



Business Plan





Business Plan

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Executive Summary

Introduction and Context

This business plan for the next 5 years has been developed for the Somerset Market Towns Forum (SMTF) so as to guide the growth and forward development of its services.

Research has been conducted into the needs of its members (currently 14 towns) as well as the local authorities and other organisations. The research has identified the need for a range of services to market town communities that are not supplied by existing bodies. There is also an identified need for complimentary provision to some existing service provision. SMTF is recognised as being uniquely placed to work in partnership and develop and deliver services that can advance the delivery of market town revitalisation.

The Somerset Market Towns Forum

SMTF was established in 2003 and from 2005 has been hosted by the Community Council for Somerset, with the aim of bringing together representatives of all the market towns and larger villages across Somerset into a network in order to share issues of common concern and help revitalise the market towns. Membership is open to community-based groups in Somerset's market and coastal towns and larger villages. The County Council and the Market and Coastal Town Association are represented on the Steering Group, which meets regularly to transact the business of the Forum. Two part-time staff deliver a support service to members such as information, events and training.

Mission Statement

"To promote and support community-based action to revitalise the market towns of Somerset"

Market Research

Market research into provision of services showed that for some services there is plenty of choice but other providers do not cover the whole county and that there are gaps in provision. Forum members were generally happy with the services the Forum provides but indicated the need for a range of new services and ideas for inclusion in the business plan.

Services and Service Development

The main services that SMTF should provide for the rest of 2007 and up to April 2009 are:

- Information
- Events
- Networking
- Email newsletters
- Website
- Signposting
- Training
- Surveys
- Research
- Community development support
- Bursary fund
- Publicity
- Service directory
- Advocacy
- IT advice and signposting
- Market town audit

The focus of the work to be carried out during this first period has been detailed in an operating plan and future work should be refined through monitoring and evaluation by members' feedback and other surveys and information.

SMTF's target market should initially comprise all the market towns and larger villages in the current administrative County of Somerset but in the longer term it should strive to serve the geographic area of Somerset to include market towns in the districts of North Somerset and Bath and North East Somerset.

A communications and marketing strategy has been produced to promote and widen the Forum's services.

Governance and Delivery

SMFT should continue, in the short-term, to be hosted by the Community Council for Somerset. The current Steering Group should establish itself as a Management Committee, with a view to the SMFT becoming independent in the longer-term at the appropriate time.

SMTF operates from a high street community office in Langport. Services are delivered by the Forum Officer and the Information Officer (24 hours a week each). The business plan anticipates the appointment of a part-time administrator in October 2008 to give further support as the range of services develops. The Forum's current work is funded through partnership grants and returns are provided quarterly (both financial and project outputs). The Forum should develop further quality control standards by the end of March 2008.

Financials

Annual **expenditure** forecasts for the first 5 years (April 2008 to March 2013) are as follows:

EXPENDITURE £	2008/9	2009/10	2010/11	2011/12	2012/13
Salaries	43,788	52,887	55,531	58,308	61,223
Other staff costs	10,250	10,975	11,474	11,997	12,547
Office costs	11,935	12,457	13,005	13,580	14,184
Volunteer costs	1,000	1,050	1,103	1,158	1,216
Events	1,000	1,050	1,103	1,158	1,216
Audit	500	525	551	579	608
TOTAL	68,473	78,944	82,767	86,780	90,994

The financial strategy for **income** generation has identified potential income from Service Level Agreements with key partners (local authorities and agencies), grants and income generation (year 2 onwards, mainly from consultancy and training support) together with some sponsorship.

INCOME £	2008/9	2009/10	2010/11	2011/12	2012/13
Service level agreements	60,000	60,000	60,000	48,000	48,000
Members subs	0	0	0	0	0
Donations/sponsorship	1,000	2,000	3,000	4,000	5,000
Earned income	0	7,894	8,277	17,356	18,199
Other grants	12,000	13,000	13,000	18,000	18,000
TOTAL	73,000	82,894	84,277	87,356	89,199
Brought forward	0	3,027	5,477	5,488	6,064
Income - expenditure	4,527	3,950	1,510	576	-1,794
Sinking fund-redundancy	1,500	1,500	1,500	0	0
BALANCE	3,027	5,477	5,487	6,064	4,268

Exit Strategy

In the longer term the Forum is expected to operate on a mix of Service Level Agreements, grants, earned income and sponsorship. The range of services required will undoubtedly change. This has been recognised and towards the end of each financial year members should be surveyed together with other organisations to identify demand and then adapt the business planning accordingly.

1. Introduction

- 1.1 This Business Plan has been prepared to guide the growth and forward development of the Somerset Market Towns Forum.
- 1.2 Somerset Market Towns Forum was established in late 2003 and hosted by the Community Council for Somerset with the aim of bringing together representatives of all the market towns and larger villages across Somerset in a network, so as to share issues of common concern, and help in the economic, social and environmental regeneration of the local communities based in and around the market towns.
- 1.3 Membership of the Forum to date has been open to community-based groups in Somerset's market and coastal towns that have been involved in the community planning process. Currently groups from fourteen towns are regarded as in membership. District Councils and the County Council are also represented on the Forum through their respective regeneration officers. For over three years, members have been meeting quarterly at "network meetings" around the County to share information and conduct the business of the Forum.
- 1.4 The Forum has also offered support services to its members such as information, events and training activities. These are currently delivered, or supported as appropriate, by a Forum Officer and an Information Officer who both work part-time (24 hours per week) for the Forum.
- 1.5 This Business Plan was commissioned by the Forum so as to show the way that it can bring about a building and strengthening of the network of Somerset's market and coastal towns. The development work for the Business Plan has been funded by the Somerset Rural Renaissance Partnership (SRRP). It made a substantial grant to the Forum in 2006 to carry out a range of actions that have enabled the Forum to begin the process of network building by:
- *Improving network & communication channels*
 - *Helping increase the capacity of groups in market towns to participate in and achieve market town regeneration.*
 - *Strengthening the long term capacity of the Forum to support market town regeneration*
 - *Building local partnerships*
- Each of these objectives has quantifiable outputs attached to them that are to be achieved by March 2008 (for more detail see paras 3.10 & 3.11).
- 1.6 This Business Plan aims to set the appropriate framework for these SRRP programme objectives and to show how the Forum should build on them to develop a long-term strategy to grow the Forum and the network for the benefit of the communities of Somerset's market and coastal towns.
- 1.7 The Forum has been assisted by independent consultants to develop its Business Plan. Their brief included carrying out an extensive consultation with the members and potential users of the Forum's services to:
- Clarify support for the Forum's objectives and establish whether existing objectives cover requirements and prioritise objectives
 - Establish take up and views on current Forum services
 - Identify potential new services that members of the Forum would find useful
 - Map organizations providing services to groups involved in the regeneration of rural towns, showing relationship of the Forum to other organisations
- 1.8 SMTF also set out to learn and build on good practice from elsewhere. To this end, information has been gathered and evaluated from forums in other counties, far and near.

2. Background

- 2.1 As a result of the Market and Coastal Towns Initiative and the Countryside Agency's Parish Planning programme of the early years of the Millennium, local groups active in the community planning process began to emerge in Somerset's market and coastal towns. These groups were generally formed from partnerships of local organisations, community representatives, employers and town/parish councils.
- 2.2 The groups received support from Somerset County Council to set up a joint working group. As a direct result, Somerset Market Towns Forum was established at a meeting held on 1st December 2003 attended by 18 representatives from groups and organisations. The terms of reference for the Forum were adopted at the meeting and the Forum commenced a programme of quarterly network meetings.

Objectives

- 2.3 The objectives of SMTF from its commencement were covered by the adopted terms of reference. They were to:
1. Promote mutual support and collaboration between Somerset Market Towns and the larger villages – by sharing good practice through visits, invited speakers and the circulation of information.
 2. Develop the capacity of the Forum and its members to serve and assist Somerset's communities - by organising appropriate seminars and training for its members.
 3. Establish an active role for the Forum in promoting regeneration in Market Towns – by acting as a 'voice' from across the County in discussions with other bodies and forums.

Structure

- 2.4 **The Forum** was set up as an unincorporated organisation. **Membership** of the Forum was free to the regeneration/community planning groups of market towns and large villages. The County Council and District/Borough Councils were also deemed members and their officers were invited to represent them at Forum meetings. A **Steering Group** is elected by, and from, the members to direct and carry out business of the Forum between meetings. Long-term policy issues are decided by the membership at a network gathering.
- 2.5 The Forum has been supported and sustained by the Community Council for Somerset and Somerset County Council. The accountable body for the finances and activities of the Forum is the Community Council for Somerset. During the period 2003-05 Somerset County Council officers provided an estimated 6 to 8 hours of staff support per week.
- 2.6 In 2004/5 the SMTF Steering Group approached the South West Regional Development Agency (SWRDA) for funding for the Forum. Finance was agreed for a Forum Officer to be employed 24 hours per week. The Officer has been employed by the Community Council for Somerset that also provided voluntary management support and managed the funds. The Officer was appointed in June 2005 and is based at the offices of Langport Area Development Trust. The Officer reports to and receives guidance from the SMTF Steering Group. The post and its associated costs to date have been funded by a one-off grant from SWRDA and an annual grant from Somerset County Council, and from December 2006 a contribution from the SRRP towards Building the Network.

3. Progress and Achievements

- 3.1 The employment of a Forum Officer brought about a step change in the work of the Forum. The Officer undertook a review of members' needs in 2005 and provided a report to the Steering Group that informed future policy and service delivery. The services developed at this time are described below. Quarterly network meetings continued. In 2006 the Forum also undertook research and produced a feasibility study 'Promoting Our Market Towns' to document the ways in which community groups in market towns were attracting visitors to their towns and to make recommendations on how this could be supported in the future.

Forum's Current Activities

- 3.2 **Information Service** - The Forum aims to respond to information requests on all matters relating to community planning and market and coastal town regeneration for members and supporters as swiftly and effectively as possible.
- 3.3 **Networking Events** - Each quarter, members of the Forum are invited to visit a member town and to learn from their regeneration activities. Speakers are invited on topics of mutual interest and Forum business is transacted. Members find this provides a useful opportunity for networking and support.
- 3.4 **Training** - The Forum Officer provides details of relevant training opportunities and sets up courses to meet members training needs. The Forum has established working links with "Vista" to enable members of market town groups to gain access to the Defra-funded Community Ventures training programme.
- 3.5 **Web Pages and website** - The Forum developed web pages at the Community Council for Somerset web site. Since July 2007 the Forum has its own website at www.somersetmarkettowns.co.uk, managed by the Information Officer, which has been developed in partnership with Cosmic – a social enterprise specialising in website design. The site has received a warm and encouraging welcome from the membership and should be developed further particularly to encourage two-way use.
- 3.6 **Email Alerts** - Members are sent topical information on funding, training and events.
- 3.7 **Representation** - The Forum is prepared to attend meetings within the County to represent its members.
- 3.8 **Research** - The Forum commissions research into matters relevant to the regeneration of market and coastal towns in Somerset. The most recent piece of work was research into the economic impact of community-based tourism initiatives in Somerset market towns. The Study, in two parts, was funded by the Somerset Rural Renaissance Partnership and carried out by consultants with the assistance and guidance of the Forum's staff.
- 3.9 **Publicity** - The Forum seeks opportunities to publicise the activities and achievements of the Forum and/or its members. The Community Council newsletters and the websites are important conduits.

Recent Developments and Background to Business Plan

- 3.10 In the summer of 2006 the Forum produced an Action Plan to guide the next phase of its work. This informed an application to Somerset Rural Renaissance Partnership (SRRP). The application was successful. Together with funding from Somerset County Council, DEFRA and the Market and Coastal Towns Association, a new phase of work entitled 'Building the Network' commenced which continues until March 2008.

Building the Network

- 3.11 The objectives of 'Building the Network' Project were set as follows. By April 2008 to have:
- extended the network services of the Forum to all market towns and larger villages in Somerset
 - extended the range of services provided by the Forum to members and to groups and individuals involved in community led regeneration of market towns
 - supported collaboration between market towns on specific projects
 - developed and implemented a sustainable funding strategy for the Forum
 - learnt and built on good practice elsewhere for the benefit of Somerset's market towns
- 3.12 The targets set for the Project, to be achieved by March 2008 are:
- Accessible network & communication channels**
Those active in community led regeneration in market towns throughout Somerset should be linked through a network. Network services should be accessible to all market towns/rural service centres including the website being accessed from all towns. At least one consultation event should be organised by the Forum with partners.
- Improvement of the capacity of groups in market towns**
Outreach work with community initiatives in market towns should result in at least 50 people receiving Community Ventures training support and 30 people attending Community Ventures training event.
Advice and training should be brokered and signposted. Six network or training events should be held over the 18 months to March 2008 and attendance should be widened to more market towns.
- Strengthening the long term capacity of the Forum**
A business planning process should have strengthened the organisation by involving Forum members, staff and partners, and should have resulted in plans for sustainable funding of the services provided.
- Partnerships built**
Collaboration between individual towns should have resulted in initiatives to benefit a number of market towns. Subject to results of a feasibility study, this could include initiatives through "Promoting Our Market Towns Stage 2".
- 3.13 In accordance with the SRRP application and using the grant from the SRRP, an Information Officer has been recruited who started in post in April 2007. Website consultants were appointed to work to the Forum's brief and the website was launched in July 2007. The website and training activities are engaging more individuals and groups with the Forum
- 3.14 A major training event was held on June 26th 2007 under the Community Ventures programme attended by 38 individuals from 22 groups and organisations. Community Ventures support is also being offered to groups in rural areas. This programme is funded by Department of the Environment, Farming and Rural Affairs (DEFRA) through the Rural Action Partnership.
- 3.15 The business planning work has been commissioned from independent consultants to carry out surveys and engage with market town communities and local authorities in accordance with a brief prepared by the Forum's Steering Group.
- 3.16 The staff of the Forum have been striving to extend membership and services of the Forum to groups in non-member towns. They have been working closely with the business planning process to help devise long-term policy for extending service delivery.

4. **Members**

- 4.1 The membership of the Forum currently (August 2007) comprises some 14 groups who have engaged in community planning and six local authorities. Each has been surveyed as part of the business planning exercise. Many of the County's other market and coastal town communities were also consulted.
- 4.2 Forum members were also consulted extensively at the end of 2005. The results of this consultation have been supplemented with the views and ideas expressed at two business planning workshops held with the Forum in July 2007 and a questionnaire that was sent to the "chair and/or key contacts" of all the community planning groups in market towns and large villages in Somerset and relevant parish councils.
- 4.3 The result of this consultation is a much better understanding of the hopes, fears, frustrations and aspirations of those who strive to bring about change and improvement to benefit the community of their market or coastal town.
- 4.4 The agenda for Somerset's market towns is quite similar to those of so many other market towns in UK (results have been compared with research into community strategies of market towns across the UK¹). The 2005 Members' Survey identified the following key activities and needs:

Somerset Market and Coastal Towns Survey 2005	
Main Interests / Activities:	Town centre Support local retail sector Housing Migrant workers Tourism Footpaths / cycleways Business parks
Training Needs:	Fund-raising Asset development Running an organisation Governance Business Planning Project implementation Engaging the Private Sector Town centre redevelopment Migrant workers
Support Need:	Signposting Funding - information & advice Documents – samples and examples Networking events Representation Links – connections Information exchange

- 4.5 The two business planning workshops held in July 2007 attracted representatives from market towns across the County. The two events affirmed, to a very large extent, the results of the 2005 Survey in terms of interests, priorities and organisational development needs. The workshops also took further the exploration of the nature of the support that is required, by considering the kind of assistance that community groups most need if they are to make strides in implementing their community plans. The table overleaf has a list of the main areas of help expressed by Somerset's market and coastal towns in 2007 (in alphabetical order).

¹ University of the West of England (for the Countryside Agency), "Summary of analysis of key issues arising from Market Town health-checks and action plans" (August 2002) & Evaluation Report "Messages from Market Town Health-checks" by the University of Gloucestershire (for the Countryside Agency) 2005

Somerset Market Towns Project Development Assistance 2007	
Childcare guidance Community development & capacity building Community planning & strategy Disability access advice Engaging in LAA development Environmental issues Financial advice & accountable body Footpaths & countryside access Funding advice & assistance ICT assistance Land & property services Legal advice & services Migrant workers advice Personnel matters PR matters Printing & publishing Recycling Regeneration Rural transport matters Small project grants Tackling anti-social behaviour Youth project development & support	

Somerset Market and Coastal Towns 2007 "the challenges" faced	
Resources and Capacity:	Recruiting volunteers Retaining volunteers Increasing confidence & ambition Regular income Leadership Project management Cash flow Action plan Succession planning
Support and Assistance:	Funding applications Technical assistance Accountable body Paid workers Private sector involvement Administrative systems & support Local Authority backing Match- and co-funding
Projects and Services:	Sustainability Funding Prioritising Experienced project workers Project management Partners Influencing policies & plans
Learning and Understanding	Funding opportunities Information Relevant training Decision-making
Communications	Marketing Networks Partners Credibility Website Links with hinterland

5. Strategic and Policy Context

National and Regional

- 5.1 At a national level, market towns have been identified as key service and employment centres within the country's rural areas. Regionally, the "Regional Economic Strategy"² identifies the Market and Coastal Towns Initiative as being essential in enabling market and coastal towns to play their role in supporting the regional economy. Locally, the Initiative links to county-level community plans and the emerging planning framework.
- 5.2 The **Market and Coastal Towns Initiative**³ was launched in 2001 as a pilot programme by a regional partnership of organisations in response to a variety of UK Government and South West regional policy initiatives.
- 5.3 Its fundamental purpose was to promote the regeneration of market and coastal towns. The importance of market towns, serving their rural hinterlands, had been previously identified in a range of key policies including:
- Rural White Paper⁴
 - SWRDA Regional Economic Strategy
 - Countryside Agency's Market Towns Programme
 - Regional Planning Guidance
- The role of the market and coastal towns had also been prioritised in various other initiatives within the region, including Single Regeneration Budget (SRB) programmes. Other programmes, such as the English Heritage HERS Schemes and the South West Housing Corporation's Investment Programmes also include some focus on market towns because of their importance in the settlement patterns of the region. The rationale for developing an independent Association to extend and deliver the Market and Coastal Towns Initiative was developed as a result of an evaluation of the pilot programme in 2003.
- 5.4 The **Market and Coastal Towns Association** (MCTA) was set up in October 2004 to "*create vibrant, healthy and sustainable market and coastal towns in South West England by helping local communities and their partners to:*
- *Prepare plans for their future covering all aspects of community life in their towns and surrounding rural areas*
 - *Develop their skills and organisational capacity to be effective partners*
 - *Share good practice and learn from local, regional, national and international experience*
 - *Secure funding and professional assistance*"
- 5.5 The MCTA provides (for those formally engaged in the MCTi process):
- Professional information, advice and guidance
 - Bespoke training and mentoring
 - Access to best practice, expertise and learning resources
 - Partnerships and networking
 - Research and analysis
 - Website
 - Newsletter
- 5.6 It is reported that the Market and Coastal Towns Initiative has "*stimulated a significant investment programme from the SWRDA amounting to £15m over three years. The real value however is in attempting to redefine the economic context within which these towns operate.*" In Somerset 14 communities have participated in the Initiative since 2001 and developed community plans and

² South West of England Regional Development Agency – Regional Economic Strategy 2006-2013

³ South West of England Regional Development Agency – Set up with partners in 2000 and now being led by the Market and Coastal Towns Association (www.mcta.org.uk)

⁴ Rural White Paper (Our Countryside – Our Future) – Defra, April 2004 and now the Rural Development Programme for 2007-2013

committed themselves to bringing about a significant revitalisation of their market town and its hinterland. Their progress and successes has led in part to three further Somerset towns successfully applying for funds and to be a part of the MCTi programme in a recent bidding round.

- 5.7 The South West of England Regional Development Agency (SWRDA) has recently announced the eight investment themes of the new Rural Development Programme due to begin in 2008⁵. Community-led development and action is one of the eight Investment Themes identified to turn the priorities in the SW Regional Implementation Plan into action on the ground.

SWRDA has stated that *“community-led development working through Local Action Groups (LAGs), is seen as an effective way of delivering many of the priorities of the Programme. In particular a community led approach provides an effective mechanism for delivering a significant part of Axis 3 (which is focussed on 'Improving the quality of life in rural areas and encouraging diversification of economic activity') as it provides opportunities for local communities to identify their own needs and devise solutions to address those needs. At the same time, it offers significant opportunities to integrate activity across all of the Axes and Priorities of the Programme.”* Market town revitalisation is therefore still seen as an important facet of the strategic regeneration agenda and needs a lot of support and understanding.

- 5.8 **Somerset County Council** has recognised that market and coastal towns are an essential component of rural Somerset and offer a focal point for commercial activity and serve as centres of service delivery to rural communities. It believes that *“the function of these towns has been undermined in recent years, as businesses have tended to re-locate to larger industrial centres where access to resources and the market place are better. As a result of this migration of business away from the market towns many are in decline. In many cases the economies of these towns are vulnerable as they are losing their importance as retail and service centres, and they tend to be overly dependent on single large employers.”* Somerset County Council recognises that strengthening the economic base of these market towns and combating constraints on the competitiveness is key to the development of the County's rural economy in the future.

- 5.9 The 2001 Somerset Economic Assessment⁶ identified seven Somerset towns (Chard, Crewkerne, Ilchester, Martock, Watchet, Ilminster and Wiveliscombe) where at least half of their firms or employment sectors were expected to decline over this present decade. Somerset County Council is keen to re-vitalise the county's market towns. It believes that all market towns have the potential to be:

- Comprehensive local service centres where people can access professional services;
- Centres for the processing of local products;
- Focal points for well planned and coordinated local transport networks;
- Hubs or gateways for tourism, and access points for a wide range of training, education and employment opportunities; and
- Centres for culture.

- 5.10 The County Council's support for the Market and Coastal Towns Initiative has led to it being an active partner in many of the community planning exercises and to be a key supporter of the Somerset Market Towns Forum.

- 5.11 **Every district council** in the administrative county of Somerset supports market town regeneration and, with one exception, has a strategy that places a focus on the market town as a significant component of rural regeneration and local economic revival. The current agenda for most local authorities in the County includes the updating of local area agreements, strengthening of the Local Strategic Partnerships and the establishment of local development frameworks. All of which makes the need for active and engaged market town communities more pertinent.

⁵ South West of England Regional Development Agency – South West Implementation Plan (2007) of the new Rural Development Programme

⁶ Somerset Economic Assessment for Somerset County Council, July 2001 by Prism Research Ltd

- 5.12 Alongside the survey of market town groups, a survey of local authorities was carried out to gauge the relationship and contribution that local authorities are making towards market town regeneration. The “development assistance” requirements (see page 8) were used to explore the extent to which local authorities are able to assist community-based action in their market towns. Each local authority was asked whether they were able to respond to the “needs for help” as expressed by market town group representatives at the [July 2007] workshops. The results of this survey are set out on the following page.
- 5.13 The two unitary authorities of geographical Somerset were included in the survey so as to facilitate comparison with neighbouring local authorities. North Somerset declined to participate but a valuable response was obtained from Bath and North East Somerset Council. To it and to all the other local authorities that took part, thanks are given for their co-operation.
- 5.14 The survey (see table on page 12) shows that:
Somerset’s local authorities do support market town initiatives in many ways;
- access to an extensive range of expertise and knowledge held by local councils is available to groups on request; and
 - every local authority is shoulding and able to nominate a key, first contact, who should “signpost” groups to the best source of help and assistance within their Council.
- The availability of service help and the extent of that help vary significantly however from council to council and are often dependent on competing demands and priorities.
- 5.16 The **Community Council for Somerset** is part of a nationwide network of charitable organisations working with rural communities on community development and regeneration initiatives. Established in 1926, its mission is to counter the threats to rural communities and enhance rural life throughout Somerset. Its remit covers the administrative area of Somerset. Central government is continuing to express at every opportunity the value of the third sector as service delivers and community advocates. The Third Sector Action Plan and the Local Government White Paper set out a clear direction for greater support to the third sector with it placed as a key player in local communities alongside elected members. Through working agreements with the District and County Councils, The Community Council for Somerset represents the interests of rural communities. In turn, it works closely with rural communities, for example, in the production of Parish Plans; which should be integrated into Local Authority Strategies.
- 5.17 The Parish Plan Process aims to bring together the views, needs and opinions of the whole community. It is a holistic document, covering the social, economic and environmental issues of relevance to local residents. A concise action plan prioritises the issues raised, and sets out how they might be tackled. All Parish Plans are different, as they are developed by each community in response to their own needs, using their unique skills and enthusiasm. Until April 2005 Parish Plans were a component of the Countryside Agency Vital Villages Programme. Since then, delivery has been devolved to local partners, especially the network of 38 Rural Community Councils. From April 2006 decisions on Parish Plan funding and delivery are made locally as part of the Rural Social and Community programme. The Community Council for Somerset has had long term involvement with the Parish Plan process and has supported over 60 communities in producing a parish plan over the last five years. Rural communities with a town council are also eligible to take part in the programme and a number of towns in Somerset have participated in the process. The Parish Plan process can result in new community projects, evidence to strengthen funding applications and greater community cohesion. Increasingly local authorities are taking note of Parish plans in their own planning processes.

Somerset Local Authority Service Support for Market and Coastal Towns								
	MEN	SED	SS	TD	WS	SCC	BNE	*
Community development & capacity building	✓	✓	✓	✓	✓	✓	✓	C
Small project grants	✓	✓	✓	✓	✓	✓	✓	C
Legal advice & services	x	x	✓	✓	x	x	✓	
ICT assistance	x	x	✓	x	✓	x	✓	
Disability access advice	✓	✓	✓	✓	✓	x	✓	C
Youth project development & support	✓	✓	✓	x	✓	✓	✓	C
Childcare guidance	x	x	✓	x	✓	x	x	
Financial advice & accountable body	x	✓	✓	✓	x	x	x	
Funding advice & assistance	✓	✓	✓	✓	✓	✓	✓	C
Regeneration	✓	✓	✓	✓	✓	✓	✓	C
Land & property services	x	✓	✓	✓	✓	x	x	
Migrant workers advice	x	x	✓	✓	x	✓	x	C
Personnel matters	x	✓	✓	✓	x	✓	x	C
Footpaths & countryside access	✓	x	✓	x	x	✓	✓	C
Rural transport matters	x	✓	✓	✓	✓	✓	✓	C
Environmental issues	✓	✓	✓	✓	✓	✓	x	C
Recycling	✓	x	✓	✓	✓	✓	✓	C
PR matters	x	✓	✓	✓	✓	x	✓	
Printing & publishing	x	✓	✓	✓	✓	x	✓	
Tackling anti-social behaviour	✓	✓	✓	✓	✓	x	✓	C
Community planning & strategy	✓	✓	✓	✓	✓	✓	✓	C
Engaging in LAA development	✓	✓	✓	✓	✓	✓	✓	C

* C = appears to be good support coverage across the County

Key to table above:

MEN = Mendip District Council
SED= Sedgemoor District Council
SS= South Somerset District Council
TD= Taunton Deane Borough Council
WS= West Somerset District Council
SCC= Somerset County Council
BNE= Bath & North East Somerset Council

Source: Survey carried out on behalf of SMTF by consultants of local authority Regeneration Officers, August 2007

(NB: North Somerset Council declined to take part)

6. Lessons from Elsewhere

- 6.1 The aim of this research was to see how market town networks are operating elsewhere and to learn from examples of 'good practice' in the UK so as to inform the Somerset Market Towns Forum's development strategy.
- 6.2 The best practice survey was carried out:
- across the UK (England, Scotland, Wales and Northern Ireland) in order to identify similar County Market Town Forums, and;
 - within Somerset, looking at similar community-based forums and organisations that may be of interest.
- 6.3 A trawl was carried out on the Internet for each of the 34 counties of England, the 13 counties of Wales, the 33 counties of Scotland and the 6 counties of Northern Ireland. The Action for Market Towns website was also used in an attempt to identify Market Town Forums. Once suitable forums were identified the websites were looked at in more detail and the contact person interviewed by telephone for further information.
- 6.4 A similar exercise was carried out within Somerset to identify potential organisational and operational 'models' for the Somerset Market Towns Forum. It was not possible in the time available to survey any of these in detail but a list has been prepared of the most interesting websites together with a summary of services provided that could be used by the Forum in the months ahead.
- 6.5 Out of an analysis of the above information and websites, three organisations appeared to be suitable examples of reasonably comprehensive support and information (best practice) that were worthy of scrutiny. These were looked at in more detail and the co-ordinators contacted by telephone. These were **Gloucestershire Market Towns Forum, Devon Towns Forum and the Market Towns East**. They were also the subject of review and discussion with members and local authority representatives at the workshops in July 2007. Additionally, SMTF staff made a fact finding visit to Gloucestershire MTF and provided a report to the consultants.
- 6.6 **The common key factors of success** for these three organisations appear to be:
- Websites with a range of information (although none were totally comprehensive and up to date)
 - Paid, knowledgeable coordinators/managers providing active contact with the towns
 - Authority and other agency support (in kind and/or cash)
 - Provision of a range of services and support (especially access to funding) that towns really need
 - Networking meetings and visits
 - Regular bulletins/newsletters or an 'alert service'
 - Annual meetings to share success
 - Effective delivery (operational) plans
- 6.7 Best practice elements were examined of each of these forums the table overleaf devised to highlight the key considerations for the Somerset Market Towns Forum if it was to adopt such practices and/or services.

'BEST PRACTICE'	CONSIDERATIONS FOR SMTF
Service providers vary as organisations – some are service providers and some are set up as legal organisations	Continue to be a service provider (with the support provided by a more mature organisation such as the RCC) but consider becoming a company limited by guarantee when capacity is considered adequate
Websites need to be up to date and informative – not all are, which creates a bad impression	Ensure the website reflects SMTF's objectives and is up to date, topical and provides the information and links that are important to members (resource implications)
Funding and support must be adequate to achieve the business plan objectives – some appear to be adequately resourced and others are not, which again can create a bad impression	Secure adequate funding to ensure that SMTF can deliver to high standards and quality Look at Service Level Agreements for specific work within the business plan (MCTA and SCC could be core funders) but there are others SLAs may include contracted officer time and support, either for specific expertise e.g. planning or more general e.g. economic/tourism
Survey and reflect needs of members and those involved in market town revitalisation	Build in adequate feedback, surveys and information gathering – this should also help in providing data to justify further funding and resources for SMTF Ensure that the (annual) service delivery plan is achievable and reviewed, with partners, each year
Funding appears to be a concern – not so much a lack of funding but a lack of 'joined up' easily accessible funding to help build partnership capacity and project development as identified in action plans	Look at Market Towns East in particular and consider how to develop funding to best support the towns – perhaps by delegated small funds, initially and building to more substantial 'asset' funding in the medium to longer term
Officer support and officers' skills	Additional support appears to be necessary if SMTF is to operate efficiently and make a real difference Working closely with market towns demands a special range of skills - SMTF may like to consider how best to develop the present skills and how these may be complemented e.g. contracted use of specialists and/or agency officer support
Community partnership skills and support - It appears that towns where most progress has been made has been the result of: Clearly developed action plans; partnerships that value the skills available ; commitment from authorities and others; Ability to access funding and resources; a forum that can continue to champion their towns so that capacity can grow and partners do not lose site of the towns' needs	SMTF therefore needs to consider a) how best to 'audit' current work and progress across the Somerset towns and, b) how that audit should be developed into a forward plan
Learning and skills – many different skills are needed (and can be complex) so a good range of training and development programmes are required None of the forums in other areas appear to deliver the courses themselves	SMTF should consider: Funding so that courses in many cases can be free to community members; how best to coordinate and make members aware of courses (and to tap into the extensive number of courses available); a logical sequence of courses that are relevant to members' needs; and getting a better assessment of skills needed and the skills already in each town/community
Information provision – there is lots of information that is pertinent to market towns but the problem is collecting it and distilling it into forms suitable for market towns. Key appear to be: Website (see above), regular newsletters; E-bulletins; Meetings/events/seminars	SMTF needs to consider how best to provide the information to the towns. At the very least it is suggested that: an annual event is held – perhaps to include performance review of the current business plan and development of the next plan; networking meetings are held (about once a quarter); newsletters should be published (about once a quarter)
Advocacy – it appears that generally the major agencies (RDA) find it helpful to have 'one voice' for the towns rather than on a town by town basis Market Towns East for example is looking at ways to link market towns more firmly into the new Local Area Agreements through the Local Strategic Partnerships	Advocacy to reflect the aspirations and needs of all towns in Somerset would seem to be important so the SMTF should need to consider how best to do this for not only the current members but for other areas as well. The Local Area Agreements should be considered as an important area of development for the SMTF (and the potential for SLA)

7. **Market Research**

- 7.1 Understanding what others can offer is an important part of the business planning. Besides the local authorities, surveys were carried out of other agencies, service providers and consultants who operate across all or part of Somerset. A questionnaire was sent out to 92 potential service providers.
- 7.2 Fifty seven organisations completed the questionnaire during the summer of 2007. Once again the organisations are thanked for the responses received to the survey.

Community Sector Service Providers Somerset 2007			
	Agencies	Consultants	Total
Advice services	28	6	34
Training	18	6	24
Project development	12	11	23
Information services	22	0	22
Business planning	9	12	21
Capacity building	14	7	21
Project management	9	11	20
Other	12	8	20
Community development	12	7	19
Services for the disabled	14	3	17
Feasibility studies	4	11	15
Fund raising	8	5	13
Research and development	5	8	13
Technical advice	10	3	13
Community plan-making	5	7	12
ICT	9	2	11
Grant giving	9	1	10
Services for BEM groups	8	2	10
Services for women	9	0	9
Marketing	4	4	8
Market research	2	5	7
Financial services	4	2	6
PR	2	2	4
Human resources	1	1	2
Catering	1	0	1
Legal services	0	1	1
Childcare	0	0	0

- 7.3 This information has enabled SMTF to be so much better informed as to what organisation is offering what service on what basis. This provides the basis of a directory of service provision that can be shared with market and coastal town communities. Up-to-date details have been obtained from over fifty of the County's service providers who would like to be included in any such directory.
- 7.4 It is noted that for some services there is an abundance of choice. It is noted also that many of the market town groups have already used the services of an agency and/or consultant. Also noted are that some agencies do not cover the whole county and some areas and communities are much poorer served. A mapping exercise has helped identify short-falls in provision or a lack of options that the Forum should use to consider how service availability and delivery to market town groups in Somerset can be improved.

- 7.5 Another facet of the market research was to consider how effective and valued the Forum's current services are. Member groups and local authorities were asked to evaluate the current services and consider whether there was scope for new services. The response from members shows a general satisfaction with those services they have used.

Members Satisfaction with Current SMTF Services 2007	
Information Services	Good
Networking	Good
Email alerts	Average
Representation	Not used sufficiently to rate
Events	Good
Research	Not used sufficiently to rate
Publicity	Not used sufficiently to rate
Website	Good

- 7.6 The opinions were asked of the local authority regeneration officers about the current services. The ratings they gave are as follows:

Local Authorities' Views on SMTF Services 2007		
Current SMTF Services?		Rating out 3
	Information Service	2.7
	Networking	2.3
	Email news	2.4
	Represent	-
	Events	2.8
	Research	2
	Publicity	2.3
	website	2.25

- 7.7 The members' workshops in July 2007 generated a number of additional service ideas based on current needs and interests:

Members' New Service Needs and Ideas 2007	
Advocacy and lobbying	Members want their interests, problems and aspirations recognised and in attendance at significant strategy and policy gatherings
Business Planning	Members want assistance in preparing viable and sustainable plans in which they can have confidence and that are likely to win backing and funding
Community development support	Members want help in encouraging and sustaining community participation and recruiting further volunteers
Events / visits	Members want to see and understand how others have been successful in implementing projects relevant to their own plans and programmes
Financial services	Members want help and support in establishing financial procedures and managing accounting for income from different sources
Funding advice	Members want up-to-date advice and support that should maximise their chance of successfully competing for project finance
IT & website	Members want help in developing websites and increasing and up-dating their IT capacity
Mentoring	Members would welcome experienced and sensitive guidance from people who have faced same problems and opportunities
PR	Members want assistance in publicising themselves and in winning attention and support
Project Development	Members want help in understanding the development process and in securing appropriate help
Resource Centre	Members want access to best practice and current standard material including reports, templates, policies, practices and applications
Skills development	Members want to heighten and broaden their local pool of skills so as to deliver quality services and projects
Surveys	Members want to be consulted and have the opportunity of influencing local and regional policies and practices

8. Analysis

- 8.1 From the consultation feedback the following SWOT analysis was constructed for the sub-sector that is the Somerset market and coastal towns:

Somerset Market and Coastal Towns' SWOT 2007	
Strengths	Weaknesses
Identity ('market towns' & Somerset) Recognised sub-sector County Council support Community Council for Somerset Market & Coastal Towns Assoc' backing SWRDA Common agenda	Fragmented & disparate sub-sector Under-resourced Community leadership Regional policy and practices Project funding Plan review process Knowledge & information
Opportunities	Threats
Future rural regeneration funding Business plan Internet & Website Service providers' interest Strategic planning (LDF, LAA etc) Government's empowerment agenda Route to independence	Economic agenda LA agenda & approaches Burn out of local people

- 8.2 The dialogue with market and coastal town representatives has led to the conclusion that the sub-sector needs collectively:

To build on its strengths:

SMTF must reinforce the importance of the County's market towns and get key agencies to re-affirm their backing to community-based market town revitalisation.

To do that SMTF needs to:

- Be well organised
- Have informed spokespersons
- Develop a higher profile
- Offer mutual benefits to partners and supporters

To remedy weaknesses:

SMTF must identify and appraise the situation in each and all of the market towns so as to develop a strategy for capacity-building community involvement and securing the support and commitment of key agencies and bodies.

To do that SMTF needs:

- Improved understanding of what is being faced and what is being done
- Up-to-date information
- To keep in touch with others
- Information and access to funding
- Publicity about market towns' action and initiatives
- To secure and value commitment from local people and organisations
- Rewards and incentives for community action

To make the most of opportunities:

SMTF must take best advantage of the current strategic reviews and revisions and harness the backing and support of others to ensure that market towns are recognised and resourced.

To do that SMTF needs:

- Strong and well informed advocates
- To be aware of what's going on
- Opportunities to take part
- Supporters

To face up to the threats:

SMTF must understand and work with the approaches of others to ensure that the “market town” is both recognised and accepted as an important facet of the regeneration agenda.

To do that SMTF needs:

- To make the plans relevant
- Recognition
- To form relevant partnerships

8.3 To develop the Forum’s business plan and make it most relevant consideration was given as to how those needs expressed above can be met so as to facilitate the growth of the sub-sector. The following are the conclusions on what is required:

Somerset Market Towns Development Strategy	
Sub-Sector Needs:	Requirements:
To be well organised	SMTF should continue and develop A range of networking opportunities (real & virtual) Proven methodologies
To have informed spokespersons	Leadership Advocates and champions Key contacts
To develop a higher profile	Brand identity Regular news and press releases High quality website
To offer mutual benefits to partners and supporters	LA access to information Integrated plans and action Economic-agenda
Understanding of what we are facing and what we are doing	Audit of situation and context Surveys and opinions Strategies and plans
Up-to-date information	Contacts Examples Inspiration
To keep in touch with others	Networking Forums Website
Information and access to finance	Reliable funding advice Ring-fenced grants Capacity-building fund
Publicity about market towns’ action and initiatives	News bulletins Website
Commitment from local people and organisations	Community interest & involvement Volunteers Supporters
Rewards and incentives for community action	Project funding Publicity Support
Strong and well informed advocates	Recognised advocates Champions Supporters
Awareness of what’s going on	Shared information Supporters
Opportunities to take part	Consultation Participation Attendance at key gatherings
Supporters	Sensitive specialist help LA champions Involvement in LA and other plans
Make plans relevant	Community plans & reviews Monitoring & evaluation Synergy with and integration with other plans
Recognition	LA policies, plans and practices SLA’s Funding
To form relevant partnerships	Shared objectives Organisation

9. *Mission Statement, Aims and Objectives*

Somerset Market Towns Forum Mission

- 9.1 ***“To promote and support community-based action to revitalise the market towns of Somerset”***

Aims

- 9.2 In doing so the Somerset Market Towns Forum should adopt and adhere to the following key values and aims:

Somerset Market Towns Forum - Aims	
<i>Relevance</i>	To Compliment the activities and actions of others To be Somerset-focussed
<i>Inclusive</i>	To offer a service to all those who are active in revitalising market towns To connect market town initiatives across Somerset
<i>Efficient</i>	To provide a speedy response To keep up-to-date
<i>Accessible</i>	To ensure that the services are freely available To develop the web-site as a key tool
<i>Encouraging</i>	To promote market town revitalisation To build community involvement & participation
<i>Sharing</i>	To encourage and facilitate mutual support and action To encourage the adoption of the “MCTi approach”
<i>Quality</i>	To strive to provide the best of services To survey and monitor the use and value of everything done

- 9.3 To be of most value, these aims need translating in to a set of practical objectives and a series of challenging but achievable targets. In this way SMTF should not only set out its stall but should also be able to monitor how successful it is in implementing the business plan.
- 9.4 Overleaf are set out the objectives of the Forum, which derive naturally from the aims when one takes into account what the members are asking for and what others are up to. Both short-term and long-term objectives have been set out. Short-term objectives should be achieved at the end of the Plan’s first year (March 2009). The longer-term objectives should be achieved within three years.

Somerset Market Towns Forum – Objectives

Aim:	Short-term Objective	Long-term Objective
1.To Compliment the activities and actions of others	To forge effective working relationships with regional, county and local authorities, agencies and organisations	To be recognised as the voice of Somerset market towns
2.To be Somerset-focussed	To offer a service to all market towns in Somerset	To have active users from market towns across all seven districts of the geographical county of Somerset
3.To offer a service to all those who are active in revitalising market towns	To understand better the service and support needs of groups engaged in market town revitalisation	To offer a range of services that are well used and make a significant contribution to market town revitalisation
4.To connect market town initiatives across Somerset	To establish a vital network that engages people from all active groups	To support a range of networking methods that offer opportunities for community activists to take part, share and learn from others
5.To provide a speedy response	To develop the methods and systems by which information requests can be quickly and efficiently dealt with	To be known as an efficient and responsive service
6.To keep up-to-date	To establish information gathering systems and key contacts and supporters	To be the first point of call for community activists involved in market town revitalisation
7.To ensure that the services freely available	To secure the necessary resources to develop the required services	To offer services that are free or affordable to all market towns groups
8.To develop the web-site as a key tool	To create and maintain a first class working tool for those engaged in market town revitalisation	To maintain a website that is well used and contributed to by market towns groups
9.To promote market town revitalisation	To secure attendance at key County and regional gatherings so as to act as spokesperson market towns revitalisation	To be consulted regularly by those interested in the views and aspirations of market towns groups
10.To build community involvement & participation	To understand the community development needs of Somerset market towns	To see a significant strengthening of market towns groups and increase in participation levels
11.To encourage and facilitate mutual support and action	To establish a regular programme of capacity-building meetings and events	To secure and support a high level of participation in networking events
12.To encourage the adoption of the “MCTi approach”	To promote and share community planning and implementation methodologies and techniques	To see every groups in every market town engaged in a process that maintains a community plan and delivers projects and services to help revitalise their market town
13.To strive to provide the best of services	To establish standards and targets for service delivery to market towns both directly and indirectly	To adopt and maintain quality standards for the Forum and amongst others who serve the market towns
14.To survey and monitor the use and value of everything done	To carry out an annual survey of users that includes satisfaction levels	To maintain high levels of satisfaction in the role and services of the Forum

10. SMTF Service Development

- 10.1 The services of the Somerset Market Towns Forum should be those that:
- Are needed by community planning and other community groups interested in revitalising their market town
 - The Forum is able to offer efficiently and effectively
 - Can be made available to groups across the whole of Somerset
 - Offer help that cannot easily be found elsewhere
 - Support the work and initiatives of others especially the local authorities
 - Should further market town revitalisation in Somerset
- 10.2 The Forum should set a programme of service development over the next few years. Over time it is hoped that the Forum can increase its capacity by extending the hours of existing posts; adding additional posts to the establishment and engaging experienced activists from the market towns groups. However, it is recognised that resources available to the Forum in the next financial year are unlikely to be much greater than at present. The operating plan therefore is designed to make best use of existing resources in 2008/09 not only to meet needs and support present initiatives but also to strengthen the knowledge base and links in the interests of establishing a vital support role for the Forum in the years ahead.
- 10.3 During 2008/09 the Somerset Market Towns Forum should continue to offer and to develop the following existing services:

Information	The Forum should continue to expand its information base so as to provide up-to-date information freely and speedily in response to requests and also via regular newsletters. It should also use the website to increase awareness of the information and the service available from the Forum.
Networking	The Forum should continue to convene network meetings on a quarterly basis that should be programmed as part of an annual diary of meetings and events. Network meetings should move around the County and include presentations and visits to projects and initiatives that offer learning, insight and inspiration to market town groups and those interested in market town revitalisation.
Events	The Forum should hold two events or study visits per year of relevance to community groups engaged in developing revitalisation policies or projects. They should be programmed as part of an annual diary of meetings and events.
Training	The Forum should make links with a small number of high quality training organisations so as to offer, jointly, relevant training to participants in market town revitalisation initiatives. The Forum's role should be to one of facilitating and supporting participation.
Newsletter	The Forum should produce a regular electronic newsletter with relevant news, events and funding alerts.
Website	The Forum should develop a lively and user friendly website that should offer access to a range of services to support market town revitalisation.
Research	The Forum should carry out an annual survey of market town groups to remain aware of current activities, interests and issues and to gain regular feedback on the efficacy of the Forum's services.
Signposting	The Forum should set up a system for signposting enquirers in the direction of those who can best assist them, if the Forum is unable to help directly, and monitor how they got on.

- 10.4 During 2008/09 the Forum should also endeavour to develop the following so as further market town revitalisation in Somerset.

Service Directory	The Forum should prepare a directory of organisations, with supporting information, that offer services to market town groups in Somerset. This should be made available on request.
Publicity	The Forum should offer advice and examples to groups who need assistance with contacting the media and issuing press releases. The Forum should offer additional services to those who need most help.
Bursary Fund	The Forum should endeavour to set up a fund that should initially offer bursaries to those who wish to attend Forum-related meetings, workshops and events but find the cost prohibitive.
Advocacy	The Forum should seek to be recognised as the voice of Somerset's market towns and endeavour to establish a presence "at the table" at all the important gatherings and meetings where the interests and future well-being of market towns is being considered or affected. However, the Forum recognises it needs to grow in membership and develop its services further before taking on an advocacy role.
Surveys	The Forum should establish a Consultation Panel of community activists via the internet so as to be able test opinion and seek the views of the market town communities in Somerset on a regular basis. This service can be made available to policy makers.
IT Support, advice and signposting	The Forum should offer advice and guidance to groups who want to improve their IT facilities and capacity.
Community Development support	The Forum should offer advice and signposting to community groups who are interested in getting involved in revitalising their town but need help to get started.
Market Town Audit	The Forum should carry out an extensive audit of Somerset's market towns so as to understand better the "landscape" of market town revitalisation. This should include assessing the strength and capacity of the local community and voluntary sector, the efficacy of the local democratic structures, the relevance of support structures and mechanisms and the potential of local authority policies and practices. (More details in par 10.5)

- 10.5 Recent surveys of the members and local authorities show that many groups are struggling to take their plans forward through engagement with active volunteers and the wide range of partners involved in regeneration, project implementation, monitoring and evaluation. The needs of Market Town partnerships do require better understanding and support. The audit is expected to provide an assessment of the community development and capacity-building needs of market town partnerships so as to enable them play an effective and proper role in the planning and implementation of market town revitalisation. The strategies, approaches, methods and priorities of the district councils also need properly understanding. It is intended that, within 18 months, the Forum should have a much greater understanding of these needs and to have identified and negotiated clear roles for SMTF and other partners in supporting and assisting community-based market town revitalisation (to a high quality standard as advocated by MCTA in the Re: sourcebook⁷).
- 10.6 The results and the output of the Market Towns' Audit should be used to develop and define the long-term service plan and provide evidence and justification for any request for growth funds and resources. It is expected that this could lead to the development of Forum initiatives that should offer community and project development support; targeted grant funding and a mentoring service.
- 10.7 The Forum's proposed operating plan up to the end of March 2009 is set out in more detail in Section 17.

⁷ "Re:source Book", Planning for your community by Alan Caldwell and Associates for SWRDA.

11. **Delivery**

11.1 The Forum's delivery principles are as follows:

- Services can be made available to all who are involved or affected by market town revitalisation in the geographical county of Somerset
- Services will be offered free to community and voluntary sector groups in Somerset's market towns
- It will endeavour to provide a speedy response to enquiries and requests for help
- It will encourage the sharing of information and resources within and between market towns

11.2 SMTF is currently served by the following officers:

Forum Officer

The purpose of the Forum Officer is to work with the representatives of the market towns and larger villages in the County in a variety of ways to develop and strengthen the Forum, and in so doing to assist the communities to share good practice, secure additional resources, and to be better able to implement their own project priorities. The post-holder is also required at present to:

- Provide managerial and secretariat services to the Forum and Chairman including the organisation and delivery of the quarterly meetings of the Forum
- To monitor progress of all activity associated with the post, including budgets and briefings- these to include identifiable measurable outputs

Information Officer

The stated main purpose of the Information Officer's post is to enable the "Building the Network" project *"by working in conjunction with the Forum Officer to support the promotion and extension of services, so they can be accessed by all market towns in Somerset."* The Information Officer has responsibility for the development and maintenance of the Forum's website; for collecting and disseminating information; publicising services and events; and maintaining data bases.

11.3 Both posts are presently part-time. It is intended to continue with these posts on the same basis during 2008/09. It is intended to add a part-time **Administrator** to the establishment so as to: increase the overall capacity; help regularise many of the services to be offered; and to free the other officers from much of the burden of administration.

11.4 The Forum wants its staff to grow with the organisation. A review of duties, roles and responsibilities should be carried out by March 2008 so as to ensure that it is able to deliver the Business Plan, and annual performance appraisals should be continued. The Forum should encourage and support personal development programmes for every member of the staff team especially where it should increase the ability to serve the needs of the market towns.

11.5 In the longer-term the Forum would like to grow its number of staff. Whilst it is recognised that it is constrained by available finance in the short-term, it is hoped to build the capacity of the Forum to play a full supporting role as defined by the Market Towns Audit and the expressed needs of the network and the partners. This ambition should be built into the financial strategy.

12. Governance

Area of Benefit and Membership

- 12.1 The Forum should be a freely available service that should be offered and accessible to anybody with an interest in furthering market town revitalisation in Somerset. All community groups interested or active in market town revitalisation should be welcomed into membership. In the short-term the Forum should continue to focus on the market town communities of the current administrative County of Somerset. In due course as its strength and capacity increases it should strive to serve the geographic area of Somerset that includes the whole districts of North Somerset and Bath and North East Somerset.
- 12.2 For the next couple of years the Forum should continue to be hosted by the Community Council for Somerset. The Steering Group does aspire however that the Forum should become a separate entity with a constitution but, it has been concluded that the time is not right and the strength of the Forum is not sufficient to take this step. At this time the membership rules and responsibilities should need to be made more formal and enshrined in the constitution.
- 12.3 During 2008/09 the Forum should continue to be regarded as a service arm of the Community Council for Somerset. It is grateful for the continuing support received from the Community Council and the Forum expects to negotiate a continuing and mutually beneficial arrangement for 2008/09 based on aspirations for the growth and development of the Forum as set out in this Plan.

Management

- 12.4 In anticipation of becoming independent the Forum should establish a Management Committee that should take much of the responsibility for managing the Forum's services and activities away from the Community Council. In the short term the Forum will retain the existing Steering Group structures and seek advice on the transition. Potentially, the Management Committee should comprise, at a minimum, seven volunteers from the market town communities of Somerset (preferably at least one from each district) together with two local authority representatives and representatives from other partner organisations who it is appropriate to invite to help manage the Forum. The Management Committee should:
- set targets and develop a forward programme of activities
 - review and monitor performance and achievements
 - advise on policies and practices
 - consider reports from the staff team and respond to recommendations
 - set budgets and review accounts and develop proposals for revenue expenditure
 - receive reports from the Community Council
- 12.5 As at present, human resource services should be provided on behalf of the Forum by the Community Council for Somerset, which should remain the employer of the Forum staff team.
- 12.6 The Forum both welcomes and values the help it gets from volunteers and their participation in Forum affairs – which is essential. The Forum should have in place a volunteer charter that covers all aspects of volunteer's rights and obligations when working for the Forum. It should also make clear the Forum's willingness to provide support to volunteers who help with the management so that they have equality of partnership and opportunity with those who help us from the public sector.

Monitoring and Evaluation

- 12.7 The Forum is keen to ensure that it remains responsive to the needs of those engaged in market town revitalisation. It should use every opportunity to get feedback from users of services. It should:
- Issue evaluation forms at every network meeting and event
 - Create a feedback facility and discussion forum on the website
 - Establish an electronic consultation panel and consult it on a regular basis
 - Carry out an annual survey of market towns (the community and its partners).

13. Partners

- 13.1 The Forum can only be successful in its mission if it establishes working partnerships with other bodies and agencies that share the same ambitions for Somerset's market towns. The following have been identified key partners with whom it wishes to work closely.

Market and Coastal Towns Association

- 13.2 The MCTA's vision and purpose is to create vibrant healthy and sustainable market and coastal towns in the South West of England. To do so they have focussed on those towns that have been successful in applying for funds and support to go through the MCTi process. The MCTA is committed to continuing to provide support in various forms to these towns within its capacity. The Forum should offer additional and complimentary support to these towns and facilitate networking between all market towns in Somerset for mutual support, action and capacity-building.

Community Council for Somerset

- 13.3 The Community Council aims to enhance life throughout Somerset by *"equipping rural communities to effect positive change by using their inherited resources, abilities and commitment"*. It has taken pride in hosting the Forum and helping it develop to the stage it is currently at. The Forum continues to value the assistance of the Community Council as it strives for independence. In implementing the Forum's forward programme it should be mindful of shared interests and values and seek ways in which mutual support and benefits can be offered.

Somerset County Council

- 13.4 The County Council's support for market town revitalisation is well documented. It has recognised the vital role that market towns play as employment and service centres for their surrounding rural hinterlands. It has appointed a Market Towns Officer with the remit to *"contribute towards the economic development input into the Market and Coastal Town initiative at a strategic level across the County and provide focused support and advice to the Somerset Market Towns Forum to strengthen the structure, service and long term sustainability of the Forum."* The Forum should work closely with this officer and colleagues to ensure that the County Council's investment of time and resources brings about the greatest benefit particularly in: creating prosperity and generating employment; improving delivery and access to services; and realising the value of the environment as an economic asset

Somerset's district councils

- 13.5 All of the local authorities in Somerset are committed to regeneration and revitalisation of the market towns in their district to a greater or lesser extent. SMTF works with the local authorities to support their market town initiatives and should develop these relationships. The methodology should be designed for the market town audit with officers of the local authorities so as to ensure that local authority policies and practices are taken fully into account and the outputs from the Audit are of significant value to the authorities.

South West Regional Development Agency

- 13.6 The Regional Development Agency has clear ambitions for the market towns of the South West. This is clear from the new Rural Development Programme and long been evidenced by such initiatives as the Market and Coastal Towns Initiative, the Rural Renaissance Programme and the Building Communities programme. The Forum should continue to lobby for investment and initiatives from SWRDA to bring about market towns revitalisation and should work closely with market towns to encourage a focus on ways to:
- Improve economic performance through building the capacity of target groups, communities and businesses and encourage their involvement in the development of their localities;
 - Improve access to services as a means of tackling disadvantage through facilitating the development of community based solutions; and
 - Harness wider economic value from sustainable environmental quality.

14 Financial Strategy

14.1 The budget (Section 15) proposes expenditure of about £68.5k for the first operating plan (up to April 2009). Expenditure rises to around £79k for the next year and £83k for the third year. This gives a total over 3 years of about £230k.

14.2 In terms of income a number sources have been considered comprising support from key partners (Section 13), membership subscriptions, donations/sponsorship, earned income and grants.

14.3 The strategy has been formulated based on research. The research shows that, particularly in the formative stages, the Forum is unlikely to gain any membership subscriptions (bearing in mind the limited resources of many market town groups and that the principles is free access). The Forum is unlikely to be able to earn any income in the first year of the plan because of programme priorities. Donations and sponsorship is more likely as the Forum becomes established but little is expected in the first year.

14.4 Part of the growth strategy is to move away from grant support. This because of the time involved for staff in obtaining grants (rather than being able to deliver the work), as well as the often short-term nature of such grants. However, it is recognised that there is potential and as part of the strategy earnings targets have been set and appropriate grants should be pursued.

14.5 Once established it is considered that there is income to be earned from areas such as consultancy, training and trading.

14.6 For the first three years the key partners should be approached for support. The best way of doing this is considered to be by approaching them with the business plan with a view to negotiating contracts to deliver services through Service Level Agreements (SLAs). Such agreements should be regarded as contracts to provide services, not grants, and is an approach that is being encouraged by central government.

14.7 The table below shows the suggested income sources for the first 5 years.

INCOME £	2008/9	2009/10	2010/11	2011/12	2012/13
Service level agreements	60,000	60,000	60,000	48,000	48,000
Members' subs	0	0	0	0	0
Donations/sponsorship	1,000	2,000	3,000	4,000	5,000
Earned income	0	7,894	8,277	17,356	18,199
Other grants	12,000	13,000	13,000	18,000	18,000
TOTAL	73,000	82,894	84,277	87,356	89,199

14.8 The proposed Financial Strategy therefore should be to:

- Approach all of the key partners during October and November 2007 in order to negotiate Service Level Agreements (SLA) for the first period with 'in principle' agreement for the first three years. Continuing support during years four and five (and beyond) will still be required but on a diminishing scale (20% a year from year 4).
- Obtain donations and sponsorship during the first year to cover the estimated costs of events (£1k). This should continue during the subsequent years with increased targets as indicated.
- During the first year set out a detailed strategy for earned income and by the end of March 2009 to have secured potential agreements for the target of £8k, representing 10% of the projected expenditure, for the second year.

- During the second year a similar strategy should be needed as above for year three. In year three and four the Forum should acknowledge increases in earned income (aiming for 20%) and grants/sponsorship towards 60% of generated income in year five.
- It is proposed that the Forum employs a part-time administrator from October 2008 onwards. In order to fund the post grant support of £12k should be sought for the first year and then £13k for year 2 and 3. The Forum should therefore seek funding sources from December 2007 onwards. Early identification and securing of funding may enable SMTF to bring the administrative post forward.
- As SMTF moves move towards independence, it should aim to generate a surplus each year. As can be seen in the budget forecasts a balance of at least £5k should be sought. This should give a degree of flexibility to support growth and meet any unforeseen eventualities.

15. Budget Forecasts

Somerset Market Towns Forum Revenue Forecast 2008/09

£'s	Apr 08	May 08	Jun 08	Jul 08	Aug 08	Sep 08	Oct 08	Nov 08	Dec 08	Jan 09	Feb 09	Mar 09	Total
Expenditure													
Management	0.00	0.00	1,250.00	0.00	0.00	1,250.00	0.00	0.00	1,250.00	0.00	0.00	1,250.00	5,000.00
Forum Officer	1,324.29	1324.29	1324.29	1324.29	1324.29	1324.29	1324.29	1324.29	1324.29	1324.29	1324.29	1324.29	15,891.43
Info Officer	1,159.71	1,159.71	1,159.71	1,159.71	1,159.71	1,159.71	1,159.71	1,159.71	1,159.71	1,159.71	1,159.71	1,159.71	13,916.37
Admin Officer	0.00	0.00	0.00	0.00	0.00	0.00	989.57	989.57	989.57	989.57	989.57	989.57	5,937.43
NI & Pensions	558.90	558.90	558.90	558.90	558.90	558.90	781.55	781.55	781.55	781.55	781.55	781.55	8,042.72
Recruitment	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	750.00
Staff Training	83.33	83.33	83.33	83.33	83.33	83.33	83.33	83.33	83.33	83.33	83.33	83.33	1,000.00
Travel & expenses	291.67	291.67	291.67	291.67	291.67	291.67	291.67	291.67	291.67	291.67	291.67	291.67	3,500.00
Equipment	375.00	0.00	0.00	375.00	0.00	0.00	375.00	0.00	0.00	375.00	0.00	0.00	1500.00
Rent, Rates, Power	1,000.00	0.00	0.00	1,000.00	0.00	0.00	1,000.00	0.00	0.00	1,000.00	0.00	0.00	4,000.00
Telephone/internet/web	381.25	0.00	0.00	381.25	0.00	0.00	381.25	0.00	0.00	381.25	0.00	0.00	1525.00
Post/photocopier	29.17	29.17	29.17	29.17	29.17	29.17	29.17	29.17	29.17	29.17	29.17	29.17	350.00
Insurance	20.83	20.83	20.83	20.83	20.83	20.83	20.83	20.83	20.83	20.83	20.83	20.83	250.00
Stationery / Printing	125.00	125.00	125.00	125.00	125.00	125.00	125.00	125.00	125.00	125.00	125.00	125.00	1,500.00
Publicity / Exhibition	375.00	0.00	0.00	375.00	0.00	0.00	375.00	0.00	0.00	375.00	0.00	0.00	1,500.00
Audit	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	500.00	500.00
Accounts / Payroll	67.50	67.50	67.50	67.50	67.50	67.50	67.50	67.50	67.50	67.50	67.50	67.50	810.00
Committee Expenses	83.33	0.00	83.33	0.00	83.33	0.00	83.33	0.00	83.33	0.00	83.33	0.00	500.00
Volunteers Training	0.00	83.33	0.00	83.33	0.00	83.33	0.00	83.33	0.00	83.33	0.00	83.33	500.00
Events	0.00	0.00	250.00	0.00	0.00	250.00	0.00	0.00	250.00	0.00	0.00	250.00	1000.00
Professional Fees	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Miscellaneous	41.67	41.67	41.67	41.67	41.67	41.67	41.67	41.67	41.67	41.67	41.67	41.67	500.00
Total	5,916.65	3,785.40	5,285.40	5,916.65	3,785.40	5,285.40	7,128.87	4,997.62	6,497.62	7,128.87	4,997.62	6,997.62	68,472.95
Income													
Service level agree	30,000.00	0.00	0.00	0.00	0.00	0.00	30,000.00	0.00	0.00	0.00	0.00	0.00	60,000.00
Members' Subs	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Sponsorship	0.00	0.00	0.00	0.00	0.00	500.00	0.00	0.00	500.00	0.00	0.00	0.00	1,000.00
Earned Income	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Other Grants	0.00	0.00	0.00	0.00	0.00	0.00	6,000.00	0.00	0.00	0.00	6,000.00	0.00	12,000.00
Total	30,000.00	0.00	0.00	0.00	0.00	500.00	36,000.00	0.00	500.00	0.00	6,000.00	0.00	73,000.00
Brought Forward	0.00	24,083.35	20,297.95	15,012.55	9,095.90	5,310.50	525.10	28,646.23	23,648.60	17,650.98	10,522.10	11,524.48	0.00
Inc – Exp	24,083.35	-3,785.40	-5,285.40	-5,916.65	-3,785.40	-4,785.40	28,121.13	-4,997.83	-5,997.63	-7,128.88	1,002.38	-6,997.63	4,526.85
Sink fund-redundancy	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	1,500	1,500
Balance	24,083.35	20,297.95	15,012.55	9,096.90	5,310.50	525.10	28,646.23	23,648.60	17,650.98	10,622.10	11,524.48	3,026.85	3,026.85

Somerset Market Towns Forum - 5 year Revenue Forecast

	2008/09	2009/10	2010/11	2011/12	2012/13
EXPENDITURE £					
Manager / Management	5,000.00	5,250.00	5,512.50	5,788.13	6,077.53
Forum Officer	15,891.43	16,686.00	17,520.30	18,396.32	19,316.13
Information Officer	13,916.57	14,612.40	15,343.02	16,110.17	16,915.68
Administrator	5,937.43	11,874.86	12,468.60	13,092.03	13,746.63
Ni & Pension	8,042.72	9,713.98	10,199.68	10,709.67	11,245.15
Recruitment	750.00	1,000.00	1,000.00	1,000.00	1,000.00
Staff Training	1,000.00	1,050.00	1,102.50	1,157.63	1,215.51
Staff Travel & Other Expenses	3,500.00	3,675.00	3,858.75	4,051.69	4,254.27
Office Equipment	1,500.00	1,500.00	1,500.00	1,500.00	1,500.00
Rent, Rates, Power	4,000.00	4,200.00	4,410.00	4,630.50	4,862.03
Telephone/internet/website	1,525.00	1,601.25	1,681.31	1,765.38	1,853.65
Post/photocopier	350.00	367.50	385.88	405.17	425.43
Insurance	250.00	262.50	275.63	289.41	303.88
Printing & Stationery	1,500.00	1,575.00	1,653.75	1,736.44	1,823.26
Publicity / Exhibition	1,500.00	1,575.00	1,653.75	1,736.44	1,823.26
Audit	500.00	525.00	551.25	578.81	607.75
Accounts/Payroll	810.00	850.50	893.03	937.68	984.56
Committee Members Travel	500.00	525.00	551.25	578.81	607.75
Training For Users/ Volunteers	500.00	525.00	551.25	578.81	607.75
Events	1,000.00	1,050.00	1,102.50	1,157.63	1,215.51
Professional Fees	0.00	0.00	0.00	0.00	0.00
Miscellaneous	500.00	525.00	551.25	578.81	607.75
TOTAL	68,473.15	78,943.99	82,766.19	86,779.50	90,993.47
INCOME £					
Service level agreements	60,000.00	60,000.00	60,000.00	48,000.00	48,000.00
Members Subs	0.00	0.00	0.00	0.00	0.00
Donations/Sponsorship	1,000.00	2,000.00	3,000.00	4,000.00	5,000.00
Earned Income	0.00	7,894.40	8,276.62	17,355.90	18,198.69
Other Grants	12,000.00	13,000.00	13,000.00	18,000.00	18,000.00
TOTAL	73,000.00	82,894.40	84,276.62	87,355.90	89,198.69
Brought Forward	0.00	3,026.85	5,477.26	5,487.69	6,064.09
Income - Expenditure	4,526.85	3,950.41	1,510.43	576.40	-1,794.78
Sinking fund - redundancy	1,500.00	1,500.00	1,500.00	0.00	0.00
BALANCE	3,026.85	5,477.26	5,487.69	6,064.09	4,269.31

16 Sensitivity Analysis

Level of LA Contribution through SLA's Not Achieved

Scenario	LA SLA	Year 1 balance	Year 2 balance	Year 3 balance
As business plan	£27,000 pa	+£3027	+£5477	+£5488
- £5,000	£22,000 pa	-£1973	-£4523	-£9512
-£10,000	£17,000 pa	-£6973	-£14523	-£24512

To bring SMTF back up to the business plan scenario it would need to negotiate with other funding partners for increased amounts.

If it cannot secure more grant or SLA income it could:

- Delay or do not appointment Administrator.
- Cut back staff/hours and work outputs.
- Look for grant support (time problems if getting grant due to long delays).

Other Grants Not Forthcoming to the Forecast Level

Scenario	Other Grants Year 1	Year 1 balance	Year 2 balance	Year 3 balance
As business plan	£12,000	+£3027	+£5477	+£5488
- £5,000	£7,000	-£1973	-£4523	-£9512
-£10,000	£2,000	-£6973	-£14523	-£24512

SMTF could not appoint the Administrative post. The administrative burden would fall on other staff and likely to result cut back on work outputs. Alternatively it could:

- Renegotiate management contract and fee.
- Secure new SLA.
- Identify volunteer or secondment support.

Earned Income is only 5% of Expenditure (rising to 10% in year 4)

Scenario	Year 1 balance	Year 2 balance	Year 3 balance	Year 4 balance
As business plan (10%)	+£3027	+£5477	+£5488	+£6064
5% of expenditure pa	+£3027	+£1530	+£2598	-£10699

SMTF could seek to increase earned income in years 2 onwards via SLA's

Alternatively, it could:

- Consider introducing membership fees.
- Ask for town/parish councils' support (say £1k a town).
- Obtain more grants.
- Cut back on staff/hours in the longer term.

Cost could be 10 % higher than Forecast

Scenario	Year 1 balance	Year 2 balance	Year 3 balance
As business plan	+£3027	+£5477	+£5488
10% higher	+£708	+£711	-£1837

SMTF could monitor expenditure on a bi-monthly basis and anticipate over-spend and make savings / cuts

Alternatively it could:

- Seek ways to increase income.

17 Operating Plan

- 17.1 The operating plan (Table 17.1) and associated indicative timescales chart (Table 17.2) are the keys to successful delivery of the Forum's ambitions and are therefore important tools for planning and managing the development of the Forum's work. These tables are outlines for the period up to the end of March 2009. They should be reviewed as the year progresses (see Section 18 – Monitoring and Evaluation). The Forum should produce annual operating plans for each year. These should be developed with stakeholders and partners so as to reflect the work carried out during the previous year and developments/improvements that should best assist in the Forum's growth and meeting its objectives, as well as stakeholders' wishes.
- 17.2 The Forum Officer (FO) and Information Officer (IO) worked with the consultants to develop the first operating plan. This was considered an important part of the process as experience shows that the best plans are developed by working closely with those most likely to be engaged in the delivery of the work.
- 17.3 The logical framework analysis (LFA) was introduced as a suggested tool for the Forum to consider in its future development work. The framework is used worldwide by many agencies, especially those operating at a community level, because the LFA is a useful tool for planning and managing development projects. The completed framework looks like a table and aims to present information about the key components of the project (in this case the Forum's development programme) in a clear, concise, logical and systematic way.
- 17.4 Because of the very limited time available face to face with the consultants it was decided that the best use of this time would be to a) introduce the concepts of the LFA and b) to identify the key activities and outputs required for the first operating plan. These activities would comprise the very first steps to progress the Forum's mission statement as well as the aims and objectives (especially the short-term objectives) as in Section 9 of the business plan. Once the activities were identified they could be used as a basis for the first operating plan, itemise a detailed budget for the first operating plan period to April 2009, draw up the financial strategy, the monitoring & evaluation strategy and complete the communications strategy.
- 17.5 Once the proposed budget (Section 15) has been approved and finalised, SMTF should then be in a position to review and modify (if necessary) the proposed operating plan.

TABLE 17.1 OPERATING PLAN – OCTOBER 2007 TO APRIL 2009

The Steering Group ranked the actions into **low**, **medium** and **high** priorities. The timescales are **INDICATIVE** only at this stage and will be refined and agreed prior to the start of the first year commencing in April 2008.

AIMS	ACTION & PRIORITY	DESCRIPTION	ACTIVITY	OUTPUT	INDICATIVE TIMESCALE
1, 5, 13	1. SMFT Organisational Change LOW	To ensure the Forum is able to provide effective delivery in line with agreed principles	<ol style="list-style-type: none"> Review accommodation Review job descriptions of staff Agree future governance and membership Agree all appropriate office documentation and procedures such as staff/committee handbook Agree quality standards Put in place a programme for staff/committee training Deliver training Administration (servicing meetings) 	Review Job descriptions Governance/membership documents Staff/committee handbook Other documents Standards Programme Training Minutes/agendas	End Apr 08 End Apr 08 End May 08 End May 08 End May 08 End May 08 Ongoing – May 08 Ongoing
7	2. Resourcing HIGH	Ensuring resources are secured in order to carry out the activities and deliver the outputs	<ol style="list-style-type: none"> Quantify the future funding/resources required Prioritise key contacts most likely to provide resources Develop the strategy and action plan to secure funding Negotiate and agree 'service level agreements' and/or grant support Prepare funding applications Review funding before the end of the first year Prepare strategy and funding action plan for next operational plan Secure funding for subsequent year(s) 	Funding/resources Database Funding/resources Agreements Applications approved Review Plan Funding/resources	End Oct 07 Mid Oct 07 End Nov 07 End Dec 07 Beg Feb 08 End Aug 08 End Sep 08 End Feb 09
3, 10	3. Intelligence MEDIUM	Assessment of the community development and capacity building needs of market town communities so as to enable them to play a proper role in the planning and implementation of market town revitalisation	<ol style="list-style-type: none"> Agree the scope for a market town audit with key organisations to include RDA, MCTA, LAs and LSP/LAG/LAA Detail the work and budget required for the audit Agree funding/resources for the audit Carry out the audit Publish the results of the audit Broker and agree with other bodies the next steps post audit Use the findings to refine SMTF business plan and operational plan 	Agreement Work plan & budget Funding Audit Published report Agreements Plans	End Jun 08 End Oct 08 End Oct 08 End Feb 08 Mid Mar 08 End Mar 08 End Mar 08

9	4. Advocacy LOW	Attending local and regional partnership meetings and other gatherings on behalf of the market towns of Somerset	<ol style="list-style-type: none"> 1. Identify the key bodies that are considered as important for a 'recognition strategy' 2. Prepare the 'recognition strategy' 3. Programme in meetings to attend 4. Seek other bodies to be approached for additional 'recognition strategies' 5. Programme in meetings as considered necessary 6. Ensure SMTF is aware of any 'ad hoc' events/meetings where a presence would forward SMTF's objectives 7. Attend those meetings 	Database Strategy Meetings Database Programme Additional meetings Meetings	End Aug 08 End Aug 08 Ongoing End Oct 08 Ongoing Ongoing Ongoing – Nov 08
2, 6, 8	5. Information HIGH (but prioritisation of activities required within this action)	Provision of information and advice through: website; news bulletins; alerts; directory; documents and other information of use to members	<ol style="list-style-type: none"> 1. Set up a referral system 2. Set up database of service providers 3. Contact providers to identify best ways of working together 4. Identify other contacts, supporters and service providers 5. Develop appropriate links with them, to gather information 6. Build database of members and other interested parties 7. Send relevant information to members/other interested bodies on a regular basis 8. Set up plan and timetable to a) keep members/organisations up to date and b) information up to date 9. Secure agreements with suitable funding advice suppliers 10. Publish the directory 11. Distribute the directory 12. Keep the directory up to date, especially in terms of funding 13. Maintain website and keep up to date 14. Clarify development objectives for the site 15. Put 'good practice' case studies on the website 16. Keep records so as to monitor use of website and evaluate content 17. Prepare reports on website use and development 	Document Database Contacts Database Database records Database Lists Timetable Agreements Directory Distribution Updated directory Website Report Case studies Records Reports	End May 08 End May 08 End Jul 08 End Aug 08 Ongoing Ongoing Ongoing End Sep 08 End Jun 08 Mid Jul 08 End Jul 08 Ongoing Ongoing End May 08 End Oct 07 then ongoing End Oct 07 then ongoing End Nov 07 – then quarterly

6	6. Marketing HIGH	Ensuring that SMTF is recognised	<ol style="list-style-type: none"> 1. Prepare marketing strategy 2. Deliver strategy 	<p>Strategy</p> <p>Delivery of information</p>	<p>End May 08 then ongoing</p> <p>End May 08 then ongoing</p>
1, 2, 4	7. Networking HIGH	Themed meetings open to all members with guest speakers	<ol style="list-style-type: none"> 1. Programme in quarterly networking meetings across Somerset 2. Deliver a high profile annual meeting 	<p>Meetings</p> <p>Annual meetings</p>	<p>Quarterly</p> <p>Beg Nov 07 Mid Feb 09</p>
11	8. Connecting MEDIUM	Half or whole day events that offer knowledge, information exchange and inspiration to those interested in market town revitalisation	<ol style="list-style-type: none"> 1. Set up regular events 2. Research the potential for more local 'self-servicing' meetings 3. Select a small number of trainers that can provide appropriate services (including VISTA) 4. Organise appropriate training/capacity building events 	<p>Events Report</p> <p>Trainers</p> <p>Training sessions</p>	<p>Ongoing End Sep 08</p> <p>End Jun 08</p> <p>Beg Oct 07 then ongoing</p>
11, 3	9. Supporting LOW	<p>Small grants fund to assist members of market town community groups further the interests of their group and its work</p> <p>Providing advice, guidance and practical help to market town groups in developing their own websites and use of IT for community development and plan making</p>	<ol style="list-style-type: none"> 1. Research best form of grant 2. Write small grant proposal 3. Secure funding 4. Publicise grant 5. Distribute funds 6. Programme in visits to members 7. Provide website advice and guidance 	<p>Research Proposal</p> <p>Funding Publicity</p> <p>Funding distributed</p> <p>Programme Advice and guidance</p>	<p>Beg Sep 08 End Sep 08 End Nov 08 End Jan 09 Mid Jan 09 – then ongoing</p> <p>Mid Oct 07 Mid Oct 07 - ongoing</p>
14	10. Monitoring and Evaluation HIGH	To ensure Forum is making progress towards its objectives, together with supporting the needs of the market towns	<ol style="list-style-type: none"> 1. Set up an agreed monitoring and evaluation system 2. Deliver awareness/training for the system 3. Prepare quarterly progress reports 4. Carry out interim evaluation with external evaluators 5. Prepare annual survey for evaluation 6. Carry out annual evaluation with external evaluators 7. Prepare end of year service level agreement reports 8. Use results to inform content of the next year operational plan 	<p>System</p> <p>Training Reports Report</p> <p>Survey Report</p> <p>Reports</p> <p>Operational plan</p>	<p>End May 08</p> <p>Mid Jun 08 Quarterly Mid Oct 08</p> <p>Beg Nov 08 End Jan 09</p> <p>Beg Mar 09</p> <p>Beg Mar 09</p>

TABLE 17.2 OPERATING PLAN – INDICATIVE TIMESCALES OCTOBER 2007 TO APRIL 2009

ACTIVITY	2007			2008												2009		
	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	Jan	Feb	Mar
1. SMTF Change																		
1. Accommodation							▲											
2. Review JD of staff							▲											
3. Governance/members								▲										
4. Agree all office docs								▲										
5. Quality standards								▲										
6. Put in place training								▲										
7. Deliver training																		
8. Administration-meetings																		
2. Resourcing																		
1. Quantify funding	▲																	
2. Key contacts	▲																	
3. Funding strategy		▲																
4. Agree support		▲																
5. Prepare applications					▲													
6. Review funding											▲							
7. Next year's funding												▲						
8. Secure forward funds																	▲	
3. Intelligence																		
1. Scope audit									▲									
2. Work/budget for audit														▲				
3. Resources agreed														▲				
4. Carry out audit																	▲	
5. Publish results																		▲
6. Agree next steps																		▲
7. Refine operation plan																		▲
4. Advocacy																		
1. Identify key bodies												▲						
2. Prepare strategy												▲						
3. Programme meetings																		
4. Seek other bodies														▲				
5. Programme meetings															▲			
6. 'Ad hoc' meetings																		
7. Attend other meetings																		

ACTIVITY	2007			2008												2009		
	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	Jan	Feb	Mar
5. Information																		
1. Referral system								▲										
2. Service providers								▲										
3. Contact providers										▲								
4. Other contacts											▲							
5. Develop links																		
6. Database of contacts																		
7. Send out regular info																		
8. Timetable for updates												▲						
9. Agreements -advisors									▲									
10. Directory										▲								
11. Distribute directory										▲								
12. Updating directory																		
13. Maintain website																		
14. Clarify objectives								▲										
15. Good practice studies	▲																	
16. Records	▲																	
17. Reports		▲				▲				▲				▲				▲
6. Marketing																		
1. Marketing strategy								▲										
2. Deliver strategy																		
7. Networking																		
1. Prog in meetings																		
2. Annual meetings		▲															▲	
8. Connecting																		
1. Set up regular events																		
2. Research												▲						
3. Select trainers									▲									
4. Deliver training																		

ACTIVITY	2007			2008												2009		
	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	Jan	Feb	Mar
9. Supporting																		
1. Grant research												▲						
2. Write proposal												▲						
3. Secure funding													▲					
4. Publicise																▲		
5. Distribute																		
6. Prog of visits	▲																	
7. Website advice																		
10. Monitoring																		
1. Set up system								▲										
2. Training									▲									
3. Progress reports									▲			▲			▲			▲
4. Interim evaluation												▲						
5. Annual survey													▲					
6. Annual evaluation																▲		
7. SLA reports																		▲
8. Refine next year plan																		▲

18. Monitoring and Evaluation

- 18.1 SMTF must ensure that it makes progress towards the objectives (mission statement, aims/objectives, actions and outputs) as well as ensuring it is able to meet the needs of supporters, members and other stakeholders. In order to measure progress the Forum should::

Set up an agreed Monitoring and Evaluation System.

- 18.2 SMTF considered, with consultants' advice, the use of the Logical Framework Analysis (LFA) to develop a monitoring and evaluation system. Framework sheets have been prepared for each of the Aims (See Section 9) and it should be the Forum's intention to use these sheets as a basis to develop the system. The LFA should enable the Forum to:
- Look at each activity in more detail and make sure they are well planned in order to meet the output.
 - Check each output, itemise an appropriate indicator and the means by which it can verify that its is meeting the output's indicator.
 - Relate the outputs to the action and aims (and objectives – especially the short-term objective) as in Section 9.
 - Consider some indicators (and the means of verifying them) that should show progress from outputs towards the aims.
 - Consider any problems that may occur as work is carried out so as to minimise the risks to delivery of the operating plan.

The information gathered can then be used as additional background to the operating plan (Tables 17.1 and 17.2). Support has been budgeted in to set this up.

Awareness and Training for the System

- 18.3 Whilst the system needs to be kept as simple as possible it is important that those who come into contact with it understand the need for robust reporting. Like any operating plan, it should be subject to revision in the light of changes and feedback so it should be important that staff and management, in particular, are aware of potential changes and have the knowledge and support to carry out any revisions. External support has been budgeted in to deliver training and awareness.

Quarterly Progress Reports

- 18.4 The Forum Officer should prepare reports for budget out-turns and progress towards outputs. These reports should be given to the Steering Group (Management Committee). Once agreed, the reports should be available to other stakeholders as part of the commitment to openness. If required, reports should be given to other supporters/funders as part of any contractual agreement.

Interim Evaluation

- 18.5 It is suggested that an interim evaluation is carried out in October 2008. The purpose of this evaluation should be to ensure that SMTF is on track in delivering the first operating plan. The evaluation should also highlight any improvements considered necessary to deliver the plan. A short report should be presented to the Management Committee for consideration. Any actions / amendments recommended by the Committee should be carried out.

Annual Evaluation

- 18.6 A survey of members and other stakeholders should be carried out on an annual basis. This should form part of a full monitoring and evaluation of the work as the Forum moves towards the end of the first operating plan. Some external, independent support has been budget in to carry out this evaluation and a report should be prepared by the end of January 2008. This should give SMTF time to consider the results and inform the content of the operating plan for April 2009 to March 2010.

Service Level Agreement (SLA) reports

- 18.7 It is anticipated that the Forum should contract with a number of authorities and agencies through SLAs. Annual delivery reports should be prepared as agreed in such contracts for each contractor.