



# COMMUNITY HEALTH EXCHANGE

## *Routes to Sustainability*



## **How to use this Briefing**

This CHEX Briefing highlights resources to help your organisation plan its long term sustainability. It contains information on business planning, monitoring and evaluation, addressing health inequalities, working with communities, influencing policy and practice, marketing, partnership working, advocating your agenda, and funding.

Under each topic heading, we pose a number of questions for you to consider and then signpost you to relevant tools such as DVDs, case studies, evidence papers, business plans, approaches to evaluation and funding sources that can help with long term strategic planning.

If you would like further information on any of these resources, please do not hesitate to contact any of the CHEX Staff Team at [chexadmin@scdc.org.uk](mailto:chexadmin@scdc.org.uk).

## **Long term sustainability – sign posting for action**

Steps to long term sustainability require Community Health Initiatives (CHIs) to plan for the future, communicate health impact to funders and profile their unique contribution to health improvement. The complicated and often fragile funding environment creates significant challenges in negotiating and securing successful pathways. In December 2004, CHEX circulated the Briefing 'SOS – Steps on Sustainability' which highlighted the experience of our Network Members in confronting these challenges. In this second Briefing, we build on these experiences and focus on the support services and resources, both national and local, that help with securing long term sustainability.

We thought it would be useful to pose some basic questions that influence the internal and external organisation of a CHI and then identify the resources that can help address these questions such as models of working, new ideas, training, technical advice, toolkits, contacts, funding sources and national and local networks. To maintain continuity, we have kept the same categories, identified in the first Briefing.

Many of the identified resources relate to the activities of the Scottish Executive's Community-led: Developing and Supporting Healthy Communities Task Group which, in December 2006, launched its recommendations and support materials on the key themes of:

- building the evidence base
- capacity building
- planning and partnership working
- addressing the long-term sustainability of community health initiatives

Six case studies representing a variety of both geographical areas of Scotland and approaches to health improvement provide qualitative evidence of health benefits from working with communities. The six have been written up in a Report and four have also been documented on a DVD. This material, together with up-to-date information on taking forward the recommendations can be accessed from the CHEX website [www.chex.org.uk](http://www.chex.org.uk) under the 'community led health' section of 'policy context'.

## **Acknowledgements**

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**Securing adequate funding for long term sustainability is a tough nut to crack for the majority of CHIs. As work is primarily funded through fixed term grants/contracts from Health Boards, Local Authorities or the Lottery, the constant pressure to 'chase' funding becomes a dominant feature of existence.**

- If your core funding is fixed term, do you have a funding strategy built into your Business Plan that addresses possible continuation of service?
  - If your core funding is based on short-term annual grants have you approached funders to negotiate and establish a 'Service Level Agreement' for at least three years?
  - If your core funding was previously provided by Health Board and Local Authorities, but has now been remitted to Community Health Partnership or Community Planning Partnership have you approached key people in these partnerships to highlight CHI's work and prepare for future funding negotiations?
  - Do you know who the key decision makers are?
  - Do they know what you do and why they benefit from your work?
  - What are the processes for allocating funding?
  - How will you know when to bid for different funds?
  - Are there clear reporting structures for existing funds?
- Have you undertaken any cost/benefit analysis of your work?
  - Has your CHI considered reconfiguration of services by identifying (a) certain services that could be delivered by mainstream services and (b) others that you want to continue to deliver yourselves?
  - Have you identified clear measures of success for the work you do?
  - What planning and evaluation tools do you use? Do they adequately demonstrate the impact your work has? Is your work measured against appropriate indicators? e.g. do you include qualitative information?
  - Should you consider working co-operatively with other community or voluntary sector organisations through a local 'network' or 'alliance' to highlight the work that you all undertake locally?
  - Has your CHI explored consortium bids with a range of partners from the community, voluntary, public and business sector?
  - Are you sharing resources with other organisations or is merger a viable option?
  - Has your CHI considered models of income generation? e.g. social economy or contracting services to the statutory sector (see the 'Strategic Planning' section of this document)



**Funder Finder** – Develops and distributes software for individuals and not-for-profit organisations in the UK to identify funding sources. Includes guidance called ‘Apply yourself’ for writing grant applications. Their website also has direct links to an alphabetical list of ‘Charitable Trusts’. [www.funderfinder.org.uk](http://www.funderfinder.org.uk)

**Scottish Arts Council** – Provides information relating to funding sources for the arts in Scotland [www.scottisharts.org.uk/1/funding.aspx](http://www.scottisharts.org.uk/1/funding.aspx)

**SCVO** (Scottish Council for Voluntary Organisations) is the national body representing the voluntary sector, [www.scvo.org.uk](http://www.scvo.org.uk). The SCVO information helpline is FREE. Call 0800 1690022. The English equivalent of SCVO is NCVO and they also have a range of resources available on their website which can equally be applied in Scotland. The link below will take you to a page about their ‘Sustainable Funding Project’ where you will find a link to their ‘Introductory Pack on Funding and Finance’ [www.ncvo-vol.org.uk/sfp/](http://www.ncvo-vol.org.uk/sfp/)

**CHEX – Point Snippets**, the fortnightly e-bulletin produced by CHEX contains the latest funding information and is sent to the CHEX network every fortnight. You can register for Snippets on the CHEX website [www.chex.org.uk](http://www.chex.org.uk)

**EQUAL** Strengthening the Social Economy has, since 2001, developed tools and training for project development including ‘Tall Poppies Enterprise Pack’ and ‘From Grants to Contracts’ [www.scvo.org.uk/equal/](http://www.scvo.org.uk/equal/)

**Big Lottery Fund** has several grant programmes available to organisations in Scotland [www.biglotteryfund.org.uk/apply-sco](http://www.biglotteryfund.org.uk/apply-sco)

**Strategic Funding Review of the Voluntary Sector in Scotland** was undertaken by the Scottish Executive in collaboration with SCVO and local government. A joint statement about the review can be located at this site [www.scotland.gov.uk/Publications/2005/05/NewPage](http://www.scotland.gov.uk/Publications/2005/05/NewPage)

**Social Firms Scotland** – exists to promote and develop new social firms throughout Scotland, and to help existing ones develop their capacity [www.socialfirms.org.uk](http://www.socialfirms.org.uk)

**Scottish Community Action Research Fund (SCARF)** provides funding “for research by community organisations to help communities get actively involved in decisions that affect them and improve their circumstances.” [www.scdc.org.uk/scarf/](http://www.scdc.org.uk/scarf/)

**The Directory of Social Change**, an English site, provides information about training and funding for the voluntary sector [www.dsc.org.uk](http://www.dsc.org.uk)

**Guide to Raising Funds** – A Guide for Scottish Voluntary Organisations. SCVO’s Guide to Fundraising, produced specifically for small and medium sized organisations working in Scotland: [www.scvo.org.uk](http://www.scvo.org.uk) Go to the information page of the website and put ‘Guide To Raising Funds’ into the search facility. Follow the link to the 134 page document ‘How To Raise Funds’ by Pam Judson.

### **Consultants/Business advisers**

If your existing funding allows it can be beneficial to hire independent consultants or advisers for business planning and projecting your funding needs. It may be worth while building in a budget heading for this specific purpose.

**Raising and acting on the health priorities identified by communities is often challenging and frustrating for CHIs – priorities, together with allocation of resources are usually determined by government departments and agencies. Therefore, CHIs have to constantly exploit opportunities that highlight their own priorities and support communities in influencing local decision-making structures.**

- How does your CHI communicate the evidence gathered from your work to a range of audiences such as local people and key decision-makers?
- Have your management committee and staff been involved in training and capacity building to develop skills in 'Effective Negotiation'?
- How does your CHI convey the health priorities of your service users to wider audiences interested in health improvement and health inequalities?
- How does your CHI make use of local decision-making structures such as Community Health Partnerships to influence the health priorities expressed by your service users?
- How does your CHI make use of national networks such as CHEX, Voluntary Health Scotland and Community Food and Health (Scotland) to highlight the health priorities expressed by your service users?
- How does your CHI use district-wide and national networks to assist you in advocating your health priorities?

**'Understanding the Policy Maze – A Guide to Social and Health Policy in Scotland'** (Published by NHS Health Scotland), Free to CHEX Network Members, Standard price £7.50. The document provides a comprehensive overview of policies and health-related initiatives. It also highlights the implications of these policies for Community Health Initiatives. Although published in 2005, there are many policies that are still relevant.

**'Lobbying politicians and policy makers'** – Voluntary Arts Network has produced a very helpful Briefing – 'Lobbying politicians and policy makers – an introduction to influencing', which outlines the thinking and doing around effective lobbying. Although focusing on the arts, this is a Briefing that can be used for any activity or issue. Download the Briefing from [www.voluntary.org/publications](http://www.voluntary.org/publications)

**Scottish Council for Voluntary Organisations (SCVO) Policy and Parliamentary Service** provides an extensive range of information and parliamentary advice related to the voluntary sector. Policy Issues provides links to policy documents produced by SCVO, consultation responses, Policy Committee papers, and briefings prepared for Parliament. Contact the service on [www.scvo.org.uk/scvo/PolicyAndParliament/AboutPolicyService.aspx](http://www.scvo.org.uk/scvo/PolicyAndParliament/AboutPolicyService.aspx)

**CHEX Network** – CHEX is a network of community health initiatives across Scotland, comprising Community Health Projects, Healthy Living Centres and community groups with a health focus. It comes together around policy and practice issues, which can directly help raise community health priorities with national and local decision makers. See Seminar Reports on policy and practice on the CHEX website [www.chex.org.uk](http://www.chex.org.uk)



**Changing Lives: Case Studies** (published by NHS Health Scotland on behalf of Community-Led: Supporting and Developing Healthy Communities Task Group) – cross- reference 'Introduction'. The Case Studies highlight effective ways of building capacity with individuals and community groups, which equip them to raise their own health priorities with decision makers. This report can be downloaded from [www.chex.org.uk/uploads/changinglives\\_pdf.pdf](http://www.chex.org.uk/uploads/changinglives_pdf.pdf)

For hard copies of the report and an accompanying DVD, contact Heather Apsley at NHS Health Scotland [Heather.Apsley@health.scot.nhs.uk](mailto:Heather.Apsley@health.scot.nhs.uk)

**West of Scotland Community Health Network** is a constituted, independent district-wide health network working to improve health and wellbeing from the North West to South West Scotland. It creates regular opportunities for network members to come together for mutual support and share information and ideas on policy and practice issues related to community health projects and other community health initiatives. Contact the Network on [www.wschn.org.uk](http://www.wschn.org.uk)

**Lothian Community Health Projects' Forum** is a registered charity, which supports the work of Community Health Projects across Lothian. The Forum works to encourage community participation, collective action, and collaborative inter-agency working in addressing inequalities in health. It advocates that the needs of communities should drive the agendas in partnership working at all levels. Contact the Forum on [www.lchpf.co.uk](http://www.lchpf.co.uk)

**The Councils for Voluntary Service Network** provides development and support services to voluntary organisations across Scotland. Many local CVSs are supporting the Community Health Partnership's Public Partnership Forums and are therefore a good point of contact to raise issues and concerns on local health priorities. Contact CVS Network Scotland at [www.scvo.org.uk](http://www.scvo.org.uk)

**Voluntary Health Scotland** is a national network of voluntary health organisations, which complement and support the work of the NHS and other public bodies. VHS focuses on strategic approaches to support and maximising the role of voluntary organisations in health improvement and health care. VHS produces Briefings on Government Policy and supports its members to influence the shaping and implementing of policies at a national level. Contact VHS on [www.vhscotland.org.uk](http://www.vhscotland.org.uk).

**The Social Policy Task Force** – UK coalition of anti-poverty networks, initiated The 'Get Heard' Project and in Scotland, the Poverty Alliance took forward this work. It facilitated workshops across the country which enabled the views of people experiencing poverty to highlight their priorities and feed them into the 2006 National Action Plan and Social Inclusion. For information on local action and copies of the NAPs Report contact [www.ukcap.org/getheard/](http://www.ukcap.org/getheard/)

**Glasgow Centre for Population Health** – a research and development centre working across the boundaries of research, policy, implementation and community life to shape a healthier future for Scotland. Based in Glasgow, the Centre has a focus on the particular characteristics of West of Scotland, in particular health inequalities – and believes that their approaches and learning have implications for other cities and regions. Contact the GCPH on [www.gcph.co.uk](http://www.gcph.co.uk).

**In a world of competing demands on health budgets and the use by many agencies of sophisticated methods for marketing their services, more than ever, CHIs must devise marketing strategies for the promotion of their unique role and remit in health improvement.**

- What are the key 'messages' you want to convey and who do you want to convey them to? What information do they need to have about your organisation?
- Why do you want to convey these messages?
- How have you translated these messages into tackling health improvement and tackling health inequalities?
- What are the channels / mediums you have considered/used to communicate your message?
- Where are the opportunities to market the organisation?
- When is the best time to market your organisation?
- What resources do you need to market effectively?



## **GCVS – ‘How to’ guide**

GCVS provides a guide to writing a marketing plan for your organisation. The guide which is downloadable from the website supports projects to define their organisational vision, aims and unique features as the most vital step in the marketing plan. The vision and aims set out in the marketing plan will dictate the direction of the organisation.

[www.gcvs.org.uk/how\\_guides](http://www.gcvs.org.uk/how_guides)

## **nfpsynergy – Getting the message across**

Not-for-profit think-tank nfpSynergy has teamed up with The ImpACT Coalition to produce a free, short, practical report and guide that will empower charities/voluntary sector organisations to formulate and communicate simple messages and dispel misperceptions their stakeholders may have, both about themselves and the wider third sector.

[www.nfpsynergy.net/freereports](http://www.nfpsynergy.net/freereports)

## **Voluntary Arts Network**

VAN provides a guide to good marketing. Marketing is about communicating with people who are interested in what you are doing, giving them access to something they want, and building a closer relationship with them. The site offers a host of useful material about getting your message across from developing a marketing campaign to ideas on working with the press.

[www.voluntaryarts.org](http://www.voluntaryarts.org) – see under ‘running your group’ then ‘marketing and publicity’.

## **Voluntary Matters 1+2 – Exploring Marketing**

This useful website advises that marketing needn’t always be expensive and glossy, many successful and dynamic charities use marketing and branding strategies adapted from the corporate sector. This web site provides resources and case studies for effective marketing.

[www.voluntarymatters1and2.org/message/marketing/index.html](http://www.voluntarymatters1and2.org/message/marketing/index.html)

## **‘The New DIY Guide to Marketing’**

This practical, no-nonsense guide for the not-for-profit sector examines the essentials of marketing from understanding your market, product/s and branding, through to strategy and costs, and a whole range of promotional techniques – from advertising and direct mail to publicity and the media. The revision also includes new chapters on the internet and printed promotional materials and more on cause related marketing and public relations. Contains useful tips, real-life true stories and checklists.

ISBN 1 860721 35 4,

2nd edition, 2001

[www.dsc.org.uk](http://www.dsc.org.uk) – see under ‘DCS publications’

## **Volresource**

This website sets out Marketing concepts and how they can be applied to voluntary organisations, whether it is for campaigning, increasing membership or fundraising. More of a quick dip rather than an in-depth treatment.

[www.volresource.org.uk/briefing/market.htm](http://www.volresource.org.uk/briefing/market.htm)

## **Media Guide**

Media Guide is a resource for voluntary organisations in Scotland to help them work more successfully with the media – be it TV, newspapers, or radio.

In a world which is experiencing information overload. Its vital for voluntary organisations to make their information stand out from the crowd, to get it used by the media and for their key messages to be heard or seen by as wide an audience as possible.

Media Guide is packed with helpful time saving tips, hints and information to help organisations make a start on this work or to get better at what they already do.

[www.mediaguide.org.uk](http://www.mediaguide.org.uk)



**‘Politicking with a small p’ is something that is rarely articulated, but tends to be done by all CHIs in advancing their agenda on either tackling health inequalities or making a case for further funding. Most organisations tend to pick up knowledge and skills for this on the job. Within the context of partnership working, it should be informed by use of outcomes from evidence, understanding of how best to communicate an argument, honed negotiating skills and experience of working with allies.**

- How does your CHI recognise the experience, expertise and skills required in advocating your own agenda?
- Does your CHI have an informed analysis of the power structures, which influence its ability and capacity to operate?
- Does your CHI have an analysis of the nature and extent of its influence on health improvement and tackling health inequalities in your area?
- How does your CHI identify and support people who are best equipped to advocate your agenda?
- Do you have access to and use robust evidence, which demonstrates and advances the work of your CHI?
- Does your CHI share ideas and network with other CHIs that have successfully influenced the agenda of local decision-making structures?



**Lobbying/Campaigning** – Identify programmes/models on campaigning and lobbying by entering the words ‘how to campaign’ into Google. This will bring up a variety of sites including trade unions, churches and campaigning organisations like Friends of the Earth. Choose the one that suits you best e.g. Friends of the Earth: Community: Resource: How To Campaign...A set of concise campaign guides written for community activists

[www.community.foe.co.uk/resource/how\\_tos/index.html](http://www.community.foe.co.uk/resource/how_tos/index.html)

**CampaignON.com** allows campaigners to set up their own fully-fledged web site. It offers a powerful tool for lobbying decision makers locally or nationally [www.campaignon.com](http://www.campaignon.com)

**Community Mediation** – Helping with Conflict in organisations. Increasingly, Community Mediation services are being used to assist conflict resolution within and between organisations. Issues that can be addressed include: interpersonal conflict in committees and governing bodies, interpersonal conflict within staff or volunteer groups, conflict between organisations over issues such as competition, working relationships or practice. Depending on the nature of the organisation/dispute and the geographical location, SACRO provide community mediation guidance. For further information: Contact SACRO Community Mediation Consultancy, 21 Abercromby Place, Edinburgh EH3 6QE by telephoning 0131 624 9200 or e-mailing [imcdonough@cmconsultancy.sacro.org.uk](mailto:imcdonough@cmconsultancy.sacro.org.uk)

**SCVO** have a host of training courses to assist with building skills for people in voluntary organisations both staff and board or committee members, including contract negotiation training [www.scvo.org.uk](http://www.scvo.org.uk) click on either ‘services and resources’ which has a ‘training’ option or ‘training events’ highlighted on their home page.

**Case Studies** which help to support your case e.g. ‘Insight’: Case Studies in community development and health in Scotland, on the Health Scotland website [www.healthscotland.com](http://www.healthscotland.com) simply put ‘Insight case studies’ into the search on the home page. The ‘Small Change Big Impact Report’ is available on the CHEX website [www.chex.org.uk](http://www.chex.org.uk) – use the search facility. (See also in the ‘Monitoring and Evaluation’ section of this Briefing Sheet)

**Evidence** which helps advocate your case, e.g. the ‘Healthy Living Centre Evidence Summary paper’ illustrates how the work of HLCs complements the national policy agenda with appropriate indicators. Downloadable from the ‘HLC Reports and Publications’ section of the CHEX website Also the work of the ‘Community Led Supporting and Developing Healthy Communities Task Group’ has resulted in a range of reports badged ‘Healthy Communities: A Shared Challenge’ and all the documents are available for download on the CHEX website. [www.chex.org.uk](http://www.chex.org.uk) (For further information see also the ‘Demonstrating the Impact’ section of this Briefing Sheet)

**Healthy Living Centres Alliance** – See ‘Partnership Working’ section of this briefing sheet.

**As no one organisation or agency can tackle health inequalities on its own, partnership working has been at the centre of community health work for several years. The evidence shows that the quality of partnership working varies greatly. Consequently, the partnership process requires investment of time, energy and resources.**

- Has your Management Committee 'bought into' the added value that partnership working brings to your CHI?
- Has your Management Committee undertaken a cost/benefit analysis of what partnership working would bring to the organisation?
- How has your Management Committee used the benefits from partnership working to take forward the role and remit of your CHI?
- How has your CHI invested in processes, which improve thinking and approaches to partnership working?
- How has your CHI identified and conveyed to others the added value from partnership working on health improvement and tackling health inequalities?
- How have you identified and quantified the use of working with others that increases your ability and capacity to impact on health improvement and tackle health inequalities?
- How do you build the capacity and strength of your Management Committee and Staff Members in Partnership Working?



**‘Getting Our Act Together..... in Community Development and health’** is a local training handbook, which provides a starting point for health practitioners to develop training opportunities with colleagues from other sectors. The handbook will help readers build up their understanding of community development and explains how to introduce or develop these approaches with colleagues and partners across other sectors. Price £19.95 from Community Development Foundation [www.cdf.org.uk](http://www.cdf.org.uk) For further information on use of the training handbook contact David Allan, CHEX Training & Development Manager [David@scdc.org.uk](mailto:David@scdc.org.uk).

**‘Partners in Health – A toolkit for building successful partnerships’** – This toolkit covers both key principles and practical steps to successful partnership working. It also contains training exercises, and addresses issues such as dealing with power and influence and how to best manage partnership working. Copies can be downloaded from NHS Health Scotland’s website. Go to [www.healthscotland.com](http://www.healthscotland.com), then into ‘resources’, then search ‘publications’.

**Partnerships Online** – Although some of the material is slightly dated, this is a useful website for accessing a range of material on partnership working that focuses on involving communities [www.partnerships.org.uk](http://www.partnerships.org.uk).

**‘National Standards for Community Engagement’** set out best practice guidance for engagement between communities and public agencies. They provide a positive framework for strengthening partnership working between communities and public sector agencies. See ‘Community Engagement’ section for more information and a weblink.

**Healthy Living Centre Alliance** was set up in England, working through nine regional networks, to raise awareness of HLCs, it does this through engagement with national, regional and local government bodies, shares good practice and develops the skills and experience of Healthy Living Initiatives. They also stimulate effective partnerships with other professional, statutory and voluntary bodies working on similar issues. Find out more about the Alliance on [www.healthylivingonline.org.uk/assets/files/hla%20leaflet%20final.pdf](http://www.healthylivingonline.org.uk/assets/files/hla%20leaflet%20final.pdf).

**The Improvement Service** is dedicated to improving the quality and accountability of public services in Scotland and has some very useful web links to resources that translate well into the community and voluntary sectors. Check it out on [www.improvementservice.org.uk/partnership-and-joint-venture/useful-links/](http://www.improvementservice.org.uk/partnership-and-joint-venture/useful-links/)

**Joseph Rowntree Foundation** – The Joseph Rowntree Foundation supports a wide programme of research and development projects in social policy, and the site provides summaries of findings on community partnership working on regeneration and social development projects. [www.jrf.org.uk](http://www.jrf.org.uk)

**‘Managing to Collaborate’** is a book on the added value and advantage to be gained from collaborating with other organisations. It deals with both the theory and practice of collaborative advantage and contains a number of case studies, including a health promotion partnership and local health care co-op. Authors Chis Huxham and Siv Yangen, published by Routledge (2005) ISBN 0-33919-7(hbk).

**Establishing effective systems to demonstrate outcomes and convey them to appropriate parties can be challenging, but in the long term extremely valuable in showing your unique contributions to health improvement and tackling health inequalities.**

- Has your CHI set and clarified the outcomes that will contribute to the intended impact? e.g. outcomes are the changes and differences you hope to make such as increase participation of service users in Public Partnership Forums and Community Health Partnerships.
- Has your CHI established how it will evaluate the work activities that will contribute to meeting these outcomes? e.g. ask questions, gather evidence, analyse evidence and act on the results.
- Are there opportunities to gather a mixture of qualitative and quantitative evidence and how would your CHI gather this evidence? e.g. feedback from service users through questionnaires, anecdotal experiences from service users, interviews with funders and local decision makers, photographs from events, numbers and patterns of accessing services, longitudinal tracking of sample of participants and records of use of resources etc.
- How do staff and volunteers record and analyse the results of their work activities? e.g. reports to funders, inputs to databases linked planning and evaluation, use of Support and Supervision Sessions.
- Have all key stakeholders in your CHI e.g. management committee, funders, staff, volunteers, service users – clarified how outcomes will be conveyed to funders, decision-makers, service users and the wider community, e.g. through written reports, DVD, presentation at meetings, drama sketches at local events, letters to elected representatives, use of national and local networks, newsletters, websites etc.

- Are you clear how these different audiences use the information you provide to them on outcomes and do they then use it to inform and influence their own work?

## **LEAP – Learning, Evaluation and Planning**

LEAP is a learning based planning and evaluation framework designed to be a useful tool in all aspects of project, programme and policy planning and development. There is a generic LEAP model as well as a specific model for planning and evaluating community health and well-being 'LEAP for Health'.

Information about LEAP can be found on the website [www.scdc.org.uk/leap](http://www.scdc.org.uk/leap) or by contacting SCDC on 0141 248 1964 or [leap@scdc.org.uk](mailto:leap@scdc.org.uk)

## **Evaluation Support Scotland**

Evaluation Support Scotland is a charity that provides specialist support across Scotland to voluntary organisations and their funders to help them to evaluate and learn. They help voluntary organisations access evaluation tools and expertise (including a downloadable monitoring and evaluation pathway assessment tool).

They can be contacted on 0870 850 1378 [www.evaluationsupportscotland.org.uk](http://www.evaluationsupportscotland.org.uk) or by email at [info@evaluationsupportscotland.org.uk](mailto:info@evaluationsupportscotland.org.uk)

## **Dundee Healthy Living Initiative – ‘The Road to Health’ (DVD)**

This DVD explores the impact of Dundee HLI's work with individuals and communities in Dundee. If you are interested in borrowing a copy of this resource please contact the Healthy Living Initiative on 01382 435824.



## **Lothian Community Health Projects Forum**

This organisation has produced two extremely useful resources:

i) 'Right on Target' is a useful and practical guide to evaluating Community Health Projects. Based on community development principles it covers key areas such as 'why evaluate?', 'who is evaluation for?', participation, and ethics. It also gives a good step-by-step guide to evaluation of Community Health Projects. It can be downloaded from the Forum's website at [www.lchpf.co.uk](http://www.lchpf.co.uk)

ii) 'Making Connections' is an interesting and informative DVD that showcases the work of the Community Health Projects in Lothian and makes very clear links between theory and practice. Copies of the DVD can be obtained from the Forum by phoning 0131 536 3540.

## **Changing Lives: Case Studies**

See Introductory Section.

## **Glasgow Council for the Voluntary Sector (GCVS) – 'Supporting Healthy Organisations'**

Healthy Organisations brings together a tailored package of GCVS organisational support and development services to meet the needs of health-oriented organisations in Glasgow [www.gcv.org.uk/services/healthy\\_organisations](http://www.gcv.org.uk/services/healthy_organisations)

The emphasis of Healthy Organisations is on joined-up support based on a thorough, independent analysis of member organisations needs. This includes planning, operational/structural support and monitoring/evaluation. Contact GCVS for more information – Tel: 0141 332 2444.

## **SCVO – The 'Big Picture' Second Edition 2003, ISBN: 1 870904 75 3**

The Big Picture is a quality improvement framework, managed by SCVO's Learning Team that supports organisational development and improvement. The second edition has a much stronger focus on the results, rather than the processes and also places more emphasis on leadership, equal opportunities and people. It costs £76.00 (£55.00 for SCVO Members) but if you send payment in advance there is a £10.00 reduction in price. SCVO also have a resource pack called 'Getting Started with the Big Picture' which is designed to give you everything you need to know to start using the Big Picture framework. Contact the SCVO publications department on 0131 556 3882 or email [publications@scvo.org.uk](mailto:publications@scvo.org.uk) for more information.

## **ASH Scotland – The Evaluation Journey**

This is an extremely practical step-by-step guide to evaluating projects. The toolkit is free of charge (apart from post & packing if ordering more than 1 copy). Copies are available from ASH Scotland Information Services on 0131 225 4725 or email at [ashscotland@ashscotland.org.uk](mailto:ashscotland@ashscotland.org.uk)

## **Edinburgh University – Research Unit in Health, Behaviour and Change (RUHBC)**

The Research Unit in Health, Behaviour and Change (RUHBC) was established in 1983 and undertakes a variety of research in the health field. The Unit's key aims are to improve understanding of the processes and mechanisms which influence the health and well-being of the Scottish population and to enhance the contribution of knowledge to the development of policy and practice interventions for health. [www.chs.med.ed.ac.uk/ruhbc/](http://www.chs.med.ed.ac.uk/ruhbc/)

## **Insight – Case Studies in Community Development and Health in Scotland & 'Getting our Act Together' in Community Development and Health.**

Both of these publications give clear and concise explanations of why community development approaches are important in tackling health inequalities and achieving health improvement (Insight – page 3-11, Getting Our Act Together – page 19-20)

Both publications also include very informative case studies of community development in health in action. Copies of Insight are available from CHEX (just a few copies left – no charge) or directly downloadable from the NHS Health Scotland website at [www.healthscotland.com/documents/133.aspx](http://www.healthscotland.com/documents/133.aspx).

'Getting Our Act Together' is available for £19.95 from Community Development Foundation – visit [www.cdf.org.uk](http://www.cdf.org.uk) and go to the publications page.

**As the needs of communities are constantly changing, together with changes in the health and social policy arena, there is an ongoing requirement for Community Health Initiatives, to regularly review their role and remit and ensure plans and work activities continue to meet the priorities of service users and funders.**

- Do you have a Business Plan, which clearly sets out your anticipated outcomes, work programmes, methods and funding proposals for an identified period?
- How does your CHI know that it is meeting its stated aims and objectives? e.g. review implementation of a Business Plan and collect evidence to show impact of services?
- What type of planning does your CHI do to ensure your work activities continue to be relevant to the needs of service users and funders? e.g. production of Strategic Plan, which outlines your agreed direction and priorities for the next three years.
- The CHI has produced a Strategic Plan, is it shared with other stakeholders who have an interest in your work? Do you have feedback mechanisms from stakeholders?
- Do you regularly produce a progress report to funders, partners and the wider community?
- Do you highlight your work activities and its impact to other local organisations and agencies, emphasising where you complement their work and 'fit' into strategic planning for the wider community?



## **Community Health Exchange (CHEX)**

CHEX has a host of tools to help you work with stakeholders and develop your CHI's business plan. The site has downloadable documents which include information on developing a social enterprise, business plan examples (particularly community health project business plans) and information on National policies.  
[www.chex.org.uk](http://www.chex.org.uk)

## **Learning Evaluation and Planning (LEAP)**

The LEAP framework is designed to be a useful tool in all aspects of project, programme and policy planning and development. It encourages us to ask critical questions about our work and to ensure that all those with a stake in what we are doing are involved and are working to a shared agenda.  
<http://leap.scdc.org.uk/>

## **Community Enterprise in Strathclyde (CEIS)**

CEIS helps social economy organisations create sustainable enterprises and develop innovative employability programmes to assist individuals, who are hard to reach and hard to help, move towards employment. The website offers a range of publications on the social economy and highlights a range of services offered by the organisation. While they primarily work in the west coast they will also operate in other areas.  
[www.ceis.org.uk/index.htm](http://www.ceis.org.uk/index.htm)

## **Community Business Scotland Network**

A non Governmental Organisation which aims to promote, encourage and support the principles and practice of community owned and controlled enterprises, enabling local communities to become more self reliant and sustainable. The organisation is committed to economic devolution to local people and provides information and support on social auditing, social enterprise and economic profiling. The site also offers a large number of reports and articles on social capital and community development.  
[www.cbs-network.org.uk/index.htm](http://www.cbs-network.org.uk/index.htm)

## **Appreciative Inquiry and Community Development**

An international site which looks in some detail at appreciative inquiry in action, the site has some useful resources and documents the experience of workers and community members with appreciative inquiry. Most development projects are designed and delivered using a combination of participatory techniques, these approaches encourage participation, emphasise the importance of local knowledge and address real problems to sustain community participation after the implementing organisation withdraws.  
[www.iisd.org/ai/default.htm](http://www.iisd.org/ai/default.htm)

## **Senscot**

Senscot was established to support social entrepreneurs - individuals who believe passionately in something which will benefit the community - businesses which trade to achieve social aims. Senscot believes that social entrepreneurs and their enterprises have the potential to transform society for the better. The site offers: a directory of social enterprises throughout Scotland, a vast array of useful tools and templates and practical documentation around business growth and development, quality issues and legal compliance.  
[www.senscot.net](http://www.senscot.net)

## **Setting up for Success**

This practical handbook shows community organisations how to develop and grow from strength to strength. It covers getting members and keeping them, working with management committees, managing budgets and finance, planning, promoting projects and activities, developing policies, getting involved in decision making, and how to be sustainable. 'Setting up for Success' is inspired by the experience of hundreds of projects and organisations who have all achieved great results in their communities.

To order a copy go to:  
[www.cdf.org.uk](http://www.cdf.org.uk) – new publications

ISBN 1-901974-75-8 / Published Feb 2007 / PB / £9.95



Engaging with community members is central to the work of CHIs. Approaches vary greatly across the country, from working alongside community members in developing partnership working to involving service users in the shaping and delivering of CHI's services. CHEX advocates and helps community development approaches, which build on people's own experience of health and help communities have greater control and influence on the structures, which affect their lives. The evidence shows that this can help to bring about a more lasting, and sustained quality of life for all people.

- What approaches and methods has your CHI used to work with community members e.g. 'Health Issues in the Community' or Participatory Appraisal?
- How does your CHI reach out to and involve community members who are more excluded from mainstream services e.g. working with groups of young homeless people or older people with mental health problems?
- How does your CHI involve community members in shaping and delivering your work? e.g. members of Board of Directors, Advisory or Reference Group to help take forward CHI's role and remit?
- How does your CHI promote and demonstrate the value of your work with community members to key decision-makers? e.g. promotion of case studies, which reflect the unique contribution, that community members bring to affecting local service delivery.
- How does your CHI ensure that working with community members ensures the long-term sustainability of your work? e.g. constantly finding new ways of reaching out to, involving and working alongside community members who have not previously been in touch with your organisation.

## National Standards for Community Engagement – Communities Scotland / Scottish Community Development Centre (SCDC)

The National Standards for Community Engagement set out best practice guidance for engagement between communities and public agencies. The Standards were commissioned by Communities Scotland, and developed by SCDC. They are informed by the experience of communities and agencies with extensive participation of over 500 community and agency representatives and endorsed by most major national agencies in Scotland.

To help people use the Standards various resources have been produced: the Standards booklet itself, illustrations and case studies from the pilot projects, a User's Guide, a Toolkit, and a Reference Manual. All these resources are available to download from the SCDC website at [www.scdc.org.uk/national-standards-communityengagement/support-materials/](http://www.scdc.org.uk/national-standards-communityengagement/support-materials/). There has also been a support programme which provided training events and conferences, consultancy and advice on the standards, and evaluation and review of how they are being used. For further information on the programme visit the SCDC website on [www.scdc.org.uk/national-standardscommunity-engagement/support-programme/](http://www.scdc.org.uk/national-standardscommunity-engagement/support-programme/)

## 'Health Issues in the Community' Training Initiative – CHEX

This is a national cascade training initiative developed by CHEX, NHS Health Scotland and Edinburgh University. It aims to help people at local level develop an understanding of the issues that affect their health and the health of their communities. The course supports individuals in devising strategies for taking action on these issues in their own lives and at a wider community level. It has been proven to effectively engage community members in issues affecting health with wide impacts on individual confidence and self-esteem, community engagement and involvement, and community action on health. For further information visit the HIIC page of the CHEX website at [www.chex.org.uk/hiic/](http://www.chex.org.uk/hiic/)



## Participatory Appraisal

Participatory Appraisal (PA) is a family of tools and approaches that facilitate a process of individual and community reflection, analysis, decision making and action planning. Many of the tools are common to those seen in other 'methodologies', and are based on visual diagrams and semi-structured interviews. Through these, the agenda is laid open for participants to take a lead (in contrast to more classic 'consultations' when questions are restricted to what the 'professional' wants to know), information is gathered and shared in a visual way that does not exclude those who cannot read or write, and local knowledge and expression is respected and valued. For more information about Participatory Appraisal including useful contacts of organisations using PA visit the website of the Oxfam UK Poverty Programme at [www.oxfamgb.org/ukpp/sid/browse\\_s\\_participation\\_tools.htm](http://www.oxfamgb.org/ukpp/sid/browse_s_participation_tools.htm)

**Insight** – case studies in Community Development and Health (CHEX)

See 'Monitoring and Evaluation' section.

**Tools of the Trade** – Community Development and Health Network (Northern Ireland).

This useful toolkit is aimed primarily at those coming from a range of backgrounds in health and social services as well as from the community and voluntary sectors who use community development approaches for improving the health of their communities.

The toolkit suggests ways of responding to common problems and aims to guide people towards sources of information that will help them focus their practice. The toolkit adopts a broad definition of health, which recognises that people's health is determined by their social, economic and environmental experience, as well as by individual factors, and that community development methods are appropriate for addressing these social determinants of health.

For further information, visit their website at [www.cdhn.org](http://www.cdhn.org)

**Changing Lives: Case Studies**

See Introductory Section.

## Scottish Community Development Network

The network provides a forum for Community Development practitioners to share experiences, exchange information, discuss and debate practice and policy issues within a framework which seeks to empower communities.

It supports its members through:

- the organisation of seminars,
- production of information,
- opportunities to comment on consultations, and
- forums for discussion and debate on practice issues.

Visit the website at [www.scdn.org.uk/index.html](http://www.scdn.org.uk/index.html) for more information and details of how to join.

**Community Food and Health (Scotland)** (formerly known as Scottish Community Diet Project)

Community Food and Health (Scotland) supports initiatives in low-income communities which helps people to take up a healthy diet. It provides a range of services around community food and health including events, newsletters, networking, a database of community food initiatives and a small grants scheme. For more information email them at [cfh@scotconsumer.org.uk](mailto:cfh@scotconsumer.org.uk) or visit the website at [www.communityfoodandhealth.org.uk/](http://www.communityfoodandhealth.org.uk/)

## Community Voices Network

This is a new network, funded by Communities Scotland, which aims to help people from the most disadvantaged communities in Scotland to 'get their voices heard' and play a bigger role in the decisions which affect the regeneration of their communities. For more information, visit their website at [www.community-voices.org.uk/](http://www.community-voices.org.uk/)

## Community Development Alliance Scotland (CDAS)

Community Development Alliance Scotland brings together networks and organisations to promote policy and practice that support community development. It would be of interest to all CHIs and health improvement workers that are keen to promote and support community development approaches. For further information

[www.communitydevelopmentalliancescotland.org/](http://www.communitydevelopmentalliancescotland.org/).

## Story Dialogue

Story-dialogue has proven to be an excellent method in enabling inquiry into different experiences/ways of working, sharing values, lessons and creating the opportunity to validate approaches. Its use by audiences such as Health Boards, Health Agencies and community and voluntary organisations demonstrates the method's versatility and accessibility as well as its popularity in a range of contexts and disciplines. To find out more about story dialogue go to:

[www.chex.org.uk/publication/briefing-sheets](http://www.chex.org.uk/publication/briefing-sheets)

**There is a high expectation from funders and decision makers to have robust evidence on how CHIs have addressed the particular factors which affect health inequalities such as addressing barriers to access, working with targeted groups of people, using appropriate methods for involvement, responding to particular needs e.g. translation of written and verbal communication and dealing with financial exclusion.**

- Do you have an accurate picture of the nature and extent of health inequalities in your area – geographic or thematic and how your CHI contributes to tackling health inequalities in your area?
- Do you know if funders and local decision-makers have a good understanding of health inequalities in your area? If not, do you provide them with helpful information e.g. Community Health Profile for your area.
- How do you communicate your work on health inequalities to funders and key decision-makers? eg. Do you provide statistics on numbers and patterns of groups using your services or case study of work with groups experiencing exclusion from services.
- Can you show how your CHI complements the role and remit of other agencies and organisations in tackling health inequalities in your area e.g. how your work contributes to the Joint Health Improvement Plan?
- Have you undertaken any action/research on health inequalities in your area? e.g. used Scottish Community Action Research Fund (SCARF) to investigate, analyse and report on the needs of a particular group in your area?
- If yes, how has your CHI promoted the results from this action/research to key decision-makers? e.g. presentations at local conferences; sent copies of reports to Directors of Community Health Partnerships; used local and national networks to highlight key findings.

## **Scottish Public Health Observatory Website**

This is an extremely useful website which, along with summary data and statistics, provides background information, interpretation, policy notes, commentaries on data sources, references and links to further information for a wide range of topics relating to the health of the Scottish population. The site also has a useful page on the policy context in relation to health inequalities. Of particular use are the Constituency Health and Well-Being Profiles and the Community Health and Well-Being Profiles which are found in the Comparative Health section of the site [www.scotpho.org.uk/web/site/home/home.asp](http://www.scotpho.org.uk/web/site/home/home.asp). For further information on the profiles or on data/statistics about population health/health inequalities contact the Observatory on 0141 300 1015, or email [scotpho@isd.csa.scot.nhs.uk](mailto:scotpho@isd.csa.scot.nhs.uk)

## **Scottish Community Action Research Fund (SCARF)**

SCARF gives community groups support to improve their skills and confidence to carry out their own research. The fund helps them to plan a project, collect information, understand it, use the information and learn from the experience. SCARF provides funding for research by community organisations to help communities get actively involved in decisions that affect them and improve their circumstances. More information about SCARF is available from the Scottish Community Development Centre by phoning 0141 248 1924/1964. There is also more information on the website at [www.scdc.org.uk/scarf/](http://www.scdc.org.uk/scarf/)

## **Policy Document – ‘Closing the Opportunity Gap’**

This is the Scottish Executive’s strategy around tackling inequalities and issues around social exclusion. It follows on from the earlier Social Justice strategy and has 6 key objectives (and related targets) around employment, children and young people, poverty, regeneration, health, and rural communities. The strategy can be found on the Scottish Executive’s website at [www.scotland.gov.uk/Topics/People/Social-Inclusion/17415/opportunity](http://www.scotland.gov.uk/Topics/People/Social-Inclusion/17415/opportunity)

## **‘Health Issues in the Community’ Training Initiative**

See ‘Community Engagement’ Section



## **The Poverty Alliance**

The Alliance covers the whole of Scotland and aims to combat poverty by affecting change in the policies, practices and beliefs of communities, policy-makers, professionals and the general public. They provide a range of services including poverty awareness training, support to community groups to develop community profiles, production of briefings and undertaking consultations. They also produce a range of useful resources on poverty including reports, toolkits and videos/DVDs. More information can be found on the Poverty Alliance website at [www.povertyalliance.org](http://www.povertyalliance.org)

## **Scottish Council Foundation**

The Scottish Council Foundation develops thinking and action around current social and economic policies in many fields including education, the economy, health, governance, tensions in the fabric of society and the challenge of adapting to the future. A recent report of interest to practitioners in community health is 'Working the System' by Andrew Harris. This report sets out to develop a new framework for the development of future policy on health and wellbeing in Scotland and is available from the SCF website at: [www.scottishcouncilfoundation.org/pubs\\_more.php?p=62](http://www.scottishcouncilfoundation.org/pubs_more.php?p=62)

## **New Economic Foundation**

New Economic Foundation is an independent think tank. It aims to improve quality of life by promoting innovative solutions that challenge mainstream thinking on economic, environment and social issues. It has established a new research centre for well-being which, amongst other things develops activity around: measuring well-being and the factors that influence; providing the tools to assess and positively influence well-being; delivering training to develop and enhance an understanding of well-being. For further information visit the website at [www.neweconomics.org/gen/](http://www.neweconomics.org/gen/)

## **UKPHA (UK Public Health Association)**

The website of the UKPHA contains a lot of useful information regarding current health inequality issues. There are also useful articles within the 'Report' magazine featured on the site – [www.ukpha.org.uk/default.asp?action=category&ID=21](http://www.ukpha.org.uk/default.asp?action=category&ID=21)

## **The Tool Box**

The Tool Box provides over 6,000 pages of practical information to support your work in promoting community health and development. This web site is created and maintained by the Work Group on Health Promotion and Community Development at the University of Kansas in Lawrence, Kansas (U.S.A). Developed in collaboration with AHEC/Community Partners in Amherst, Massachusetts, the site has been on line since 1995, and it continues to grow on a weekly basis.

**The core of the Tool Box** is the "topic sections" that include practical guidance for the different tasks necessary to promote community health and development. For instance, there are sections on leadership, strategic planning, community assessment, grant writing, and evaluation to give just a few examples. Each section includes a description of the task, advantages of doing it, step-by-step guidelines, examples, checklists of points to review, and training materials. For further information visit the website at <http://ctb.ku.edu/index.jsp>

## **Routes to Sustainability – Glossary**

### **Community Health Initiatives (CHIs)**

CHI's work closely with communities and local partnerships to identify and tackle health inequalities. They promote the right to good health for all and work to reduce the barriers to participation and increase the confidence and skills of local people. CHI's seek to challenge life circumstances and behaviours while working with communities to address the underlying determinants of poor health.

### **Community Health Exchange (CHEX)**

CHEX is the leading agency in Scotland's health sector that provides a resource in supporting community development approaches to health improvement and challenging health inequalities. The organisation facilitates a network of community health initiatives and supports them in developing good practice and influencing health and social policies.

### **Scottish Community Development Centre (SCDC)**

SCDC is the designated National Development Centre for community development in Scotland. It supports best practice in community development throughout Scotland with the aim of building stronger and healthier communities.

### **Community Development**

Community Development is about building active and sustainable communities based on social justice and mutual respect. It is about changing power structures to remove the barriers that prevent people from participating in the issues that affect their lives.

Community development workers support individuals, groups and organisations in this process based on the values of social justice, participation, equality, learning and co-operation. (Scottish Community Development Network Definition)

### **Health Inequalities**

Health inequalities operate and impact at many levels including ill health, material deprivation, inadequate income, discrimination, lack of social status, unequal access to health care, poor housing, unaffordable food – the list is long. Although particular aspects of health status are improving in Scotland, it is increasingly clear that these improvements are restricted to particular social groups in certain parts of the country. There is a widening gap in Scotland where low income groups and certain communities experience greater risk of ill health.

### **Community-Led: Supporting and Developing Healthy Communities Task Group**

The Task Group worked from Nov. 2004 to Dec. 2006 to raise awareness and assist the embedding of community-led approaches to health improvement at a local level. In Dec. 2006 it launched a number of recommendations, together with support material to:

- build a strong evidence base
- improve planning and integration
- enhance capacity building
- address long-term sustainability of community-led initiatives

An Implementation Group is now taking forward the recommendations and will report to the Health Minister at the end of 2007.

The logo for CHEX features the word 'cheX' in a stylized, lowercase font. The letters 'che' are in a blue, cursive-like script, while the 'X' is a large, bold, green character with a thick stroke, positioned to the right and slightly overlapping the 'e'.

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