



trellis

How to set up a

# Therapeutic Gardening Project



# Thank You

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**This guide would never have made it to publication without the hard work of many people.**

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## Foreword



*Dr Richard Simpson MSP  
Mid Scotland and Fife*

**I**n 2016, Trellis will celebrate its 10th anniversary and the organisation now supports a network of over 300 therapeutic gardening projects.

The importance of adaptive gardening in sustaining well-being and assisting in recovery is now widely recognised. For some it is a way of establishing social links that help improve self-confidence, for others it is a route to gaining horticulture and life skills that can lead on to work opportunities.

As a patron of Trellis I am very proud to be writing this brief introduction. The guide does not set out to be comprehensive but provides the essential considerations for establishing a new garden. It also provides substantial links and signposting to greater detail. Without attention to the many elements that make up a successful voluntary organisation in this field,

new groups may find it difficult to sustain their project. The guide provides a sound basis for developing an adaptive garden.

Therapeutic gardening is not just about a profusion of sensations for those with sensory impairment, nor just 'raised beds' and wheelchair accessibility, but offers scope to reconnect social bonds and to learn through the many and varied facets of horticulture.

As communities re-engage with their environments I hope that many will find this guide is stimulating, and it encourages them to extend their reach.

*R Simpson*

# Therapeutic Gardening

Therapeutic gardens often start with the seed of an idea in one person's mind. It's always best to nurture it by starting small and growing slowly, ensuring a healthy, sustainable project — one that is useful, enjoyable and fulfils its purpose.

## Introduction

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**T**his guide has been produced by Trellis, the Scottish therapeutic gardening charity. We support, promote and develop the use of horticulture to improve health, well-being and life opportunities for all. We represent a network of over 300 projects across Scotland.

Developing a therapeutic gardening project is not a linear activity. You'll probably consider many aspects of the development simultaneously which is, of course, complex. From experience we know that not everyone wants or needs to do everything at once. So dip into the following chapters in the order that seems most relevant to your needs. The guide is designed to be used in this way.

### The guide aims to:

- Help you establish, run and sustain a therapeutic gardening project.
- Describe the main aspects of therapeutic gardening.
- Highlight the areas that need careful consideration at each stage.
- Suggest sources for further information, some of which will be on our website.
- Offer local contacts who may help when the going gets tough.

We won't be able to answer all your questions, although we do hope to guide you towards finding answers, and we don't offer one particular model of an ideal therapeutic garden as each project is unique and adapts to its own very particular circumstances.

## Clarifying your project aims

Before starting a therapeutic gardening project it's important to have a clear idea as to why you're engaging in this work. Setting out your aims, objectives and actions is a way of clarifying how and what you intend to do and why. An aim says what you hope to achieve. An objective is a planned activity or programme of work that will help you to achieve your aim. For example, one project aim might be to 'help project attendees develop gardening skills'. Whilst one of the objectives to achieve that aim might be to 'run workshops on gardening skills' or to 'provide mentoring through the RCHS Grow & Learn Award'.

### Why do you need set aims?

- To guide the development of the project
- To attract others to help in the project
- To ensure everyone is working toward the same aim
- To aid in seeking funding
- To gain local support
- To help in finding a site
- To help engage with other organisations

### Make sure your aims are:

#### STRATEGIC

Are they considered, informed and intended?

#### WRITTEN DOWN

Aims are important reference points, the basis for future planning.

#### DEVELOPED

Aims should be part of a process involving people important to the progress of your ideas.

#### FEASIBLE

Aims should be of a feasible scale and ambition. Perhaps you can help the entire population of your city to improve the quality of their lives through gardening, but you'll need a city-sized budget, a sizeable plot and an army of people to match this aim.

*Aims*

*What you hope to achieve*

*Objectives*

*What will allow you to achieve your aims*

*Actions*

*How you will best achieve your objectives*

## Moving on to your objectives

Once you have clear aims on paper, you can flesh them out by writing objectives. These will specify in more detail how you will achieve your aims.

### Ask yourself and those who share your aims:

- What do you want to do in the proposed garden, courtyard or windowsill?
- Who with?
- What are the needs of the people who will work with you and use the garden?
- What do you want to achieve within the first month/quarter/year?
- And then ask is this realistic? Are these objectives measurable? Achievable?

## Actions

The question to ask here is 'how can we best do this?' If your objective was to 'run gardening skills workshops' you might break that down into smaller actions, such as 'gauge particular training needs', 'plan appropriate training content' etc. It's useful to decide which actions are most important and should take priority.

Pick your top three and this gives you a starting point. There may be a logical order that presents itself because of constraints on budgets or annual cycles of planning and seasons, availability of plots etc. For instance, you may be able to start running workshops in makeshift venues pending a lease on your dream site. Or you may need to find and secure a site before anything else happens.



## How you can help yourself at this stage

### TALK TO PEOPLE WHO HAVE GONE THROUGH A SIMILAR EXPERIENCE

One of the most valuable things you can do during the early stages of developing a project is to speak to others who have gone through a similar experience.

### JOIN THE TRELIS NETWORK

It's free! Trellis regularly hosts local knowledge and skills sharing network meetings, an annual conference and training courses on relevant subjects where you can meet others. This can be helpful at all stages of a garden project. Keep an eye on the Trellis web pages or sign up for the network and the email bulletin at [www.trellisscotland.org.uk](http://www.trellisscotland.org.uk)

### VISIT SIMILAR PROJECTS

Visits to projects similar to your own proposed one may also be very helpful.

### READ CASE STUDIES

The case study in section 11 might serve as a guide as well as case studies available online at [www.trellisscotland.org.uk](http://www.trellisscotland.org.uk)

### TRELIS INFORMATION & FIELDWORK SERVICES

Trellis can provide support to help clarify your thinking.

## Further support & information

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## Introduction

### AIMS AND OBJECTIVES

When talking about aims, objectives and outcomes, we use the widely-accepted definitions given by the Charities Evaluation Service found at [www.ces-vol.org.uk/about-performance-improvement/about-monitoring-evaluation/planning-for-monitoring-evaluation/aims](http://www.ces-vol.org.uk/about-performance-improvement/about-monitoring-evaluation/planning-for-monitoring-evaluation/aims)

### BUSINESS PLANNING

Voluntary Action Perthshire (VAP) has an excellent Community Toolkit which covers all areas of developing a community group/charity including planning [www.pkvs.toolkit.sitekit.net](http://www.pkvs.toolkit.sitekit.net)

Bookmark this one as, along with the [www.scvo.org.uk](http://www.scvo.org.uk), it will be of enormous use in the early stages of setting up.

In addition, your local voluntary association Third Sector Interface (TSI) may offer additional help and information. Links to your local TSI web pages are to be found at Voluntary Action Scotland [www.vascotland.org/tsis/find-your-tsi](http://www.vascotland.org/tsis/find-your-tsi)

### CONTACTING OTHER THERAPEUTIC GARDENS

Look online at the Trellis Directory of Therapeutic Gardens and the Trellis Map or email [info@trellisscotland.org.uk](mailto:info@trellisscotland.org.uk)

### NETWORKING IN THERAPEUTIC GARDENING

Trellis regularly hosts local knowledge and skill sharing network meetings, an annual conference and training courses on relevant therapeutic gardening subjects where you can meet others. Join the Trellis network for free and sign up for the email bulletin at [www.trellisscotland.org.uk](http://www.trellisscotland.org.uk)

### YOUR LOCAL TRELIS FIELDWORKER

Contact the Trellis office and talk to our Information & Fieldwork Team, email [info@trellisscotland.org.uk](mailto:info@trellisscotland.org.uk) or call 01738 624348.



## What is a Therapeutic Garden?

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**T**herapeutic gardens come in all shapes and guises, and are set up for many reasons in very varied settings. At the most general level, they provide a cost-effective and sustainable way of helping people to improve their physical and mental well-being.

A therapeutic garden can give people great pleasure through contact with the soil and plants, engagement in meaningful and relaxing activity, be a haven offering moments of solitude, as well as providing a catalyst for social interaction.

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Gardening activity is endlessly adaptable. The best therapeutic gardening practice is responsive to the needs and interests of those taking part in it.

# Adaptive gardening

Gardening is supremely adaptable for all ages, abilities, preferences and needs. Gardens and gardening activities that are designed to be accessible and achievable allow maximum participation for all.

This adaptive gardening ethos is central to therapeutic gardening.



**Therapeutic gardening can offer wide-ranging benefits to many different groups of people, in a variety of settings. For example:**

- Vulnerable groups including homeless people
- Hospital patients
- People in prisons and secure settings
- Veterans facing combat stress
- Those with sensory impairment or physical disabilities
- People dealing with drug and alcohol dependency
- Asylum seekers and refugees

Therapeutic gardening projects can also be of any size from pot plants on a windowsill, containers on a patio or hanging baskets, to acres of ornamental planting or fruit and vegetable production. They can also be indoors or outdoors, in domestic homes or hospital corridors, polytunnels, or glass houses. They can also be intermittent, seasonal or available to suit need and meet demand.

**What therapeutic gardens are not:**

- They don't necessarily always offer the best activity or setting for a particular disadvantaged group or the best way to address a given problem.
- They're not always full of raised beds and masses of sensory stimulation.
- They're not necessarily a whole garden, and not always outside — you can achieve therapeutic goals indoors or with a few window boxes or pots.
- They're not always very different from an 'ordinary' garden, depending on your aims.

# The benefits of therapeutic gardening

## **Extends individual interest and provides enjoyment.**

Rich, immersive, sensory experiences especially for people with sensory, learning and physical disabilities or cognitive impairment.

**Delivers social support** e.g. for adults recovering from mental ill health or providing work-related activities for people with learning disabilities.

## **Counters public preconceptions**

by showing how people with different needs can be very capable gardeners when barriers to participation are removed.

## **Encourages social cohesion**

by bringing a community together to improve the neighbourhood or grow, sell or share locally grown produce.

## **Real world settings for formal and informal training**

in literacy, numeracy, work and social skills and core skills in horticulture itself.

**Improved self-confidence, independence, fitness and skills.**

## **Promote interest in particular topics**

e.g. cookery or biology, for educational or personal purposes.

## **Positive stimulation and meaningful activity**

for people with Alzheimer's disease or other dementias.

## **Social integration**

e.g. enables communities to be and feel safe by affording offenders, and those in danger of offending, the chance to re-engage positively with society.

**Provides volunteering and employment opportunities.**

## **Offers skills and knowledge sharing opportunities**

across communities and between generations.

## **Environmentally sustainable:**

local, accessible services, increased access to fresh, affordable produce, awareness of food chains, habitat for wildlife, composting, recycling/waste reduction, carbon offsetting.

## Further support & information

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# What is a Therapeutic Garden?

## **INFORMATION ON THERAPEUTIC GARDENS IN SCOTLAND**

On the Trellis web pages you'll find a number of garden case studies and a directory of therapeutic gardening projects in Scotland [www.trellisscotland.org.uk](http://www.trellisscotland.org.uk)

## **THRIVE**

Information on therapeutic gardening [www.thrive.org.uk](http://www.thrive.org.uk)

## **ASSOCIATION OF SOCIAL AND THERAPEUTIC HORTICULTURAL PRACTITIONERS**

ASTHP is a membership network organisation in England and Wales [www.asthp.org.uk](http://www.asthp.org.uk)

## **FEDERATION OF CITY FARMS AND COMMUNITY GARDENS**

Organisation representing community gardens and city farms in the UK [www.farmgarden.org.uk](http://www.farmgarden.org.uk)

## **BOOKS AND ARTICLES ON THERAPEUTIC GARDENING**

Access the Trellis website for factsheets and further reading [www.trellisscotland.org.uk](http://www.trellisscotland.org.uk)





## The Team



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**I**t's common to seek support from a number of people and organisations to help set up a therapeutic gardening project.

Networking during the early development stages will mean you're more likely to build a sustainable project that's understood and championed by lots of people. It's worth bearing in mind that perhaps not everyone will welcome a new project's presence for various reasons, and often projects need to prove themselves first.

**Attracting a variety of people to join your project team can help in several ways:**

- To gather evidence of the need for your project.
- Help to find and/or negotiate access to land.
- To discuss and test your ideas and gather new ones.

- To consult with prospective clients and those who may make referrals.
- To garner support — financial, practical, political and maybe legal too.
- To promote your project to the local community.
- To meet prospective funders, supporters and donors.
- To attract potential employees, volunteers or board members and friendly suppliers.
- To anticipate potential objections and stumbling blocks before they derail your idea. One of the most common problems for nascent projects comes from people who were not consulted or involved who may feel aggrieved and more inclined to hinder rather than help progress.

# People to involve in your project

## PEOPLE ALREADY WORKING ON THE SITE, E.G. GARDENERS

If you are developing an existing garden site, it will be important to develop your plans, where possible, in collaboration with those who are already involved. They will have concerns and questions, but will

also have ideas and suggestions to share including knowledge of soil and climactic conditions, what grows well where, current user/interest groups and awareness of vandalism or other existing problems.



## PEOPLE WHO ARE PART OF THE ORGANISATION THAT OWNS THE GARDEN GROUND

This will be especially relevant where gardens are to be developed in the grounds of hospitals, clinics, day centres or residential homes. Consider speaking to estates, grounds maintenance and health & safety staff including fire officers, caretakers, health promotion personnel, managers, nurses, occupational therapists and associated health professionals, care workers and doctors. Involve them from the start.

Individual Health Board communications departments can be very helpful in circulating email information around hospitals and NHS staff.

## PROFESSIONALS IN THE THERAPEUTIC FIELD

These may include therapeutic horticulture practitioners, health professionals such as community mental health workers or occupational therapists, social workers, counsellors and carers, depending on the nature of your project. Some of these people may refer clients to your project; many may become advocates and be actively involved.

## NEIGHBOURS OF YOUR THERAPEUTIC GARDEN SITE

Include them from the start, set up a meeting and invite local people along. This community engagement could take the form of a party e.g. a BBQ at the proposed site. Tea and cakes in a local venue or perhaps a garden related activity might be an appropriate focus.

Fun, informal settings are excellent for listening, learning and sharing. It's a great opportunity to ask about attitudes to the land and your proposals.

You may need to allay fears, build interest and support, research market demand for produce/services or encourage volunteering.

It's also an opportunity to ask questions about the current use of the site, plans locals know of that may affect it, rights of way, and site quality e.g. possible soil toxicity issues. It's always best to check out soil quality, even if sites don't have any previous industrial use.

Further information in 'The Garden' section.

Offer several ways of contributing ideas and opinions, vocally and publicly in groups or privately in one-to-one conversations or by contributing in writing on an ideas board (colourful paper and pens essential) or pinning up a 'washing line' of ideas. Give people plenty of opportunity to contact you throughout these processes.

#### **LOCAL COUNCILLORS**

Local councillors have large personal networks so try to develop positive relationships with the ones who represent the area where your project will be. They can be very helpful and supportive.

#### **OTHER THERAPEUTIC GARDENING PROJECTS**

These will provide invaluable advice including how to avoid all the early pitfalls that they may have experienced. They are easily contacted via Trellis HQ or your local fieldworker.

#### **LOCAL GARDENERS, GARDEN DESIGNERS, GARDENING CLUBS AND NURSERIES**

As well as understanding and championing aspects of what you do, these groups may offer practical help and support as you develop your site, e.g. technical advice on pruning, volunteer help, and fundraising support.

#### **OTHER LOCAL GROUPS**

Be aware of what's happening in your locality that might link to your project's aims and be of benefit to your clients.

#### **LOCAL COLLEGES**

If your local college has a horticulture department it may well be interested in a therapeutic garden in the area. But be aware they can sometimes be overwhelmed with requests for involvement in horticultural projects.

Staff may support you with advice or be keen to have their students learn about therapeutic gardening whilst offering a helping hand with specific developments within your garden, e.g. hard landscaping work, as well as providing relevant courses. Staff may also be able to help you deliver and accredit training on site, e.g. by acting as a verifier.

An art department may also take an interest if you offer your site as a space for some environmental art. If you plan to serve food to clients or visitors, the college is the likely place for food hygiene courses to ensure staff and volunteers are compliant with the law. Social care students and staff may like to see how you are working with clients as an example of a 'day care' service and may wish to pursue a work placement at your project.

#### **LOCAL SCHOOLS**

School groups may like to visit the garden to look at the wildlife, take on a plot if you have the space, harvest fruit or for numerous other creative reasons. Such visits can help establish your project in the wider community through the interest of parents, grandparents and teachers.

#### **LOCAL BUSINESSES**

Business people may be interested in funding aspects of your work or enjoy some corporate team building sessions, potentially offering a team of volunteers on site for an occasional day. This can be very useful for bigger pieces of work, e.g. hard landscaping or shed building, and will help to increase local understanding of your project's aims and boost its profile.

#### **LOCAL PRESS**

Local newspapers are often glad of an article and a photograph, even if it is not much more than a narrative advertisement for your project. Use this to your advantage to recruit volunteers or promote an event. You might also be able to negotiate a regular gardening/events column.

## How one project consulted their community

Carr Gomm's Lochend Community Growing Project in Edinburgh consulted their local community by having an event entitled Seeds of Tomorrow: How would we like to grow?

A diverse group of local people expressed their ideas about what they would like to see happen in the community. These ideas were drawn on a large sheet of paper to give a dynamic visual representation of the community's thoughts and ideas. This provided the objectives of the Lochend Secret Garden. Their aims were to facilitate social networks and reduce social isolation in the area.



The completed 'vision' compiled by the group at the community visioning day — Seeds of Tomorrow

Included by kind permission of Carr Gomm. Extract from Lochend Community Growing Project Progress Report August 2011 to August 2012. Available from the Trellis case studies web page at [www.trellisScotland.org.uk](http://www.trellisScotland.org.uk)



## LOCAL VOLUNTEER ASSOCIATION

Your local volunteer centre will both help you find and advise on looking after volunteers. It will also offer guidance on the governance of your group e.g. advice about writing a constitution if that is relevant and also on fundraising.

Many projects run, at first, as part of a larger organisation, e.g. within the NHS, or in the community as a group of people with a common aim. This is called an unincorporated association. An unincorporated group cannot hold property in its own name, enter into contracts in its own name or undertake legal proceedings in its own name.

Also, individuals acting for an unincorporated group may be held personally responsible if things go wrong, for example if the group end up in debt or with outstanding legal obligations. So these may be reasons for your group to become more structured.

## This group structure can take several forms, for example:

- Registered charity
- Company Limited by Guarantee (which can also register as a charity)
- Scottish Charitable Incorporated Organisation (SCIO)
- Community Interest Company (CIC)
- Industrial and Provident Society
- Friendly Society
- Club/Clubhouse structure

These structures each have their advantages and disadvantages, e.g. charitable status: advantages include tax relief on donations and access to funding only available to charities.

Disadvantages of charitable status include a certain amount of administration and restrictions on spending. Your local volunteer association can help you plan which structure is best for your group.

## Further support & information



## The Team

### COMMUNITY ENGAGEMENT

For creative ideas for community engagement see The Eden Project web page [www.edenproject.com/eden-story/our-ethos/creative-community-engagement](http://www.edenproject.com/eden-story/our-ethos/creative-community-engagement)

### GARDEN CLUBS/GARDENERS

Try the Scottish Gardeners Forum [www.scottishgardenersforum.org.uk/index.htm](http://www.scottishgardenersforum.org.uk/index.htm) also the Scottish Allotments and Gardens Society (SAGS) website [www.sags.org.uk](http://www.sags.org.uk) or use your local library for community information.

### GROUP STRUCTURE

VAP Voluntary Action Perthshire Community [www.pkvs.toolkit.sitekit.net/Setting-up-Group-or-Project/choosing-a-structure.htm](http://www.pkvs.toolkit.sitekit.net/Setting-up-Group-or-Project/choosing-a-structure.htm)

### LOCAL VOLUNTEER ASSOCIATION

For local help in choosing/developing your structure, looking after volunteers and funding, find your local voluntary association Third Sector Interface (TSI) Community Toolkit online at Voluntary Action Scotland [www.vascotland.org/tsis/find-your-tsi](http://www.vascotland.org/tsis/find-your-tsi)

### LOCAL BUSINESSES

Try the Chamber of Commerce in your nearest town.

### OTHER THERAPEUTIC GARDENING PROJECTS/ PROFESSIONALS

Look online at the Trellis Directory of Therapeutic Gardens and the Trellis Map or email the Trellis Information & Fieldwork Team on [info@trellisscotland.org.uk](mailto:info@trellisscotland.org.uk)

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# The Target Group

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**You may already have a fairly well formed idea for a therapeutic gardening project and, in particular, a target group.**

It's essential to research to see what services already exist locally that cater for your prospective clients and have a garden theme.

Is there evidence of local demand not being met?

Do weigh up the national context and current local/national governmental concerns and interests, and also consider your own skills and knowledge.

Prospective clients themselves will want to contribute to project development and they should be involved from the outset. This type of inclusive, participatory planning will lead to a more locally relevant and sustainable project.



# When thinking about your client group have you considered/ can you define the following?

## WHO ARE YOUR CLIENTS?

- Specific group, e.g. adults affected by mental ill health
- Age, gender(s), ethnic group.
- Everyone: the project will be open to all.

## NEEDS AND BENEFITS?

- What are the needs of your group?
- What benefits will your project offer?
- The skills and knowledge available to you — and the gaps.

## WISHES AND EXPECTATIONS?

- What do clients want: activities, support, facilities, etc.?
- What do the families, carers and key workers of clients want and expect of the project, if appropriate?

## COMMUNICATION

- Where do target group members live and how you will contact them?
- How will you communicate with clients? E.g. regular meetings (run by clients themselves?), newsletters, events calendars, social media etc.
- How can clients communicate with you? Although this will generally be an informal process, you should have a fully accessible complaints procedure in place that is introduced when new clients are inducted.
- Will you need help from a local advocacy service?

## TRANSPORT

- How will clients get to the project?
- Consider transport links, costs and accessibility.

## SITE CONSIDERATIONS

- What your site, if you already have one earmarked, allows you and clients to do?
- How many people you can accommodate?
- What adaptations need to be made, e.g. accessible paths, shade, slopes to replace steps and what they might cost?
- What facilities are required, e.g. accessible toilets?

## MANAGING CLIENT PLACES

- What level of supervision and support can you offer?
- A referral and/or selection process and a trial period.
- A well organised induction process, including, for example, a buddy system, and reviews.
- Time-limited or semi/permanent placements?
- Whether you will offer qualifications or awards, e.g. SVQ or RCHS Grow & Learn, and the implications of running these.

## DISCLOSURES, CONFIDENTIALITY AND BOUNDARIES

- How will you run background checks on staff, volunteers and potentially on clients to ensure that everyone on site is working in a safe team?
- How will you store and deal with any confidential information revealed to you about personnel and clients?
- How will you manage any potentially worrying disclosures?
- How will you agree 'boundaries' to ensure staff and volunteers don't get drawn into discussions on subjects that they are not equipped to deal with or that might represent a breach of professional standards/personal data and privacy?

## Further support & information

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# The Target Group

### **PARTICIPATORY PLANNING**

For guidance on community consultation, needs assessment, surveys, focus groups and feasibility studies, see VAP Voluntary Action Perthshire Community Toolkit 'Listening to your community' [www.pkvs.toolkit.sitekit.net/Setting-up-Group-or-Project/listening-to-your-community.htm](http://www.pkvs.toolkit.sitekit.net/Setting-up-Group-or-Project/listening-to-your-community.htm)

Other flavours of local voluntary association are available! Find your local voluntary association Third Sector Interface (TSI) online at Voluntary Action Scotland [www.vascotland.org/tsis/find-your-tsi](http://www.vascotland.org/tsis/find-your-tsi)

### **CLIENT FACILITIES**

Your local authority planning department may be able to advise on the provision of facilities, e.g. number of toilets, washing facilities, etc. Insurers and fire officers may advise on safe legal occupation limits for a given space.

### **ACCESSIBLE COMMUNICATION**

The Sensory Trust, Inclusive Design, range of factsheets provide practical guidance on accessible information for a variety of client groups [www.sensorytrust.org.uk](http://www.sensorytrust.org.uk)

### **COMPLAINTS PROCEDURES**

Examples available on the Trellis web pages [www.trellisscotland.org.uk](http://www.trellisscotland.org.uk)

### **THERAPEUTIC GARDENING CAREERS**

There's no fixed route into a career in therapeutic gardening. Many people have medical, care or community development qualifications combined with 'on the job' learning/volunteer experience in therapeutic gardening projects and formal horticultural qualifications.

### **THERAPEUTIC GARDENING TRAINING**

Trellis provides a range of CPD, knowledge, skills and good practice sharing events in response to the needs of therapeutic gardening projects in the network [www.trellisscotland.org.uk](http://www.trellisscotland.org.uk)

There are courses specialising in social and therapeutic gardening available provided by Capel Manor College, Coventry University and Thrive. These do not, however, provide a formally recognised basis for practicing as a 'therapist'.

### **HORTICULTURE QUALIFICATIONS**

The Grow Careers 'Find a college' search is useful to get an overview of horticulture colleges, see [www.growcareers.info/go/aboutus](http://www.growcareers.info/go/aboutus). There are a variety of horticultural qualifications available: Introduction to Horticulture NC; Horticulture NC; SVQ Level 2 Horticulture and RHS Level 2 Certificate in Practical Horticulture, all providing useful practical knowledge for applying to therapeutic gardening. LANTRA is the skills sector body for land based professions.

### **HORTICULTURAL AWARDS**

The Grow & Learn Award is used to recognise achievement in horticulture skills and personal development goals. It is a person centred, portfolio based award for those whose needs are not met by SVQ type training. Administered by the Galey [www.rchs.co.uk](http://www.rchs.co.uk)

### **STAFF/CLIENT RATIOS**

Your local authority health and social care departments may be able to advise. Garden project staff must also perform regular risk assessments to judge what levels of staff support and supervision are needed to ensure the safety of all involved in day to day operations. The level of staff support deemed safe may vary with individual attendees' needs, with different activities and different areas of the site.





# The Garden

## Seeking a Site

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As you seek the best possible site for your project, use the following points to help you scout out potential locations. The ‘movers and shakers’ team that you have been in contact with locally may be a good source of information about available sites and their owners.

However, don’t think you have to find a large site in order to garden.

Many of the most sustainable therapeutic gardening projects have developed from, or retain their value in, being small, portable or very easy to maintain and enjoy. E.g. indoor windowsill plants, outdoor growing in containers or a small garden bed.

### Considerations to bear in mind:

#### YOUR AIMS, CONSULTATION FINDINGS AND BUDGET

- Your project aims — any site must offer a means to fulfil these.
- Client and local community needs and wishes and how many people you want to accommodate.
- The site’s neighbours and how they might view your proposed project.
- Your budget — actual or potential.

## LEGAL

- Who owns the site? Does it have defined boundaries?
- Is it available to lease/rent/buy? Is a secure tenancy on offer? Some funders/referrers may require a minimum lease, e.g. 5 years.
- If your proposed site was not previously used as a therapeutic garden, would a change of use be required/allowed by the owner/council?
- Any planning restrictions related to the site.
- Any rights of way affecting the site.
- Any trees or habitats that will need to be preserved or are the subject of preservation orders.

## SITE FEATURES

- Consider the site's aspect, slope, size, shape, topography, drainage, sun and shade, soil type, climate, altitude, wind/exposure. All these things may affect how clients, staff, volunteers and visitors will experience the site. Wind filtering, shading, levelling, drainage and plant protection measures may be required.
- The site's previous use — and whether it may need remedial action in the case of a contaminated brown field site, for example. It's always best to check out soil quality, even if no previous industrial use is recorded.

## ACCESS

- The site's accessibility and safety — or any changes that would be needed to improve these, and the cost.
- The availability of transport links to the site.
- Access to services — water, drains, sewers, electricity, gas, telephones, and their cost if they are not currently available. Also you may need to contact utilities companies or the local council about the position of underground pipes, cables and drains running through the site before you begin to dig.

## Further support & information

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# The Garden: Seeking a Site

### ACQUIRING A SITE

For help in acquiring a site your local authority, local health board/NHS Trust and Fields in Trust [www.fieldsintrust.org/scotland.aspx](http://www.fieldsintrust.org/scotland.aspx) are all worth contacting. Advertise for land in the Trellis email bulletin and web pages. Find out who local landowners are via Scottish Land and Estates [www.scottishlandandestates.co.uk](http://www.scottishlandandestates.co.uk)

### LEGAL ADVICE

Seek advice on all aspects of leasing, buying, renting out land from the Community Land Advisory Service (CLAS Scotland) [www.communitylandadvice.org.uk](http://www.communitylandadvice.org.uk)

### ACCESSING SERVICES

Your site plans should include the position of underground cables, pipes, etc., utilities providers can advise. For older sites you may need to visit your local council office or archive.

### LAND CONTAMINATION

The 'Guide for Growing on Land Which May Be Contaminated' includes a site visit checklist to assess the level of concern you should have about a prospective garden site, as well as information on soil testing, remedial action suggestions and case studies. Available to download from [www.growyourownscotland.info](http://www.growyourownscotland.info)

Your local planning authority will also offer advice and some universities and colleges with agriculture or environmental faculties may help with soil analysis.

### BUILT ENVIRONMENT FORUM SCOTLAND

Useful links, case studies and information if you are involved in developing a site that includes converting an historic building for a new use [www.befs.co.uk](http://www.befs.co.uk)

### PLANNING AID FOR SCOTLAND

A charity/social enterprise that helps people engage more easily with the planning process [www.pas.org.uk](http://www.pas.org.uk)

### PLANNING RESTRICTIONS

If you are seeking to make any changes to a site, whether physical or in its use, contact your local planning authority for advice early on.

### RIGHTS OF WAY

Scottish Rights of Way Society [www.scotways.com](http://www.scotways.com) and Scottish Natural Heritage [www.snh.org.uk](http://www.snh.org.uk) have lots of information, as will your local council.

### TREE PRESERVATION

Contact your local authority planning department if you plan to reduce in size or remove trees.

# The Garden

## Designing a Garden

**I**n therapeutic gardening the definition of a 'garden' is a very broad one. Remember it doesn't have to be a big garden to be an effective space for your project. Pots, containers, hanging baskets and looking after other people's gardens are all viable options.

### Considerations to bear in mind:

- Your aims and budget — again!
- Include all interested parties in planning and creating the 'garden'.
- Focusing on the potential of the site as much as on its constraints.
- The surrounding area and how best to make your site 'fit' e.g. using materials like gravel that reflect the local geology.
- Designing in the areas required to achieve your aims, e.g. borders, raised beds, contemplation area, social areas, office space, toilets, covered space for winter work, compost area, space for flowers, vegetables and propagation, accessible water taps, good paths and trails around the garden, seating areas.
- Design in accessibility and interpretation e.g. for wheelchair gardeners or those living with dementia. And where necessary, signage and/or colour coding of areas. Consult the people concerned about what they need.
- Themed areas, e.g. the seaside, a colour, the wild garden.
- Building in art works.
- Nearby parking.
- Access to a reliable water supply or a cunning plan to get round the lack of a supply. Consider the distance from the water source/taps to the area(s) to be watered, and the height of taps/standpipes. Remember water is heavy.

## Further support & information

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# The Garden: Designing a Garden

### DESIGNING A GARDEN

We can advise on the accessibility of your garden design. To draw up a garden plan, Trellis can offer free initial site visits for groups aiming to develop therapeutic gardening space, with any subsequent work time being subject to charges. Please contact the Trellis office for further information.

### ADAPTIVE GARDENING

Trellis factsheets on many aspects of adaptive gardening design, techniques and activities can be found at [www.trellisscotland.org.uk](http://www.trellisscotland.org.uk)

### INCLUSIVE DESIGN

The Sensory Trust [www.sensorytrust.org.uk](http://www.sensorytrust.org.uk) provides lots of information on designing for accessibility, ideas for activities to enrich experiences, as well as a useful factsheet on path widths, gradients, surfaces, etc.

The Fieldfare Trust provide information about countryside accessibility including some useful ideas that can be scaled down to garden size [www.fieldfare.org.uk](http://www.fieldfare.org.uk)

### DEMENTIA FRIENDLY

The Dementia Services Development Centre in Stirling offers a number of garden design guides [www.dementia.stir.ac.uk](http://www.dementia.stir.ac.uk)

An internet search on inclusive or accessible design will provide more information. Contact your local authority planning department if you plan to reduce in size or remove trees.



# The Garden Planting

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**A**gain, a reminder about how useful it can be to start small, after assessing your clients' needs and in conjunction with your project aims.

#### Considerations to bear in mind:

- The site's aspect, slope, size, shape, topography, drainage, sun and shade, soil type, climate, altitude, wind/exposure.
- The number of clients, staff and volunteers and their needs, interests and skills.
- What style of gardening is open to you: formal/ornamental, high or low maintenance, active or mainly for relaxing in, crop production, forest gardening, fruit or flower production, wildlife gardening, groomed to perfection or messy and all-encompassing.
- Whether you will sell plants or produce to the public.

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Many people can feel overwhelmed by the perceived burden of caring for a large area of garden ground or plants with a long growing season. Dividing the 'garden' into small manageable pots, containers or plots with a mix of growing seasons is one method of overcoming this perception.

## Further support & information

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### The Garden: Planting

#### PLANTS AND GROWING

For horticulture advice see the resources produced by the Royal Horticultural Society (RHS) [www.rhs.org.uk](http://www.rhs.org.uk) or look at the many books available on plants and planting. In particular Dr G Hessayon's guides, 'Garden Plants for Scotland' by Ken Cox & Raoul Curtis-Machin and 'Fruit and Vegetables for Scotland' by Ken Cox & Caroline Beaton.

#### ORGANIC GROWING

ASK organic [www.askorganic.co.uk](http://www.askorganic.co.uk) is a mine of useful information on organic gardening methods in Scotland.

Access the HDRA (Henry Doubleday Research Association Centre) for all the gen on organic growing [www.gardenorganic.org.uk](http://www.gardenorganic.org.uk)

The Soil Association — campaigning organisation for organic methods, offering lots of information as well as regulation and promotion of organic products [www.soilassociation.org](http://www.soilassociation.org)

#### FOREST GARDENING

For information on forest gardening see [www.scottishforestgarden.wordpress.com](http://www.scottishforestgarden.wordpress.com) and also The Permaculture Association website [www.permaculture.org.uk](http://www.permaculture.org.uk) which documents what's going on in Scotland.

#### SELLING ITEMS/PRODUCE

There is a very useful factsheet entitled 'A beginner's guide to growing and selling produce' available from the Trellis factsheets web page at [www.trellisScotland.org.uk](http://www.trellisScotland.org.uk)

Contact other garden projects to learn from their experience of trading. The administrative complexities are reduced for small scale operations, so don't be put off.

Selling produce can become complex because of tax law. Information is available from Her Majesty's Revenue and Customs [www.hmrc.gov.uk](http://www.hmrc.gov.uk) and OSCR [www.oscr.org.uk](http://www.oscr.org.uk)

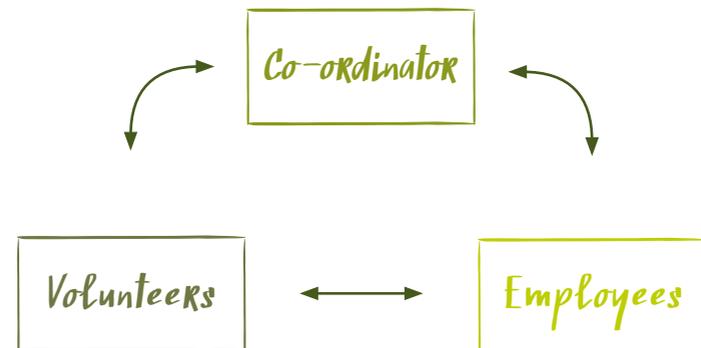


## Staff & Volunteers

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Many projects expand over time, starting with one enthusiastic person and building in scope.

Often this expansion involves recruiting paid staff or volunteers. Many therapeutic garden projects have at least one paid member of staff. Although some small projects do run successfully using only volunteers, this is the exception rather than the rule.



## People and structures

### Commonly found structures and positions include:

#### CO-ORDINATOR

Someone who is in charge of the project. This person will generally be paid and will take responsibility for all aspects of the work of the project, its clients, staff, volunteers and facilities. They will be accountable to, and supported by, a board of directors or management committee of a charity or possibly senior managers in an NHS department or a voluntary services agency.

#### VOLUNTEERS

Some projects do not take on volunteers but many do. Reliable and skilled volunteers can make a very considerable contribution to a project. All volunteers will need training and support. Factor in additional time, energy and funds for this. The level of support each volunteer requires can vary a lot and some garden projects regard every participant as a volunteer. Each project will have to decide what they expect from volunteers and what they can offer in return.

#### EMPLOYEES

Depending on the number of people your project supports and the work you intend to carry out, further paid employees may be required. They will be trained, monitored, supported by, and accountable to, the person in charge.

If you do decide to employ staff, you will have to become a constituted group in order to legally do so (see section 3, The Team, 'Local Volunteer Association'). Some groups, e.g. a limited company or a Scottish Charitable Incorporated Organisation (SCIO) have legal powers to take on employees. So think about this when considering the best structure for your group.

## Who's who and does it really matter?

There's huge variation in how different gardening projects configure their personnel teams. In some gardens, everyone is referred to as a volunteer, including people who need a full time support worker to help them participate alongside others who can work more independently.

At other sites, there may be more clearly demarcated roles, nurses and patients for example or prison service staff and prisoner gardeners. These roles reflect the material differences in authority and responsibilities, whether a given participant is receiving a salary or not, and in many cases in what a person expects to get out of their involvement.

Within certain projects, some participants are 'trainees' while others are tutors, activity leaders or instructors, and at yet other garden sites, everyone is referred to as simply 'gardeners'.

The way everyone works together and describes him or herself at a project will have a lot to do with the ethos of that group and may have a little to do, sometimes, with the funders who support it or the larger organisation it is a part of.

The desire to counteract inequalities or stigma may lead to a preference for not differentiating between people who, after all, have come together with a common purpose: to garden and to give what they can. But in some settings professional structures may come in to play, often for good reasons. The question may never arise at your project, but if it does, while you might find examples of projects similar to yours in the network, there is no protocol.

## Recruiting and managing staff and volunteers

**Here are some general points to consider when taking on either staff or volunteers:**

**Is the project's emphasis on care, horticulture, rehabilitation, education and training or something else?**

You will need people with particular (and complementary) knowledge and skills. Both staff and volunteers need a person specification and a job description — but build in flexibility. Exemplar person specifications and job descriptions are available from Trellis.

**How many staff/volunteers do you need and with which skills and experience?**

This will be dependent on your project aims, the number of people you plan to work with and their needs. The more complex the support needs of the project attendees, the greater the level of staff you need to support them. Some people may want to come along with a carer, buddy, mentor or support/advocacy helper. Think about how you will cover for staff and volunteer holidays, sickness absence and any special leave (planned and unplanned) so that the project can still operate safely.

**Appropriate salary or expenses?**

Do you have an adequate budget for the staff you'll need? Staff roles, the level of responsibility and the qualifications required dictate salary levels. Salaries should reflect your desire to recruit and retain the best possible staff. Current therapeutic gardening salary averages are available from the Trellis web pages. Volunteers should generally be offered reimbursement of travel costs and out of pocket expenses.

**The project's constitution.**

If you do decide to employ staff, some groups, e.g. a limited company or a Scottish Charitable Incorporated Organisation (SCIO) have legal powers to take on employees. See section 3 The Team, Local Volunteer Association for more information. So think about this when considering the best structure for your group.

## Recruitment policies and procedures

All the policies outlined below and overleaf should be 'live' not just dusty documents, but guidance that actually steers the project's daily operations. This means that regular training and revision work should be included in the annual calendar to make sure everyone is aware of what the policies say and they know how to follow procedures and why they are in place.

Your group will need to agree that formal recruitment policy and procedures should be put in place so that posts, whether paid or unpaid, are allocated according to transparent criteria and in line with equal opportunities guidelines. Advertising a post is likely to entail costs in the traditional press and online media. However Trellis offers free job advertising via our web pages and email bulletin. It's also worth contacting your local job centre. Trellis and Volunteer Scotland also host free advertising for volunteer positions offered and sought.

A vital part of the recruitment process is acquiring references. Two references, is standard, from previous employers or volunteer managers. References offer an additional layer of assurance about the abilities and reliability of new team members.

A PVG (Protecting Vulnerable Groups) check is essential if staff and volunteers will be working with children and/or vulnerable adults. The PVG check would usually be needed before starting work and is paid for by your project. Checks are available from Disclosure Scotland ([www.disclosurescotland.co.uk](http://www.disclosurescotland.co.uk)).

As a matter of good practice, you should consider the ethnic and cultural diversity and the gender and age balance of your workforce, in relation to the community and your client group. This should be dealt with through your equal opportunities policy and procedures. Organisations may also ask about disabilities as part of their equalities monitoring, and less commonly, about religion and sexuality. There's little point in collecting such data unless you have time to review it to highlight inadvertent biases/barriers and consider any changes needed.

To ensure that a project fulfils its aims and ethos, appropriate and on-going training should be provided for staff and volunteers, beginning with an induction programme. In addition, it's common practice to support staff with regular supervision meetings where an honest exchange

between manager/co-ordinator and staff member/volunteer should help monitor, evaluate and plan work, mitigate problems and to acknowledge success. These are commonly scheduled every six to eight weeks. Depending on the size of project there might also be an annual appraisal.

It's important to consider how you will deal with any discipline and grievance problems that occur and express this as a written grievance and disciplinary policy and procedure. All staff, volunteers and visitors (if yours is a public site) must have access to a clear and responsive complaints procedure. These documents should outline a clear chain of responsibility with names and contact details where possible so that a complainant can take their concerns to the next level if not satisfactorily resolved at the first port of call. Ultimately, an external mediator may need to be named as the final arbiter in more intractable disputes.

Communication is the key to harmony when a group of people work together. Build in communication strategies from the start, e.g. weekly planning meetings, monthly e-bulletin, and encourage staff, volunteers, clients and carers to contribute. Everyone needs to feel that they're listened to and that their ideas and concerns are welcomed and may have the potential to change things.

### MEASURING PROGRESS

Don't forget 'having fun' when considering your success criteria (see section 10 Measuring Progress).

Gardening is a very pleasurable activity but it's very easy to focus on more sombre measures and to forget the importance to us all, of joy and fun. Consciously building a cohesive team and celebrating the successes of staff, volunteers and clients is a very important part of the work of a therapeutic garden and if done well, will lead to a shared sense of enjoyment and accomplishment.



## Further support & information

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### Staff & Volunteers

#### COMPLAINTS PROCEDURE

Access the Trellis website for examples of complaints procedures.

#### DIVERSITY/EQUALITY

For general, policy-level information, look at the Equality and Human Rights Commission website [www.equalityhumanrights.com](http://www.equalityhumanrights.com). The Trellis website has examples of equalities policies [www.trellisscotland.org.uk](http://www.trellisscotland.org.uk)

#### GRIEVANCE PROCEDURES

ACAS has a useful guide on Discipline and Grievance at Work which includes an example of a grievance procedure for a small organisation [www.acas.org.uk](http://www.acas.org.uk)

#### JOB DESCRIPTIONS

Lots of help online but the Trellis network is probably the best place to look for help. Free advertising and examples of job descriptions are available from the Trellis website [www.trellisscotland.org.uk](http://www.trellisscotland.org.uk)

#### PVG CHECK

Available from Disclosure Scotland [www.disclosurescotland.co.uk](http://www.disclosurescotland.co.uk) — generally projects pay to have staff disclosure checked. You can acquire a basic disclosure via an online facility for a fee of around £25.

#### SUPPORT AND TRAINING

It's crucial to do this well so that the staff and volunteers you manage are well trained, motivated and committed to nurturing their clients. Seek advice from network peers as necessary.

Trellis offers a range of formal training, CPD, knowledge & skill sharing events and an annual conference all related to therapeutic gardening. Your local charity/volunteer umbrella organisation may also offer other relevant training. SCVO has a very wide menu of training opportunities [www.scvo.org.uk/events](http://www.scvo.org.uk/events)

#### THERAPEUTIC GARDENING SALARY

Available on the Trellis web pages [www.trellisscotland.org.uk](http://www.trellisscotland.org.uk)

#### VOLUNTEERS

Volunteer (Development) Scotland [www.volunteerscotland.net](http://www.volunteerscotland.net) has help and training for those who recruit and manage volunteers. It also hosts a free national volunteering recruitment website. Also look out for training and advice run by the local voluntary association in your area [www.vascotland.org/tsis/find-your-tsi](http://www.vascotland.org/tsis/find-your-tsi)

Scottish Business in the Community [www.sbcscot.com](http://www.sbcscot.com) works with businesses to offer volunteer teams for a day.



# Attracting and Generating Money

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**Y**our project may be in the fortunate position of having a core budget from a parent or commissioning organisation, e.g. the local council. Even if this is the case, current financial realities mean that you're likely to need additional funds at some point as grants decrease or costs rise.

But before rushing off to complete a pile of funding applications, ask yourself if you could achieve your aims with less money? Or make the money you have work harder for you?

Consider where you are now and how you might get to where you want to be. Be clear about what you need and what the most crucial priorities are.

Are you only after a little revenue funding to keep you in seeds, pots and compost? In which case, local fundraising activities are all that are needed to keep your project sustainable.

Or do you need larger scale capital funding for a new building or facilities as well as revenue for staff costs? You may need funds for all these things.

A series of discussions leading to the creation of a funding plan will clarify what type of additional funding is needed, when you will need it, how you plan to acquire it, and who will do that work.

# Creating a funding plan

Some of the questions to consider when creating a funding plan:

## DO YOU REALLY NEED MORE MONEY?

- Could you do more with what you have?
- Can your gardening activity generate money?
- Could you engage the local community more — free labour, exchange of goods and services, LETS scheme or a time bank or in-kind giving?

## CLARIFY WHAT YOU NEED FUNDING FOR

- Do you need small, 'seed' funding or funds for a major capital expenditure?
- A simple funding plan with budgets and timescales helps to focus your efforts. Perhaps funding several smaller phases will work better than a one-off larger sum.
- Create a budget and ensure your finances are in order.

## SEARCH FOR SUITABLE FUNDING OPTIONS

- Seek out Trellis, local council and volunteer centre support.
- Are legacies, endowments, sponsorship or a 'friends of...' group suitable options?
- Funding database search — seek more than one funder.
- Note deadlines, and ensure you check the 'what we don't fund' section of any trust's website.
- Crowd funding options work for some projects.
- What type of entity works best for your project?

## FUNDING APPLICATION TOP TIPS

- Be succinct and clear about the need for your project and who will benefit.
- Include relevant statistics and comments from potential users of the project to demonstrate this.
- Be sure you know how you will measure the impact of the funding you receive.

# Do you really need more money?

Can you achieve your aims with less money, or make the money you have work harder for you? Could you do more with what you have?

## CUTTING COSTS:

- Look at things like bank charges, utility providers and insurance costs. Shopping around will ensure you get the best possible deal.
- Consider your supplies and services. Could you buy co-operatively with other nearby projects?
- If you are a non-profit organisation, ask suppliers if they offer special/discounted rates to charitable causes.
- Involve and engage your local community and local businesses more. Ask for donations in kind e.g. a garden centre may donate spades etc. What skills and materials could you find for little, or nothing, from volunteers (civilian, army or corporate) or through time-banking?

## LOCAL FUNDRAISING

Local fundraising activities are a good way to strengthen community support and raise awareness of your work e.g. try a Strawberry Sunday — invite people to come and work in garden for two hours in return for a strawberry tea. Those that can't manage or don't want to do gardening work can enjoy the company and it's a useful inclusive activity.

## CAN YOUR GARDENING ACTIVITY GENERATE MONEY?

Plant sales; veg box schemes; baking sales; café; garden maintenance; floristry; craft sales; woodworking; upcycling. The experience of projects in the Trellis network suggests that only a small percentage of annual income can be generated through these means.

**Create a budget for what you want to achieve. Include:**

- Staff costs (incl. salary + 15% to cover NI/pension).
- Fixed costs (heating, lighting, water etc.).
- Materials.
- Travel (public transport costs and car travel e.g. 45p per mile).

## The search for suitable charitable funding options

Once you know where you want to get to, spend some time exploring the funding options available to a project like yours. There is enormous competition for funding and many grant providers and trusts are oversubscribed. It's common to try for funding from a number of sources simultaneously. This has the obvious benefit of spreading your chances of success by not depending on one funder who, if they turn down your request, will leave you back at square one.

There are a considerable number of funding bodies in existence. Some have very broad criteria as to who they will fund and others have very specific priorities or locality-based criteria. Seeking them out and filtering out the irrelevant ones is part of the job of creating an efficient funding structure for your project.

Knowing what you want and how much to budget for will also help you narrow your search. There is a complete range of funders from those offering a few hundred pounds to those exclusively interested in large capital projects.

Visit the Trellis funding web pages for funder suggestions; the e-bulletin too carries funding news.

- Your local voluntary association may host an online funder finder search facility and may also be able to provide one-to-one sessions helping you to search for funding. They may also issue regular funding bulletins.
- Local councils will often have community funding section which can also be a good place to start.
- Local environment trusts are often good sources of local funding information.
- SCVO will also offer advice and, of course, other projects may share ideas as to where to look for funding.

Funders differ in the amount of discussion they prefer to have with prospective applicants prior to and during the submission process. Some discourage questions entirely and refer everyone to an online form and guidelines; others prefer you to call them and may even send a grant officer or trustee to meet you.

## What type of entity works best for your project?

Depending on how you will primarily raise income, consider becoming a company limited by guarantee or a Scottish Charitable Incorporated Organisation (SCIO). This has implications for the level of admin and reporting to regulators you'll have to do (the administrative burden for companies is considered to be slightly more than for SCIOs), the funds you'll be eligible to apply for and your project's legal powers and duties regarding hiring staff, complying with certain laws and buying property/stock etc. as well as taxation.

Note that you can become a company and a registered charity. The Charity

Commission also has some useful guidance and although Scottish law on charities is a little different from that in England and Wales the basic principles are similar.

If trading is going to be an important feature of your project it may be worth considering becoming a Community Interest Company (CIC) or a Social Enterprise. These kinds of organisations hope to make a profit and aim to plough it back into the project again. Again, take advice, as once a CIC always a CIC, and this could be restricting if applying for charitable trust funding in future. For further help and advice on choosing a group structure, see page 27.

## Corporate sponsorship

Corporate sponsorship from local or national business is another funding option and although not common, if pitched correctly, can be of real benefit to you and your sponsor. Be aware that a sponsorship deal is a partnership from which both parties hope to benefit and your proposal should clearly demonstrate what your sponsor will get in return for their investment. A garden project may want relatively simple things, e.g. some funding, an increased profile or a piece of equipment, while

the sponsor may want their association with the project acknowledged by, for example, the inclusion of their logo on your website/paperwork, photo calls or other marketing activity. Successful sponsorship relationships are clear about what both parties want from the partnership, are comfortable with the association and confident that its impact will be positive. Consider local businesses or organisations that may have a thematic link to your work as a starting point.

# Funding applications

## **TIMESCALE**

If you plan to contact trusts or grant providers, note deadlines or lead in times. There will be closing dates, perhaps a number of deadlines each year or a rolling programme with bids considered as they arrive. Funders will generally provide information about the time it takes them from receipt of your bid to the provision of money, if you're successful. As you're likely to need your funding by a specific date, you'll need to take note of this.

Be aware of the turnaround time that each funding application may need: allow time to write; time to have the application considered; take into consideration the date when funding may be awarded and what time period it's awarded for. Apply for funding at the appropriate time — funders may have specific deadlines or regular funding cycles. In the case of local council funding, most people apply at the start of the year and councils are inundated with funding applications. You may stand a better chance applying a few weeks later when the rush has died down. Some councils are careful to eke out money across the year, often there is money left to be used up towards the end of the year or fund closing date. Sometimes the

opposite is true and money is used up before the end of the year. Speak to your council to find out how they treat applications and apply accordingly.

You may also want to consider legacies, endowments, or the setting up of a fundraising 'Friends of...' group. These forms of fundraising activity may not be appropriate for your project, or may be something for five years into your plan.

## **WHAT TO INCLUDE**

When making an application for funding, imagine that you are the funder who has thousands of applications to read. Make your application stand out for the best reasons: no spelling mistakes, research the funding body, and give the funder exactly the information they require.

Charitable funds are applied for in the name of one person who is accountable to their project board of directors. On application forms, a referee is often required to vouch for this named person/give a reference, this is generally a person independent of the project/board of directors.

## **FUNDING BIDS**

Any funding bids you make should be well thought through, well targeted to the money-giving body (read their criteria carefully so that you don't waste your time and theirs), extremely well written and proof read. It's vital that you present the best possible picture of your project to any prospective funder. Try to offer a succinct account of your project as providing something that is unique, innovative, locally relevant and valued. Be as specific as you can e.g. money needed for a new shed, 7 spades, 3 garden forks etc.

Your project needs to demonstrate that it is well managed with clear aims and solid, but flexible plans, for a sustainable future.

Don't forget to include any relevant statistics and personal comments from local people you may have that offer proof of need (and success if you're already up and running).

Clarify how you will measure the impact of the money you're requesting (see section 10 Measuring Progress). This means you need to be clear about what the outcomes and impact of your planned work will be and for whom. You also need to express clearly what indicators will show you've successfully brought about the planned changes and how you'll measure them.

Include a well written budget which has income, expenditure and in-kind contributions all included. You'll also need to prove your financial control systems are robust and transparent. You can do this in many ways such as outlining any proven experience of managing budgets in previous jobs, or by calling on the services of a friendly accountant who'll advise on and verify your budget and help keep monthly account records in shape.

Many funders want to see your annual audited accounts and annual report if you have them. If you don't yet have accounts because you are a new project, a budget forecast for the first year of operation is often required.



## Attracting and Generating Money

### GROUP STRUCTURE

VAP Voluntary Action Perthshire Community Toolkit 'Setting up a Community Group / Choosing a Structure' for guidance on a variety of group structures  
[www.pkvs.toolkit.sitekit.net/Setting-up-Group-or-Project/choosing-a-structure.htm](http://www.pkvs.toolkit.sitekit.net/Setting-up-Group-or-Project/choosing-a-structure.htm)

### SCOTTISH CHARITABLE INCORPORATED ORGANISATION (SCIO)

OSCR [www.oscr.org.uk](http://www.oscr.org.uk) has a practical step-by-step guide and SCVO [www.scvo.org.uk](http://www.scvo.org.uk) offers comprehensive information on the subject.

### COMMUNITY INTEREST COMPANY (CIC)

Introduced in 2006, this is a form of limited liability company structure set up for organisations that have the specific aim of providing benefit to a community. Note that it cannot be a registered charity as well. For information and case studies see [www.gov.uk/government/organisations/office-of-the-regulator-of-community-interest-companies](http://www.gov.uk/government/organisations/office-of-the-regulator-of-community-interest-companies)

### COMPANY LIMITED BY GUARANTEE

For guidance on what a company structure offers, OSCR [www.oscr.org.uk](http://www.oscr.org.uk) has a practical step-by-step guide and SCVO [www.scvo.org.uk](http://www.scvo.org.uk) offers comprehensive information on the subject.

Companies House [www.gov.uk/government/organisations/companies-house](http://www.gov.uk/government/organisations/companies-house) is the place to register your company but creating a legally fit constitution and agreeing on the make-up of your governing structures and rules can be complex.

Some local voluntary association TSIs will offer guidance, and the Business Gateway may also help [www.bgateway.com/local-offices](http://www.bgateway.com/local-offices). HMRC also publishes guidance on Company Law which will apply to your group if you opt for this structure.

### FUNDING RESOURCES

Your local voluntary association Third Sector Interface (TSI) can provide face to face information on generating income and finding funding as well as an online funder search and often a regular bulletin or update. Find your local TSI at [www.vascotland.org/tsis/find-your-tsi](http://www.vascotland.org/tsis/find-your-tsi)

Your local council may also offer funding advice and information.

Look on the Trellis funding web pages and in your local library they might have some paper-based reference books on trust funding. The SCVO produces a very useful funding directory that comes as a PDF [www.scvo.org.uk](http://www.scvo.org.uk)

### SOCIAL ENTERPRISE

The VAP Community Toolkit has a lot of information on Social Enterprise (and on SCIOs and CICs) [www.pkvs.toolkit.sitekit.net](http://www.pkvs.toolkit.sitekit.net)

### WRITING FUNDING PROPOSALS

Several organisations including SCVO run courses on fundraising. There is information online too and several books available on the subject. The Institute of Fundraising might also prove useful and they have a Scottish arm [www.institute-of-fundraising.org.uk](http://www.institute-of-fundraising.org.uk)

Company Solutions (run by Gareth Edwards) provides excellent short training courses on different aspects of fundraising across the UK [www.companysolutions.biz](http://www.companysolutions.biz)





# Promoting Your Gardening Project

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As with all things project-related, having a plan will help. Within it consider including what you need to say, to whom, when, and how you'll judge the success of a particular communication.

## **You may want to promote your therapeutic gardening project:**

- To help local people, potential referrers and prospective clients understand what you are doing and to encourage their participation.
- To encourage connections with linked or complementary initiatives, organisations and potential partners.
- To ensure you have a profile that truly conveys 'who you are' and your project ethos.
- To garner support, understanding, good will, funding or volunteer help.
- To publicise specific areas of your work, fund-raising events or particular activities.
- To publicly celebrate successes and build the self-esteem of all involved.



## Marketing

### Give the image of your project careful consideration.

- Agree who your target audience is. From this you can figure out which promotion vehicles, methods and styles will work best.
- Decide on the message you wish people to take from your work. Once you're clear about this then develop consistent wording that you can use, whatever the context or the audience.
- Try to make any communication as clear, concise and consistent as possible.
- Use simple language to get your message across.
- Images are great for capturing people's attention. There will always be competition with lots of other promotional material and yours needs to stand out. If using imagery, be sure you have permissions in place to use it publicly.

### WEBSITE

A website can be a good way of communicating and conveying information. This does not need to be costly as there are lots of options available which allow you to build a good website for little or no cost (such

as *wordpress.com*). Ensure your website clearly shows contact information, your location and opening times. Keeping your website up to date is crucial and getting some of your personal interest stories across as blogs from those within your project is a great way to do this. So be sure you have the time and resources for the upkeep before embarking on website creation.

### SOCIAL MEDIA

You can also consider using Facebook, Twitter and Pinterest, amongst other sites, to keep people updated with your project's activities and successes, and to continue reinforcing your core message.

If you're open to the public, you may want to think about asking visitors to 'like' your Facebook page or to capture their email address, giving them the opportunity to be first to know of any special events, activities or items for sale that you offer. If you do this, don't forget your data protection responsibilities.

Social media also must be regularly updated if they are to work well for you, so ensure you have someone in the project with the skills and capacity to do this work.

Look out for local training opportunities on the subject of social media if you need support — or ask colleagues who have relevant experience.

## **MEDIA RELATIONS**

In addition to websites and social media you may wish to send articles or press releases to the local press. If you're using the local or national newspapers do ensure that they're clear about who and what they can photograph, and write the press release yourself to ensure (at least before a journalist edits your words!) that the detail of what you want to get across is clear and not misleading or patronising.

- Your first paragraph needs to capture the reader's attention. No need for detail at this point.
- Your first few words should clarify the most important aspect of the story and be written in a style tailored to the target audience (it's important to have a clear idea of who this will be of interest to).
- Focus throughout on the **IMPACT** and **BENEFITS** of your work.
- Connect with your audience: who will be affected by your news story? Why does it matter?
- Keep it focussed on the impact on the lives of real people: human interest stories always sell.

Larger urban areas may have news sheets or websites for specific areas of town. Make contact with these if it suits your purposes as they're often glad of stories.

An interview with the local radio station can be helpful but go prepared with three clear points you want to make so you can be in control of the message that's broadcast and be less prone to missing an important point or being thrown by an unexpected question.

## **DIRECT MARKETING**

Leaflets can be very useful, as can posters. Consider what it is you're promoting and, by extension, who your target audience is and where they might be. Focus any leafleting or poster activity in these areas, e.g. local schools and community centres for a children's bug hunt or doctors' and dentists' surgeries, libraries and the local hospital for a 'green exercise' event. Ensure the design of graphic information is relevant and accessible to your target audience.

## **PROJECT CHAMPIONS**

You may have volunteers who are well connected within the local community. You could invite them to act as champions for your project. This could mean that they offer to talk, formally or informally, about your work to relevant community or horticultural groups. People who have good presentation skills can really heighten the profile of a project, leading potentially to offers of support of various kinds as well as an increased understanding and awareness of your project's work and aims.



## EVENTS

Of course promotion is not just the written stuff. Promotional events will give you another opportunity to demonstrate to people who you are and what you're trying to achieve.

There are brilliant examples of innovative events held across the country that have been successful in catching the eye of the public and of influential people too.

Well run events can prove to a potential sponsor or funder that you have the ability to deliver what you say you can.

Consider linking with other like-minded groups in joint events. Many communities have regular charity fairs where you can promote your project.

Your promotional efforts will grow with your project and as more support becomes available. You don't need to be doing it all from the start, just do what you can with consistency.

## MICRO PROMOTION

While you're engaged in all the 'out there' stuff don't lose sight of the signs, notices and other written materials that are visible on site when clients, staff and visitors come to your project.

- Are these elements also reflecting your message/ethos?
- Are they welcoming, positive, clear, comprehensive, current and accessible to all?
- Ask a friend to be a 'secret shopper' to test them.
- Some organisations may have accessibility auditors who could provide an evaluation.

Promotional efforts should build up, and should fit together, so that you are projecting a consistent message. A flurry of hand-crafted leaflets and posters is a great start but you should aim to follow up with a marketing plan, however simple.

## Further support & information

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# Promoting Your Gardening Project

### ACCESSIBLE TEXT

CALL Scotland supports the development of communication and assistive technology. Although aimed at teachers you can download a useful booklet on producing accessible text [www.callscotland.org.uk](http://www.callscotland.org.uk)

Contact the RNIB if you are supporting people with sight loss [www.rnib.org.uk](http://www.rnib.org.uk) for advice on making your signage and literature more accessible to visually impaired visitors.

If you are working with people who do not speak English well, speak to your local council, college or volunteer centre about translation services, and think about including language skills in your training programme (for staff and volunteers) and recruitment requirements.

### LOCAL NEWSLETTERS

Your local library is likely to have contact details of local newsletters and any free newspapers. Often they are very glad to be offered articles and photographs.

### MARKETING PLAN

A simple list of what you are going to do to maintain a profile within your community and how frequently, would be a start. Allocate tasks and keep promotion as a standing agenda item for your staff/client meetings.

### SOCIAL MEDIA

Charity Comms is a membership network for charity communications professionals [www.charitycomms.org.uk](http://www.charitycomms.org.uk) — their website has some useful information and advice in this area. SCVO offers training [www.scvo.org.uk](http://www.scvo.org.uk) and the Media Officers Network.

### WRITING A PRESS RELEASE

Look at the Charity Comms website for tips, advice and 'thought pieces' [www.charitycomms.org.uk](http://www.charitycomms.org.uk). The Media Trust is also worth a look [www.mediatrust.org](http://www.mediatrust.org). WikiHow [www.wikihow.com/Write-a-Press-Release](http://www.wikihow.com/Write-a-Press-Release)



# Getting the Administration Right

## Governance

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**G**overnance means the act of controlling or directing an organisation.

To ensure and demonstrate good governance it's important to have certain rules and agreements in place, available to all and influencing all areas of operation.

For many, this aspect of running your project may seem daunting but there are lots of simple templates and organisations that can help get your project shipshape. Trellis also runs regular network meetings and training on many aspects of good governance.

Anyone coming into contact with your project, no matter how small that project is, will want to be confident that it is run with transparency and integrity.



**YOUR MANAGEMENT SYSTEMS CAN DEVELOP OVER TIME BUT MAY INCLUDE:**

- A constitution or 'governing document'.
- Various policies covering areas such as equal opportunities, health & safety, data protection, protecting vulnerable people, child protection, financial control, IT use, staff management procedures including discipline and grievance protocols, volunteer management guidelines as well as a complaints procedure.
- Transparent financial processes and records that can be subject to independent examination.
- Risk assessments to gauge and minimise risk both to personnel, clients and visitors to the organisation, its reputation, service provision and viability.
- Processes/documentation in place to show you comply with relevant legislation such as data protection, employment law and equal opportunities as well as areas such as health & safety and licensing.
- The production of an annual report, including a summary of financial activity over the year, reflecting good governance and demonstrating how you fulfilled the project aims. This report may also be required by funders from whom you are requesting money.

**Further support & information**

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## Getting the Administration Right: Governance

**ANNUAL REPORT**

The PKAVS Community Toolkit has some information on this subject [www.pkvs.toolkit.sitekit.net](http://www.pkvs.toolkit.sitekit.net)

**CONSTITUTION**

Your local volunteer centre may have advice and model constitutions to study. SCVO also offers one to download [www.scvo.org.uk](http://www.scvo.org.uk)

**LEGISLATION**

Look at SCVO's 'Running Your Organisation' tab for all the basics [www.scvo.org.uk](http://www.scvo.org.uk)

**LICENSING**

If you plan to sell food or alcohol for any reason then contact the local council for advice and to acquire a premises licence. Beware as this can be complex! Very informal, one-off bake sales or offering jams, cakes or other home-produced food items at an open day or fête might be exempt from this type of licensing providing clear signage about allergies (e.g. nuts) is displayed.

If you play music live or on a radio or TV in the background to entertain clients, staff or visitors you will need a licence. Look at the Performing Rights Society website for information related to charities and community groups [www.prsformusic.com](http://www.prsformusic.com)

Public collections of funds (e.g. shaking a tin at an event or in the street) also require a licence from your local council.

**POLICY CREATION**

The Trellis website offers examples of policies written by network members. These examples can be a good prompt to thinking about all the areas you might need to consider and help demonstrate the style of wording that works well, but will always need adapting to the specific circumstances of your own project. The PKAVS Community Toolkit also has many exemplar policies covering all areas of governance and management [www.pkvs.toolkit.sitekit.net](http://www.pkvs.toolkit.sitekit.net)

# Getting the Administration Right

## Health & Safety

**I**t's common to hear people groan when the phrase 'health & safety' is uttered.

For therapeutic horticulture projects, the importance of sensible health & safety awareness and practice cannot be overstated. Certain actions under health & safety legislation are mandatory and of course it's important your clients, staff, volunteers and visitors can be, and feel, safe when they attend the project. People running a garden project have a duty of care to manage risk on behalf of everyone who comes onto the site.

There are some obvious areas in a therapeutic garden where you'll need to take particular care, assessing risks and taking measures to reduce them, as well as some reporting and recording duties in some cases. Examples include:

- The use of sharp tools and machinery — maintain up to date risk assessments and servicing logs.
- The use of dangerous substances like herbicides: COSHH rules apply.
- The possibility of slips and trips on uneven or icy surfaces or sun burn in summer — risk assessments and measures to ameliorate risks.
- Some of the plants your project personnel and clients might handle may have poisonous parts, stings or thorns.

For basic background information and training opportunities, the Trellis website health & safety section is a good place to start. It's also worth contacting your local fire safety officer or environmental health officer (if you are handling food) for advice and guidance. As always, other garden projects will often be able to help with advice and perhaps exemplar policies and risk assessments.

### Ensure that you have considered and acted on the following:

There is one named person in the project responsible for health & safety matters.

It is everyone's personal responsibility to behave in a safe way and this message must be constantly communicated to all who are part of the project.

Create a health & safety policy and update it annually (remember to date all documents when you first produce them). Think through emergency continuity planning as part of this process, i.e. what would need to be done if the site had to be abandoned suddenly for any reason. This could become a separate policy or protocol.

Produce risk assessments and safe systems of work documents for all areas of the site and the activities carried out there, e.g. using hand tools, using machinery, working with food, managing bonfires, etc.

Ensure that staff, clients and volunteers have had a tetanus booster vaccination if necessary. It's important to agree your project policy on this and make it clear to all who want to work on the site.

Get advice about safe staff/volunteers supervision and support levels, considering the support needs of everyone on site. This should then inform staff handbook clauses/guidance on areas like staff absence e.g. if someone is unable to come to work, do you need to cancel some or all of a group who were scheduled to attend that day?

Maintain a training record for clients so you're clear who can do what, to what standard (of safety) and any supervision needs required.

Think about how you will deal with accidents. Will you need someone trained as a first aider? You will also have to maintain an accident record book, securely stored.

A regular inspection of your project site, premises, equipment and activities will help you to spot hazards and to remove or minimise them.

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Ensure you have all the required fire safety equipment and that the right people know how to use it. Have the equipment maintained. Institute regular fire evacuation practice and keep a record of these events.

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You will need to provide hand washing facilities if people are eating at your project.

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Consider if, and then where, you will allow people to smoke.

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Make provision for preventing over-exposure to sun. Note that some medications for mental health conditions can increase skin sensitivity to sunburn, so it's worth taking extra care in the summer. Some projects keep hats and sun cream in the stores, but timing of work sessions and making use of shady trees may also be ways of minimising the risk.

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Consider whether you need safety signs (Hedge clipping underway — please use the other path) or disclaimers (Accompanying adults are responsible for children within the garden).

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It can be useful to make 'tools safety' sessions a regular feature. Just five minutes is all it takes. Group members take turns to pick up a tool, name it and demonstrate how to safely use, carry and stow.

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If you have potentially dangerous substances at the project, e.g. bleach or chemical pesticides, you will need the necessary information sheets about them regarding their chemical composition, health effects and what to do in case of accidents.

You will also need to complete COSHH (Control of Substances Hazardous to Health) documentation and store it securely. The substances may need to be kept in locked cupboards. It's important to make personnel aware of substance ingredients, effects and the action to take in the event of accidental spills, ingestion etc.

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Any necessary insurance. Public Liability, Employers Liability, possibly Professional Indemnity. Some brokers offer discounts to charities and garden projects — see Insurance section on page 76.

## Further support & information

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# Getting the Administration Right: Health & Safety

### ACCIDENT BOOK

Available from the Health & Safety Executive (HSE) [www.hse.gov.uk](http://www.hse.gov.uk)

### COSHH

All you need on the Control of Substances Hazardous to Health, including exemplar paperwork, is on the HSE website [www.hse.gov.uk](http://www.hse.gov.uk)

### HEALTH & SAFETY EXECUTIVE

Lots of useful, straightforward information including exemplar paperwork [www.hse.gov.uk](http://www.hse.gov.uk)

### RISK REGISTER

Try [www.brighthubpm.com/risk-management/3247-creating-a-risk-register-a-free-excel-template/](http://www.brighthubpm.com/risk-management/3247-creating-a-risk-register-a-free-excel-template/) for a template. You will also find one in the Charity Commission publication 'Charities and Risk Management' mentioned under General Advice.

### GENERAL ADVICE

Possibly containing more than you might want (!) but certainly comprehensive, the Charity Commission document, 'Charities and Risk Management' is worth downloading. Navigate to [www.charitycommission.gov.uk](http://www.charitycommission.gov.uk) then enter 'cc26' into the search box.

SCVO also offers some advice. Search for 'risk management' via the search box on [www.scvo.org.uk](http://www.scvo.org.uk)

The Trellis website offers information [www.trellisscotland.org.uk](http://www.trellisscotland.org.uk). The PKAVS Community Toolkit also has a section on Health & Safety [www.pkvs.toolkit.sitekit.net](http://www.pkvs.toolkit.sitekit.net)

# Getting the Administration Right

## Insurance

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**You should consider what insurance is necessary to cover your project against accidents, damage, loss, liability, etc.**

Note that any agreement or lease you have for use of your site may stipulate that particular insurance policies be held.

### **PUBLIC LIABILITY INSURANCE**

As a basic minimum the most likely requirement is public liability insurance. This covers you for any injury, disability or death of people taking part in your project or visiting it. It would be wise to acquire this insurance before any work is done on the site at all.

If you run special events, check that your insurance covers these. Many policies allow cover for a certain number of events, on or off site, per year and may cover equipment taken off site, under certain conditions.

### **EMPLOYERS' LIABILITY INSURANCE**

If you are taking on staff you will need employers' liability insurance. This covers both employees and volunteers.

Often insurance companies/brokers can offer a combined public liability/employers' liability insurance.

You need to display both your public liability insurance and your employers' liability insurance documents.

### **VEHICLE INSURANCE**

If you are running any vehicles they will need to be insured. And if staff are required to use their own vehicles for work-related activities, seek proof from them that their personal insurance covers them for business use. It's advisable to indicate this requirement in recruitment paperwork and staff handbooks etc.

### **ALL RISKS POLICY**

An all risks policy would cover your garden and equipment against fire, theft, flood, etc.

### **PROFESSIONAL INDEMNITY INSURANCE**

People offering tailored advice, designs or recommendations for individuals or groups/organisations, could be held responsible for any losses/mistakes, unintentional copyright infringements, or other ill-effects that are a result of this advice.

This is when professional indemnity cover may be needed. In the main, garden projects are providing a venue and activities that people choose to take part in and practitioners are acting in good faith providing a service rather than making specific recommendations or offering tailored advice, so often this kind of cover is not needed.

When practitioners do create a more tailored programme with an individual, they're often covered by insurance that's already in place due to their practice as a qualified health professional e.g. an occupational therapist.

### **GET IT RIGHT**

Always read the small print of any policy you are offered so that you can be confident that the cover is adequate. Don't leave this until you make a claim or be tempted to be under-insured as a way of saving money.

#### **At renewal time:**

- As annual renewal dates come round, remember to update your insurer about any material change to your circumstances such as the number of staff and volunteers, amendments to your equipment inventory, more frequent events or new facilities.
- Review your insurance policies annually when you are sent your renewal documents to ensure you are getting the best possible deal. SCVO and some advisory and umbrella organisations offer special packages for gardening projects or charities. Try the Horticulture Trades Association, Trellis or FCFGG.

As ever, speak to similar projects and ask their advice about insurance policies held and insurance companies or brokers they recommend.

Further support & information

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## Getting the Administration Right: Insurance

### WHICH INSURANCE?

Look at the SCVO website [www.scvo.org.uk](http://www.scvo.org.uk) for information and advice. The VAP Community Toolkit [www.pkvs.toolkit.sitekit.net](http://www.pkvs.toolkit.sitekit.net) also has good information.



## Getting the Administration Right Managing funds

**W**ithout good financial management your project is at risk of running into difficulties. You need to assess the amount of money required to fulfil the aims of your project and have a plan for how to raise this.

You must be able to demonstrate that your funds are being spent as per your plan — this is often a legal requirement and you also need to show funders that your financial management skills are adequate. Good financial records will help you to produce reports, forecasts and future plans.

### WRITE A BUSINESS PLAN

You may well start your project development by writing a business plan.

This would outline how you propose to start and develop your project and, along with the narrative, details of costs and any income would be included.

If all this sounds daunting, remember that many tiny projects deal with all this on a daily basis, often very simply. So gather advice before you start and aim for robust procedures that everyone is trained to adhere to.

### THE PRODUCTION OF A BUDGET IS IMPORTANT

You might want to create an outline budget covering, for example, a three year period. This would help you keep tabs on the areas that will require funds in the future and so will guide you as to how much time you need to spend on writing and submitting bids.

It's good practice to produce a budget each year. This helps you to control the money you have available, measuring expenditure against any income received.

If your project plans to sell anything to the public it may be useful to set some realistic income targets too. And of course you will need to be aware of, and administer, such things as VAT returns if necessary.

If people elsewhere in your organisation are setting your budget, do try to get involved in the process. The project co-ordinator/founder is likely to know in detail what is happening and that reality should be factored into any calculations.

### PAYROLL

Many people find processing payroll to be a daunting prospect or just too time-consuming. Several agencies can do this work for you for a small monthly fee.

### ALL STAFF SHOULD WORK TO AGREED FINANCIAL PROCEDURES

These include things like opening a bank account for the project, agreeing a mandate for the required number of signatories for transactions, using petty cash records, limits on petty cash and single transaction amounts, obtaining receipts for money spent, asking for a signed receipt when expenses are paid in cash, keeping as little money as possible on site, paying cash into the bank regularly and storing financial records for at least seven years in labelled boxes or digitally (with backup).

### DON'T FORGET THE DATE

As always with formal documents of any kind, don't forget to add the date to everything. It's useful to date stamp mail when you receive it.

## Further support & information

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# Getting the Administration Right: Managing Funds

### BUSINESS PLANNING

Try the VAP Third Sector Interface Community Toolkit at [www.pkvs.toolkit.sitekit.net](http://www.pkvs.toolkit.sitekit.net) which includes advice from the Big Lottery. SCVO also has advice at [www.scvo.org.uk](http://www.scvo.org.uk) — search using 'business plan'.

### FINANCE

The Scottish Charity Finance Group, (membership fee applies), probably offers more than most of us need [www.scfg.org.uk](http://www.scfg.org.uk). OSCR also offers guidance although again it is probably more than anyone, bar your accountant, will need. Under the tab 'Running your organisation', SCVO has excellent basic information on all areas of financial management [www.scvo.org.uk](http://www.scvo.org.uk)

### VAT

Her Majesty's Revenue and Customs (HMRC) website advises on all tax matters [www.hmrc.gov.uk](http://www.hmrc.gov.uk). The PKAVS Community Toolkit offers information relevant to smaller non-profit groups [www.pkvs.toolkit.sitekit.net](http://www.pkvs.toolkit.sitekit.net) as does SCVO [www.scvo.org.uk](http://www.scvo.org.uk)

### PAYROLL

SCVO is one of several organisations that offer a payroll agency service. Many charities outsource this work.



# Getting the Administration Right

## Record keeping

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**F**or a variety of reasons your project will probably need to keep records. It's a good idea to document certain things, even if keeping some records is not a legal requirement.

Well-organised and maintained records give a fascinating insight into the development and work of a project and can be inspiring for staff and clients as well as useful to colleagues hoping to set up projects of their own. They can also be a guide to what will work in future.

Remember that confidentiality is really important and records must be safely stored in a fire-proof, locked cabinet or a password-protected computer (with regular back-ups stored in an appropriate location — virtual or real world — to prevent loss or theft of data).

By doing this you are complying with the Data Protection Act, 1998. Read more about data protection laws in the Charity Finance Group's guide, 'Protecting Data, Protecting People', to be clear about what data you can and can't collect and store and the permissions you need to seek.

**Consider whether the project needs to create and store the following information:**

### CLIENT RECORDS

- Personal details, emergency contact, health/medical information e.g. allergies, epilepsy risk or anaphylactic shock.
- Personal Progress Records of how a person is getting on? E.g. development of skills, confidence, fitness, future aspirations. These should be jointly recorded with the project coordinator/practitioner and available for the client to see on request.

### STAFF/VOLUNTEER RECORDS

- Personal, emergency contact/next of kin and medical details.
- Skills, experience and training completed.
- Supervision notes.
- Holiday, sick leave and expense claim records.

### FINANCIAL RECORDS

- Copies of funding bids, awards and reports for funders.
- Day to day accounts and receipts.
- Salary, payroll, pension and expense payments.
- Ensure you keep these for seven years in case of an inspection by HMRC.

### EVALUATION & MONITORING

- How the project's progressing towards its aims; business & operational plans.
- Strengths and weaknesses.
- Notes and feedback from events & other indicators of progress.

### MINUTES OF MEETINGS

- Staff and client meetings, board, partnership and funding meetings.
- Note decisions made and actions taken.
- These records should reflect the democratic way your project is run.

### VISUAL AND AUDIO RECORDS

- Chronicle the development of your site.
- Capture events, visitors, celebrations, seasonal changes, achievements.
- Collages, sketches, paintings, photos, videos and sound clips.
- Ensure you receive permission to take and use photographic images.

### SITE RECORDS

- Might include plans of the garden, historical land registry information, planning permissions, deeds of sale/leases.
- Planting schemes.
- Location of services e.g. underground cables.
- Receipts and guarantees of work done.
- Site visits by safety inspectors, fire fighting equipment, servicing records, COSHH information, information on soil contamination.

### CONTACTS

- All the people related to the project.
- Referrers, clients, electrician, suppliers etc.
- Ensure information is accessible to all who need it and inaccessible to those who don't.
- Keep emergency contacts in a separate red folder, somewhere prominent.

## Further support & information

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# Getting the Administration Right: Record Keeping

### DATA PROTECTION

Look at the good old SCVO website for starters [www.scvo.org.uk](http://www.scvo.org.uk) — and you will find more on the VAP Third Sector Interface Community Toolkit [www.pkvs.toolkit.sitekit.net](http://www.pkvs.toolkit.sitekit.net) and the Charity Commission and Charity Finance Group websites.

### FINANCIAL RECORDS

HMRC has advice on the storage requirements of financial records for tax purposes [www.hmrc.gov.uk](http://www.hmrc.gov.uk)

### FREEDOM OF INFORMATION ACT

Start with SCVO or VAP Third Sector Interface Community Toolkit websites. Information is also available from the Scottish Information Commissioner at [www.itpublicknowledge.info](http://www.itpublicknowledge.info)





# Measuring Progress and Planning for the Future

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**T**o be able to plan efficiently for the future, you need a clear understanding of what has gone before.

## THE PLANNING CYCLE

To get a clear picture, collecting good information on how the project is progressing should be built into weekly operations, both to monitor success and to deal speedily with anything that is not working.

Information collection is often essential to prove to people outwith your service that the project is successfully moving towards the aims agreed with funders or commissioning bodies.



### MEASURING PROGRESS

Measuring progress (may be defined as 'achieving outcomes' by funders) need not be as worrying as some people fear. In essence, you define your aims, decide on the best information you could gather to show you've achieved those aims, and gather and record the information on a regular basis, collate your findings, and evaluate the data. It's common to do this on an annual schedule. Ensure that your report is accessible to all those people who might be interested in its contents, not least your clients.

### EVALUATION REPORTS

Evaluation reports outline progress to date and suggest future actions (and funding) required. And so this leads to your next plan, along with any new ideas or phased work you already have.

This is in essence the planning cycle. At best, this process also demonstrates what is called reflective practice, whereby you make time to consider what is working well and not so well and how your approach has been received, then change your practice where needed.

### HARD AND SOFT INDICATORS

The information you gather to track your progress can be termed 'hard' or 'soft'. 'Hard indicators' are objective, quantitative data, e.g. number of people attending an event or attaining an award, amount of income raised, number of visitors.

'Soft indicators' are more qualitative and include things like client comments or event evaluations from visitors, i.e. things that you cannot count. Soft indicators are arguably open to wider interpretation than hard indicators but it's widely acknowledged that they are an important evaluative tool in projects with broadly social outcomes. Soft and hard indicators taken together will offer a comprehensive picture of your project.

### CO-OPERATIVE EVALUATION AND PLANNING

It is important to involve clients, as well as staff and volunteers, in any evaluative and planning and activities. They may have insights into the progress of the project's aims and, after all, if you're designing a service to meet the needs of particular target groups, how can you know you're succeeding without asking them? Try to offer flexible ways to contribute and adequate support so everyone involved in the project can contribute meaningfully to the evaluation and planning process.



## EVALUATIVE TOOLS

There are a number of tools that might help you evaluate your project. PQASSO (Practical Quality Assurance System for Small Organisations), or versions of it, is commonly used and takes you through the whole evaluative process in a fairly easy way. It is quite time consuming to use, though, so you will need to ensure people have the capacity to administer it.

The Reading-based therapeutic horticulture charity, Thrive, has produced an evaluation scheme based on PQASSO. It is called Cultivating Quality and can be purchased via the Thrive website [www.thrive.org.uk](http://www.thrive.org.uk). Greenspace Scotland LEAP framework (Learning Evaluation and Planning) takes a relatively simple approach and has been designed for 'green' projects. It is available as a PDF from [www.greenspacescotland.org.uk](http://www.greenspacescotland.org.uk)

For individual clients there are a number of tools that attempt to measure personal progress towards aims. For example the Mental Health Recovery Star allows clients and staff together to take a holistic approach to monitoring progress within a project supporting adults recovering from mental ill health.

But not everyone likes this scheme. Occupational therapists in the Trellis network may be able to advise on this and other specific evaluative tools. 'STAR' type tools tend to assume upwards, positive progress.

This may be inappropriate in projects targeted at people who have a degenerative condition or people whose goals are to do with maintaining current levels of function/sense of wellbeing or to slow the worsening of a problem.



## Further support & information

# Measuring Progress and Planning for the future

### EVALUATION

Contact other projects, SCVO or practitioners working in your field (mental health, dementia, learning disabilities etc.) to discuss how they monitor outcomes. Evaluation Support Scotland [www.evaluationsupportscotland.org.uk](http://www.evaluationsupportscotland.org.uk) works with third sector organisations to help them measure and report on progress. There is a useful page on this subject on the Trellis website [www.trellisscotland.org.uk](http://www.trellisscotland.org.uk)

VAP Third Sector Interface Community Toolkit also covers this area [www.pkvs.toolkit.sitekit.net](http://www.pkvs.toolkit.sitekit.net) and includes a downloadable booklet on measuring wellbeing from the New Economics Foundation [www.neweconomics.org/publications/entry/measuring-well-being](http://www.neweconomics.org/publications/entry/measuring-well-being)

### PQASSO

All the information you need about this approach from the Charities Evaluation Services [www.ces-vol.org.uk](http://www.ces-vol.org.uk)

### LEAP

The Scottish Community Development Centre provides information on LEAP at [www.planandevaluate.com](http://www.planandevaluate.com) and they offer a licence for use of the associated online software. The Scottish Government website offers information on LEAP and other evaluation schemes.

### OUTCOMES STAR

A commercial product which can be purchased for use with a range of client groups. Information at [www.outcomesstar.org.uk](http://www.outcomesstar.org.uk)

### THRIVE

Cultivating Quality (2007), a quality assurance toolkit from the English therapeutic gardening charity [www.thrive.org.uk](http://www.thrive.org.uk)



# Case study

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*By Mary Stewart  
St. Vincent's Therapy Garden*

This is the story of how St. Vincent's Therapy Garden, Kingussie came about, told by its founder Mary Stewart.

Mary is a former NHS Occupational Therapist and currently a Trellis fieldworker in Highland Scotland. This case study is one of several which feature on the Trellis Case Studies web page at [www.trelliscotland.org.uk](http://www.trelliscotland.org.uk)

## St. Vincent's Therapy Garden, Kingussie

Following completion of my Diploma in Social and Therapeutic Horticulture (STH) and gaining a part time post which allowed me time to develop my own therapeutic project, during a chance conversation with a local councillor I heard of a small enclosed patio garden area at the local hospital. It had fallen into disrepair, but had borders, a few raised beds, and a greenhouse.

The two of us then made contact with a few key people including those with an interest in gardening, some with disabilities and a senior member of hospital staff. Using the feasibility study from the final part of my Diploma in STH and also the Federation of City Farms and Community Gardens (FCFCG) Community Garden Starter Pack as resources, I explained my Therapy Garden idea to them.

## June 2010

Fortunately these people were very interested and soon came together with me to form a steering group. We decided on our aims for the project and who to prioritise as our service user groups. We focused on three different groups — patients with dementia from the local hospital, people from the community with stress, anxiety and depression (the original group from the feasibility study) and people with learning disabilities from a local charity.

I had visited another project earlier in the year and it had given me encouragement, as had support from the Trellis Fieldwork Co-ordinator.

The following months were spent, firstly, gaining permission from the NHS to use the garden area, then fundraising, seeking permission to build a potting shed/summerhouse, and preparing a constitution and a business plan. All these processes took considerable time. The steering group were also meeting on a regular basis to discuss progress and next steps.

I have to add that the garden is situated in the Highlands and with very low temperatures and feet of snow in winter — the garden will operate seasonally from March to October.

## April 2011

We met with an architect to draw up plans for an access ramp and summer house. Unfortunately as this person was giving us his time free we were at his convenience — and this caused delays! I would recommend that paying for some services if possible is more time efficient when starting a project.

More fundraising took place through talks to local groups and we eventually had enough funds for a summerhouse. The planning department questioned our location of the summerhouse — next to the garden area! It also imposed conditions regarding tree roots. This meant several site visits — and more delays.

We continued to meet on a regular basis and had meetings with local GPs and the Consultant Psychiatrist from the adjacent hospital to inform them of our project and ensure their support. At the end of this year we added to our steering group a retired lawyer — and keen gardener.

## May 2012

The summerhouse was eventually erected, but we experienced delays in getting our access path due to costs and availability of the eventual contractors. We continued to make funding applications, some of which were successful, to have steering group meetings, to work on our policies, to insure the project — and to maintain our enthusiasm.

In September we had an official open evening, elected a committee and encouraged members and volunteers to join the project. I was then officially made the project manager.

Disclosure processes followed, and although essential with any project, the paperwork and the red tape can take some time to get into place.

Discussions took place with relevant people regarding the use of the therapy garden with different groups of service users.

The weather played havoc throughout the year, but we did have a short bulb planting session at the end of November with a few learning disability service users — just before we closed for the winter!

## Early 2013

We started the year with the new committee deciding to move to a SCIO structure for the project and this has again resulted in several meetings. We're finalising the necessary policies, and ordering equipment. We've not undertaken much of the groundwork at the therapy garden as we feel the groups attending will have more ownership if they're involved in developing the site from the start.

Now that the weather is improving we're planning to undertake induction and training with our volunteers and start one of the sessions.

My advice? Remember that the project development processes will take longer than you think, ensure you have people with a variety of skills in your team, be prepared for knock backs, remain positive.

**By Mary Stewart**  
**St. Vincent's Therapy Garden**



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Photographs by Graham Thom,  
taken at projects in the Trellis network.

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How to set up a

# Therapeutic Gardening Project



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