

Access Foundation Project plan stage 2

Revised following Board and local vision day and conversation with local access

Gantt

16 weeks allows slippage over the summer or early submission

Weeks end 1 st October 2019	1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16
Stakeholder analysis	X															
Stakeholder consultation, feedback and communication	X			x			x				x			x	x	
Partnership steering group meetings and decision making		X				x				x					x	x
Visioning and theory of change, refining vision, creating ownership, discussion 1-2-1 and using workshop opportunities			X	x	x	x	x	x								
Research				x	X	X						x		x		
Outcomes and options appraisal consultations meetings and workshops , - 1-2-1 follow up discussions, and telecalls Risk, opportunities and financial planning and management of loans								X	x	x	x	x				
Enterprise development Link with current work under connect fund encourage attendance at social development opportunities, use findings and approaches with case studies to inform LAP, provide range of enterprise support models and scope costings based on research																
investment model options outline for further development in stage 3														x		
Writing draft and final proposal for stage 3						x				x				x	x	x
Revise and develop project plan	x		x			x				x			X		X	

Activity	resource	budget	Who
1. Stakeholder engagement			
(a) Agree stakeholder engagement principals and communication plan	Board		
2. Steering and partnership group – Monitors and steers day to day work.	Venues	800	
• Coordination and Facilitation of 4 meetings, notes and coms			RP

<ul style="list-style-type: none"> Revise and agree plan and process Develop and agree ToR Write up meeting notes 	Coordination		
3. visioning and theory of change <ul style="list-style-type: none"> define the change and create the vision Map the current situation, assets, problem and opportunities (use tools such as story analysis, PESTLE, double diamond, 5 why's, fishbone etc), identify root causes etc Facilitated sessions with wide sector. What is the dream for 10 years – what would it look like, what do we need to get there, what issues might occur. How do we build on ABCD and how do we use enterprise and blended finance to get there. Facilitated sessions and write up Communicate and check back with attendees using iterative process to grow and agree model design and vision and process for change to achieve it Facilitated workshop with partnership to agree outcomes and develop theory of change 	events/ workshops facilitation, admin and coord venues	£3400	All with range of external facilitat ors
4. Research expand on concept note info <ul style="list-style-type: none"> Stakeholder analysis: Identify stakeholder groups, interests and roles current delivery and gap analysis Size of the VCSE market, demand for repayable finance and support needs (survey): State of the sector report – could VAL do this anyway, as a contribution to the project – this would help to sell the proposal! Need in the local social economy Current and future social investment available Other potential funding and opportunities including asset transfer Capital investment plans (local grants, loans, gov funding) 	research	£1200	CASE
5. SORI, outcomes and options development Use SROI methods (SROI forecast) to produce an <ol style="list-style-type: none"> Options analysis and review in line with vision and change theory Qualitative research: Consult with stakeholders to identify and agree outcomes Ascertain interest and attitudes to financial risk planning Make recommendations for action 		1200	External /val/cas e
6. Enterprise development <ol style="list-style-type: none"> Link with current work under connect fund encourage attendance at social development opportunities, use local connect fund findings and approaches with case studies to inform LAP provide range of enterprise support models and scope costings based on research and knowledge of other areas and effective practice and report on current infrastructure support being delivered 	Research and writing venues events/ workshops facilitation, admin and co-ord	900	VAL and Case

7. Investment model options Scope the funding model as a potential outline of options including (a) research & analysis of VCSE size, type, needs etc (b) provide a range of options for mix of loan and grant size, interest rates etc, terms, timescales. (c) Provide draft outline of options appraisal of fund structure and operational model with future actions required		400	External / val/ case
8. Write up & project plan for stage 3 Review plan, consult coordinate feedback, write in sections as different elements are completed Draft, Revise, proof check and issue to stake holders for comment on an on-going basis and to steering group for sign off	Writing proof reading and editing	900	external
9. research, consultation and negotiation stage 3 (a) Consult with philanthropy, trusts and foundations, local finance providers, corporates, local authorities to identify commitment to and interest in additional match funding: (b) Consult with impact investing experts			
10. Project management General Consultation and communications across all groups Project coordination and management, contract management and progress chasing		1200	RP

20/6/2019