



## Marketing and Monitoring Programmes

This advice note deals with marketing - its role in project development, project delivery and its importance as a source of reliable information that can be used in several practical ways. The advice note also provides a summary of the things to consider when monitoring community groups and community projects.

### Marketing

From project concept through all the developmental stages to final realisation, marketing is a lynchpin, proving a project's worth to potential funders, convincing the community of the project's value, and helping identify problems and build solutions against a solid factual background.

Marketing has just as important a role to play in promoting the activities of non-profit making/voluntary or community projects, as it does in any other commercial activity.

Many people believe that marketing, which is often seen as a hard nosed business method, is neither necessary nor appropriate for these organisations, and of course nothing is further from the truth.

Every organisation has to sell its services or ideas to someone, whether it is the local post office, a community swimming pool, a museum, music school, nursery or training centre. Social and sporting clubs need to attract members and customers. Even the police have to market themselves in order to attract recruits, get support and ensure they have a good public image.

The approach to marketing is similar for all organisations. However, being sure of your market is even more important, as your product is quite likely going to be specialised and limited.

Because funds will probably always be limited, marketing planning and operations have to be considered very carefully, and carried out with even greater precision. Extravagant spending will simply not be possible. A few of the more usual questions community groups ask about marketing are:

### *What is marketing?*

Marketing is identifying the demand for your product or service. Three vital questions to be considered in marketing are:

- Does anybody really want our product or service?
- Can those who want it afford it?
- How can they get it?

Marketing is a philosophy that believes that an organisation should be governed by its customer's or client's needs.

No organisation can exist if there is no demand for its products or services. This applies to community based projects as much as it does to multi-national companies. It does not matter how fancy or complex marketing systems might be - the bottom line is this: if there are no customers - there is no organisation/business.

### *Isn't marketing just a fancy name for selling or advertising?*

To many people marketing is the same as selling, advertising or possibly market research - marketing actually covers all of these elements. Marketing takes an overview of all aspects of activity of an organisation. It identifies the customer or client, ensures the product or service meets the target audience needs, promotes the product or service, achieves the sales of the product or service, and continually monitors and checks that the product or service is still meeting the needs of the customer.

The most significant aspect of marketing is that it is essential to all types of organisations, businesses and projects, whether it is a community group project, a government service or a multi-national industrial firm. Marketing and its basic techniques will therefore be relevant to you.

### *When should we start marketing?*

Marketing for community projects includes identifying the community/client wants or needs. Often this is stimulated by factors such as: the loss of a service or facility such as a local shop or post office; the perceived need for a new service such as nursery provision or community centre; or the opportunity to acquire a hall or



facility which is about to close. Or it may be that a community may become aware of funding for potential projects, and now you want to identify what your community might be able to do.

For all of these situations, identifying the likely support and demand from the community is essential, and is the first step in your marketing process.

### **Can we do this ourselves?**

The first hurdle you have to face is deciding how to gather the information from your community. There are several options open to you at this stage.

- Carry out all your community research yourselves.
- Employ consultants to do it for you.
- Mix the consultants' skill with the community skills to help you through the process.

There are many methods and techniques being employed throughout the country in the area of community research - it will probably not surprise you to know that this has been quite a considerable 'growth' industry in itself during the last 10 years.

Some of these methods are Planning for Real, Community Appraisals, Community Profiles, Needs Assessments, Community Surveys, Community Stock takes, Priority Search - drama and history are even used as methods to identify community issues and try to find solutions, and create visions for the future of communities.

The most important point is that the community has ownership of the ideas and the results, and they are in a position to challenge decisions.

It is vital that whoever does the work does not encourage the community to make unrealistic 'wish lists'.

### **Which market research method is the right one for our community?**

There is no easy answer to this, just as there are no right or wrong methods of carrying out this research. What is important is that you have clearly identified why you want to do the research, and what you hope to achieve as an end result. Planning the research is vital if the results

of the study are to be relevant and useful. There are several steps that must be taken when designing any research plan:

- Identify the purpose of the study, or the problem to be resolved.
- Discuss this with informed and interested people, and look at different methods available to carry out the study.
- Design or adapt research methods or techniques to meet your needs.
- Decide who will participate in the study.
- Conduct the fieldwork, using chosen method.
- Process the data.
- Assemble the results.
- Relate results back to the community.

### **What do we do after market research?**

Now that you have carried out the research you should have hopefully identified a project or projects to take forward. Now the various planning stages begin. Feasibility Studies and Business Plans are covered in other advice notes with the Community Toolkit. The Marketing Plan is another key to the process of successful project management.

Marketing plans should be flexible, short and to the point. They are working documents that allow you to continually monitor and evaluate whether or not you are achieving your aims.

They should include some or all of the following components:

- A description of the activities covered by the plan.
- The length of time covered by the plan (usually 3-5 years).
- A list of the targets to be achieved.
- Where the prospective customers/market are.
- Outline of ongoing methods of ensuring community involvement .
- Social value and benefits.
- Details of pricing strategies, discounts etc.
- Promotions plan, specifying how and where you will promote your project.
- Description of potential competition.
- Strengths, Weaknesses, Opportunities and Threats (SWOT) analysis.



- Specify distribution methods if needed.
- Outline of financial and other targets against achievements.

### ***Do we need to do anything else now we have a marketing plan?***

One of the biggest problems faced by organisations is making plans and then forgetting about them. All plans should be used as working documents that are constantly referred to.

A good plan should be revised and developed continually to take account of changing needs within the community. For example, a pre-school nursery might be what everyone wants in 2008, but in three years' time there might be a need for after school care, which means changing the whole philosophy and management of the project.

Further marketing advice for community groups is available at: Carmarthenshire Association of Volunteer Services [www.cavs.org.uk](http://www.cavs.org.uk) and [www.businesslink.gov.uk](http://www.businesslink.gov.uk)

### **Evaluation and Monitoring**

Community projects need to take many more aspects into consideration than a traditional business does. In business you consider the needs of your customer, investor and employees (hopefully). However, community projects and businesses must take the whole community into consideration. Therefore the social, environmental and ethical aspects can be even more important than the economic aspects of their operations.

When evaluating the success of any community project, simply looking at a cash flow sheet or set of financial projections can never assess it properly. Good evaluation should look at the project in a holistic way, assessing the full impact of the project on the community.

Monitoring 'soft outcomes' is very important. How have volunteers confidence improved, what skills have they learnt (from form filing to customer care, market research etc.).

Evaluation should be ongoing. It should never be used as an answer to a problem and therefore carried out too

late.

Developing a monitoring system for community projects therefore remains an important part of the overall project planning process. Groups should always consider how they are going to measure the success of a project from the outset, and set in place indicators against which progress can be assessed. Different projects will obviously have different indicators but, for example, these might include the number of customers, or the area of ground improved, or the number of new members in a group.

Project planning should involve setting basic and realistic goals or targets for the different indicators, which are then assessed by the group at periodic reviews (these could be monthly, quarterly or annually depending on the type of project).

It is also worth noting that grant giving agencies will often ask applicants to show that they have considered monitoring systems and have agreed basic targets for the project, with appropriate indicators. Agencies will normally ask this in order to allow them to follow the progress of projects that they have assisted.

### **Disclaimer**

This Advice Note has been produced on behalf of the Carmarthenshire Community Toolkit to assist community groups to make funding applications. However, it should not be taken as a definitive guide covering all areas of concern and it is recommended that further advice is sought in appropriate circumstances.