



THE STEERING GROUP

1.0 WHAT IS A STEERING GROUP AND WHAT DOES IT DO?

The Steering Group is a group of committed local people who believe in Parish Planning and are responsible for making the Parish Plan project happen in their community. Its major functions are:

PLANNING

ORGANISING AND OVERSEEING

LEADING, DRIVING AND PROGRESSING

STIMULATING, ENTHUSING AND ENCOURAGING

MANAGING AND DIRECTING

FINISHING AND LAUNCHING

The overall aims and objectives of the Steering Group will emerge from the open community meeting/s and soundings already taken. These will need airing well before they are narrowed down to the more specific aims and objectives on which the group will ultimately focus.

2.0 COMMITTEE NAME

Choose something meaningful and simple that identifies the **community** and the **purpose** of the Steering Group.

Examples might be

XXXXXX Parish Plan Steering Group

XXXXXX Parish Plan Development Group

XXXXXX Parish Plan Working Group

XXXXXX Parish Plan Group

XXXXXX Parish Plan Production Group

XXXXXX Parish Plan Focus Group

XXXXXX Village Action Group

3.0 NUMBERS

The number of members on the Steering Group will depend on the size of your community and the size and complexity of the project. Generally somewhere between 8 and 15 members is workable and most Steering Groups tend to work with **10-12** members. Any larger than this and it becomes unworkable, unwieldy and it becomes difficult to move things along, make decisions and keep control. Any smaller than 10 members and you may find that you do not have a sufficient mixture of skills, expertise and talents to do the job. You also need to be able to share the workload so that no one person is carrying the entire load and there is also a need to be able to bounce ideas off one another.

4.0 RELATIONSHIP WITH THE PARISH COUNCIL

It is important to consider and define the way that the Steering Group will work with the Parish Council. We would strongly recommend a **collaborative** and **co-operative** approach, **working together** to achieve a common aim, ie the production of an achievable and realistic Action Plan for the whole community.

We would recommend that there is active representation by the Parish Council on the Steering Group of between **1 and 3 members**. Generally we have found **2** Parish Council members on the Steering Group provides a reasonable balance and representation. These Parish Council members are active participants in the process and not merely on a watching brief.

The Parish Council should not however dominate or lead the entire process, nor should it or the Parish Clerk be expected to do all the work. For this reason the **Chairman** of the Steering Group should be someone other than a Parish Council member (see sections 5 and 13 below).

You do need to remember that it is the Parish Council that will make the application for grant funding and the monies will be paid to the Parish Council initially. You should consider whether you want a formal **reporting** process to the Parish Council such as the Chairman of the Steering Group reporting back to the Parish Council on a regular basis or sending copies of the minutes of the meetings to the Parish Council and having a standard item on the Parish Council agenda for receiving the report or the minutes. You may be happy for the process to be less formal and merely rely on your Parish Council representatives on the Steering Group to keep the Parish Council informed, provided that this actually occurs.

Whatever you decide, you do need to be sure that there is effective **information flow** between the Steering Group and the Parish Council. You cannot work co-operatively and collaboratively without **good communication**. You also need to bear in mind that once the Plan has been completed, the implementation of some of the projects in the Action Plan may need action by and/or support from the Parish Council to achieve them.

5.0 OFFICERS AND ROLES

The essential **Officers** of the group that you need to consider appointing are :

Chairman
Secretary
Treasurer

You may also find it useful to have Vice Chairman who also doubles up and has some other role within the group.

Other Roles you may wish to consider are:

Publicity and media co-ordinator
Volunteer co-ordinator
Production co-ordinator
Youth co-ordinator
Editor
IT specialist

In selecting your Steering Group members, you are aiming for a representative **cross section of the community**, in terms of age, gender, occupation, lifestyle and geography. You also need to involve people with a **range of skills, talents, knowledge and experience**. Some of the skills that groups have found very useful include: IT specialists; writers/journalists; Artists/photographers; researchers; organisers; financial, business and marketing experience, tea makers.

You need to have a good proportion of members who are prepared to **commit to the whole period** of the Parish Plan project, so far as they can, ie around 18 months. You should be honest about how much time each person has available to commit to the project. You may need to admit new members as the project develops and you realise that you need additional skills and expertise or simply more hands.

6.0 RESPONSIBILITIES

Having identified the officers and roles within the Steering Group, you will need to be clear about the responsibilities that go with each role and define what each person is expected to do. Again time commitment needs to be considered here and what it is reasonable to ask of a volunteer. You also need to capitalise on whatever skills your volunteers have, so far as possible and ensure that volunteers are not only fully aware of what they are being asked to do but are also comfortable with the tasks set.

7.0 SIMPLE CONSTITUTION

Examples of draft constitutions for the Steering Group are available, one is produced by the Countryside Agency and the others by us. **Contact the PPDO, Bron Kerrigan, on 01606 881760 or email bron.kerrigan@cheshireaction.org.uk for the PP Precedents Guide, which can be emailed to you or sent in hard copy.** It does not need to be complicated but it does need to deal with the essential and important issues listed below.

Steering Group Name**Purpose and Terms of Reference****Membership** (including election)**Officers** (including appointment)**Meetings** (including frequency, quorum, voting, minutes)**Working or Focus Groups** (including appointment and authority)**Finance** (including recording of expenditure, keeping of accounts, reporting)**Changes to the Constitution** (including the mechanism)**Dissolution** (including dispersal of funds)**8.0 SIMPLE TERMS OF REFERENCE FOR WORKING GROUPS**

If the Steering Group is to work through a series of working or focus groups then you will need to consider setting these groups a clear brief, by way of terms of reference. Examples of terms of reference for individual working groups are available, one is produced by the Countryside Agency and the other by us. **Contact the PPDO, Bron Kerrigan, on 01606 881760 or email bron.kerrigan@cheshireaction.org.uk for the PP Precedents Guide, which can be emailed to you or sent in hard copy.** It does not need to be complicated but it does need to deal with the essential and important issues listed below.

Working Group Name**Purpose****Representation on Steering Group****Working methods****Extent of its delegated authority****Finance position****Timescale and projected budget****Expenditure limits and mechanism for approval****Reporting back to Steering Group-method and frequency****9.0 HANDLING MONEY**

The Steering Group will need to work with the Parish Council, which will initially hold any grant monies, to decide how money will be filtered through to the Steering Group. The Steering Group will need to be clear about the planning, budgeting and expenditure of money and the recording of expenditure and proper accounting, hence the need for a Treasurer to keep the finances in order. If you apply for Parish Plan funding to develop your Plan, the Terms and Conditions of Grant set out in more detail the requirement for proper accounting and a final, financial statement at the end of the project, as this is public money for which the Steering Group and the Parish Council are accountable.

10.0 VOLUNTEERS

The Steering Group will need to give volunteers a clear brief as to what is required of them, in terms of tasks set, their authority, time spent and budgetary control. A clear policy on the claiming and refunding of expenses is important and needs to be publicised widely amongst all volunteers at the outset. It is wise to set clear limits on what volunteers may spend and what prior approvals they need for items of

expenditure. Everyone involved in the project needs to understand what they are being asked to do, what role they are being asked to take and how far they are entitled to go. Setting these parameters is important from the outset. Having a Volunteer Co-ordinator may also be helpful in encouraging and managing the work of the volunteers.

11.0 SELECTING THE STEERING GROUP VOLUNTEERS

A simple application form for volunteers is a good way to find out what experience and skills people have to offer. Asking applicants to explain in a less than 50 words or 5 short lines why they want to serve on the Steering Group can also be very illuminating. Simple Volunteer Forms are available – **contact the PPDO, Bron Kerrigan, 01606 881760/email bron.kerrigan@cheshireaction.org.uk for the PP Volunteer Guide, which can be emailed to you or sent in hard copy.**

Always remember to say thank you to people who volunteer, whether or not they are selected. If volunteers are not selected for the Steering Group, try and secure their help for a working or focus group instead or some other useful function, such as critical reading of draft documents, piloting questionnaires, delivering information.

12.0 USING EXPERTS FROM THE COMMUNITY

You may also find it useful to establish contact with a range of other ‘experts’ who are not on the group but who can be called on to share their experience and for guidance and advice. Examples of such other experts might be, people who represent ‘hard to reach’ sections of the community, such as the elderly, housebound or disabled, (eg Age Concern) young people (eg a local Youth Worker) and ethnic minorities. Other examples might include organisations or bodies that have an impact on the community such as the Local Authority, transport bodies, the Primary Care Trust, the Police, local Landowners like the National Trust, local retailers and businesses and a wide range of special interest groups.

Neighbouring Parish Councils may have carried out a similar project or have shared/common issues and be able to offer guidance and support. It is worth making these links at an early stage and keeping them going throughout the project and beyond into the implementation stage when these partnerships may become even more important and enable you to implement the actions from your plan. A simple Contacts List is available in this Guide.

13.0 THE FIRST MEETING OF THE STEERING GROUP

13.1 Getting to Know You

You will need to use some of the time at this first meeting to get to know each other and find out what skills, expertise and knowledge you each have and can bring to the group. A simple round the room, self-introduction exercise can be helpful. This can be followed up with a tick the box style Skills Audit and Skills Audit Form is available for this purpose in this Guide. Volunteers should be honest about the type of role they are prepared to undertake and realistic about the time they are able to

commit to the project. It is always better and fairer to the Steering Group to under promise and over deliver, than over promise and under deliver!

13.2 Chairman

Having spent some time finding out about each other you can then begin the process of electing your main officers. You will need to elect or chose a **Chairman**, who is **not** also a member of the Parish Council. You want someone who will encourage and manage debate fairly, keep people to the agenda, watch the time and have an open mind. It needs to be someone committed to the project, who can provide focus, drive and encouragement. It should not be a member of the PC nor should it be someone with their own agenda.

13.3 Secretary

You will also need a **Secretary** as it is not the job of the Parish Clerk to act as secretary to the Steering Group. The Secretary needs to be well organised and thorough with the paperwork, someone who will take and produce minutes, agendas and other necessary paperwork. A good central filing system for all the data you will collect over the course of the project is important and needs setting up from the outset. It is essential to record everything in a systematic way from the start otherwise it can become overpowering at a later stage.

13.4 Treasurer

You will also need a **Treasurer** who is well organised and thorough with the financial planning, budgeting and recording of expenditure and income and who will keep proper accounts and a firm but fair rein on Steering Group funding. The Treasurer will be instrumental in applying for funding and putting together and handling the budget for the project.

13.5 Name and Constitution

The **name** and **constitution** of the Steering Group needs agreeing, including its terms of reference or less formally its aims and objectives. The frequency of meetings, voting rights and working methods all need to be agreed. This will not happen overnight and it may take a few weeks to settle on the Steering Group and its aims and objectives. It is important not to move ahead until these fundamentals are in place and you have generated enough support, representation and interest across the community to begin the process.

13.6 Building Structures and Foundations

Some of the questions that the Steering Group may find it useful to consider at its initial meeting/s are:

What is the purpose of undertaking a Parish Plan?

What are our aims and objectives?

What are we hoping to achieve by producing one?

What will the scope of our Parish Plan be?

How will we go about finding out what we need to know?

What methods and techniques will we use?

How do we formulate a plan of action and a programme of work?

How will we keep our community informed?

How will we keep our community interested?

How will we keep the Parish Council informed?
How can we encourage our community to participate in the process?
How will we liaise with the Local Authority?
How will we liaise with other bodies and organisations?
How long will it all take realistically?
How much time do we each have to devote to this project?
How much responsibility do we each want to take on?
How will we record the data we collect?
Where will we keep the data and information we collect?

You may not find the answer to all of these questions at the first meeting but in the first few weeks of the project these are the type of issues you will need to get to grips with.

14.0 SETTING UP WORKING GROUPS

The Steering Group is not expected to do all the work and will probably need to work through working groups that focus on a given subject or topic. Some of the commonest topics that appear regularly in Parish Plans are as follows:

Communication	Community Safety
Community Services	Community/Social Needs
Community Spirit	Economy/Employment Needs/Business
Housing/Accommodation Needs	Land and Built Environment
Natural Environment	Recreation/Sport/Leisure
Transport/Traffic/Travel/Highways	Tourism

Once the Steering Group has identified the main topic areas for investigation and consultation through the open meetings, mini surveys, post card or post it note exercises, X10 exercise, etc, it will need to set up the relevant working groups to cover the main topic areas. As explained above each working group will need to be given a clear brief and the best way to do this is by means of written Terms of Reference.

15.0 DESK TOP AND WIDER RESEARCH

You will find it useful to do some desk top and wider research about your Parish before you begin the detailed consultation. You can start by pulling together as much information about the Parish as you can, including the outcomes of previous surveys (eg housing needs, transport), historical publications, census information, Parish Maps, Village Design Statements, Parish Landscape Assessments, business directories, information leaflets and local publications. Your Local Authority should be able to help and support you with some of this information and we would urge you to make contact with them straight away.

16.0 FOCUS ON SECURING FUNDING

It is important to focus on funding at an early stage in the process because securing funding will be key to the success of the project. Whilst the Parish Plan Starter Grant can be used to cover expenditure retrospectively, the Parish Plan Development Grant

cannot be used in this way. You may only use this Grant to fund expenditure incurred after you receive the funding. You would therefore be wise to delay any large items of expenditure until after you have secured your Development Grant. In order to apply for this funding you will have to produce both a fully costed budget and a programme of work and events to demonstrate how you intend to carry out your project. The application for funding is therefore carefully designed to make you plan ahead and budget.

There is often a tendency for Steering Groups to start drafting questionnaires immediately, but you would be well advised to put this on the back burner for a couple of months until you have put in place firm structures and foundations for the Steering Group and Working Groups, done some serious research, planning and budgeting and made contact with relevant bodies, individuals and agencies, who may be able to help you in the process. This preparatory and foundational work will pay dividends in the long run.

17.0 COMMUNICATING

You will need to consider how you will communicate with each other as a Steering Group and set up a system. A full list of Steering Group members with their addresses, telephone numbers and email details is a must for all members of the Steering Group, Working Groups and Parish Council. It is also important to pass this on to the Parish Plans Development Officer at Cheshire Community Action.

You will also need to consider how you will communicate effectively with your community and keep them informed of your progress. It is vital that having created a head of steam and interest within your Parish that you continue to feed this regularly with updates. Let people know what you are doing and why at all stages. Make sure that residents know how to contact the Steering Group members and how they can find out about how the project is progressing. A range of methods is often important as different sections of the community will be more likely to use some methods than others.