

Community-led Housing Toolkit 1

How to get your community-led housing
project up and running

Table of Contents

Introduction: What and who is this guide for?	4
How should you use it?	4
Step One: Agree on your project	5
Get things clear from the outset	5
What are our reasons for considering a community-led housing project?	5
Who are the beneficiaries of your project?.....	5
What form will your project take?	6
Where will your project be?	7
What will your project cost?	7
Pre-feasibility funding	8
When and how will you engage with the community?	9
Step Two: Evidence for your project	10
Research and consultation.....	10
What does the community need?	10
What does the community want?	12
Step Three: Project proposal	13
What needs to be done and who will do it?	13
What should be in the plan?	13
What model best fits your project?	13
Paying the early stage bills?	14
Do you know where to get help?	14
Step Four: Choose a legal structure	15
What is right for your project?.....	15
What is a community-led organisation?	15
What are the options?	16
Appendix A: Sample Projects and Budgets	17
Appendix B: Guide to community consultation	17
Appendix C: Common housing project models	19

Appendix D: Legal structures..... 22
Appendix E: Further information & resources 25
Template 1: Budget example..... 27
Template 2: Project proposal 30

Introduction: What and who is this guide for?

This is a guide for groups who are considering a particular community-led housing project and looking for practical advice on how to progress it. It can be used by new groups starting a project from scratch or by existing community groups branching out into community-led housing (CLH).

How should you use it?

Use it to guide your thinking and your processes, but don't be its slave. It covers all the key elements of a start-up CLH project, but because all projects are different, it's not definitive. Therefore there will be times when you will need to seek further advice or make a judgment about something. That's part and parcel of a CLH project.

If you download this guide, write answers to the points raised in the text boxes shown. This will help you record your progress. There is also an appendix (E) within the toolkit, and using this give links to further sources of support. Though in reality, all elements of this toolkit could be handled concurrently, we suggest that for ease of use, you try to complete each process in this guide before you move onto the next. When you've completed all elements, you're ready to move onto **Toolkit 2**.

Step One: Agree on your project

Get things clear from the outset

Call a meeting of people who have shown interest in being part of a CLH project (a steering group) and don't leave the room until the points in this section have been answered. Agreement about the basics now will save time, effort and money later on.

What are our reasons for considering a community-led housing project?

Identify the problem you want to address. Perhaps you are facing a shortage of affordable housing for young families, or no suitable housing for older people? It may be that your community has a high number of empty or boarded up properties while there is a very long waiting list for council housing. Whatever your situation, try to reduce it to a couple of sentences you all agree on.

Download document to write your notes here

-
-
-
-
-
-

Who are the beneficiaries of your project?

Agree on the people who will ultimately benefit from the housing you want to build. This can be several groups, including for example, those who will live in the housing, and those who may gain training and work experience through involvement in building or refurbishing it.

You can also include other wider beneficiaries, for example, if housing for older people means they can downsize, their existing houses could become available for young families in the area. At this stage it is worth thinking about the type of tenures you might want to offer, and the people who would benefit from those.

Download document to write your notes here

-
-
-
-

What form will your project take?

Decide on the type of housing you think best for your project. If you are unsure, you should ask the community before you go any further. Further information on community engagement can be found on page 9 and in **Appendix B**.

If you have a pretty good idea of what seems appropriate - even if this later changes due to financial or other constraints - put it on paper. It's always helpful to have a vision of your completed project, so that everyone understands what is being discussed as the project proceeds. So for example, 15 affordable rent starter homes, or eight smaller units for older people, or two refurbished empty properties for sale. Of course you will also need to spend time ensuring that your proposed project is what is *actually* needed and wanted. See *'Evidence for your project'* for more information.

Download document to write your notes here

Where will your project be?

Do you have a site or building in mind for your CLH project? Who owns it and have you approached them? Starting an early dialogue with the land owner may help you avoid wasting time if a site is not likely to be made available for whatever reason. Also, task someone with speaking to the local planning department about the kind of development likely to win planning permission. This could provide you with an early warning about possible problems such as access or infrastructure.

If you haven't yet found land or property, take this opportunity to make a shortlist of your key requirements for a potential site or building. This will keep your search on track and avoid you wasting time on possibilities that could easily be assessed and discounted using your agreed parameters.

Download document to write your notes here

What will your project cost?

The potential cost of a community-led housing project can be daunting but it's better to know sooner than later the ball park you're playing in. Identify members of the steering group who can go away and start working on this by firstly considering the cost of the land or property, which will vary considerably depending on the size of the project and the local market value. It will also depend on its current condition, proximity to other facilities and how it can be accessed. It's worth noting that land or property owned by a public authority may be available as an asset transfer, possibly at little cost. For more information see <http://mycommunity.org.uk/programme/community-asset-transfer/>.

As an alternative to buying land, you could perhaps consider buying vacant properties with a view to refurbishing or rebuilding them. See <http://self-help-housing.org/>.

Then ensure someone works with a professional person (architect, surveyor or developer) to come up with a broad costing for the building project. At an early stage, an estimated price may be calculated on a cost per square metre basis, though ultimately, this will depend on the quality of the materials to be used and the technology to be incorporated. Don't forget to include the costs of any land preparation work that may be needed. There is also a useful, more detailed calculator tool available at www.communitybuildingschecker.org.uk.

At this point you won't have a hard and fast budget but this approach should help bring your project into focus. Use **Template 1: Budget** to do this. Then as your scheme is designed in more detail, more accurate and itemised costings will be developed.

The subject of funding and finance is covered in finer detail in **Toolkit 3** but it's never too early to start thinking about how you can raise the money you need to progress the project.

Some funding sources include :

- Public funds: Central government, local government, European grants
- Grant making charities & trusts
- Donations
- Commercial & ethical bank loans
- Community Shares
- Crowdfunding

Download document to write your notes here

Pre-feasibility funding

Funding is available for community-led housing to help you assess the feasibility of a community-led housing project prior to submitting a traditional planning application (or a [Community Right to Build Order](#)). More detailed guidance on this grant is available in the guidance notes [here](#).

When and how will you engage with the community?

Any CLH project needs the support of the local community to proceed, and if you are looking for external grant funding, evidence of this support will be essential. Start thinking about this now but ask some of the members in your group to consider the options and then call another meeting to get things moving.

The types of engagement you could consider are:

- Consultation events - identifying needs, aspirations and gaps.
- The use of social media (website, Facebook, Twitter) - to disseminate and gather information and raise awareness of the proposals.
- Written surveys and questionnaires delivered to local residents and/or canvassed on the street.
- Stakeholder workshops and discussion groups - to debate issues, develop solutions and establish a consensus.
- Design workshops - possibly including mapping and model-making.

Download document to write your notes here

Step Two: Evidence for your project

Research and consultation

Once your initial meeting is over and you have your ideas down on paper, you need to ensure they are backed up by hard evidence. The steering group may understand what needs to be done, but when you come to the business of raising funds for your project, you must be able to *evidence* both the local need and the local demand for it. They are not the same thing. Call your second meeting to go over the information you have pulled together so far and then start planning ahead.

What does the community need?

Desk based research will be helpful here. Task someone to review existing information which is increasingly available online from your local authority and other public organisations. At the very least they should consider housing needs reports. Check out the Local Plan - you can find this by looking on your local planning authority website.

It will also be helpful to look at a range of economic and environmental data, such as population trends, local employment, industry and social and market trends. Other evidence might relate to transport, natural environments and community facilities.

Ask local interested parties (stakeholders) to write to you explaining their understanding of local need and speak to potential beneficiaries to record their insights at first hand.

If your project is part of a Neighbourhood Plan, or is in an area where a Neighbourhood Plan is underway, make early contact. Speak to the Parish/Town Council or the Neighbourhood Forum heading it up. They will be looking in detail at the needs of the area, so getting involved makes good sense. There's more information about Neighbourhood Planning at mycommunity.org.uk.

Stakeholders could include

- Local residents or potential residents
- Local authorities or councillors
- Local shopkeepers, businesses, major employers and business organisations
- Community groups
- Landowners and developers
- Schools, colleges and universities
- Health and social care organisations.

Download document to write your notes here

What does the community want?

The best way to find out what people want is to consult them. If your project is in a Neighbourhood Plan area, tying in with their consultation could be helpful and avoid duplication of effort. If there is no Neighbourhood Plan, your steering group should work out the best method of consultation by discussing the results of any previous consultations, the direction of the Local Plan and the goals of groups active in the community. There's a good guide to community consultation in [Appendix B](#).

You must find out whether people support your idea as a positive local project, or whether they have other ideas as to what should be done. Make sure you are not planning something that simply isn't required.

Download document to write your notes here

Step Three: Project proposal

What needs to be done and who will do it?

Your next Steering Group task is to start shaping your project by preparing a proposal. This is a key element of the project and will be really helpful when you consult with your community so start putting this together as soon as you can.

What should be in the plan?

It should explain who you are, what you're trying to do, why you're trying to do it and how you're going to achieve it. Use the information you have gathered so far along with the template in **Template 2: Project proposal** at the end of this guide and assign different elements to different people to spread the workload. Then allocate someone to pull it all together. It doesn't have to be all encompassing at this stage, but it needs to capture the basics of your project in a form people can easily understand.

What model best fits your project?

At this stage you might like to consider which of the commonly adopted models of housing matches your project most closely. Doing this will help people to understand your plans better, and will help you identify the support organisations that can best help as you progress. It will also simplify matters when you come to choose a legal structure in the next section. These are the main models available:

- Community Development Trust
- Community Land Trust (CLT)
- Co-housing
- Co-operative housing
- Self-help housing
- Group or community self-build

See the full list of models explained in **Appendix C**.

Download document to write your notes here

Paying the early stage bills?

If you haven't incurred costs yet, you probably soon will. From time to time funders make small pots of money available to help fledgling groups or existing groups setting up new projects. [Community Buildings pre-feasibility](#) funding is currently available to help you scope out your project. You can also find a good guide to other funding sources here www.fundingcentral.org.uk. Alternatively, many groups decide to carry out local fundraising or solicit donations to cover the very early stage costs. Local fundraising events often include fun days, sponsored events, concerts, car boot sales, fetes and so on.

If you have ideas for funding applications or local fundraising activities, sketch out a list here and allocate people to investigate and organise them.

Download document to write your notes here

Do you know where to get help?

Keep checking back to this guide, and particularly to the Appendix E which also has useful links to sources of advice and support. Write down what issues concern you most here and try to address them one by one.

Step Four: Choose a legal structure

What is right for your project?

Now is the time to formalise your group and create an appropriate legal structure for it. There are a number of choices available to you and these will be best discussed at your final steering group meeting of this Toolkit 1 section.

What is a community-led organisation?

Community-led organisations are those in which the local community has a say in strategic and policy decisions. This is usually achieved through a board of management drawn from the local community, with existing or prospective residents in the majority. The make-up of the board usually reflects the mix of the local community in terms of gender, age, ethnicity and other characteristics.

Community-led organisations are independent and guard against undue influence by making sure that representatives from partner organisations or the local authority comprise no more than 20% of the board. Independence is also maintained by avoiding over reliance on a singular source of funding or particular partnerships.

Community-led organisations often have a broad membership which extends beyond board representation and maintain a dialogue with the community by keeping local people informed of developments and encouraging, welcoming and acting upon local views and opinions. Community-led organisations put the needs of the community before potential profits, which they generally invest back into the business or in community projects.

What are the options?

Look at the table in **Appendix D**. It shows the main features of the different formats available. We suggest you take legal advice at this point, and ensure that the registration of your group is professionally handled. However you can also get general advice and guidance by contacting one of the support organisations referred to on the accompanying checklist document. Make sure that everyone understands what is being suggested. Write down your early thoughts and concerns and ensure you address them before making a final decision.

Download document to write your notes here

We advise incorporating because...

1. Groups of people working under some sort of basic constitution, are actually unincorporated associations (and/or charities). An unincorporated association/charity is not a legal entity and therefore it cannot hold land or buildings.
2. Individuals involved in an unincorporated association or charity, are jointly and severally liable for any debts or wrongdoing incurred by the organisation. Incorporating limits personal liability.
3. Funding bodies generally require a group to be a 'body corporate' in order to be eligible for grant awards.

Appendix A: Sample Projects and Budgets

There is an interesting and inspiring selection of case studies carried in the wider research report [Understanding the Scale of Small Scale Housing](#) by Tom Johnston and Jo Gooding, 2015.

More examples can be found by [contacting Locality](#) or one of the other housing support sector organisations shown on the kit checklist.

Appendix B: Guide to community consultation

Good community consultation will be the basis of ensuring a project proceeds smoothly and with the input and support of local people. Here are some tips to digest before you start:

Tokenism

The purpose of undertaking community engagement is to inform the progress of the development you are proposing. If the outcomes have already been determined, community engagement is tokenistic. In effect it is a public relations exercise. This can lead to scepticism and disillusionment.

Specialist Support

It may be necessary to bring in specialist advice and support for those leading and participating in the housing project. This will help to ensure that any potential pitfalls or technical issues are addressed early on.

Creativity

Community engagement should be stimulating and enjoyable. It should be relevant to people's lives and allow everyone to contribute. Too often it is dull and inaccessible and therefore fails to creatively engage. Developing community engagement events requires real skill and creativity.

Managing Expectations

Community engagement exercises can raise unrealistic expectations if they are poorly run, leading to disappointment and cynicism. Be clear from the outset about what you are proposing, how people can get involved and the timetable for progress.

Targeting.

It is good practice to involve as many groups of people as possible, particularly those who are often considered hard to reach, for example the elderly, young people, ethnic groups and other minority groups. Local partnerships are one of the ways of spreading the reach of community engagement activities.

Accessibility

Careful thought needs to be given to make events accessible, including location, timing, media, and format. Events should be informal and unthreatening, for example, those running events should dress informally. They should be timed to avoid clashing with key events, such as sports events, and to cater for people who work at different times.

Feedback

It is essential to provide feedback on community engagement activities at all stages of the plan-making process. It is also important to explain how consultation feedback feeds into the development process.

Here are some good guides around community consultation:

- <http://www.rtpi.org.uk/media/6312/Good-Practice-Guide-to-Public-Engagement-in-Development-Scheme-High-Res.pdf>
- http://www.communityplanning.net/methods/methods_a-z.php
- <http://www.communityplanningtoolkit.org/sites/default/files/Engagement.pdf>

Appendix C: Common housing project models

There are various models for community-led organisations capable of developing diverse housing initiatives, and different sorts of model can attract different sorts of funding. The following section describes some of the most common.

Development Trusts

Development trusts are independent, community-led, not-for-private-profit organisations concerned with the regeneration of a particular area or community. They seek to be self-sustaining though generating income from their own enterprises and through the ownership of assets. These organisations are eligible to become members of Locality in England www.locality.org.uk and its sister organisations, the Development Trusts Associations for Scotland, Wales and Northern Ireland. These organisations provide a range of resources including advice, events and direct support.

Community Land Trusts (CLTs)

These are community-led organisations that provide land, homes and other assets to meet the long-term needs of the community. They have a membership structure that is open to anyone who lives or works in the local area, whether or not they live in the properties the trust provides. CLTs deliver things like homes, as well as meeting spaces, workspaces, shops, pubs, farms and gardens. They hold these assets in trust for the benefit of the community and ensure that they remain permanently affordable and provide a long-term income stream.

The National CLT Network provides guidance, funding, toolkits and advice for anyone running or setting up a CLT (www.communitylandtrusts.org.uk). Also [see CLT structure explanation here](#). In terms of a suitable legal framework this can vary as long as it meets the defining criteria (ie, an asset lock, open membership to community members and not-for-profit)

Cohousing

Cohousing is a concept that brings individuals and families together in groups to share common aims and activities while having their own self-contained accommodation and personal space. The combination of housing units and shared facilities helps bring neighbours together to collaborate and offers particular benefits for children, in terms of secure play space, and for older people in terms of mutual support. Cohousing communities are set up and run by their members for mutual benefit. It can be developed for home ownership, shared ownership or both affordable and market rent. The [UK Cohousing Network](#) provides a range of resources including advice, events and direct support. There is no one legal framework that needs to be adopted. A project could be a co-operative or a company limited by guarantee, or a CIC.

Co-operative Housing

A housing cooperative is a housing organisation that is controlled, managed and owned by its members. There are many forms in the UK, the most common being ‘ownership’ housing co-ops, where the community owns all the homes and rents them to tenant members. Most are ‘fully mutual’, meaning that all of their tenants are required to be members of the co-op and their governance structures consist entirely of tenant members.

The [Confederation of Co-operative Housing](#) is open to co-operative housing organisations and others who support co-operative housing, and provides advice and support to community organisations, local authorities and housing associations.

Self-help housing

This involves local community-led organisations procuring and renovating empty properties to make them habitable to rent or buy. It differs from self-build housing, which involves constructing new homes on vacant or cleared plots. Self-help housing projects are normally taken up by groups of people with particular housing needs, which are not being met by local authorities or housing associations, such as single people, young people and refugees. [Self Help Housing.org](#) offers advice, case studies and a directory and location of over 120 organisations. There is no requirement to adopt a particular legal framework to engage in self-help housing.

Group or community self-build

Around 11,000 people a year build their own homes, a growing number of which choose to do so collectively, by forming their own private groups, forming co-operatives or by working in partnership with a housing association. The [Self Build Portal](#) provides help in understanding the ways groups can get self-build projects off the ground. The [Community Self Build Agency](#) helps groups manage and deliver their schemes and the [National Self Build Association](#) campaigns to make it easier for people to build their own homes.

Appendix D: Legal structures

Community groups that are formed to own property, employ staff or offer services need to choose a legal structure that fits in with what they want to achieve, their community values and the level of financial commitment they will take on. Adopting an appropriate legal model will:

- protect individuals from personal liability by creating a separate legal entity
- help others to understand how and why the organisation operates
- instil the confidence of the local community and potential funders.

There are surprisingly few different organisational legal structures and only a handful are suitable for community (not-for-private-profit) organisations taking on the ownership or development of buildings and land.

Appropriate structures share key features:

- they are designed to serve a particular community or area of benefit
- they stipulate that any profits will only be used to further the objectives of the organisation
- they protect assets in perpetuity for the public good or benefit of the local community through a provision in their governing document, known as an Asset Lock.

Each different model has its own form of governing document that will set out:

- the objects or purpose
- the powers it will use to carry out its objectives
- its internal administration
- how it will maintain public accountability
- how rules may be changed.

The following section describes different legal models:

A Company Limited by Guarantee

This is the most common legal structure for a community organisation. Directors act as guarantors of the company and there are no shareholders. They are relatively inexpensive to establish and are regulated by Companies House. A Company Limited by Guarantee, with charitable objectives, may also register as a charity with the Charity Commission. Registering as a charity provides an asset lock, which would otherwise need to be specifically stated in the company's governing document.

Companies that are registered as charities need to submit annual returns for both Companies House and the Charity Commission.

Community Interest Company Limited by Guarantee (CIC)

A CIC has the same basic structure as a standard limited company, but has a guarantee that the company's assets are used for the benefit of the community. They are regulated by Companies House, which liaises with the CIC regulator for which they produce an annual statement of community benefit. Their governing documents include an asset lock, they are not required or permitted to register as a charity and they are inexpensive to establish.

A Community Benefit Society

This model has open membership and all members have one equal vote. This model is used by those organisations that intend to raise capital by carrying out a community share issue. They are more expensive and more time consuming to set up. Registration is via the FCA. A Community Benefit Society with exclusively charitable objectives can also benefit from charitable status.

Charitable Incorporated Organisation (CIO)

This is the most recently established structure. It is an incorporated form of charity, which creates a legal entity, but which is not a company and only has to register with the Charity Commission. It can enter into contracts in its own right, its trustees having limited liability.

Legal Structures for Developing Community Buildings: At a Glance

Legal structure	Summary - most typical features	Ownership, governance and constitution	Can its activities benefit those who own and/or run it?	Assets 'locked in' for community benefit?	Can it be a charity and get charitable status tax benefits?
Company Limited by Guarantee	Most frequently adopted not-for-private-profit legal structure; can be adapted to suit most purposes.	Directors manage business on behalf of members. Considerable flexibility over internal rules.	Yes (but no dividends etc. to members).	Would need bespoke drafting in articles (which could be amended by members).	Yes if it meets the criteria for being a charity.
Community Interest Company (CIC)	An 'off-the-peg' limited company structure for social enterprise with secure "asset lock" and focus on community benefit.	As for other limited companies, but subject to additional regulation to ensure community benefits.	Yes, but must benefit wider community as well.	Yes, through standard provisions which all CICs must include in their constitutions.	No, but can become a charity if it ceases to be a CIC.
Community Benefit Society (Society for the Benefit of the Community 2014 Act - BenComm)	Benefit community other than just own members.	Board, elected by the members (£1 shareholders) and manages the organisation.	Must be of benefit to the whole community and not just members. Asset lock applies.	Yes (asset lock only survives dissolution if new statutory form of asset lock adopted).	Yes if it meets the criteria for being a charity in which case the objectives must be "charitable", rather than simply of community benefit.
Co-operative Society ('bona fide' co-op)	Exists primarily to provide a benefit to own members.	Jointly owned and controlled by members.	Yes.	Most adopt a voluntary asset lock.	No.
Charitable Incorporated Organisation (CIO)	A ready-made corporate structure specifically designed for charities.	Similar to company but with different terminology (e.g. for 'directors' read 'charity trustees').	Members: no. Charity trustees: only if constitution, court or Charity Commission permits.	Yes.	Cannot be anything but a charity, and must meet the criteria for being a charity.

Appendix E: Further information & resources

This document is a handy prompter to remind you of the key issues to be tackled when getting your community led housing project up and running. Useful links are also included for quick reference and further information.

1. Agree on your project

- Community Development Foundation (CDF): Just Act
<http://www.justact.org.uk/category/step-02-involve-others/>
- Community Planning
<http://www.communityplanning.net/aboutcp/aboutthissite.php>

2. Evidence your project

- CDF: Just Act
 - <http://www.justact.org.uk/category/step-1-find-out-whats-already-happening/>
- Big Lottery
 - <https://www.biglotteryfund.org.uk/funding/funding-guidance/managing-your-funding/about-equalities/gathering-your-evidence/sources-of-evidence-england>
- Rural Housing Alliance
 - http://www.midlandsrural.org.uk/media/77165/affordable-rural-housing_a-practical-guide-for-parish-councils.pdf

3. Draw up a project proposal

- CDF: Just Act
 - <http://www.justact.org.uk/category/step-03-develop-a-plan-of-action/>
 - <http://www.justact.org.uk/category/step-6-find-funding-and-support/>
- VAL online
 - <http://www.valonline.org.uk/book/export/html/180>

4. Choose a legal structure

- Community Matters
 - <http://www.communitymatters.org.uk/content/467/2-Legal-Structures--Charitable-Status>
- Charity Commission
 - <https://www.gov.uk/guidance/charity-types-how-to-choose-a-structure>
- Just Act
 - <http://www.justact.org.uk/category/step-04-create-an-organisation/>
 - NB: Useful links to other housing support organisation resources
- CLT Network: Getting started
 - <http://www.communitylandtrusts.org.uk/get-involved/start-a-clt>
- UK Co-Housing: Getting started
 - http://cohousing.org.uk/resources-bookshelf?field_stage_tid=35
- Confederation of Co-operative Housing: Guide to developing a new project
 - <http://www.cch.coop/new-co-operative-and-community-led-homes/>
- Self Help Housing: Making use of empty property
 - <http://self-help-housing.org>
- National Custom & Self Build Association
 - <http://www.nacsba.org.uk/about-us>
- Community Self Build Association
 - <http://www.communityselfbuildagency.org.uk/>

Template 1: Budget example

Name of Group:

Budget period:

Budget Section 1. Costs			
Start up and Development Costs	Budget figure	Actual spend	Saving/deficit
Community Consultation			
Architect/surveyor fees			
Legal fees			
Planning			
Admin/supplies			
Marketing/publicity			
Equipment			
Staff costs			
Other			
Continued.....			

Budget Section 1 continued

Construction/refurb costs			
Land or buildings purchase			
Construction/renovation costs			
Infrastructure, cost of access roads, services etc.			
Insurance			
Administrative costs			
Professional fees (architects/surveyors, legal			
Staff Time			
Loan repayments			
Other			
Land or buildings purchase			
TOTAL Project Costs			

Budget Section 2. Income

	Budget figure	Actual spend	Saving/deficit
Grant(s)			
Loan(s)			
Fundraising			
Donations			
Community share issue/bonds			
Other			
TOTAL Income			

Template 2: Project proposal

Cover page

- Name of Group
- Name of Project
- Date
- Contact details

Contents

Executive Summary

Section 1: Introduction and background

- 1.1 Purpose of the project proposal
- 1.2 Who we are
- 1.3 Mission statement

Section 2: The project

- 2.1 Project summary
- 2.2 Objective
- 2.3 Outputs and impact
- 2.4 Policy context
- 2.5 Need and demand

Section 3: Organisation

- 3.1 Governance
- 3.2 Legal requirements
- 3.3 Project management

Section 4: Project budget

- 4.1 Outline budget
- 4.2 Capital funding
- 4.3 Revenue finance

Section 5: Timetable

- 5.1 Draft timetable

Executive Summary

This consists of an overall summary of the entire document. It could be no longer than one page. It gives the reader a ‘taste’ of the document, briefly identifying the main aspects. It should be completed last of all (even though it appears first).

Section 1: Introduction and background

1.1 Purpose of the Project Proposal

E.g. to provide a summary of the plans currently being proposed by _____. It will be used as a guide for the _____ as a way of informing others and seeking support for its plans.

1.2 Who we are

Brief explanation of the organisation, who it involves and its legal status.

1.3 Mission Statement

This is a statement about the organisation and how you will achieve your vision for the local area.

Section 2: The project

2.1 Project Summary

Use this section to describe the nature of your project and why you are pursuing it.

2.2 Objective

State the objective of the project in clear terms. State what it is, where it will be located, who it is aimed and the timescale involved.

Remember to be:

- Specific: use precise wording
- Measurable: can it be measured / counted?
- Achievable: is this realistic?
- Resourced: have you the resources to achieve this
- Time conscious: set a definite time limit on achieving your objective (e.g. to build five affordable houses in West Road for local families in need, using loans and grant monies for a completion date in or before June 2018).

2.3 Outputs and impact

Explain how many people will benefit from the project and in what ways.

Identify the major social impacts that your organisation will have by completing your project.

Link them back to your vision, mission and objectives e.g.

- Economic - create jobs and training opportunities in construction
- Environmental - local 'greening' through creation of eco-friendly houses
- Social wellbeing - provision of homes for families in need creating secure domestic environments and stability for local children.

2.4 Policy Context

The nature of the work of community organisations often connects to a number of national, regional and local policies and strategies. You may wish to mention the national Localism agenda and the onus being placed on communities to take more control of their own neighbourhoods for example.

2.5 Need and demand

What is the evidence that what you're hoping to do will meet an identified *need* in your community? What is the evidence that people will want to use the services you propose to offer (*demand*).

Section 3: Organisation

3.1 Governance

Explain the structure of your organization including members, trustees, staff and volunteers.

3.2 Legal requirements

Outline how you have met legal obligations such as: health and safety, buildings insurance, contents insurance, employer's liability insurance, public liability etc.

3.3 Project management

Who will oversee the capital development, ensure it is taken forward, and protect the interests of the organisation (e.g. a lead officer within the organisation).

Section 4: Project budget

4.1 Outline your budget

Show how you are planning to pay for the project. This can be done by using the completed template budget in Template 2. However, if you feel that there is still work to be done on the budget, you can make it clear that this is a draft or indicative budget. Failing that, if you feel

that even a draft budget would not stand up to public scrutiny at this stage, you could just set out the headline figures relating to capital funding/expenditure & revenue finance while making it clear that these are being worked up in more detail.

4.2 Capital funding

Explain any specific sources of funding you plan to pursue such as grant, loan finance, grant/equity/loan combinations or even issuing shares.

4.3 Revenue finance

Include a description of income sources (e.g. fundraising, secured/unsecured grant, income generated through lettings etc.).

Section 5: Timetable

5.1 Give a draft timetable for the project

©2015 My Community Locality

Visit the My Community website to find out more:

mycommunity.org.uk

Follow us on twitter: [@mycommunityhelp](https://twitter.com/mycommunityhelp)