

# Planning Considerations

## **Decide what type of activity you want to run and whether you need to set up a group**

First things first, decide what type of activity you want to run and whether you need to set up a group to help you achieve this. If you do decide to set up a group, together you need to decide where you want to run it, how often you will need to meet and who else might be involved. It's worth doing some research into other similar groups or organisations. Could you join an existing group and/work together to develop something new or to improve an existing service? Could you share resources, premises and expertise?

## **Do you need to get others on board?**

Once you have established what type of activity it is you want to run, consider whether you want or need others to help make it happen. If you have the time, expertise, energy and commitment to do everything yourself you can get going. Alternatively, if you need organisers and volunteers you could spread the word through social networking sites or advertise in local newspapers or notice boards in community buildings, local shops, post offices, libraries or surgeries. If you are setting up a group, you might need a committee with someone to chair the meetings, someone to write down what happens (a secretary) and someone who looks after any money (a treasurer).

## **Do you need to create a plan of action?**

You may wish to be clear about all the jobs that you need to do and who is responsible for what so it may be useful to create a plan of action. Ideally, your plan should explain what you or your group intends to do (otherwise referred to as Aims or Objectives), who you aim to help or serve and how you plan to do that. It may also help you to prioritise. Include:

- what you hope to achieve and/or change as a result of the activity
- how often your activity will be run, when and where
- who is involved, their position and what they are responsible for
- the resources you have available (people's time, specialist skills, equipment etc)
- the funds you need to find (either by donations or fundraising events)
- a timetable of how soon you expect to get things done

## **Write a constitution**

This is basically a document that sets out the rules for you or your group to help make it clear to everyone involved what you intend to do. As you are not a registered charity or a limited company, there are no legal rules about what your constitution should say.

Once you have written and agreed it, it then becomes the 'governing document' of your group, and it should set out clearly how you intend to run your group. A good constitution can help to resolve disputes and enable new members to participate fully in group activities. If you are going to apply for grant funding, this document will show funders that you are well organised. For groups, it may also be worth documenting the following within your constitution:

- the person in charge
- a first aider
- a designated person in charge of Health & Safety
- agree how the committee will work with processes for decision making/resolving disputes
- a note of who the treasurer and secretary is

### **Agree a name**

There are a number of reasons why it may be useful to give you, your group or activity a name, mainly for legal requirements. That aside, it will be a lot easier to refer to it by name and will make for easier promotion and a more professional approach. If you have been running an informal group you may already have a name. If not, perhaps something obvious springs to mind, deriving from the activity itself or your location. Alternatively, think of something unconventional that will make you stand out from the crowd or convey a message. A key thing you may wish to consider when choosing a name is to avoid duplication with other organisations in your area. As a start, use internet search engines to find out if anyone else is using the name. If they are operating in a different sector and their name is not a registered trademark, you may still be able to use it, but it is best to avoid duplication and potential misunderstandings wherever possible.

### **Consider opening a bank account**

You may need to agree and record a way of handling money for the group or activity. Not only will this protect the person responsible for holding the money but it will also protect the group money itself. Our suggestion is to consider opening a separate bank account. Banks, like any other business, are fighting for your custom and have many products and services on offer. It is worth shopping around to find the deal that best suits your needs. For further information on this, please visit [Legal Considerations](#).

### **Get started!**

This is not an exhaustive list of things you need to do but at least it will help you get started. Good luck!