

Inspiring Change

Creating a successful
development trust



DEVELOPMENT
TRUSTS ASSOCIATION
SCOTLAND

the community-led regeneration network

Rewarding
Respecting
Planning
Managing
Communicating
Enterprising
Learning
Challenging
Financing
Partnering
Celebrating
Sustaining

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This publication was commissioned by Development Trusts Association Scotland and written by Alan Caldwell of Alan Caldwell Associates. DTAS is the fastest growing network of community enterprise practitioners – see www.dtascot.org.uk

Alan is a volunteer board member of the Comrie Development Trust and is a consultant specialising in community planning, regeneration and a low carbon future – see www.alancaldwellassociates.co.uk

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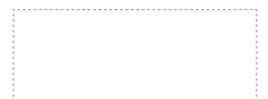
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 **DEVELOPMENT
TRUSTS ASSOCIATION
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the community-led regeneration network

 Alan
Caldwell
Associates



Introduction

Inspiring Change is a new resource which provides a way for communities, who are motivated and ready to take action, to gain the inspiration and information they need to take their first steps towards making their ideas become a reality. Based around the birth and early years of Comrie Development Trust, the booklet, DVD and wallchart highlight the different stages of, and key elements for, a successful development trust. While the case study is based in Perthshire, the learning and key messages are generic to development trusts and will be of relevance to urban as well as rural communities throughout Scotland.

› **Development trusts** are community owned and led organisations which use self-help, trading for social purpose, and ownership of buildings and land, to bring about long-term social, economic and environmental benefits in their community. They operate in both urban and rural areas and although are independent they work in partnership with the public sector, private businesses and other community groups.

› **The Development Trusts Association Scotland (DTAS)** is a network of community enterprise practitioners dedicated to helping people set up development trusts and helping existing development trusts learn from each other and work effectively.

With funding from the Big Lottery Fund and the Scottish Government, DTAS employs a small staff team which provides a range of peer learning and networking opportunities through training events, an annual conference and visits

programme. In addition to these, DTAS also provides a wide range of other membership benefits – for the full range of services and benefits available see www.dtascot.org.uk

› **Comrie information bank** is a unique resource from the Comrie Development Trust. From the earliest meetings that established the Comrie Development Group to the creation of the Trust and Comrie Foundation, the information bank gives easy access to a comprehensive range of documents that chart this journey. Posters, leaflets, briefing notes, press releases, funding applications, newsletters, constitutions and feasibility studies are all available to download, inspire and inform. All the information bank resources are free and can be found at www.comriefoundation.org

'Everyone enjoys the rewards that come with making something good happen.'

1/ Rewarding

Development trusts are all about local action for local benefit. They are about communities taking control, shaping their future and making things happen. They encourage everyone to get involved and play their part. They rely on local people stepping up to the mark. Volunteers can get involved in a small way to deliver leaflets or make a simple project happen, or take a bigger role by joining the board and committing significant time to leading the trust. Why would you get involved? The answer is that it can be a hugely rewarding experience.

Inspiring ideas

> Sense of belonging

One board member of the Comrie Development Trust describes a very powerful motivation for his involvement. He says that, "On the scale of things that matter there is your family, your friends and your community. Getting involved in our Trust is all about my sense of belonging to the community I live in". Others in Comrie talk about the importance of ensuring the community has the basic things it needs to prepare for the considerable challenges of the 21st century. Others put it much more simply: "I enjoy it and it makes me feel good".

> Friendship

Working together as part of a trust builds new friendships and strengthens existing ones. Everyone involved shares one thing in common which is that they believe in the idea of the trust and want to work for their community. You will strike up new

relationships with people you might not have encountered. You will form friendships across different ages and groups in your community. One volunteer in Comrie describes how they work on their own in a home based office. Becoming involved in the Trust has helped relieve the sense of isolation which that way of working can bring.

> New skills and experience

However you choose to become involved you will gain new skills and experience. You will learn from the other volunteers and the projects you make happen. You will learn from the other communities you talk to and visit. You may choose to take advantage of training opportunities that come along, be those high-level management courses or practical gardening classes.



› Achievement

Everyone enjoys the rewards that come with making something good happen. It could be working with young people on a drama production, completing a delivery of newsletters or securing major finance to purchase a community asset. Celebrating achievements with your fellow volunteers only increases this sense of wellbeing.

› Following your passion

Trusts get involved in all aspects of community life. They work at social, economic, environmental and cultural levels. This means that there is likely to be a project going on that matches your own passions and interests. If there is not, you can use the trust to suggest an idea close to your heart and encourage others to work with you to make your idea happen.

› Always remember

Volunteering is a demanding role. Board members can find many evenings and hours become occupied by meetings, telephone calls and emails. Talk to volunteer board members in other trusts, gauge their experience and the ways that they balance their commitments with other parts of their lives.

› Resources

- The **DVD** that accompanies this booklet features many of the Comrie volunteers talking about the highs and lows of being part of an active trust.
- **Volunteer Development Scotland** – Scotland's Centre for Excellence in volunteer development. For more information visit www.vds.org.uk

'Every community has people within it who make things happen.'

2/ Respecting

Starting a development trust in your community is a big step. People are unlikely to know what a trust is or what it can do. As a new organisation it may be viewed with suspicion, caution and maybe even hostility. The section on 'Communicating' discusses how to handle this. Any change in communities will stir interest and emotions. One of the most important lessons from other trusts is one of respect for existing groups, community leaders and projects in your community. If you can show that the trust is an opportunity and not a threat you will benefit greatly from the experience and support of those who know their community so well.

Inspiring ideas

› Incomer not local

This distinction can cause real tensions. Often it is the energy and drive of people who have moved into a community that are behind the establishment of a development trust. One thing is for sure, if those people do not respect the knowledge and understanding of those who have lived longer in a place, the work of the trust will be all the harder. You need to take time to involve existing groups and work with existing projects. Make extra efforts to offer support to long-standing community events.

› Community Council

Most successful development trusts have a good working relationship with their community council. When the two organisations realise that they make a powerful combination working together, exciting things begin to happen. Before this can happen, it

takes a great deal of careful and patient discussions to show how compatible the two organisations are. In Comrie, where 3 years on relationships are still being built, the trust has a board member who is also a Community Councillor. He acts as a link between the two organisations.

During the community buy out of Cultybraggan Army Camp the Trust and Community Council jointly published information bulletins. The two organisations meet when appropriate to discuss issues of common interest. The ability of the Trust to raise funds for projects identified by the Community Council is a particularly useful way to foster joint working.

In urban areas community controlled housing associations and other local partners may be a more appropriate focus for joint working with a trust. The same principles apply to fostering a close relationship.

› Existing groups

Every place has a wide range of local groups that add to community life. Many are a long-standing part of the community and will have dedicated volunteers. Many will have struggled to make ends meet and run fundraising events to keep them going over the years. Think about how a trust might be able to help these groups. Take time to meet them and introduce the idea of the trust. You will find that many of the people who show an interest in the trust are part of these groups. Use them to help build this common understanding about the trust.

In Comrie, when the Trust was launched at the 'Comrie Alive' festival, all 56 local groups were invited to a 'village market place' to recruit volunteers and raise funds for these groups. The 'Thursday Club' broke with tradition and produced their wonderful regular village lunch on a Saturday for the first time.

› Think about the fanfare

The formation of a development trust and the wide-ranging aims of the organisation will inevitably bring local attention and a certain fanfare of press activity. Remember many of the local groups will have been working way below the radar for a long, long while. Be sensitive to this.

› Your volunteers

A development trust will attract new volunteers keen to work for their community. Many might not even know about all the local clubs and organisations in the community. Existing groups often struggle for the very new volunteers that come naturally to the trust. Produce a directory of local groups, promote them at your meetings and make connections and encourage folk to get involved in groups that interest them.



› Community leaders

Every community has people within it who make things happen. Find out who they are, try to get them involved and at the very least keep in close contact to gauge their reaction as your work progresses.

› Resources

- **Comrie information bank**
 - contains examples of local directories, joint Community Council and Trust bulletins and other useful information. www.comriefoundation.org
- **So you want to set up a development trust**
 - a guide highlighting some of the steps involved in setting up a development trust. For more information visit www.dtascot.org.uk

'If you know where you're going it is equally important that you know where you are coming from.'

3/ Planning

Development trusts are interested in the social, economic, environmental and cultural future of their community. To be successful you will need to involve your community, prepare a strategic plan and create the organisation to make the plan happen. If you are to affect what happens to your community in the future you must plan carefully. If you do this you will make a real difference.

Inspiring ideas

> Getting ready

Comrie started with a presentation by the Westray Development Trust from Orkney. This inspired a small number of people to set up the Comrie Development Group. They met, talked with local groups and slowly developed a vision and range of ideas to test with the wider community. A community meeting took the ideas apart and put them back together. People began to sign up to working groups and things really started to happen. Taking time to get ready is the key.

> Agreeing a vision

Why are you doing this? Is it about the sustainable future of your community? It may be to prepare for the challenges of climate change or peak oil. It may be driven by depopulation or the threat of an unwanted development. Whatever your vision, it is important to discuss it as a group and then as a community to ensure everyone is buying in to the same ideal.

> Understanding the current situation

If you know where you're going it is equally important that you know where you are coming from. Take time to understand your community, from simple facts and figures (population, housing, transport, paths, economy, etc) to views on what people like and dislike about your community. Build a picture of the current situation. It will raise awareness of the trust and give you an insight into your community.

> Identifying the main themes

Imagine a washing line. One pole is the vision, the other the current situation. The rope between the two represents a theme that links where you are now to where you want to be. It might be housing (for example the lack of affordable housing) or employment. It may be transport and/or the local economy. Chart the list of the themes.



› Making things happen

The projects and actions that will take you from where you are now to where you want to be are the clothes you hang on the washing line. For your housing theme you might want to carry out more detailed housing surveys, identify suitable housing sites and explore different models of housing tenure for your trust. Do this for each of your themes and you will begin to shape the main part of your plan for the future.

› Measuring progress

Think about how you are going to measure progress. Keep it simple and relevant to each of your projects and themes. Consider using tools such as social auditing (see Resources). Develop indicators that match your projects so your community will clearly understand how your work is progressing. Remember this is not just about the hard facts such as jobs created and houses built, this is also about the less tangible community and social benefits. In Comrie the purchase of Cultybraggan Army Camp enabled one organisation, Comrie in Colour, to erect a polytunnel. As well as providing growing space for all the flowers and hanging baskets, they quickly set up gardening classes for the local primary school. Take photos and video footage whenever possible.

› Learning and sharing

Remember to take time to reflect on the lessons learned and make sure others can have access to your experience.

› Resources

- **Comrie information bank** – contains copies of the business plan for Comrie and earlier planning documents from Comrie Development Group and the earlier stages of the Trust. See www.comriefoundation.org
- **Re:sourcebook: planning for your community** – this encourages communities to plan effectively for their future from getting started and establishing a steering group to preparing a plan, developing your organisation and finding the resources to make things happen. Available free to download from www.alancaldwellassociates.co.uk
- **Proving and improving: a quality and impact toolkit for social enterprise** – aims to provide social enterprises with the knowledge, tools and resources to prove and improve their quality and social impact. Available from www.neweconomics.org
- **Fife Council introduction to consultation methods** – www.fife.gov.uk/uploadfiles/Publications/c64_4ConsultationMethods.pdf

› FOR INSTANCE...

Inverclyde Community Development Trust through the Port Glasgow Regeneration Centre has an active involvement in the regeneration of Port Glasgow and has produced, in partnership with Inverclyde Council Community Work and Community Futures, the Port Glasgow Community Action Plan. This document outlines the hopes and ideals for the future of the town, as provided by the people through community engagement, and has won wide acclaim from community groups, politicians, third sector organisations and many residents of Port Glasgow.

'Be patient, and as you make things happen, more and more people will come to understand and support your work.'

4/ **Managing**

Managing the different aspects of a trust will require patience, dedication and a very thick skin. Ensuring your trust is a well-managed business is nothing compared to the effort that will be required to manage community expectations, information, accusations and aspirations. You will need to communicate well, ensure all information is high quality and timely and that you maintain an open and transparent organisation in everything you do. Even then, expect a tough time. It comes with the territory.

Inspiring ideas

> Expectations

It is guaranteed that the majority of your community will have unrealistic expectations of what the trust can do and what it will achieve. Many will not understand why things are taking so long, where you are getting the funds from and why you cannot provide them with instant information to answer their questions. Many will want the trust to work on projects that you are not able to progress and disagree with other projects you prioritise. Many will not read newsletters or posters in the windows. Many do not come to meetings or pay attention to local press. Spend a disproportionate amount of time on communicating well. Remember, face-to-face discussions are the best way. Be patient, and as you make things happen, more and more people will come to understand and support your work.

> A good business

Remember many people will not have come across a development trust before. Their experience will be of organisations that tackle community projects using grant funding. They may not understand what your staff are doing and why they are needed. Many will take time to understand your entrepreneurial approach (see *Enterprising*) and what it means for the trust. Take time and use every opportunity to show good practice in your business. Hold well-organised meetings, run your AGMs well and publish clear plans and financial information.

> Group opposition

Your trust is likely to meet opposition from established local groups (see *Respecting*). Work hard to involve these groups in your work. Co-opt important groups onto your board. Help them to achieve projects that are important to them. They will have a long track record in your community and deserve the greatest respect from the 'new kid on the block'.

› Individual opposition

You will inevitably receive opposition from individuals in your community. There is a truth in the phrase “You cannot please all of the people all of the time”. Some will be well informed and simply disagree with your stance. Others will disagree on the basis of poor quality information. Some will not understand that a trust is a democratic organisation and that ultimately they can change things by standing for election to the board. The solution is along the same lines as managing both expectations and the opposition of local groups.

› Accusations

As soon as your trust owns land, employs staff or starts issuing contracts locally you may face accusations of personal interest. Be prepared for this to be a very demanding issue. Many will not understand why people are prepared to volunteer their valuable time to support the trust. They will see a darker side and some will be prepared to ‘sling mud’. Adopt clear policies about how members raise any questions on sensitive issues. Use the skills in your community to defuse difficult situations. In Comrie the Trust asked the local minister to chair a couple of major community events on the lead up to the purchase of Cultybraggan Army Camp.

› Resources

- **Comrie information bank**
– contains examples of best practice policies for declarations of personal interests and other useful documents to manage expectations. See www.comriefoundation.org
- **Getting to grips with governance** – an SCVO publication designed to get you up to speed on what you need to know about governance in a voluntary organisation in Scotland. Available from www.scvo.org.uk/scvo/Publications/PublicationCatalog.aspx
- **Early warning guide** – an easy to use tool designed to help development trusts and other third sector organisations to spot the warning signs of potential problems in order to help them identify these challenges as early as possible. For more information visit www.dtascot.org.uk



'Creating an exciting, recognisable identity for your trust will help you get the message across.'

5/ Communicating

Communication is the single most important activity for your trust. It is the key to being an open, transparent and inclusive organisation. It is central to explaining difficult and unfamiliar projects. It is crucial in getting across even the most straightforward aspects of your work. Remember your trust is likely to be the 'new kid on the block' and therefore viewed with suspicion and caution. People are unlikely to know what a trust is or what it can do. The majority do not come to meetings or read posters in windows. They forget and lose interest quickly. In the absence of good quality, regular information people will, quite simply, make it up! A clear, imaginative and consistent approach to spreading the word is required.

Inspiring ideas

› Branding

Good branding is a simple way to ensure people know what projects and events the trust is involved in. Creating an exciting, recognisable identity for your trust will help you get the message across. Seek out the artistic talent in your community and put them to work.

› Talking and meeting

Encourage everyone who is closely involved in your work to talk openly as they go about their everyday life. Make sure the gossip is well informed. Hold regular open meetings. In Comrie they are held on the first Monday of every month, each with a different theme, but they are always a place where anyone can raise issues that concern them.

› Community texting

In Comrie they have started a community texting scheme (see www.txtlocal.co.uk). This enables you to bulk buy text messages and manage your account over the website. People are encouraged to register their text number and categories that will interest them (e.g. music events, community meetings, drama classes, sports activities, etc). The Trust can then send text alerts to keep people up to date with news and a 'what's on in your community' guide

› Bulletins and newsletters

While it is important to use existing newsletters, it is equally important for your trust to create its own identity. Dedicated newsletters to explain major projects and keep people informed are an excellent idea. Build a team of willing volunteers to deliver door to door if possible. Leave them in shops, the doctor's surgery and post office. In Comrie they aim for two to three bulletins a year.

› Website and e-bulletins

A website is now a given for any trust. Start by piggybacking on your community website, if there is one, and develop your own over time. Build a database of email addresses by requesting this information on your membership form. E-bulletins give you the opportunity to send short and snappy updates and 'what's on' information to your membership.

› Press releases

Building relationships with local journalists and national contacts in radio, television and newspapers will be rewarding. Big stories will attract major coverage. In Comrie, the purchase of Cultybraggan Army Camp received blanket national news coverage. Of equal importance are the small announcements and successes that keep the Trust on people's radar. Once again, seek out those with journalistic and PR skills in your community.

› Shop front

Comrie is lucky enough to have a shop front on the main street. Even although the staff members are now experts on bus timetables and tourist enquiries the street presence and window space is invaluable.

› Afternoon discussions

Remember many older folk will not come to evening meetings. Plug into the coffee morning circuit and make the effort to go along and have a conversation about the trust.

› Local events and groups

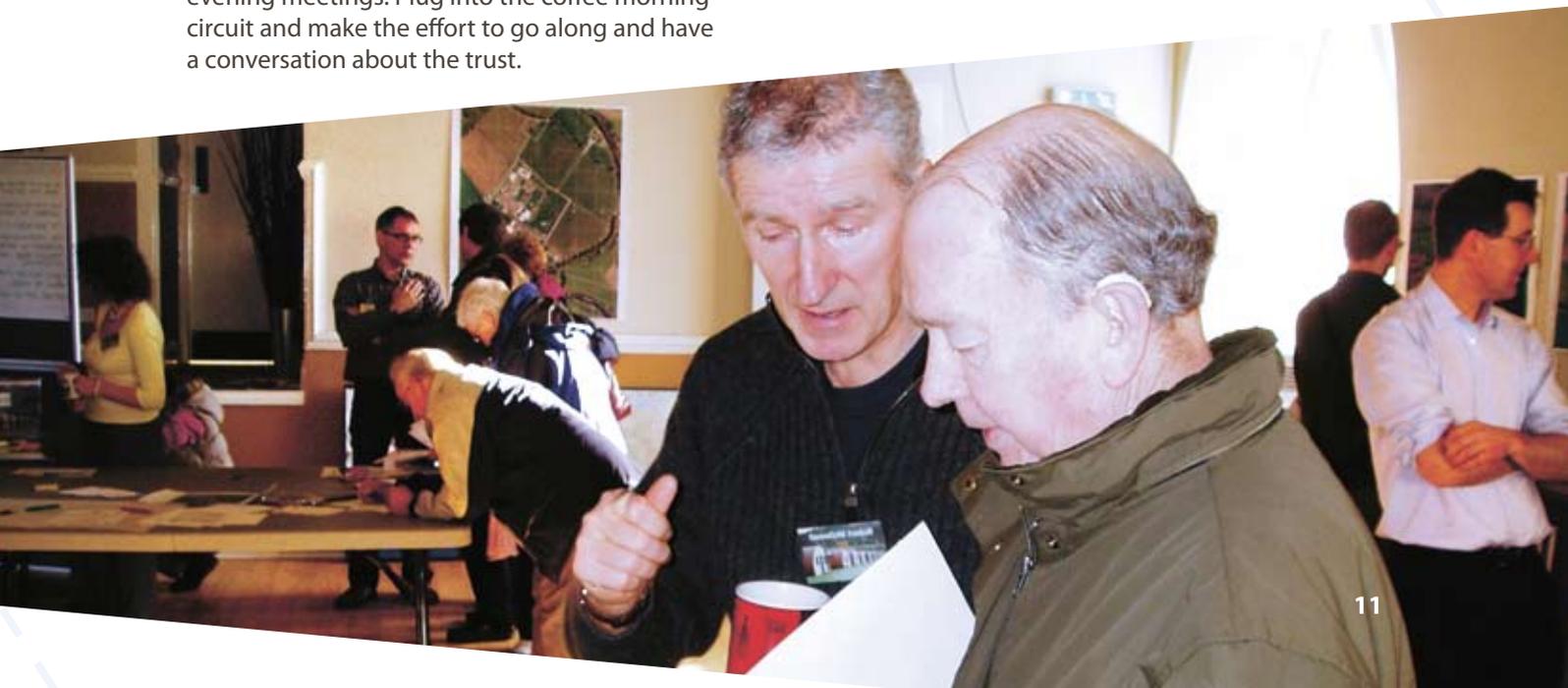
Always remember that existing groups, schools, community and arts events are always a good way to reach people in a low-key way.

› Hard to reach

In Comrie, the Cinema Club established by the Trust runs free showings in local care homes and schools. This is one simple way to raise the profile of the trust in the community. Concentrating on groups that may be excluded from the community is essential. This includes young people, disabled groups and ethnic minorities. Work through existing networks that will have good links and experience in this work.

› Resources

- **Comrie information bank**
– contains examples of bulletins, e-bulletins, press releases by the Trust and other useful documents. See www.comriefoundation.org
- **DIY toolkit: improving your community** – getting children and young people involved. This guide provides methods of working for adults interested in encouraging young people to become actively involved in their local community and its regeneration. Available to download from www.savethechildren.org.uk/en/54_3186.htm
- **DTA Scotland media guide** – to help your development trust raise awareness and generate support through the media. Available from www.dtascot.org.uk



'Do not underestimate the challenge you face and the demands it will place on those involved.'

6/ **Enterprising**

Development trusts are enterprising organisations aiming for long-term financial self-sufficiency by generating surpluses to reinvest in the trust and the wider community. To do this you need to be entrepreneurial, take risks and look out for opportunities and business ideas to benefit your community. The time is right for this approach. Government is supportive, funding is available, expertise is on hand and there are a growing number of community led examples to learn from.

Inspiring ideas

› **Unfamiliar territory**

Development trusts will be a new idea to most people in your community. The thought of behaving like an entrepreneur – taking risks, buying land, starting community businesses and generating an income – will come as a complete surprise to most. The important thing to remember is while community businesses are like other business in that products or services are sold to make a profit, the profit is not for private gain. Instead it is reinvested into the development trust and used to support other community projects. Take time to explain things, build an understanding and encourage people to learn from others.

› **Opportunism**

Opportunities will arise when you are least expecting them. Being able to grasp them when they come along is an important aspect of being entrepreneurial, but knowing what ideas to let pass is even more important! The impending sale of Cultybraggan Army Camp arrived when the Trust in Comrie was just getting started. They thought

long and hard about submitting their registration of interest but decided to go ahead because of the long term benefits ownership would bring to the community.

› **Be business like**

Being entrepreneurial is demanding. It combines the skills of good community development with sound business sense. To own land and/or buildings you will have to understand the weight of responsibilities in becoming a good owner. To borrow money you will have to display sound business planning, cash flow analysis and an appreciation of the workings of credit panels. Being entrepreneurial will require a steep learning curve for your members, your board and your community. Do not underestimate the challenge you face and the demands it will place on those involved.

› **Knowledge**

The first of three crucial ingredients is building a knowledge base in all parts of your trust. Your staff must be equipped with the skills and understanding to underpin your business approach. Your board

should have a good mix of experience including private sector business. Take advantage of the business skills in your communities. Tap into all the training courses available and the organisations that will provide help and advice. Spread the load and you will be surprised at how quickly your trust becomes a highly capable organisation.

› Volunteers and paid staff

The second ingredient is to ensure that you have the people power to make things happen. Volunteers can take an idea so far, but being business-like will demand dedicated, full time skills for anything but the most straightforward project.

› Capital

The third ingredient is the most important and, in many ways, the easiest to acquire. A good business project with a capable organisation and robust business plan behind it is likely to get funding. The section on 'Financing' gives more ideas and links on gaining good funding support for your idea.



› Resources

- **Comrie information bank**
– contains examples of the business plan, cash flows and lots of information on their community right to buy bid. See www.comriefoundation.org
- **Firstport** – provides free business support and advice to new and emerging social enterprises across Scotland. Visit www.firstport.org.uk for more information.
- **Cultivating enterprise** – this toolkit will guide you step by step through the stages of setting up an enterprising community organisation. It is carefully designed to mirror the core structure of a business plan and offers practical activities for getting ahead. For more information visit www.dtascot.org.uk
- **The complete guide to business and strategic planning** by Alan Lawrie. Provides an introduction to the process of strategic planning. Available from the Directory of Social Change at www.dsc.org.uk/Publications/Managementandgovernance/@2555

- **Balancing risk** – a Triodos Bank guide for trustees and managers in charities and social enterprises on making major decisions involving risk. Download from www.triodos.co.uk/balancingrisk
- **Proving and improving: a quality and impact toolkit for social enterprise** – aims to provide social enterprises with the knowledge, tools and resources to prove and improve their quality and social impact. Available from www.neweconomics.org

› FOR INSTANCE...

The Boyndie Trust in Banffshire earns its entire income through a range of enterprises. The Trust owns and runs a visitor centre, attracting 35,000 visitors a year, with a four star restaurant, gift shop, plant nursery, textiles workshop, and joinery business. This means that two-thirds of its income comes through the tills and the remainder from a local authority day care contract. Together these provide training opportunities for 70 people, and paid employment for a further 30 people.

**'Development trusts take time:
time to develop, time to plan and time
to mature. Be patient and don't try
to rush things that will have
their own pace.'**

**Open the centrefold
to see the journey to date
for Comrie Development Trust...**



"It's great to feel such a part of the place you have chosen to live in and hopefully to give a little bit of something towards it... because if we don't do it, nobody will!"

**(Alan Caldwell,
Board Member
of the Comrie
Development
Trust)**



"If it is to be done, it's to be done and you go for it and 90% of the population will be behind you."

(Joan Carmichael, Patron of Comrie Foundation)

'One of the biggest benefits of being involved in a trust is the opportunity to learn new skills.'

7/ Learning

Development trusts aim to be leading examples of sustainable development for communities across the country. To achieve this you should learn as you go and from the wealth of experience in other communities and supportive organisations. While your trust will directly benefit your own community, others are relying on you for inspiration and practical knowledge of what works and what doesn't. You should take care to document your successes and failures and make sure your story is accessible to all.

Inspiring ideas

> Open meetings and events

The foundation of any trust is the quality of your engagement with your community. In Comrie they hold monthly open meetings. These meetings report on progress and enable local people to raise issues where they feel the Trust could help. They often have a theme and guest speaker to inform and advance projects. Issues are often raised which the Trust will research and report back on. Working groups are created to explore particular ideas and think through the best way forward.

> Learn as you go

Take time to share what you are learning on a regular basis at board and open meetings. This is probably the most powerful way to learn and you will be amazed at how much you gain by simply carrying out your work. Volunteers will acquire new skills and understanding and you will uncover a wealth of talent among your own community. Everyone involved will grow in confidence by working together.

> Hold community events

In Comrie, the Trust holds events under the banner of 'Comrie Conversations'. The first one in 2006 brought the internationally acclaimed presentation 'Hard Rain' to a packed audience at their community centre. It was followed by a village question time chaired by the local MSP to debate the challenges of Climate Change and Peak Oil.

> Visit others

There are numerous sources of funding to enable you to visit other communities to learn from their experience. In Comrie, for example, the young people campaigning for their skateboard park went on a tour of five successful parks in a weekend trip with the adults who were helping their work. These trips are fun and build good relationships with those who go and between the communities involved.

› Formal and informal training

One of the biggest benefits of being involved in a trust is the opportunity to learn new skills. Once again, this is an area that is well funded to encourage all sorts of learning. Encourage board members to attend courses on governance and finance. Take time to find out the sort of training your volunteers would like. In Comrie the volunteers from 'Comrie In Colour' have organised classes on growing vegetables for the local primary school children from their new polytunnel at Cultybraggan Army Camp.

› Hold a conference

Organising a seminar or conference event is a major undertaking but has huge benefits. If there is a particular aspect of your work that is important to you and others it will be worthwhile bringing people together to learn about it.

› Reflect and review

Keep detailed records of your progress and all the benefits, successes and failures. Record all of the knock-on benefits from projects. In Comrie, opening the allotments meant that local businesses manufactured raised beds to sell to the plot holders. A 'seeds exchange' was set up and the local college started a 6 week basic gardening course that was open to all. Think about how you are going to record this and the best way to measure your progress. There are a number of tools available to help you (see Resources).

› Publicise your learning

Remember to use all the avenues open to you to tell people about the opportunities to learn and to encourage ideas for future events or courses.



› Resources

- **Comrie information bank**
– contains examples of the Trust's learning events and training courses and other useful documents. See www.comriefoundation.org
- **Evaluation support Scotland** – works with voluntary organisations and funders so they can measure the impact of their work. They provide practical support and access to resources and tools. For more information visit www.evaluationsupportscotland.org.uk
- **Tell your Story: community impact mapping**
– this DTA guide is designed to help development trusts map their community impact and tell their stories in an effective way. For further information visit www.dtascot.org.uk

› FOR INSTANCE...

Mull & Iona Community Trust are developing a Community Business Resource Centre. Part of the feasibility study involved a series of study visits to other organisations who have developed similar projects. What they learnt helped them to avoid making mistakes and enabled them to take full advantage of the approaches which worked well for other groups.

'Owning and managing an asset is the most demanding part of the process.'

8/ Challenging

One of the most challenging yet exciting opportunities for development trusts is the possibility of taking on and developing physical assets, such as land or buildings. Assets are an essential resource in creating a sustainable future. In September 2008, the Comrie Development Trust purchased 96 acres of land at Cultybraggan Army Camp. However, the decision to take ownership of an asset should not be entered into lightly as getting hold of it can be a highly demanding process. And these demands are incomparable to the scale of the responsibilities you will face if you succeed in acquiring it. Be inspired but be prepared!

Inspiring ideas

› Clarifying your purpose

You need to be very clear as to why you want to take on an asset. You may want to use it to provide a range of services or opportunities locally, or to generate income. You may want to restore and protect a woodland or historic building, or re-kindle local pride as a community that owns its own assets. Keep revisiting your aims at key points and ask yourself whether the project is still on track to meet them. Do you need an asset in order to meet them? Are you focussing on the right asset?

› Getting support from your community

Think very carefully about how you will do this. The ownership of assets such as land and buildings can be a highly emotive subject in communities. It will polarise views. Take time to inform your community and discuss the idea with them. Get the media interested (when the time is right) and communicate the potential benefits, as well as the challenges

involved. Above all, use your ingenuity. In Comrie, the opportunity to purchase the camp came when the Trust was only a few months old. The Trust had to weigh up the numerous challenges of going ahead, against the opportunities that owning 96 acres on the edge of the village would bring.

› Using the community right to buy

Development trusts in rural Scotland have the opportunity to use the community right to buy provisions within the Land Reform (Scotland) Act 2003. To be able to use this, your trust must be constituted in a way that meets the requirements of the Act. Development Trusts Association Scotland can advise you on this and have a toolkit that will help you (see Essential Resources at the back). The legislation can be complex and time consuming to use. However, it can be a useful safeguard where there are key local assets that your trust wants to secure. Comrie used the community right to buy to purchase Cultybraggan Army Camp.

› Testing your ideas

Prior to purchase it is crucial that you undertake detailed feasibility work on the costs and benefits of your project. Is it an asset or is it actually a liability? Focus on the practicalities rather than grand ideas. Is it the best location for your purposes? Will you get planning permission? Are the drains and other infrastructure up to scratch? If you are looking at a building, is it sound or would a new building be more viable? What are the financial realities – how much will the asset cost to buy and run, how much income might it generate, and how will you fund the difference between these? What will your ongoing management responsibilities be? Part of this process could include visiting other development trusts that have taken on similar assets.

› Financing the purchase

If it feels right, fundraise within your community once you have got their support. Awareness will be high and all the publicity will help. Prepare grant applications too. If you are taking an enterprising approach and expect your asset to generate income in the longer term, talk to partners about loans. Comrie purchased Cultybraggan Army Camp with an interest free loan from a charitable Trust that it will repay through fundraising (see Sustaining) and refinancing on commercial terms. If you are looking to take on an asset that is owned by a public body, might they reduce the purchase price if the buy-out will help the public body meet their objectives?

› Owning an asset

Owning and managing an asset is the most demanding part of the process. Most importantly, ensure that you will have the capacity (time, skills and money) to make your project work. It is likely you will have to learn new skills very quickly. Trying to manage significant assets like land and buildings on volunteer input alone is not sustainable.



› Resources

- **Comrie information bank**
– contains copies of the business plan for Comrie including the plans for Cultybraggan. It also includes documents from every stage of Comrie's purchase of Cultybraggan Army Camp using the Land Reform (Scotland) Act 2003. See www.comriefoundation.org
- **The Scottish Government – guidance on using part 2 of the Land Reform (Scotland) Act 2003: Community right to buy** – www.scotland.gov.uk/Publications/2009/06/08101427/0
- **To have and to hold** – provides a broad range of information, resources and contacts that you can use to develop a land or building project that is an asset for your organisation and local community. See www.dtascot.org.uk for more details.
- **The Asset Transfer Unit** – provides information and inspiring case studies on the successful transfer of assets from public bodies to community organisations at less than market value. Visit www.atu.org.uk
- **The Forestry Commission Scotland**
– National Forest Land Scheme gives community organisations the opportunity to buy or lease National Forest Land. For more details, see www.forestry.gov.uk/nfls

'Involve your funding partners in strategic discussions and give them the opportunity to contribute their expertise and ideas.'

9/ Financing

Money makes the world go around. Every community project needs a benefactor. Every community business needs an investor. The key to both lies in the vision, clarity and benefits of your project. Ask any successful trust and their experience is likely to be that money followed inspirational and well organised projects. Even at the most difficult of times there are charities willing to support worthy community projects and investors willing to back enterprising social businesses ideas.

Inspiring ideas

› What makes a good funding partner?

There will always be good, smaller scale funding sources for community projects. Any good fundraiser or trawl of the Internet will enable you to match your project to funding pots. What takes more effort and thought is cultivating good working relationships with partners who can really make a difference. In Comrie, the Trust made links across the sectors. The Tudor Trust and the Gannochy Trust understood the vision of the Trust and shared the risks in making Cultybraggan Army Camp happen. Triodos Bank provided development capital and the Scottish Government invested grant and loan finance through the Scottish Investment Fund. Remember to resist the temptation of adapting well planned projects to fit funding criteria. There is a fine balance to be struck.

Each of these organisations understands the meaning of a real partnership. They took an interest in the vision, visited the community, spoke to the board and built up an understanding of the risks and potential of the projects. If you can see the qualities of respect, openness and a desire to talk sensibly face-to-face you have found a good partner.

› What makes for a good source of money?

For enterprising projects, be very wary of funding sources that require endless lists of outcomes and those who are reluctant to open face-to-face contact. Risk is part of being entrepreneurial so be cautious about funding partners who seem risk averse. Complicated development projects will change, and change quickly. Circumstances will alter, costs may increase and planning consents may not go to plan. You need sources of money that understand this and can adapt quickly and easily.

Consider working with specialist social lenders as they will be more familiar with, and have more expertise, in the issues associated with setting up and running community-owned businesses. They are likely to be driven by more than profit so are often as, or more competitive, than high street banks. Talk to partners and discuss these issues before entering into any relationship.

› Communicating with your partners

Your end of the bargain requires good communication with your partners. The quality of the information you provide and the frequency of progress updates helps to build confidence. Set up e-bulletins, arrange get-togethers when required and be honest and open when you meet difficulties. Involve your funding partners in strategic discussions and give them the opportunity to contribute their expertise and ideas.

› Mixing grant and loan

Be prepared to use both grant and loan funding. This is an increasingly accepted mix for public and charitable sector partners more traditionally limited to grant funding.

› Encouraging local wealth and wider support

In Comrie, they are launching the 'Comrie Foundation' to encourage investment for the benefit of the community. Donations, legacies and community share issues will all be possibilities through the Foundation. The first appeal will be to clear the £350,000 loan the Trust received to purchase Cultybraggan Army Camp. The Foundation is a long term project to finance beneficial work in the community for generations to come.

› Measuring social benefit

This is increasingly important as both grant and funding partners look to measure the social benefit of projects. Charitable lenders who are open to loan funding may accept an element of social return in addition to financial return. See Resources for ways of recording and measuring social benefit.

› Have vision

No vision, no funding. It is that simple!

› Resources

- **Comrie information bank**
– contains examples of various successful and unsuccessful funding applications for loan and grant funding, plus other useful documents. See www.comriefoundation.org
- **Introductory pack on funding and finance** (NCVO publication) – available to download from www.ncvo-vol.org.uk/publications/publication.asp?id=3257
- **Better to borrow?** – a DTA publication showcasing examples of where loan finance has been used by development trusts to further significant asset projects. Available from www.dta.org.uk
- **Proving and improving: a quality and impact toolkit for social enterprise** – aims to provide social enterprises with the knowledge, tools and resources to prove and improve their quality and social impact. Available from www.neweconomics.org

› FOR INSTANCE...

The Knoydart Foundation was established in 1997 to purchase the Knoydart estate in north west Scotland. It owns six residential properties, a backpackers hostel and several additional farm buildings, many of which are being renovated to meet modern requirements with money from Triodos Bank, in particular a Triodos Bank loan, as well as with significant grant funding.



'Invite officers and councillors to visit your trust, explain your work and share the limelight when things go well.'

10/ Partnering

Development trusts form partnerships. They can provide the leadership and inspiration for big visions. Your vision will be shared by others who can in turn share the responsibilities. Look for like-minded partners who can share the workload, the difficulties and the achievements. Being proactive and spending time cultivating good relationships with politicians, your local authority, charitable foundations and private sector companies will be time well spent.

Inspiring ideas

> Key People

Your vision will be shaped and driven by leaders in your trust, the wider community and among your partners. You will find that certain individuals will 'get it' and make real commitments to help you make things happen. It may be the Chief Executive of one of your charitable partners who makes a special effort to bring others in his field on board. It may be the local business leader who offers to sponsor a fundraising dinner. It may be the senior officer in your local authority that cuts through the bureaucracy to match you to the right people in the council. It may be the government minister who sees your project as an example others can follow. As Comrie discovered, these leaders can make a huge difference to making things happen.

> Local politicians

Development trusts are well placed to win political support. The power of development trusts is increasingly recognised at a national and local level. The government is supportive towards social enterprises and our political system gives easy access to even the most senior ministers. At a local

level your local authority will play a significant role in your work. Whether it is funding support, planning permission or advice it is helpful to build an understanding at a political level. Invite officers and councillors to visit your trust, explain your work and share the limelight when things go well.

> Your bank

The foundation of any successful trust is a sound financial footing and a good relationship with your bank. If you are taking an enterprising approach then your choice of banking partner is crucial. There are an increasing number of banks and financial institutions that work with development trusts and social enterprises. There are a number of ingredients you should be looking for in choosing your bank. It is important that they share your aims and principles. They must have a good range of products to match your saving and current account needs. They must be able to compete for your business in investment capital and loans to help you develop your projects. Crucially they must be accessible and interested in your work. If you cannot have a direct and open conversation with a senior member in the bank, think carefully about their suitability as a partner.

In Comrie, the Trust is fortunate enough to have an excellent partner in Triodos Bank. Triodos are interested in the relationship with their customers and offer more than just the finance a project needs. They first had contact with the Trust in Comrie more than two years before they actually lent any money to them. They shared a vision that the community buy-out could work, and their team's determination to help make it happen was clear.

› Your strategy

It is worth taking time to think through your strategy for building partnerships. As a baseline, make sure you draw up a list of who you think are influential individuals in the community, public, private, political and charitable sectors. Invite them to the launch and significant events of the trust. Keep them well informed by sending them copies of community bulletins and progress reports. Invite them to visit your community and attend particular events you might be holding. Go and see them face-to-face. Ask them how best you can influence and explain your work to their trustees, management boards or committees. In Comrie, they found that certain individuals make that extra effort and you can build on their interest to create lasting partners for your work.

› Resources

- **Comrie information bank**
– contains details about the information and briefings the Trust used to build good partnerships. See www.comriefoundation.org
- **Triodos Bank** – enables money to work for positive social, environmental and cultural change. They provide a full range of banking services to social businesses, charities and groups as well as savings accounts for individuals. For more information visit www.triodos.co.uk
- **Social capital** – partnerships which build relationships of trust and reciprocity (the basics of social capital) will maximise information sharing and the flow of resources need to achieve effective collaboration. For more information visit www.social-capital.net/showart.php?articleid=91
- **Engaging and influencing decision makers**
– a guide on how to create and act on opportunities to influence decision makers. Download from www.cdf.org.uk/web/guest/publication?id=15309



'Development trusts are about creating vibrant, dynamic communities.'

11/ Celebrating

Taking time to celebrate is important. Time to celebrate small achievements and major milestones, time to celebrate as a trust and as a wider community, time to enjoy the company of others and to acknowledge the hard work of your volunteers. Development trusts are about creating vibrant, dynamic communities. You can't do this without having fun!

Inspiring ideas

> Festivals

In Comrie, the Trust was launched at a weekend festival called 'Comrie Alive'. Friday night saw the opening of the community cinema and premiere of the film 'Comrie Confidential' directed by and starring youngsters from the community. Saturday had a market place for local groups, a community lunch, a community photo and an evening ceilidh. Sunday saw an ecumenical service and a youth rock concert (not at the same time!). Nearly one-third of the residents attended some part of the weekend, connecting people to the Trust and building a wider support.

> Music and arts events

Music draws people together. More importantly, it attracts people who might not normally pay any attention to your trust. Have membership forms and leaflets available on the evening in a low-key way. Try different sorts of music and arts events to attract

different audiences. Ask local talent to support the main acts and use local contacts and companies for the catering and equipment. Connecting in as many ways as possible with your community will build bridges, support and respect.

> Birthdays

Celebrate the birthday of your trust. Bring your board members and volunteers together to mark this important occasion. In Comrie, they had a 'pot luck supper' this year to celebrate and take time outside of the normal meetings to look forward and share ideas on how the trust should develop.

> Community events

Most communities have an annual gala day or community celebration. See if there are ways to include your trust. Take a stall at the street market, sponsor an event, put an advert in the programme or make a float for the procession. Make sure your trust and your volunteers support the hard work that makes these events a success.

› Marking success

Acknowledge achievements, no matter how small, with appropriate celebrations. Congratulate each other on your hard work. It might be a successful funding application or the completion of a project. It might be as a whole board, a working group or a bunch of volunteers. Look for ways to involve the wider community when the achievement is more significant. In Comrie, they organised an open day when they bought Cultybraggan Army Camp so the whole village could look around the 90 acres they now owned. The open day is now a regular part of the 'Comrie Fortnight' so villagers can keep track of progress and visitors can be inspired by the project.

› Resources

- **Comrie information bank** – contains examples of posters for music events, the programme for 'Comrie Alive', membership forms, introductory leaflet to the Trust and other useful documents. See www.comriefoundation.org
- **Organising an event** – this SCVO guide provides information on all aspects of organising an event, including sample forms for conferences. Covers publicity, budgeting, finding suitable venues and speakers. Available from www.scvo.org.uk/scvo/Publications/PublicationCatalog.aspx
- **Community matters information sheet** on organising a carnival or gala. Available from www.communitymatters.org.uk/Resources/information-sheets

› FOR INSTANCE...

Celebrating and enriching local life and culture lies at the heart of the **Neilston Development Trust's** priorities. The aim of the Neilston Live! Festival is to enable people to thrive and have fun in Neilston, mix and enjoy each others' company and share their talents. For two weeks in August, the village is awash with children's and adult's workshops, family concerts, and special events from baking demonstrations to tea dances which take place in and around the village's open spaces and community halls, with the community-owned Old Bank acting as the focal point.



'... it is important to explore how you can generate your own income.'

12/ Sustaining

Development trusts are in for the long haul. They are sustainable organisations for a sustainable future. How will you keep the interest and motivation of volunteers? How will you avoid burnout among your board members and attract new people to come forward? How will you keep the interest of your partners and continue to secure funding for staff? Will you be able to keep the community on your side? Crucially, will you be able to secure the funding you need as an organisation and for your projects.

Inspiring ideas

> Keep your projects relevant

Never lose sight of community priorities. Be a transparent and open organisation. Encourage people to come forward with projects that will help achieve the vision. If you can do all this and keep an eye open for new opportunities and funding sources you will thrive. This is the key to attracting new volunteers and new blood to the organisation.

> Build an asset base

Development trusts aim to be financially self-sufficient. Grants may always play a part in your work but it is important to explore how you can generate your own income. Some trusts deliver services and others rent out space to businesses. Some develop wind turbines and others develop housing. This entrepreneurial approach will help you to attract partners and respect.

> Raise the bar

Building an asset base is likely to move your organisation on to a different level. In Comrie, Cultybraggan enabled the Trust to issue major contracts to local builders. Local professionals such as engineers and quantity surveyors serviced the project. When your community sees that the trust is creating local employment and putting food on people's tables you will win new support. This will bring with it new volunteers and interest in your organisation.

> Staff and Board

Taking an entrepreneurial approach demands skilled staff and capable board members. The board will have to understand sound business planning and project management. Your staff should have the abilities required to develop your chosen assets while relating to the local community. It is a demanding package! Plan carefully to give your organisation the skills and experience it requires (both paid and voluntary). From the earliest stage begin planning for the time when your revenue grants and funding run out. This is always a tricky area and the more time you can give yourself to line up new funding sources the better.



› Consolidation

Keep consolidating your work as you go. Many trusts have overstretched themselves by taking on too much and too wide a range of projects. When your community sees that you are an organisation that makes things happen they will place heavy demands on your time and resources. Strike a balance between being accommodating and knowing when to explain that you cannot take on anything new for a while.

› Money

Grants and loans are two ways to support the trust and your projects. There are also imaginative ways of capturing local wealth. Community share and bond issues are becoming increasingly popular. With such innovation you are likely to have to look at your legal structure and this is all part of a maturing organisation. In Comrie, the Trust is looking to establish a Foundation that will fund projects and community benefit in the village. Donations, legacies and share issues will all be possibilities to sustain good work.

› Look after each other and celebrate

Everyone involved in the trust (especially on the board) has a duty to look after each other. You are all volunteers and you need to watch for individuals under strain. Share the load whenever you can. Never forget to celebrate achievements and milestones in the development of the trust. Don't lose sight of the fact it is supposed to be rewarding and even fun.

› Resources

- **Comrie information bank** – contains information about the Comrie Foundation and other useful documents about sustaining the Trust. See www.comriefoundation.org
- **Sustainable sun needs analysis tool for voluntary and community organisations** – designed to help organisations work out where you are now in each of seven areas which are integral to long-term sustainability. Available from www.ncvo-vol.org.uk/sfp/?id=3992
- **Community bond and share issue** – this publication examines how community organisations can use share and bond issues as a source of funding. It explains what shares are and the benefits of share issue, how to organise one and the legal implications. Available from www.dtascot.org.uk
- **Setting up a trading subsidiary** – produced for development trusts that are registered charities and are planning to become involved in trading activities that are non-charitable. Available from www.dtascot.org.uk

Essential Resources

Publications

- **DTAS Start-up toolkit** – designed to help communities set up companies limited by guarantee with charitable status. Written by Stephen Phillips, a specialist in charity law, the guide is designed to take a development trust through each step of the set-up process and thus avoid the costs of engaging a solicitor. Further information available from www.dtascot.org.uk
- **Brief guide to employing people** – highlights the main areas of importance to watch out for when employing people. Available from www.dtascot.org.uk
- **Fit for purpose** – a diagnostic tool to help a development trust in assessing its strengths and areas for improvement against key criteria. Further information available from www.dtascot.org.uk
- **Voluntary but not amateur** – a guide to the law for voluntary organisations and community groups. Available to order from www.dsc.org.uk/Publications
- **Guide to the major trusts (Volume 1) 2007/8** – regarded as the fundraiser's bible, these essential reference works provide the only source of independent critical analysis of what trusts do in practice. Available to order from www.dsc.org.uk/Publications
- **Guide to Scottish trusts 06/07** – Comprehensive coverage of trust giving in Scotland, with independent analysis and commentary. Available to order from www.dsc.org.uk/Publications
- **Bearing fruit – good practice in asset-based rural community development.** Further information available from www.dtascot.org.uk

And more...

- **Scottish Council for Voluntary Organisations** – the national body representing the voluntary sector in Scotland. www.scvo.org.uk
- **Skye & Lochalsh community toolkit** – This resource has been developed to help improve skills and knowledge and bring benefits to local communities. There are guidelines on a range of topics, including setting up and running a community group, legal requirements and good practice, planning and fundraising. www.scvo.org.uk
- **Skills toolkit for healthy community organisations** – produced for Stirling Council by STAR Consultants www.stirling.gov.uk/skillstoolkit/getting_started.htm
- **Community matters information sheets** www.communitymatters.org.uk/Resources/information-sheets
- **Directory of social change** – the leading source of information and training to the community and voluntary sectors, including links to funding websites. www.dsc.org.uk
- **Cash-online** – financial advice for small voluntary organisations, giving access to free easy-to-read guidelines, sample policies, templates etc on all aspects of financial management. www.cash-online.org.uk
- **High peaks CVS – Guide to asset development** which comprises five useful fact sheets. Available to downloaded at www.highpeakcvs.org.uk/how/KnowledgeBank-AssetsPack.pdf

› The Scottish Community Foundation

The Scottish Community Foundation is an independent grant-making charity, matching donors with good causes. Formed in 1996, the Foundation works with individuals, companies and charitable trusts to support their philanthropic goals. We manage 250 charitable funds, and have awarded almost £18 million in grants to Scotland's communities over the last 12 years. We are now one of the largest independent funders of the voluntary and community sector in the country, supporting grassroots community activity in every local authority in Scotland.

The Foundation aims to help people and organisations build strong, successful communities. We provide funding for a broad range of projects. We have a particular interest in helping community-based organisations make the most of local assets and resources to generate benefits for local people, and give them a greater role in their community's future. We recognise the role that development trusts can play in achieving this, and we are pleased to have made 21 grants to such organisations in recent years, from North Ronaldsay in the northern isles to Carluke in southern Scotland.

The Foundation describes its mission as being to connect people, ideas and resources. We think this publication and DVD will help to do just that. It provides a valuable information resource that will connect people to those involved in the Comrie Development Trust, their ideas and experience. We hope it will inspire others to achieve similar successes, or at least make informed decisions about the best means for promoting their own community's development. For further information about the Foundation visit www.scottishcf.org



› Triodos Bank

Triodos Bank works with some of the UK's most progressive businesses and charities, including community projects, fair trade enterprises, renewable energy and organic food and farming. Customers range from the Isle of Gigha Heritage Trust in Scotland to fair trade pioneers Cafédirect. Triodos provides a genuinely human approach to banking, unrivalled expertise, and a comprehensive range of competitive banking services. This year the bank received global recognition when it won the Financial Times' Sustainable Bank of the Year Award.

To find out what banking ethically can do for your organisation, visit www.triodos.co.uk or call **0500 008 720** free. Organisations in Scotland should contact David Cousland or Avril Herd at the Edinburgh office – **0131 557 5528** or e-mail scotland@triodos.co.uk



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Inspiring Change

A new learning resource from DTA Scotland
for communities who are motivated and ready
to take action but need inspiration and information
to take their first steps towards making
their ideas a reality.



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