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# Starting a Project

What to do when you get funding

# Workshop aims

- To give attendees an overview of what's involved in managing a grant funded project
- To discuss the expectations vs realities of managing projects with other attendees
- To provide checklists and top tips



# Staff and volunteers

For some organisations, getting funding for a project means employing people for the first time, or taking on new volunteers.

Checklist – before recruiting

- Establish who will manage the post-holder and/or volunteers
- Set up systems – for first-time employers this will include setting up a pension scheme and payroll
- Notify insurers if you are taking on new staff or volunteers in new roles
- Policies and procedures ready – e.g. employment contract, probation period, lone working, expenses, supervision, sick leave, holidays
- Equipment and IT – desk, mobile phone, computer
- Interim management – who will cover while you are recruiting?



# Staff and volunteers

Checklist – recruitment and induction

- Check funder requirements – open recruitment?
- Set timescales and dates for recruitment
- Job/role description and person specification
- Advertising, shortlisting and equal opportunities monitoring
- Prepare interview panel, questions and scoresheets – fair and equitable
- Induction – staff/volunteer handbook, policies and procedures, health and safety, overview of project and how it fits with your work
- Set first review period and ongoing supervision



# Staff and volunteers

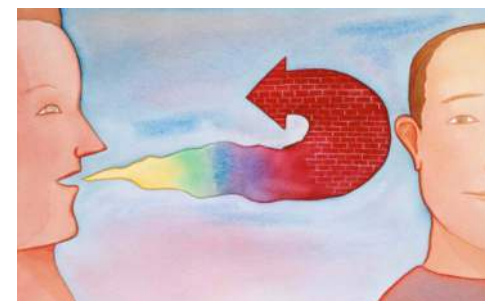
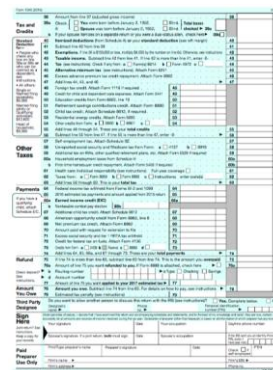
## Top tips

- Don't start from scratch if you are a first-time employer, but be wary of using template policies and contracts without understanding them
- Using sessional staff, as many VCSE organisations do, doesn't remove your responsibilities e.g. health and safety, risk assessments
- Recruiting the right staff and volunteers saves time and hassle later on - don't rush into anything if you don't get the right candidate the first time. Just keep funders informed
- Don't just take on any volunteers - you have to feel they will be able to contribute to your project

# Making projects accessible

## Checklist

- Venues
- Cost
- Transport
- Equipment
- Promotional activities
- Protected characteristics – understanding discrimination
- Policies and procedures
- Materials e.g. training, surveys
- Staff and volunteers – training
- Reviewing and monitoring
- Referral networks



# Making projects accessible

## Top tips



- It can help to think through all the things that can exclude people – location, times, cost, language, atmosphere – what can you change?
- Be realistic – what can't you change? Are there any people you can't include?
- Get feedback and input from existing or new service users
- 'Mystery shop' or road-test your project with support from volunteers or other groups
- Record what you've learned and changed – this is part of your impact

# Recording information

## Checklist

- Establish reporting schedule with funder
- Check if there is a preferred method
- Set up recording systems e.g. questionnaires/surveys
- Check GDPR requirements and get participant consent to store data
- Link recording methods to project outcomes
- Gather baseline data if needed
- Anonymise data before reporting
- Identify and undertake case studies to show the difference made to individuals





# Recording information

## Top tips

- Monitoring is an ongoing exercise - don't leave it until just before your project reports are due
- Regular monitoring gives you the opportunity to see if things are going well or not so well, and make any adjustments necessary
- Is there an opportunity within the funding for some development work to look at your recording of data and see if it is fit for purpose? Just because something has always been done in a certain way, doesn't mean it can't be improved
- Involve your whole staff team when looking at how you record information. After all, they will be the ones delivering the project and will know what will work and what is realistic
- Make sure your presentation of information is simple and clear and reflects what you said you would do

# Keeping track of the budget

## Checklist

- First-time funding – set up a spreadsheet or recording system
- Ensure system matches costs to the headings submitted to funder
- Expense sheets for staff/volunteers
- Timesheets for volunteers if using hours as match funding
- Allocate expenses to specific projects so you can separate them
- Quotes for big expenses
- Set up method for taking payments if charging for activities

Budget				
Description	2017	2018	2019	Total £
Head of Community Engagement	37,000	38,295	39,635	114,930
On-costs				
NI (13.8%)	5,106	5,285	5,470	15,861
Pension (3%)	1,110	1,149	1,189	3,448
Rent	7,292	7,512	7,736	22,540
Administration	3,200	3,200	3,200	9,600
ICT/Equipment	800	1,000	400	2,200
Travel Expenses	4,158	4,303	4,454	12,915
Volunteer Information Packs	2,000	2,000	2,000	6,000
Volunteer Manager Training	2,000	2,000	2,000	6,000
Volunteer Training	7,500	6,000	6,000	19,500
Volunteer Reward & Recognition	2,000	2,000	2,000	6,000
Games Management Seminar	2,000	2,000	2,000	6,000
Volunteer Manager	28,000	28,980	29,994	86,974
NI (13.8%)	3,864	3,999	4,139	12,002
Pension (3%)	840	869	900	2,609
<b>Total Expenditure</b>	<b>£106,810</b>	<b>£108,892</b>	<b>£111,117</b>	<b>£326,819</b>
<b>Total Income</b>				
Named Contract Income	10,000	10,000	10,000	30,000
Named Funder income	20,000	10,000		30,000
<b>Total</b>	<b>£30,000</b>	<b>£20,000</b>	<b>£10,000</b>	<b>£60,000</b>
<b>Shortfall</b>	<b>£76,810</b>	<b>£88,892</b>	<b>£101,117</b>	<b>£266,819</b>
To apply for from The Henry Smith Charity	25,623	29,531	33,706	88,860
To apply for from 2 <sup>nd</sup> Named Funder	25,623	29,531	33,706	88,860
To apply for from 3 <sup>rd</sup> Named Funder	25,623	29,531	33,706	88,860



# Keeping track of the budget

## Top tips

- Let relevant staff/volunteers know about the budget – this helps to prevent over-spending
- Agree who can sign off on what e.g. purchasing refreshments for events
- Budgeting must be ongoing; the charity that contributed to this session spoke about reviewing theirs on a monthly basis
- It's just as important not to underspend - after all you have told the funders that what you need to deliver the project
- You can 'reprofile' budget headings if you get funder consent
- Keep receipts of all expenditure and expense sheets
- You don't need to open a separate bank account for each fund you hold, but you do need to be able to show which items of income and expenditure relate to which projects

# What happens if things go wrong?

## Top tips

- Set up a risk log at the start – it doesn't have to be complicated but helps you think through possibilities and take early action
- Keep talking to your funders, keep them informed every step along the way. Funders understand that things go wrong and will have heard similar stories before
- Seek support/advice from support organisations and other projects in the area
- Take action e.g. conduct, safeguarding, incident reporting
- Keep trustees/committee members informed



# Sample risk log

Risk	Likelihood/impact	Mitigation
Not enough volunteers recruited	Unlikely but it would impact on paid staff	Ask existing volunteers about the role. Offer free training and a welcome lunch
Overspending on activities	Medium likelihood (inexperienced at budgeting). Impact would be fewer activities	Link in with other groups. Borrow equipment. Look for free venues
Not getting target number of participants	Unlikely as we know there is a need, but funder would be concerned	Advertise at a minimum of 40 locations, set up referral network

# Finishing a project



## Checklist

- Compile an 'exit strategy' at the start to plan the project closure
- Funding strategy in advance
- Staff – contract length (must be permanent if > 2 years), redundancy, other opportunities
- Volunteers – other projects, refer to other organisations
- Prepare service users/participants, taking vulnerability and dependence into account
- Final invoices and income/expenditure
- Celebration or learning event
- Send all final information to funder

# What next?

## Questions and considerations

- If it's a longer-term project, e.g. 3 years, then don't leave it until the end to plan what happens next
- Evaluate the project - what have you learnt from it?
- Could it continue in a different format or with a different group of people?
- Can you use it as a pilot-type project to secure further funding?
- Hopefully you have been able to secure further funding to continue with the project – but sometimes you have to let things go, as hard as this may be



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# General advice

- Make sure you take everyone on the journey with you - funders, staff, volunteers, service users and your trustees
- Never be afraid to speak to your funders; it helps you to build up a positive relationship with them
- Stay focused on what you said you would deliver
- Don't be tempted to chase funding just for the money; if you have said you can deliver a project which is out of your comfort zone and capabilities, you will struggle to meet your targets and it will become a headache!
- Ask for help – from Sector Connect, Smile or other support agencies, and take advantage of any peer support opportunities

