnaire. The information that you put in the project questionnaire is used by the Core Group and Trustees to identify how we can support your project and any adjustments that might be needed for your project to become a Transition Chichester project. It helps us to fulfil our responsibility to the organisation and meet the legal requirements placed on us by Companies House, and for this reason the questionnaire should be completed for each project.

You don't have to fill it in on your own, we will be happy to help you prepare the information and complete the questionnaire.

If you don't want to fill in this questionnaire, you can just run your project as you have planned, but it will not be a Transition Chichester project. We may be able to offer you some support with promoting your events, so please get in touch if you would like us to do this.

OTHER THINGS THAT MIGHT HELP...

BUILD A VOLUNTEER GROUP

You don't have to go it alone getting a team of volunteers together may be surprisingly easy. In addition to contacting the Transition Chichester network, you can reach out to volunteers through a range of networks.

Volunteering England gives a wealth of advice on recruiting, retaining and working with volunteers. There are a range of agencies specifically established to help volunteers find you and you to find volunteers (the text below is taken from their own websites):

Volunteer Centres: Volunteer Centres (sometimes known as volunteer bureaux or volunteer development agencies) provide support at a local level for individual volunteers and volunteer involving organisations.

Timebank: TimeBank is a national charity inspiring and connecting people to share and give time. TimeBank appeals to people like you who know that their time and skills are in demand - but just don't know what to do about it or where to start.

Do-it.org.uk: do-it.org.uk was launched in 2001 with the first, and still the only, national database of volunteering opportunities in the UK. do-it.org.uk is part of the registered charity YouthNet, a non-profit-making organisation. We do not charge people to use the database as we believe that volunteering should be free to the user and so make a small charge to organisations registering their opportunities to ensure this.

IT4communities.com: We are the UK's leading national IT volunteering programme. Our main areas of activity are:

- Helping charities and community/voluntary groups to find volunteers to help with their IT needs
- Helping IT professionals to find suitable IT volunteering opportunities
- Providing support for volunteering projects from project definition to project completion

A number of recruitment agencies have specialist 'charity' departments, and some, like Charityjob will advertise volunteer opportunities free of charge.

ON-LINE RESOURCES

Volunteering England offer a wealth of useful information on working with volunteers
<http://www.volunteering.org.uk/goodpractice/information>

Free online Gantt tool <https://www.smartsheet.com/>

Clear guidance of fundraising regulation, legislation and best practice <http://www.institute-of-fundraising.org.uk/guidance/codes-of-fundraising-practice/codes-directory/>

The National Council of Voluntary Organisations offer a range of useful online tools, here is one that helps you think about making a difference through your project, or 'having impact' <http://www.ncvo-vol.org.uk/strategy-impact/six-impact-activities>

**We look forward to helping you grow a successful project as part of the
Transition Chichester network**

ANNEX 1: TRANSITION CHICHESTER PROJECT QUESTIONNAIRE

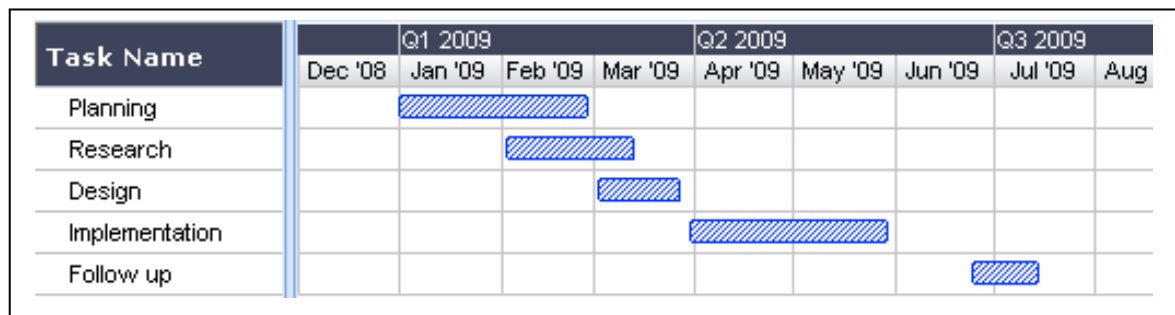
Unless you prefer to complete this directly, we recommend that you go through this questionnaire with the TC Co-ordinator, or a member of the Board of Trustees, who will help you to complete it.

1. What is the name of your project?	
2. Please give a brief description of your project (150 words max)	
3. Who is responsible for the delivery of your project, please provide name and contact details.	
4. How does your project help us 'Transition'?	
5. What are your project start and end dates?	
6. Is there a project plan (if not would you like support with preparing one)?	
7. What are the five key measures of success for your project (please ensure they are SMART)?	
8. How will you measure these?	
9. What skills are needed to successfully and safely deliver your project?	
10. Which people on the project team have these skills? (please provide the names of these people)	
11. If you do not have the required skills to deliver the project, how will you fill this resource gap? Please describe your strategy.	
12. Who will benefit from your project? (please estimate how many people)	
13. What are the main activities for your project? Please list these indicating their start and end dates.	
14. Does your project involve children, vulnerable adults, and people with disabilities or elderly?	
15. If you answered yes to the question above, what special measures do you need to take to ensure legal compliance and safety of the participants?	
16. Have you completed a project plan?	
17. Have you completed a risk assessment?	

18. What elements of your project need insurance cover?	
19. For which elements of your project are you seeking insurance cover through the Transition Chichester insurance plan?	
20. Have you completed a project budget, and how much is the total expenditure of your project?	
21. How do you plan to cover the costs of your project?	
22. Will you need to use the Transition Chichester bank account for project funds?	
23. Are you familiar with the regulations regarding the handling of donations and payments, and have you put the right systems in place?	
24. How will you communicate your project?	
25. How can Transition Chichester help you to communicate your project?	

ANNEX 2: SAMPLE GANTT CHART

A Gantt chart is a simple spread sheet that puts the dates across the top and the activities on the left hand vertical. Think carefully about every activity you will need to deliver and then plot them into your Gantt, which will look a bit like this:



This Gantt above shows the top-level chunks of activity. Though it can seem a bit overwhelming at first, breaking down each chunk of the project into all its component activities will provide you with the best overview of what needs to happen.

Gants aren't just for one-off projects; you can create a Gantt for a recurring project, for example a monthly film night. The Gantt then becomes your check-list, helping you to remember everything that needs doing and when.

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