



Introduction

Congratulations on receiving your funding!

You have proved to your funders you have the vision, the drive and the determination - so now it's all systems go! But are things that simple? Keeping on top of the project will require a great deal of forward planning.

Receiving a cheque is the very first step. You now have to put the project into action and do what you said you could when you applied for the money. Suddenly this seems like a very scary thought. A cold sweat sets in and you decide that now would be a good time to take that long overseas holiday.

Managing a project can look like a difficult process, but don't be put off, it's all about being prepared. **Don't panic!**

Before You Start

Foster a good relationship with your funder from the outset. It's a good idea to thank them, and mention them in any publicity you may be thinking of.	
Be aware that some funders may not want you to publicise your successful funding result until after a certain date – respect this request.	
It's a good idea to keep all the paperwork from the original application together, and in a safe place. Dig out the original proposal and take another look at it.	
Re-familiarise yourself with the idea that inspired you to ask for the money in the first place.	
Check out what you said you would do, and how you would go about doing it.	
Spread the word! Keep any interested parties - such as a Committee or Trustees - up to date, include them in decision-making processes.	
Decide upon the best course of action; this may also mean consulting with the community to check exactly what is needed if this has not already been done.	
Think about continuation funding. If your project is intended to provide an ongoing service, then you will have to secure more funding to keep it going.	
Are any other organisations able to support your project? The more people that there are involved, the stronger and more successful your project will be.	
How will you monitor the success of your project? Gather evidence of progress and the difference it is making. Keep records from the beginning.	

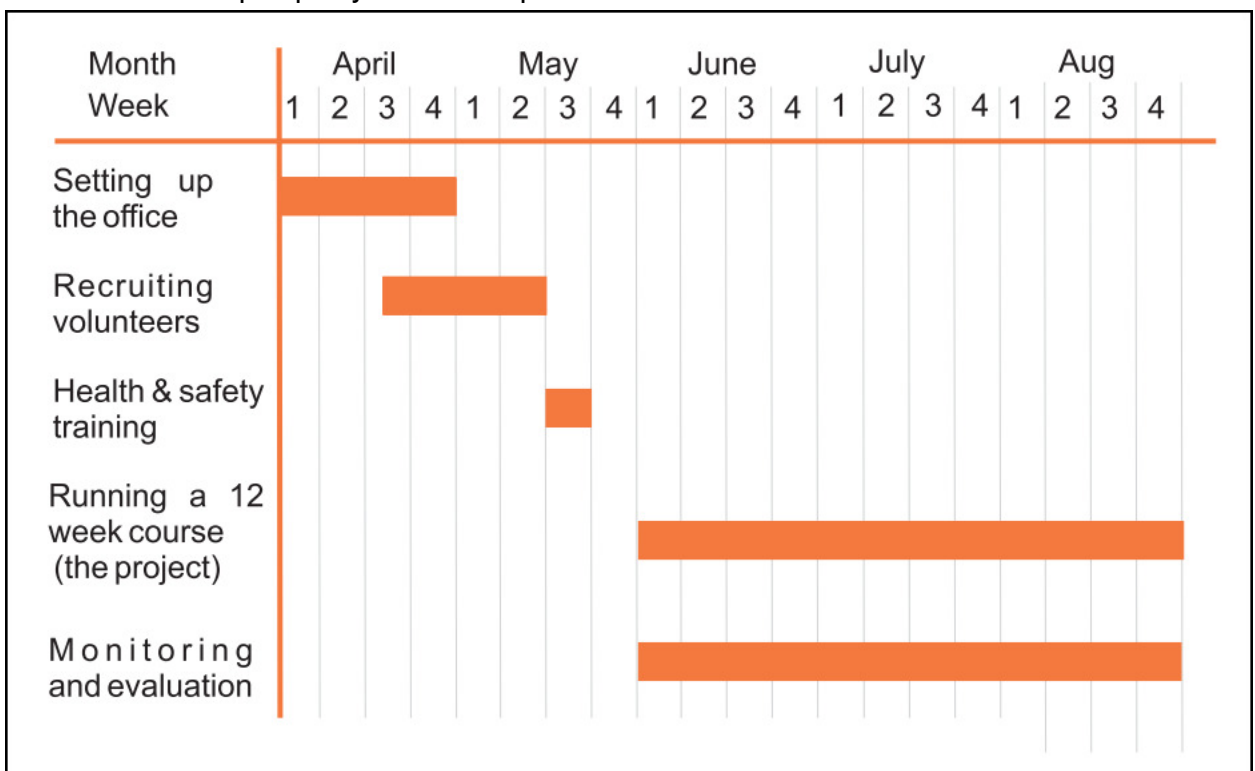
Drawing Up a Plan Of Action

Most projects work to a fixed timescale with a specific beginning, middle and end.

Managing something with a fixed timescale can be tricky. It needs to be up and running quickly (the beginning) achieve its objectives (the middle) and meet its deadlines (the end) - and all before you have time to blink!

Putting together an action plan, with estimated dates, will give you an overall view of how your project will unfold. Look at it regularly - it will let you see at a glance where you are, and how much you have left to do.

A plan of action is also a good way of making sure that all people involved share the same view of which way the project is heading, what will happen, and the order that it will happen in. It will also let you have an overview of the tasks involved, and how they can be divided up equally. For example:



A project is worked on by a team of several people, all with specific roles. Consider the following points when putting your team together.

Who will take overall responsibility for managing the project? (Often called a project co-ordinator)	
How many other people will be involved in the running of the project?	
Does each person on the team have a specific role, and are they clear about what it is? It might be an idea to make a list of roles and responsibilities, for example: <ul style="list-style-type: none"> • Project Co-ordinator • Handling the money 	

<ul style="list-style-type: none"> • Handling the office paperwork • Project workers 	
Will you need to take on extra workers or recruit extra volunteers to help with the project?	
<p>Will you need to provide any training opportunities to help your workers successfully deliver and manage your project? E.g.: Book-keeping or IT skills</p>	

Time Management

Good time management is essential to the success of your project. It is relevant to all areas, from the actual length of the project, to what occurs on a day-to-day basis.

The essential steps in good time management are:

- A desire to use time more effectively
- Being clear about what needs to be done and its priority in the grand scheme
- Planning what needs to be done at every level and making lists
- Doing the actual task
- Checking lists and revisiting plans on a regular basis. Amending any plans if this is necessary to ensure that you deliver and finish your project on time.

There are ways that you can prompt your team to observe good time management:

- Hold weekly team meetings to discuss the project and the plans for the week
- Stick to a routine: for example, keep team meetings to the same time each week
- Keep tasks manageable by breaking them down into easy steps
- Encourage your team to draw up work-plans and 'To Do' lists
- All the jobs are the responsibility of the team. Draw up rotas where necessary. It's unfair to lump all of the boring tasks onto one individual.

Keeping Up Momentum

<p>At the start of your project you will be met by enthusiasm on all sides. But as the days become weeks and the paperwork kicks in, keeping people inspired is a skill in itself.</p>	<p>Right from the start make sure everyone knows what particular goals the project is expected to deliver, and by when (milestones). Regular reviews of the project will ensure that people are being constantly motivated to meet set targets.</p>
<p>The project co-ordinator should have regular one-to-one chats with team members. This will allow you to identify any problems at an early stage and try to solve them before they become too serious.</p>	<p>Make sure that everyone feels a valued part of the team and involve them in meetings and discussions from the start. Try and make sure that people are not too intimidated to air their views at, or bring their problems to, team meetings.</p>

Project Review

Regular reviews are an important part of your project, and will allow you to monitor your progress effectively.

PAST	
<ul style="list-style-type: none"> You had an idea You developed a proposal You have a project plan 	
PRESENT	
Are you meeting the needs that you identified in your proposal?	
Do you need to make any changes at this stage?	
Are you engaging with the people you said you would?	
If not, do you need to promote your project differently?	
E.g.: If you are not meeting the milestones you set out, how can you improve on this?	
Do you need to speak to your funders and seek their advice?	
They will usually be supportive if you need to make changes.	
FUTURE	
What actions have come about as a result of this review?	
What would you do differently if you had to start again?	

Monitoring and Evaluation

MONITORING

Is the process of collecting the information you require, and is ongoing throughout the life of the project. There are two main reasons for monitoring your project:

Accountability

In the community and voluntary sector, your funders will expect regular updates about the projects they have funded or commissioned. This is because, most often, your money will have come from public - or charitable - funds, and there is a need to show that public money is being spent wisely.

Most funding agreements set out the required process for monitoring and evaluation at the beginning. You need to identify before you start delivering your project what information your funders will require at the end.

It is often not enough to show how the money has been spent, but also who has benefitted from the money, and how they have benefitted; this can sometimes lead to complicated and time consuming form filling, so when you decide on the information required for the funder, keep the forms as simple as possible.

Learning and Development

Good monitoring can help an organisation learn by identifying what works and what doesn't. It can identify the impact of your project's work on the community and analyse what has worked best and what requires attention.

Monitoring should show the progress that your project is making. You can compare this to your project plan and adjust accordingly. Monitoring can also be a successful way of finding out what your beneficiaries think. (The beneficiaries are the people whom your project is helping). Early feedback is valuable in identifying present problems, any new needs, and developing future plans.

EVALUATION

Is the interpretation of how well the project did and takes place at the end of the project. Once you have monitored your project (collected all the evidence / information) you can then use that information to make a judgement about the overall project.

Decide what your project evaluation will be used for. Are you carrying out an evaluation to give to your funder, or is it for your organisation's benefit?

Project evaluation should focus on the following questions:

- Has our project achieved its original purpose?
- Was the project well organised, meeting targets and milestones you expected?
- Did it meet the needs of the beneficiaries, or participants?
- How did it meet those needs?
- What can we learn from the project?
- Were there any changes which occurred as a result of the project? (impact)
- What next? (Either for your group or beneficiaries)
- What new projects might emerge from this one?

Sometimes something completely unexpected turns up as a result of your project, and a good evaluation process will identify this. Good ideas inspired by this project could well lead to further projects or funding.

Words and Their Definitions

When it comes to running a project, you are likely to come across a whole new language! This is a brief overview:

Beneficiaries	The people who benefit from your project.
Best Value	Funders look for best value; how the costs / effectiveness of one organisation compares with any alternative services on offer. I.e. If you can use local residents for a project who would benefit from being involved, this can be better value than employing an outside agency to do the work
Budget	Itemise / detail how you plan to spend the money.
Cashflow	Looks at time and money together. When money comes in and out of the project and making sure that you do not overspend at any time.
Deliverables	This means what your project has delivered, or intends to deliver.

Impact	The bigger picture. The impact that your project has on the wider community, and over the longer term.
Milestones	The big steps along the way. Things you intend to achieve within the overall project and when you intend to achieve them.
Outputs	Evidence of what you have delivered.
Outcomes	All the changes and effects that happen as a result of your work.
Performance	What gets done and what happens during a specific time-frame.
Performance Indicators	A SPECIFIC description of how that delivery will be measured. I.e.: Take a series of IT tests to measure the increase in IT skills.
Performance Measures	A GENERAL description of what you will deliver overall. I.e.: To increase IT skills within the community.
Quality Standards and Quality Assurance	Quality Standards are an agreed level of service that people should be able to expect from an organisation. Quality Assurance is the process of developing your standards, delivering to these standards and monitoring the process.
Value for money	Value for money does not necessarily mean cheap. A value for money review will look at your project and decide if it is efficient, effective and does the job.

Performance Measures / Indicators

If you cannot measure the performance of your project, how will you know when it has been successful?

You will need to decide on particular performance measures / indicators, and how they will apply to your project. This is how you will be able to monitor the success of your project and how you can prove to your funder that your project has been a success.

Designing how you measure your project relates back to the initial planning stages, and what you initially set out to achieve.

What is your project's overall aim?

During the planning stage of your project, before applying for funding, you should have decided what you want to achieve and how you would achieve it.

The measures that you create should relate to your overall plan and be able to reflect your successes as they happen.

What do you want to measure?

You need to decide which parts of your project require measuring. You should develop a range of realistic measures that give a good overview of how your project is progressing and allow you to report that information to the relevant parties.

How will you measure it?

After deciding what is to be measured, you need to decide upon how you will efficiently collect and record the information.

Project Aim - To provide a 10 week computer course which will give people new training and help them find jobs				
PERFORMANCE - To train 100 people over a 10 week period (10 per week) which will enable them:			Forecast	Actual
PERFORMANCE MEASURES		PERFORMANCE INDICATORS		
To improve IT skills		To pass IT test	100	
To improve access to job opportunities		To complete job search forms	100	
To increase motivation and confidence		Record achievements that participants would not have been able to do before	100	

Cashflow

How you spend your money may seem like the easiest part of the process. However, it is essential that you know when and how you will be receiving your funding and likewise, when and how you will be spending it.

For example;

- Will you be receiving your money all in one go, or will it be divided up into smaller amounts and paid out in separate instalments?
- When do your costs arise? And if your money is not paid in full at the beginning of your project, do you have enough funds to sustain the project until more money comes through?

A CASHFLOW is the breakdown of your income / expenditure and shows clearly how things will unfold. It will allow you to consider all the variables and plan accordingly.

1. No problems

The money is there to meet your costs as they arise

CASHFLOW	Jan	Feb	Mar	Apr	TOTAL
Money In:	10K	8K	8K	8K	34K
Money Out:	10K	8K	8K	8K	34K

2. Potential problems

You need to spend money before it's received - do you have additional resources in place to use?

CASHFLOW	Jan	Feb	Mar	Apr	TOTAL
Money In:		18K		16K	34K
Money Out:	10K	8K	8K	8K	34K

In this case you are having to spend money in January and March before you receive the income.

Check It Over...

<p>Have you looked back at the original proposal?</p> <ul style="list-style-type: none"> To remember what it was you said you would do To help you devise a plan of action. 	
<p>Have you drawn up a plan of action with your team?</p> <ul style="list-style-type: none"> What will happen When it will happen. 	
<p>Have you agreed upon the role that each member of the team will play?</p> <ul style="list-style-type: none"> Everyone needs to be clear about their particular role, and what the group structure is. 	
<p>Have you decided upon the measures / indicators that you will use to monitor the progress and impact of your project?</p>	
<p>Have you worked out a realistic budget and cashflow?</p>	

... And Finally

Getting funding for a project that you feel passionately about is an amazing opportunity. An opportunity to change things, to develop your organisation or simply help your community out.

Whatever your reasons, don't be put off by the more complicated parts of the process. There is plenty of help available to guide you through the parts that you cannot manage alone.

Share your success with your community and partner organisations. They will be vital in terms of identifying 'what comes next' and supporting you to take the next step.

Things you may want to find out more about ...

Keeping accounts - How will you keep accurate records of money received and spent?

Budgets & cashflows - How will you plan your income and expenditure?

Keeping records - How will you keep track of all your activities and the developments or changes you need to tell your funder about?

Employment & policies - How will you make sure that you operate legally?

Evaluation techniques - How will you interpret the information that you are gathering?

Project planning - How will you ensure that your projects run smoothly?

Training - How will you identify the training needs of your workers to help them do a really good job?

Insurance - Are you aware of the different legal requirements you will need to put in place?

Engaging & consulting with beneficiaries - Do you know all the different ways of gathering information?

Quality - How do you know whether what you are doing meets Quality Standards?

Year end accounts - Will your accounts need to be audited by an expert?

Further Reading

The Complete Guide to Creating and Managing New Projects. Directory Of Social Change (Third Edition, February 2010), Alan Lawrie

Just About Managing - Effective Management for Voluntary Organisations and Community Groups. London Voluntary Service Council (4th Edition January 2006), Sandy Adirondack

Voluntary but not amateur – A guide to the law for voluntary organisations and community groups. London Voluntary Service Council (8th Edition, March 2009), Ruth Hayes and Jacki Reason

Voluntary Matters - Media Trust

A variety of relevant free leaflets and booklets can be obtained from the Charity Commission www.charity-commission.gov.uk

Suffolk Association of Voluntary Organisations (SAVO) has produced a wide range of free e-learning practical toolkits which provide guidance, practical advice and template policies and procedures. These include:

- The Starter Pack Toolkit for New Groups
- The Good Employers' Policies and Procedures Toolkit
- The Good Employers' Staff Management Toolkit.

Visit www.practicaltoolkits.org.uk

Speak To The Experts

You should now have a better understanding of what to do with your funding once you have received it, and in which direction you are heading.

However, there are many issues which would benefit from further research, or a quick chat with an expert.

For further details contact your county partner, listed on www.learnEAST.org.uk.

Document History

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