

Fishermen's Associations

Toolkit



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The
FISHMONGERS'
Company's

FISHERIES CHARITABLE TRUST

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FOREWORD

The Fishmonger's Company has played a leading role in upholding standards within the fishing industry for over seven hundred and fifty years and we are delighted to present this toolkit, which we hope will help people organise themselves in support of flourishing and sustainable local fishing communities.

Working together for mutual benefit is a value we hold dearly, and can be a powerful way to face challenges together and to make a difference. There are some great examples of how other people have made this happen in this guide. However, good intentions are not enough, and we know from experience that creating and running successful community associations can be hard work. Therefore, we have brought together experience and insight from good practice across the UK to develop this toolkit.

Why are we doing this? Well, we believe self-organised local fishing communities are at the heart of a flourishing fishing industry. Furthermore, giving local fishermen a voice in the decisions that affect them, particularly around the sustainable management and use of the marine environment is vital for the prosperity of the fishing industry and of our island nation.

We would therefore encourage you to use the practical guidance and tools in this toolkit to help you think through the best way to develop strong local fishermen's associations. Self-organising associations have always been a vital part of the fishing industry. We think that this toolkit will help you build a better future for your local community.

Good luck on your journey and let us know how you get on.



Alison Freeman
Fisheries Programme Manager, Fishmongers' Company's Fisheries Charitable Trust

THE FISHMONGERS' COMPANY

One of the Great Twelve Livery Companies of the City of London, the Worshipful Company of Fishmongers has been closely linked to London's Fish Trade for well over 750 years.

Today the Company's Fisheries Charitable Trust supports a wide range of projects and grants spanning education, conservation, fisheries, aquaculture and the seafood trade, to build and safeguard a prosperous and sustainable fishing industry, for the benefit of those engaged in it, and the wider environment.

WHO IS THIS TOOLKIT FOR?

This toolkit is for anyone thinking of setting up a group to improve the lives and wellbeing of fishermen and others in the fishing industry, and to enhance the sustainability of fishing in the UK.

We think that there are significant benefits in bringing people together to form a representative organisation or association. However, setting up an organisation can be a daunting and challenging process.

This toolkit builds on the experience of other groups who have come together to help achieve common aims for fishermen. It provides a step-by-step guide to the essential elements of creating an appropriate structure and running a successful organisation. It will help you navigate the sometimes-complicated regulatory landscape and ensure that the organisation you develop is fit-for-purpose.

WORKING FOR A SOCIAL PURPOSE

There are many reasons why you might want to come together as a group, and this toolkit will look at a variety of different models and explore their pros and cons. However, this toolkit primarily focuses on groups who are working for a social purpose, i.e. for the benefit of the community as a whole,

rather than for the personal interest of individuals. For this reason, this toolkit is not for those who want to further purely commercial interests, nor for those whose primary aim is to lobby for change in legislation.

Social Purpose

Social Purpose is a broad term that covers a range of different activities that benefit the community at large. A social purpose organisation has two main characteristics.

Firstly, its primary focus is broadly-speaking 'making the world a better place' rather than creating a profit. 'The world' in the context of this toolkit may be as small as a local fishing community, or it could be as large as the whole of the fishing industry. Its second main characteristic is that it works for the benefit of the community as a whole, rather than for individuals, although obviously individuals benefit when a community benefits. We will explain more about this later on in this toolkit.

Commercial interests

In contrast, fishermen might want to work together primarily for commercial reasons, for instance to share the ownership of equipment or facilities, to share processing facilities, or undertake joint marketing or distribution. This is, of course, a perfectly legitimate option, but it is outside the scope of this toolkit, as the primary purpose of the organisation would be to further the commercial interests of the individual members and/or businesses involved rather than furthering a social purpose. In most cases the most appropriate legal structure for such groups would be to form a business partnership, co-operative (mutual benefit society), or a limited company.

Political campaigning and/or lobbying

Similarly, a group of fishermen might want to organise with the primary reason of opposing a particular piece of legislation or policy or to support or oppose a particular political party. Again, this is legitimate activity but is outside the scope of this toolkit because the legal structures we will look at

will not permit overt political campaigning. For example, political parties and pressure groups, or companies owned or controlled by them, cannot become Community Interest Companies.

There is often quite a fine line between a social purpose approach, a commercial approach and a political approach, and in fact a social purpose organisation may well benefit the commercial interests of the fishing community, and be involved in a certain amount of lobbying of decision-makers. However, it is all in the scale and primary focus of the organisation, and this will be explained later.

A STEP-BY-STEP APPROACH

This toolkit will take a step-by-step approach to guide you through the process of setting up an organisation. At each stage we will suggest tools and resources you can use to help along the way. The toolkit is interspersed with three case studies which tell you how other groups have done it.

Step 1 - Your Idea: This is all about clarifying your ideas. We will look at the pros and cons of setting up an organisation; the different reasons people may have for coming together, and suggest ways to involve other people.

Step 2 – Preparation: This is about identifying the right organisational structure for what you want to do, and putting in place the necessary governing documents.

Step 3 – Early Stages: This is about putting in place the building blocks for your new organisation, appointing trustees or directors, starting to develop a business plan, and looking at finances.

Step 4 – Deliver: This is the final stage in which you are beginning to deliver against your objectives, identifying the resources and funding you need to deliver, and putting in place processes to measure your impact.

STEP BY STEP GUIDE



STEP 1 YOUR IDEA

WHY SET UP AN ORGANISATION?

FINDING YOUR 'WHY'

INVOLVING PEOPLE AND BUILDING CONSENSUS

STEP 2 PREPARATION

DEVELOPING YOUR VISION, MISSION OR PURPOSE

CHOOSING A LEGAL STRUCTURE

STEP 3 EARLY STAGES

APPOINTING TRUSTEES, DIRECTORS OR MANAGEMENT COMMITTEE

DEVELOPING A SIMPLE BUSINESS PLAN

STEP 4 DELIVER

APPLY FOR FUNDING

DELIVERING ACTIVITIES

MEASURING AND PROMOTING IMPACT





STEP 1

IDEA

Step 1 is all about clarifying your ideas - Why do you want to set up an organisation? What is it you want to do? Are there others who can help you to achieve this?

1.1 WHY SET UP AN ORGANISATION?

The first question is a very important question: 'Why set up an organisation at all?' This is important because setting up and running an organisation can be hard work. So, you need to be clear why you are doing it, and what benefits it could bring.

Benefits

There can be many benefits of setting up a legally-recognised organisation, for instance:

- It brings together like-minded people to pursue a common goal
- It helps you achieve your common purpose, as you can often do more together than you can do on your own
- It creates an organised representative body, that can bring together the voice of local people and communities of interest, and which is therefore more likely to be listened to
- It limits your liability as an individual – this is particularly important if you are planning to employ people, rent or own property, hold significant assets, or enter into significant contracts with third parties – which all have legal responsibilities
- Taking on a recognised legal structure indicates to backers and potential funders that you are a serious organisation working for the benefit of the community.
- Dependent on the structure, you can apply for grant-funding to help you start-up or for specific projects.
- To ensure public accountability and transparency of operation.

Challenges

On the other hand, there are some challenges that come with creating a new organisation, such as:

- The process of setting up an organisation can be quite daunting – there are lots of different options that can get quite confusing.
- After the initial flurry of activity, maintaining the interest of members and stakeholders can be difficult.
- Finance and sustainability – once the organisation is up and running, you will need to continue to raise income year after year for the continued working of the organisation, and this in itself takes time and effort, whether this is through attracting grant funding, membership fees, or generating income through trading goods or services.
- It takes time and resources to manage an organisation and meet the demands of regulatory bodies such as Company House, The CIC Regulator, Financial Conduct Authority or The Charity Commission.
- Some of the requirements can be quite bureaucratic, such as filling in annual reports and returns and sorting out HMRC reporting. Some reporting requirements may incur costs such as completing annual financial accounts.

You need to carefully weigh up the challenges and benefits of setting up a new organisation before setting off on this journey. Indeed, for small-scale or time-limited projects there may be no need to set up a formal legal structure at all.

If what you want to do will not create significant financial commitments, or is focused on a single event or time-limited project, you may well be better remaining as an informal group (known legally as an 'unincorporated association'). This gives you greater flexibility in what you can do and how you do it, but has limited accountability and may not be appropriate if you need to take on significant legal or financial commitments.

1.2 FINDING YOUR 'WHY'

Before forming your own group, it is important to understand why you are doing it, and what is it you are trying to achieve. Two key questions you need to ask at this stage are:

- What is the issue or need you want to address?

OR

- What is the problem you want to solve?

There may be many reasons why people set up a group, but broadly speaking they fit into four main areas – social issues, cultural issues, economic issues or environmental issues.

Social issues, for example:

- Improving fishermen's welfare
- Supporting and improving fisherman's health and wellbeing
- Improving fishermen's education and training, e.g., supporting apprenticeships, health and safety training, skills development, etc
- Improving safety at sea
- Advancing inclusivity, e.g., supporting women's involvement in the industry; supporting new entrants into the industry; supporting young people into the industry, etc.

Cultural issues, for example:

- To celebrate the local fishing industry and its rich history
- To record and preserve the unique cultural heritage of local fishing communities
- To promote awareness of the local fishing industry amongst the wider community.

Economic issues, for example:

- Regeneration of coastal and fishing communities
- Stimulating the local fishing economy, e.g., promoting the consumption of locally sourced seafood
- Providing accessible loan schemes for fishermen
- Advancing shared economic interests, although the economic benefit must be for the community as a whole, and not for individuals or individual businesses.

Environmental issues, for example:

- Preserving local fisheries
- Ensuring the sustainability of local fisheries
- The protection of particular species or habitats
- De-carbonisation of the fishing fleet

Many groups have several things they want to achieve covering all four areas. And that is fine, but it is good to be clear and prioritise your most important aims as these become the official 'purposes' for your organisation that get written into official documents. You might want to undertake a prioritisation exercise with your key stakeholders, to understand their different viewpoints (see Prioritisation Exercise Tool below, page 40).

1.3 INVOLVING OTHER PEOPLE

Although there is usually a small number of 'doers' at the centre of any organisation, it is important at the beginning of the process to bring together a wider group of like-minded people who may be able help you along the way. Not only is it good to test your ideas and build consensus across a wider group, but they may be the very people who can offer practical support and expertise. Holding a public meeting of fishermen and others involved in the local fishing industry is often a good idea at this point. This will give you an opportunity to explain your ideas and your vision, build a shared sense of purpose and get a wider group of people signed up to the project.

There are a range of ways you could do this:

- Use your local contacts to canvass opinion – simply talk to local people involved in the fishing industry
- Host an open, public event and promote it far and wide
- Host a smaller, more targeted invitation-only event
- Run a short consultation online using Google Forms or SurveyMonkey type software
- Create a group online using social media like Facebook, LinkedIn or Twitter and invite people to join this.
- Hold individual meetings with key people you think might be interested

You also need to think about who else might have an interest in the group. These are usually known as your 'stakeholders'. A stakeholder could be any individual, community group, business or organisation, political or otherwise, with an interest in the outcome of your project either as a result of being affected by it positively or negatively or by being able to influence the outcome of the activity in a positive or negative way. Identifying who could 'put a spanner in the works' is just as important as knowing who might help you.

Think about who in the local community could be affected by your ideas, both those directly involved in the fishing industry and the many others who could be indirectly affected:

- Local businesses who provide services or products
- Local retailers
- Local hospitality sector – cafes, restaurants, hotels etc.
- Regulatory bodies
- Research institutions like universities
- Important 'decision makers' or influential people in your community
- Your local MP
- Local Councillors
- Journalists and local media contacts
- Policy-makers in local councils and other representative bodies etc.

You may like to use the Stakeholder Analysis tool to help you identify who you need to talk to and what their influence could be on the group (see Stakeholder Analysis Tool, page 41-42).

CASE STUDY 1

PLYMOUTH FISHING AND SEAFOOD ASSOCIATION

www.pfsa.uk

LEGAL STRUCTURE:

Community Interest Company

GEOGRAPHICAL AREA:

Plymouth and surrounding area

CONTACT:

hello@pfsa.uk

Membership

The company has a wide group of stakeholders, extending from those who are directly involved in the fishing industry to others who have an interest in the marine environment and in seeing the local fishing communities sustained and revived. The company's primary stakeholders are the fishers and everyone who is part of the fishing industry on shore, including fish processors, fish traders, fish merchants, the auction house, engineers, equipment suppliers, and other service providers. The PFSA Directors are comprised of members from the catch (recreational and commercial), seafood processors and retail and NGO sector. We also have an open membership for others working in or involved with the seafood industry in Plymouth. We currently have around 60 members.

Objectives

To enable the fishing communities in and connected to Plymouth to secure a socially, environmentally, economically and culturally sustainable future whilst protecting the marine environment for all.

In support of this, the PFSA's strategic objectives are:

- An environmentally sustainable and diverse

local fishing industry which underpins the economic and social regeneration of local fishing communities.

- Community based co-management of fisheries sensitive to the economic and social needs of fishing communities whilst contributing to improving the health of our oceans.
- Rebalancing the social and economic inequalities experienced by and within fishing communities.
- Reducing the carbon footprint of the fishing industry, working towards net zero and enabling Plymouth's fishing industry to be better positioned to adapt to climate change.
- More seafood caught locally from well managed fisheries are sold and consumed locally and within the UK.
- Better informed marine science and research, which draws on the expertise and knowledge of the fishing industry.
- Improved safety at sea

Activities

- PFSA is currently involved in the following activities:
- Working with Plymouth City Council and Sutton Harbour Group to ensure local fishing fleet has access to suitable infrastructure,
- Working with Plymouth City Council on a Sustainable Seafood project to increase the retail and consumption of local seafood.
- Working with partners to reduce local fishing businesses' carbon footprint and adapt to climate change.
- Working in partnership with local and national academic institutions to better inform marine science and research, particularly with regard to local management of fish stocks.
- Working with other organisations and support agencies to improve safety at sea.





STEP 2

PREPARATION

2.1 DEVELOPING YOUR VISION, MISSION AND PURPOSE

One way of describing what you want to do is to write a simple vision or mission statement. These will form the basis for your governing documents and business plan. (Use the Vision and Mission Statement Tool on page 43 to jot down your ideas).

Vision

Writing a vision statement is a powerful way of describing what the world would 'look' like if you are successful in your work. This would be the ultimate dream or aspiration you have. It's a powerful statement of 'why' you exist as a group. Examples from the industry are:

"A vibrant, profitable and diverse fishing industry providing social and economic benefits to coastal communities, such as Plymouth, with the industry playing a major role in safeguarding the marine environment for future generations"

Plymouth Fishing and Seafood Association

"A prosperous future for our seas, coasts and communities"

Marine Management Organisation

Mission

A mission statement is more practical than a vision statement – it is essentially a statement of what you are trying to do to accomplish the vision. For example:

"To promote a flourishing fishing industry and healthy fulfilled lives for people and initiatives in need of support, by the best use of the broad range of resources at our disposal"

The Fishmongers Company

"To provide practical welfare and spiritual support to active and former fishermen and their families"

The Fishermen's Mission

Purpose

You might prefer to write a simple statement of 'purpose' – i.e. stating the reason for your organisation's existence. Vision/mission/purpose are interrelated and reflect each other.

Values

Once you have established your purpose you might want to also think about what's important to you in how you deliver your work, for example, to you want to be inclusive, accessible, compassionate, supportive, transparent, etc whilst delivering your work. These values underpin your activities.

2.2 CHOOSING A LEGAL STRUCTURE

The structure you choose will depend on what you want to do, how you want to do it and who is involved. There is no one legal structure which is appropriate for all groups, they all have their advantages and disadvantages. The key questions to ask here are:

- Who will 'own' the organisation?
- How will the organisation benefit the community?
- How do you propose to raise money?
- Do you expect the organisation to employ people, or own assets?
- Who will make decisions?

We will look at these in more detail below. There is also a 'Legal Structures at One Glance' Tool on page 19 which may help you to decide on a structure.

Ownership

It is important to consider who 'owns' the organisation, i.e. is it a small group of individuals or a wider group of members. We expect that for most fishermen's associations it will be the latter. However, sometimes small groups do get together to deliver projects.

Owners can be called different things, for example, shareholders, members, guarantors, etc. These are usually the founders of the organisation. Membership is usually open to anyone who wants to

further the aims of the organisation, but not always. It is up to you to set the membership criteria for your organisation.

Linked to this is owners' liabilities. In an unincorporated association the members have unlimited liability because the organisation is not a legal entity and has no 'legal persona'. This may open the members to legal or financial risks if things go wrong. In companies the members have limited liability. The company itself has a legal persona and the liabilities are limited usually to a small amount like one pound.

Community Benefit

We have discussed vision and mission in the previous section. If the purpose of the organisation is exclusively charitable than registering a charity could be a good way forward. A list of charitable purposes can be found here:

www.gov.uk/government/publications/charitable-purposes/charitable-purposes

If the aims are not exclusively charitable, other structures such as Community Interest Companies could be more appropriate.

Raising Money

Thinking about the financial model for the organisation is important at this stage and will have a bearing on the legal structure you choose. A key thing to consider is how will the organisation make money? If it will be reliant on grants, donations and more traditional fund-raising, a charity is usually the best way to go as charities get significant tax breaks such as gift aid on donations and can access more grants than other legal forms.

If income will be more of a mix of some grants and some trading or contracts, then a CIC could be a more flexible option. Charities can receive income from trading but there are important trading restrictions to consider. See Charity Commission for more information on this.

Another consideration is how will any profits be used? In most of the legal structures we are looking at, profits are usually kept in the organisation and used to fulfil the community purpose rather than being distributed to members. Some CICs,

however, can provide a limited dividend to private shareholders.

For further information on funding, please refer to the Fishing into the Future's Porthole Website: www.fishingporthole.co.uk/learn/accessing-funding/

Employment and assets

If you think the organisation will grow quickly and employ people or take on significant assets, it is probably best to use an incorporated structure straight away. The risks and potential liabilities can become too big, too quickly such that the members usually want some degree of limit on their personal liability. Structures such as CICs, Charitable Incorporated Organisations provide this limited liability.

Decision Making

Usually, the members of the organisation appoint or elect a smaller group of people to run the organisation on their behalf. This smaller group can be called different things such as management committee, board of directors or group of trustees. Day-to-day decision making is usually done by this group of people. Major decisions such as changes to purpose and direction can still be reserved for the wider membership. Directors and trustees may run the organisation themselves or they might appoint staff to run the organisation. Staff report to the directors who are accountable to the members. It is important to set out decision-making powers as the organisation grows (see Governance section below).

The second step is about making some key decisions about organisational structure and direction, and formalising your ideas by getting it down on paper.

2.3 GOVERNANCE AND GOVERNING DOCUMENTS

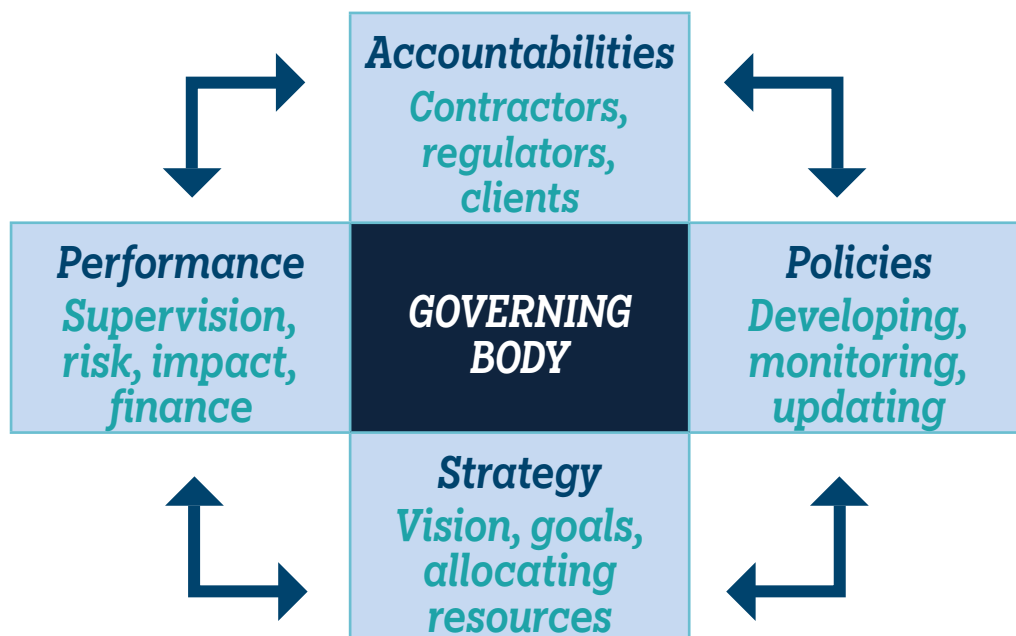
Governance is a broad topic but is often defined as the 'system that provides a framework for managing organisations'. This 'system' identifies who can make decisions, who has the authority to act on behalf of the organisation and who is accountable for how an organisation and its people behave and perform.

Governance enables organisations to run legally,

ethically, sustainably, and successfully, for the benefit of stakeholders, including members, staff, clients and customers, and for the good of wider society.

The central 'governing body' has ultimate responsibility for the governance of the organisation.

Governance can be broken down into the following areas:



Governing documents

Different types of organisations have different governing documents. These are sometimes called articles of association (if a company), a constitution (if a smaller community group) or a trust deed or set of rules. Whatever the name, this is an important foundational document that sets out the key terms of reference for the organisation – how it is run and its purpose.

Policies and procedures

As you grow it will be important to develop policies and procedures to help govern the organisation. Many funders and other partners will expect certain policies and procedures to be in place such as financial management, health and safety, equal opportunities, staff management, safeguarding, etc. You can often download template policies from the internet. These are a good starting point but will need to be amended for the organisation and kept up to date as the organisation develops.

Insurance

You will, in all likelihood, need insurance to run your organisation. Public Liability Insurance is an important basic insurance to acquire. Other insurances like professional indemnity or employers' liability may become relevant as you develop and may depend on the nature of your work. You can also get trustee indemnity insurance which can provide some cover for the people on the management committee. Some links to insurers can be found in the additional support section of this toolkit.

CASE STUDY 2

CLYDE FISHERMEN'S TRUST

LEGAL STRUCTURE:

Scottish Charitable Incorporated Organisation

GEOGRAPHICAL AREA:

Wider Clyde and the west coast of Scotland

CONTACT:

contact@clydefishermenstrust.com

Objectives

The trust's charitable purposes are the:

- Advancement of education
- Advancement of citizenship or community development
- Advancement of the arts, heritage, culture or science
- Providing heritage education projects to primary schools
- Celebrating the history and cultural heritage of ring-net fishing
- Art and creative projects with local communities

Activities

The Trust supports a range of projects and initiatives (see their website for details) including:

- Science and Policy
 - Conducting surveys of fish stocks
 - Developing a strategic vision document for the Clyde Fishery
- Arts, Culture and Heritage
 - Organising an annual 'Festival of the Sea'
- Training
 - Providing support, equipment and transportation for the diversification of local fish markets
 - Helping to provide pre-employability training courses
 - Courses for new entrants into fishing





STEP 3

EARLY STAGES

Step 3 is about putting in place some of the basic building blocks for your organisation. Key to this will be appointing the right people to lead your organisation, and developing a business plan which will set out how you will achieve your objectives.

3.1 APPOINTING TRUSTEES, DIRECTORS OR MANAGEMENT COMMITTEE

It is important to make sure that the people you have on your board are the right fit. They not only need to be passionate about what the organisation is trying to do, but they also need to be committed and have the capacity to put in the time necessary to support the organisation, particularly in its early stages. You also need to think of the mix of skills, experience and qualifications across the board.

Look around the group of people who are already involved. If there is a glaring gap in skills or need for specialist expertise, you should rectify that gap by appointing someone on your board early on.

It is also possible to set up a board of advisors. They may not be as formal as your actual board of directors, trustees or management committee and they will not have any of the same legal duties. They can act as advisors and even ambassadors for your initiative. Such advice could be unbiased, it can help you solve problems and can give you advice on a wide range of topics such as marketing, sales or different types of finance available. Make sure you have the right balance of people to help you begin.

Things you need to think about:

- What skills and experience are needed?
- What are the skills/experience of potential members of the board? Are they the right mix?
- Where can we find those skills and experience?

3.2 DEVELOPING A SIMPLE BUSINESS PLAN

As you begin to bring the building blocks of your organisation together, you will need to start writing down the key elements that define your purpose and direction. Writing a simple business plan can be a useful way of focussing hearts and minds on what the organisation wants to do and how it wants to do it. It is important to consider who the plan is for: Is it an 'internal' document i.e., only for people inside the organisation to see? Or is it an 'external' document

– one that will be sent to people and organisations outside of the organisation.

On the pages overleaf are two tools you might like to use to start with. The first is a One Page Strategic Plan Tool. This can be a useful way of bringing together your vision and mission with your objectives and activities in a simple format and making sure they are all aligned. This could then be edited or graphically designed to be used with a wider audience.

The second tool is a One Page Business Planning Tool. A business plan is more operational than a strategic plan, and looks in more detail at what you are going to do, how you are going to do it, and the resources needed to achieve it. The text only needs to be brief and understandable by yourselves.

This one-page business plan may be all you need initially to outline key directions for your trustees or management committee; but over time you will need to add more details to meet the needs of different audiences.

As you develop your ideas, your business plan will grow, but there is no one-size fits all, and depends on what you want to do with it. A business plan can be anything from a one-page sheet of paper, to a glossy fifty-page document that could be sent out to funders and partners to try to win investment or support. It could even be presented as a film or a set of statements on a website.

There are various templates you can use for a fuller business plan, but in short, a business plan should contain the following elements:

- Executive summary
- Description of the business – vision/mission/values/purpose
- Description of the problem or the need being addressed
- Statement of activities – what is being done, where and how (the 'operations' of the organisation)
- Marketing plan
- Fund-raising plan
- Biographies of key people involved

- Budget or cashflow forecast for the period the plan covers.

At the stage you need to write a fuller business plan to attract investment and financial support, you may need the expertise of a specialist organisation such as your local Business Support Network to help you. Details of supporting agencies are given at the end of the toolkit.

3.3 BANK ACCOUNTS AND BASIC BUDGETING

Bank accounts

A first step for any organisation is to set up a bank account in the name of the group. This enables the organisation to attract funding and finance and pay for things it needs. Most of the major banks have accounts specifically for community groups. There are also specific ethical banks such as Unity Trust Bank, Triodos Bank and The Co-operative Bank.

Many banks can take a long time to set up accounts and it is often a time-consuming process to gather all the information they require. We suggest allowing at least two months between applying for an account and successfully opening it.

Financial management

Sound financial management is crucial for the successful running of any organisation. This is usually broken down into the following areas:

- Bookkeeping – a daily record of money in and out
- Annual accounts – formal yearly accounts necessary for your regulator e.g., Companies House, Charity Commission, Financial Conduct Authority, etc.
- Budgeting – usually a yearly projection of income and expenditure
- Cash flow forecasting – usually a twelve-month breakdown of how money comes in and out of the organisation per month. This is extremely useful for planning any seasonal financial pinch points and or gaps in income generation
- Management accounts – usually a quarterly

report for the management committee summarising cash-flow, budget, actual spending versus forecasts, etc.

- Procurement and payments – how things are bought and paid for, checks and balances in the system.
- Financial policies and procedures – description of how money is managed in the organisation.

There are some financial management tools provided in this toolkit. The two most basic are a budget, which tells you how much you think are going to spend, and a simple cash-flow forecast, which projects the flow of money in and out of the organisation over a year. Both these are provided on the following pages. It is important to stress that the complexity of your financial management should be proportionate with the work you are doing and the levels of money flowing through the organisation. No-one would expect the same level of scrutiny for a multi-million-pound organisation with public sector contracts compared to a small group earning under ten thousand pounds a year from small local funders.

CASE STUDY 3

REAF

www.reafcic.org

LEGAL STRUCTURE:

Community Interest Company (CIC)

GEOGRAPHICAL AREA:

Norfolk, Suffolk and Essex

CONTACT:

admin@reafcic.org

Objectives

- REAF is a community-led group that is seeking to regenerate and revitalise the local fishing industry for the benefit of coastal communities and the people of East Anglia.
- REAF was initially set up in response to the opportunities and challenges created by the UK's departure from the EU's Common Fisheries Policy but has ambitions to set up a number of projects to benefit local fishermen.
- REAF CIC is a growing membership organisation that represents the interests of the fisheries and seafood sector in East Anglia. Members and partners include fishers, processors, government, and non-government organisations, and individuals working.

Activities

- REAF is currently reviewing its priorities and activities. For further details, see their website.





STEP 4

DELIVER

Once you have got the building blocks in place, now it is time to focus on delivery.

4.1 APPLY FOR FUNDING

Once you have a rough budget in place, you'll need to think about how you will raise the income to cover the costs and deliver the work you want to do. Developing a funding strategy is a good first step. The tool provided on page 47 will help you plan the mix of your income – from donations and grants through contracts to open market selling goods and services. You may find that you are overly reliant on one source of income or that it is hard to raise income from another source.

Trying to diversify your revenue will help the organisation be more sustainable. Use the tool to help develop a plan for how you will achieve income in one, two or more of the columns.

If you are seeking income from any of the sources mentioned in this toolkit it is important to develop a clear plan for how you will go about doing this. For example:

- Researching appropriate grant funders and donors and noting any deadlines
- Gathering all necessary technical information to make a bid such as financial details, constitution, project or business plan, etc.
- Writing and submitting the funding bid
- Acting on any questions or requests for more information from funders

Many funders want to see evidence that you have consulted and engaged the community and the beneficiaries you will be working with so doing this at an early stage is an important way to improve your chances of success.

You will not win all the funding bids you apply for. If you are unsuccessful, try to gain feedback and act on any comments the funder makes. It may be that you submitted a good bid but that there simply was not enough money to fund everyone. However, a well-planned and written application that aligns closely with the funder's priorities has a good chance of success.

There are many resources to help with fund-raising. See the list in the 'additional support' section of this toolkit.

You may also be seeking contracts with other organisations and/or the public sector. Sign up for tender advertising websites in your area and tailor these to your organisation. You may spot opportunities to win commissions alone or enter into partnerships with other organisations to win bids.

4.2 DELIVERING ACTIVITIES

Once you have received funding then comes the hard work of delivering the project. You may need to employ staff and develop risk assessments for any activities. It is important to read the terms and conditions of any grant or contract carefully and note any financial requirements.

Undertaking a risk assessment for the project (and the organisation as a whole) can be useful to understand what the main issues for delivery are, how likely they are to happen and the impact if they did happen. You can also develop mitigation plans to try to stop the risk happening in the first place and contingency plans for what to do if that risk does occur.

You should plan project delivery carefully and put in place good processes for supervision of staff, project management reporting and management committee oversight of the work. Always talk to your funder or contract holder if things aren't quite going to plan or if unexpected changes occur as you may be able to agree changes to budgets or delivery targets with their consent.

IMPACT	HIGH	DETECT & MONITOR	PREVENT/ HIGH LEVEL SCRUTINY
	LOW	LOW LEVEL CONTROL	DETECT & MONITOR
		LOW	HIGH
		LIKELIHOOD	

4.3 MEASURING AND PROMOTING IMPACT

Measuring and shouting about the impact you have as an organisation is critical to both winning future funding and fundamentally delivering on your purpose as an organisation. Successfully tracking and celebrating your impact can also help motivate and inspire staff and volunteers and help you gain partners. Understanding the difference your organisation makes and why is also important for improving the quality of your work.

The social impact tool on page 48 is a useful starting point. This sets out a logical plan that links the needs in the community with your activities, the results you expect and the longer-term impact you hope to have.

Monitoring and measurement processes can include:

- Event feedback forms (online or paper)
- Surveys of clients and beneficiaries
- One-to-one interviews with clients and beneficiaries
- Focus groups with clients and beneficiaries
- Case studies
- Quotes

It is important to develop a clear sense of what you are trying to do and why (vision/mission) and the best way to track the difference you want to make. Social impact management methods should be commensurate with the complexity and size of the projects you are delivering. If you are delivering a multi-million taxpayer funded contract for your local council there will be a higher degree of scrutiny than for a small grant from a local funder.

There are many different social impact frameworks and methodologies you can adopt. It may be simpler to start with your own bespoke system and develop as you grow. The key thing is to start somewhere and celebrate what you can and aim to improve your social impact work as you go.

This toolkit assumes that most people using this guide will be setting up social or environmental purpose organisations so being able to show the impact you are having is fundamental to your vision and mission as an organisation.

You can also embed social impact concepts into staff and volunteer supervision and in management and board meetings. That way social impact is rooted into the culture of the organisation rather than seen as an add-on.

POSTSCRIPT

In this toolkit we have provided a step-by-step approach to setting up an appropriately structured organisation which will be able to undertake a range of projects and initiatives to support your local fishing community. By the nature of the toolkit, we have not been able to give detailed information about every potential possibility. If you need further support there are a range of business support agencies, and organisations focusing on community groups and social enterprises which might be able to help. You should be able to get contact information for these organisations from your local Council.

ADDITIONAL SUPPORT

Further support and advice

Further advice and support on developing specific types of organisations can be found from the following websites:

Charity Commission: www.gov.uk/government/organisations/charity-commission

CIC Regulator: www.gov.uk/government/organisations/office-of-the-regulator-of-community-interest-companies

Companies House: www.gov.uk/government/organisations/companies-house

Financial Conduct Authority: www.fca.org.uk

National Council for Voluntary Organisations: www.ncvo.org.uk

Social Enterprise UK: www.socialenterprise.org.uk

Co-operatives UK: www.uk.coop

Bank accounts

Triodos: www.triodos.co.uk

Barclays: www.barclays.co.uk/business-banking/accounts/community-organisations

Co-op Bank: www.co-operativebank.co.uk/business/community

HSBC: www.business.hsbc.uk/en-gb/everyday-banking/business-accounts/charity-banking-community-account

Lloyds: www.lloydsbank.com/business/business-accounts/community-accounts.html

NatWest: www.natwest.com/business/bank-accounts/community-bank-account.html

Santander: www.santander.co.uk/business/current-accounts/treasurers-current-account

TSB: www.tsb.co.uk/business/accounts/business_plus_account

Insurance

Zurich Insurance:

www.zurich.co.uk/charity-insurance

Simply Business: www.simplybusiness.co.uk

Ecclesiastical: www.ecclesiastical.com

Funding related websites

My Funding Central: www.myfundingcentral.co.uk

Directory of Social Change: www.dsc.org.uk

Government Grants Service:

www.find-government-grants.service.gov.uk

Grants Online: www.grantsonline.org.uk

Accountancy, legal and HR advice

If you need professional services, we recommend you seek three quotes from trusted local suppliers.

GET IN TOUCH

Please contact us if you have any questions or need further information and support.

Contact details:

The Fishmongers Company

Fishmongers' Hall

London Bridge

London

EC4R 9EL

www.fishmongers.org.uk

0207 626 3531

alison.freeman@fishmongers.org.uk

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This toolkit has been developed by John Bodley Scott and Iridescent Ideas CIC on behalf of the Fishmongers' Company. Iridescent Ideas is a social enterprise based in Plymouth, UK, that works to develop a more socially enterprising, greener, fairer world. For more information about Iridescent Ideas please visit www.iridescentideas.com. John Bodley Scott is an independent consultant based in Devon, who works with community groups and social enterprises to support social change. He can be contacted at bodleyscott.john@gmail.com.



TOOLBOX

The Toolbox contains further tools you can use to help you develop your ideas and your organisation.

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TOOL: PRIORITISATION EXERCISE

DIAMOND RANKING

THIS TOOL WILL HELP YOU PRIORITISE YOUR AIMS AND OBJECTIVES AND REACH CONSENSUS ABOUT WHAT IS IMPORTANT FOR YOUR GROUP. THE METHOD WORKS BEST WITH A SMALL GROUP OF 3-6 PEOPLE. IT USUALLY TAKES ABOUT HALF AN HOUR.

Firstly, brainstorm what people think are the most important aims and objectives for the group - What are you trying to achieve? What change are you trying to make? Write down each idea clearly onto individual pieces of paper.

Once you have agreed the most important aims you can ask the group to start to order them into a diamond shape. You might end up with more than nine to start with, but it's important you only put a maximum of nine in the matrix. Place the highest priority at the top of the matrix and the lowest priority at the bottom. This usually provokes a considerable amount of useful discussion. Continue with the other priorities, placing them at the most appropriate level. There is no need to order the high, medium and low priorities – just the general sense of where they fit in the hierarchy is enough. Continue until you have filled the matrix.



TOOL: STAKEHOLDER ANALYSIS

1. Identify and List on the table overleaf all those who may be affected by, or who may influence the outcome of the project (the stakeholders).
2. Estimate whether the stakeholders are supportive or opposed to the project, and give some sort of value to their position.
3. Estimate the Influence they have over the project
4. Use the Stakeholder Influence tool below to plan how you are going to involve each of the stakeholder groups. What is the appropriate level of involvement for each group? What methods are you going to use? Do you need to use particular strategies to engage 'difficult' or excluded groups?

++ STRONGLY IN FAVOUR
 + WEAKLY IN FAVOUR
 0 INDIFFERENT OR UNDECIDED
 - WEAKLY OPPOSED
 -- STRONGLY OPPOSED

HIGH: THIS PERSON OR GROUP HAS POWER OF VETO, FORMALLY OR INFORMALLY
MEDIUM: YOU COULD PROBABLY ACHIEVE YOUR GOALS AGAINST THIS PERSON'S OR GROUP'S OPPOSITION, BUT NOT EASILY
LOW: THIS PERSON CAN DO LITTLE TO INFLUENCE THE OUTCOMES OF YOUR INTENDED

HIGH	KEEP INFORMED <i>INFORM AND CONSULT</i>	KEEP SATISFIED <i>INFORM AND CONSULT</i>
	LIGHT TOUCH MONITORING <i>INFORM</i>	MANAGE CLOSELY <i>INFORM, CONSULT, COLLABORATE</i>
LOW	LEVEL OF INTEREST	
		HIGH

TOOL: VISION AND MISSION STATEMENT

A SIMPLE SET OF QUESTIONS AND ISSUES TO CONSIDER FOR EACH OF THE MAIN INCORPORATED LEGAL STRUCTURES.

VISION

WRITE YOUR VISION IN FEWER THAN 15 WORDS.

MISSION

WRITE YOUR MISSION IN FEWER THAN 15 WORDS.

VISION IS THE STATE OF THE WORLD IF YOU ARE SUCCESSFUL, YOUR DREAMS AND ASPIRATIONS. COMPARE TO OXFAM'S VISION: 'A JUST WORLD WITHOUT POVERTY'

MISSION IS WHAT YOU AIM DO TO ACHIEVE THE VISION, E.G. TO DELIVER LASTING SOLUTIONS TO POVERTY' OR 'TO PUT A COMPUTER ON EVERY DESK IN THE WORLD'

TOOL: LEGAL STRUCTURES AT A GLANCE

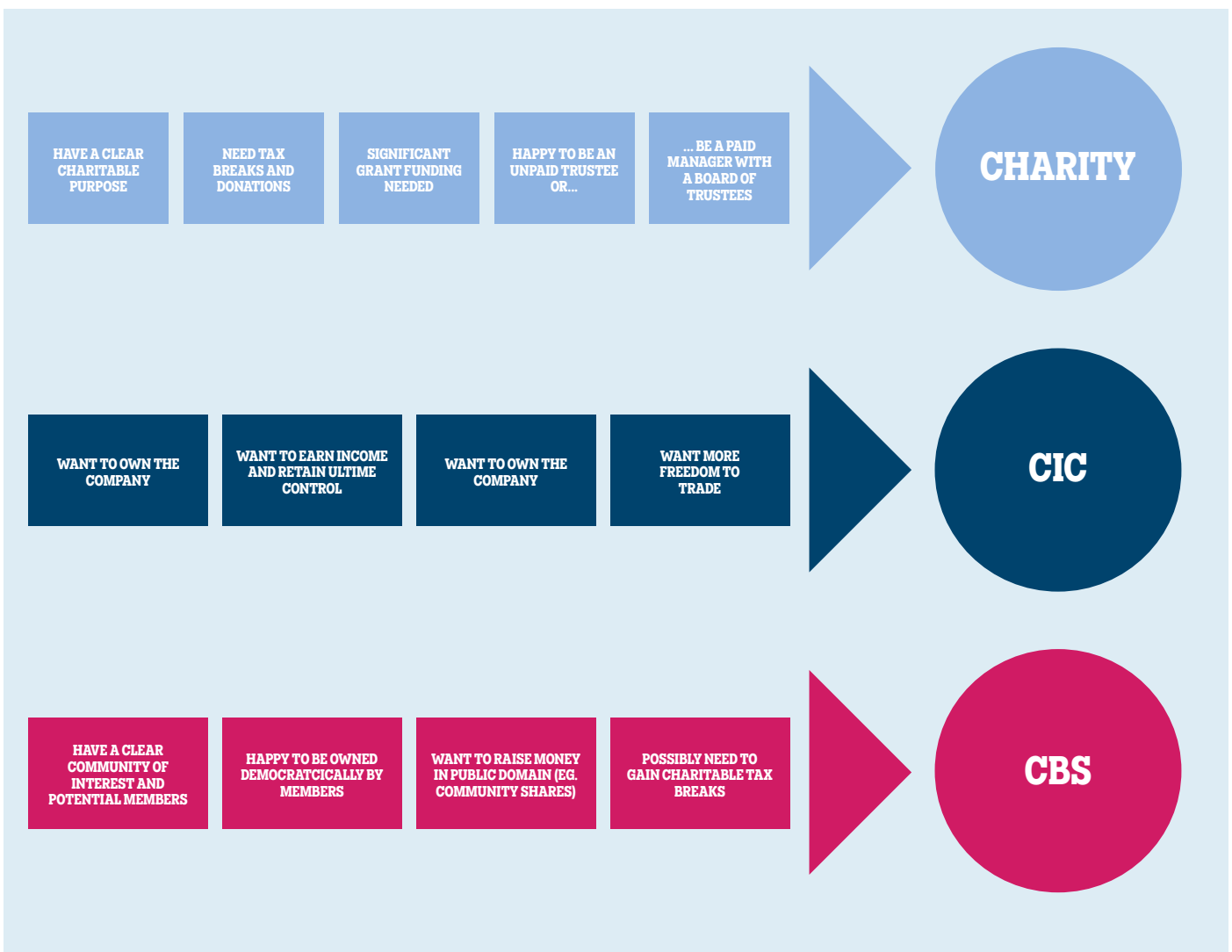
THIS IS A GUIDE TO THE LEGAL STRUCTURES MOST COMMONLY ASSOCIATED WITH COMMUNITY GROUPS AND SOCIAL ENTERPRISES.

For more information on them, see the websites listed below. There are a variety of legal requirements associated with setting up the structures described below, and you should consider seeking professional advice before your organisation adopts any one of them.

Legal structure	Summary: most typical features	Ownership, governance and constitution	Is it a legal 'person' distinct from those who own and/or run it?	Can its activities benefit those who own and/or run it?	Assets 'locked in' for community benefit?	Can it be a charity and get charitable status tax benefits?
Unincorporated association	Informal; no general regulation of this structure; need to make own rules.	Nobody owns - governed according to own rules.	No. This can create problems for contracts, property and liability.	Depends on own rules.	Would need bespoke drafting to achieve this.	Yes, if it meets the criteria for being a charity.
Trust	A way of holding assets to separate legal ownership from economic interest.	Assets owned by trustees and managed in interests of beneficiaries on the terms of trust.	No, which means the trustees are personally liable.	Not usually. Trustees can only benefit if trust, court or Charity Commission give permission.	Yes, if trust established for community benefit.	Yes, if it meets the criteria for being a charity.
Limited Company (other than Community Interest Company) <i>www.companieshouse.gov.uk</i>	Most frequently adopted corporate legal structure; can be adapted to suit most purposes.	Directors manage business on behalf of members. Flexibility over internal rules.	Yes, members' liability limited to amount unpaid on shares or by guarantee	Yes, but no dividends etc to members if it is a company limited by guarantee.	Would need bespoke drafting in articles, which could be amended by members.	Yes, if it meets the criteria for being a charity.
Community Interest Company (CIC) <i>www.cicregulator.gov.uk</i>	A limited company structure for social enterprise with secure 'asset lock' and focus on community benefit.	As for other limited companies, but subject to additional regulation to ensure community benefits.	Yes, members' liability limited to amount unpaid on shares or by guarantee.	Yes, but must benefit the community. Can pay limited dividends to private investors. Directors can be paid.	Yes, through standard provisions which all CICs must include in their constitutions.	No, but can become a charity if it ceases to be a CIC.
Registered Charity <i>www.charity-commission.gov.uk</i>	Regulated and dependent on turnover must report to the Charity Commission. Various tax reliefs.	Managed and decision making by trustees. Trustees are accountable and liable.	No, meaning trustees are personally liable.	Not usually. Trustees restricted on what benefits they can take from the charity and what expenses can be claimed	If constitution governs then yes. Will have to be established for a community benefit.	YES!
Charitable Incorporated Organisation (CIO) <i>www.charity-commission.gov.uk</i>	First ready-made corporate structure specifically designed for charities.	Similar to company but with different terminology, e.g., 'charity trustee' instead of 'director'.	Yes, members either have no liability or limited liability.	Members usually not permitted to benefit and trustees are only able to benefit if Charity Commission gives permission.	Yes.	Cannot be anything but a charity and must meet the criteria for being a charity.
Community Benefit Society <i>www.fca.org.uk</i>	Corporate structure designed to be owned by members and must serve wider community interests.	Usually owned by members who appoint directors to run the society. One member-one vote democratic voting and ownership	Yes, members have limited liability	Any profit made by a community benefit society must be used for the benefit of the community not members	Yes, a CBS has an asset lock.	Yes, a CBS, if charitable, can be deemed an exempt charity for tax and other purposes.

TOOL: GOVERNMENT STRUCTURE DECISION MAKING

**A SIMPLE SET OF QUESTIONS AND ISSUES TO CONSIDER FOR EACH OF THE
MAIN INCORPORATED LEGAL STRUCTURES**



TOOL: ONE PAGE STRATEGIC PLAN

ORGANISATION NAME:				DATE:
OUR VISION:				
OUR MISSION:				
OUR VALUES				
VALUE 1	VALUE 2	VALUE 3	VALUE 4	VALUE 5
OUR PRIORITIES/OBJECTIVES/AIMS				
HOW WE DO THIS				
PRIORITY 1	PRIORITY 2	PRIORITY 3	PRIORITY 4	

TOOL: ONE PAGE BUSINESS PLAN

OUR VISION	AIMS	KEY PERFORMANCE INDICATORS
OUR VALUES	FINANCIAL OBJECTIVES	
OUR SERVICES/ PRODUCTS	MARKETING OBJECTIVES	OUR SKILLS AND EXPERIENCE
OUR CUSTOMERS	OPERATIONAL OBJECTIVES	KEY ACTIONS IN NEXT 6 MONTHS
SOCIAL OBJECTIVES	PEOPLE OBJECTIVES	

TOOL: PESTLE ANALYSIS

A COMMON TOOL USED TO ANALYSE EXTERNAL CONTEXTS FOR THE WORK OF THE ORGANISATION. IT CAN ALSO BE USED FOR RISK ANALYSIS. THE HEADINGS DENOTE MAJOR INFLUENCES AND CONTEXTS, AND YOU CAN EXPLORE ANY PARTICULAR ISSUES AND ALLOCATE ACTIONS TO DEAL WITH THEM.

	<i>Domain</i>	<i>Issue</i>	<i>Actions</i>
P	<i>Political</i>		
E	<i>Economic</i>		
S	<i>Social</i>		
T	<i>Technological</i>		
L	<i>Legal</i>		
E	<i>Environmental</i>		

TOOL: SWOT ANALYSIS

A TRADITIONAL BUSINESS PLANNING TOOL THAT LOOKS AT THE STRENGTHS AND WEAKNESSES OF THE ORGANISATION AND THE OPPORTUNITIES AND THREATS THE ORGANISATION FACES. IMPORTANTLY THE STRENGTHS AND WEAKNESSES ARE USUALLY 'INTERNAL' TO THE ORGANISATION WHEREAS THE OPPORTUNITIES AND THREATS ARE EXTERNAL TO THE ORGANISATION.

STRENGTHS
(Internal)

OPPORTUNITIES
(External)

WEAKNESSES
(Internal)

THREATS
(External)

TOOL: BUDGT TEMPLATE

Income	Year...
<i>Fees</i>	
<i>Advertising</i>	
<i>Grants</i>	
<i>Other</i>	
Total income	£ -
Expenditure	Year...
<i>Salaries</i>	
<i>Payroll costs</i>	
<i>Rent</i>	
<i>Training</i>	
<i>Utilities</i>	
<i>Stationery</i>	
<i>Phone</i>	
<i>Expenses</i>	
<i>Travel</i>	
<i>Accounting</i>	
<i>Other professional fees</i>	
<i>Subscriptions</i>	
<i>Insurance</i>	
<i>Advertising</i>	
<i>Miscellaneous</i>	
Total expenditure	£ -
Profit/Loss	£ -

TOOL: SIMPLE CASH-FLOW FORECAST

A BASIC FINANCIAL PLANNING TOOL TO HELP UNDERSTAND HOW MONEY COMES IN AND OUT OF THE ORGANISATION. THIS WILL HELP IF INCOME IS SEASONAL OR SPORADIC – FOR EXAMPLE GRANT INCOME. YOU WILL BE ABLE TO SPOT ANY PROBLEMS IN ADVANCE AND TAKE STEPS TO ADDRESS THESE.

CASH-FLOW FORECAST		Month 1	Month 2	Month 3	Month 4	Month 5	Month 6	Month 7	Month 8	Month 9	Month 10	Month 11	Month 12	TOTAL
1. CASH BROUGHT FORWARD (beginning of month)		£ -	£ -	£ -	£ -	£ -	£ -	£ -	£ -	£ -	£ -	£ -	£ -	£ -
2. INCOME														
Grants														£ -
Contract 1														£ -
Contract 2														£ -
Sales														£ -
Other														£ -
3. TOTAL INCOME		£ -	£ -	£ -	£ -	£ -	£ -	£ -	£ -	£ -	£ -	£ -	£ -	£ -
4. TOTAL CASH AVAILABLE (income plus cash b/wd)		£ -	£ -	£ -	£ -	£ -	£ -	£ -	£ -	£ -	£ -	£ -	£ -	£ -
5. OUTGOINGS														
Salaries														£ -
Payroll costs														£ -
Rent														£ -
Training														£ -
Utilities														£ -
Stationery														£ -
Phone														£ -
Expenses														£ -
Travel														£ -
Accounting														£ -
Other professional fees														£ -
Subscriptions														£ -
Insurance														£ -
Advertising														£ -
Miscellaneous														£ -
6. TOTAL CASH PAID OUT		£ -	£ -	£ -	£ -	£ -	£ -	£ -	£ -	£ -	£ -	£ -	£ -	£ -
7. CASH POSITION		£ -	£ -	£ -	£ -	£ -	£ -	£ -	£ -	£ -	£ -	£ -	£ -	£ -

TOOL: SUSTAINABLE INCOME MIX

(ADAPTED FROM NVCO TOOL)

A USEFUL TOOL FOR PLANNING HOW THE ORGANISATION WILL GENERATE INCOME AND TO DIVERSIFY ITS FINANCIAL BASE. AIM TO SECURE INCOME IN EACH OF THE FOUR COLUMNS AND NOT BE RELIANT ON ONE SOURCE OF INCOME.

DONATIONS	GRANTS	CONTRACTS	OPEN MARKET TRADING
INCLUDES: <ul style="list-style-type: none"> • GIFTS DONATIONS • LEGACIES • SOME SPONSORSHIPS 	INCLUDES: <ul style="list-style-type: none"> • TRUSTS AND FOUNDATIONS • LOTTERY 	INCLUDES: <ul style="list-style-type: none"> • CONTRACTS • SERVICE LEVEL AGREEMENTS. 	INCLUDES: <ul style="list-style-type: none"> • DIRECT SALES IN OPEN MARKET.
USUALLY UNRESTRICTED INCOME. SOME DONORS MAY APPLY CONDITIONS OR RESTRICTIONS ON USE OF THE MONEY. THEREFORE CAN BE USED IN ANY WAY TO HELP ACHIEVE YOUR OBJECTIVES.	USUALLY RESTRICTED TO THE PURPOSES OUTLINED IN THE BID DOCUMENT. CAN ONLY BE USED FOR THE PROJECT. SOME FUNDERS ALLOW A PERCENTAGE TO BE USED FOR 'CORE' ORGANIZATION COSTS.	USUALLY UNRESTRICTED ALTHOUGH YOU HAVE TO FULFIL THE CONTRACT SPECIFICATION. CAN BE USED TO DELIVER THE CONTRACT AND SURPLUS CAN BE USED IN ANY WAY TO ACHIEVE YOUR OBJECTIVES.	UNRESTRICTED INCOME. CAN BE USE IN ANY WAY TO ACHIEVE YOUR OBJECTIVES.
CURRENT PERCENTAGE OF ANNUAL INCOME			
DESIRED PERCENTAGE OF ANNUAL INCOME			
ACTIONS TO BE TAKEN TO INCREASE OR REDUCE THIS LEVEL OF INCOME			

TOOL: SOCIAL IMPACT MEASUREMENT

A SIMPLE TOOL TO GET DOWN SPECIFIC PROJECT IDEAS AND SEE HOW THEY FIT THE WIDER VISION AND MISSION. YOU CAN USE THIS TO PLAN OUT THE NEEDS AND ISSUES, WHAT YOU WILL DO ABOUT THEM AND HOW YOU MIGHT MEASURE RESULTS AND THE DIFFERENCE MADE BY YOUR ORGANISATION.

<i>Organisation:</i>		
<i>Vision:</i>		
<i>Mission:</i>		
	Project 1	Project 2
<i>Needs identified</i>		
<i>Activities (inputs)</i>		
<i>Results (outputs)</i>		
<i>Impact (outcomes)</i>		
<i>Evaluation Tools</i>		



Fishermen's Associations Toolkit

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The
FISHMONGERS'
Company's

FISHERIES CHARITABLE TRUST