



Muckamore Parish Development Association

Strategic Plan 2024-2029

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1. Executive Summary and Recommendations

Through the facilitation session a new mission statement was developed

“our mission is to create a positive and lasting impact in the community because we care”

The strategic plan has been developed on the balanced scorecard model. This allows the Board of MPDA to look at the organisation from four important perspectives, financial, internal process, learning and growth and the customer, figure one gives an overview of the balance scorecard approach.

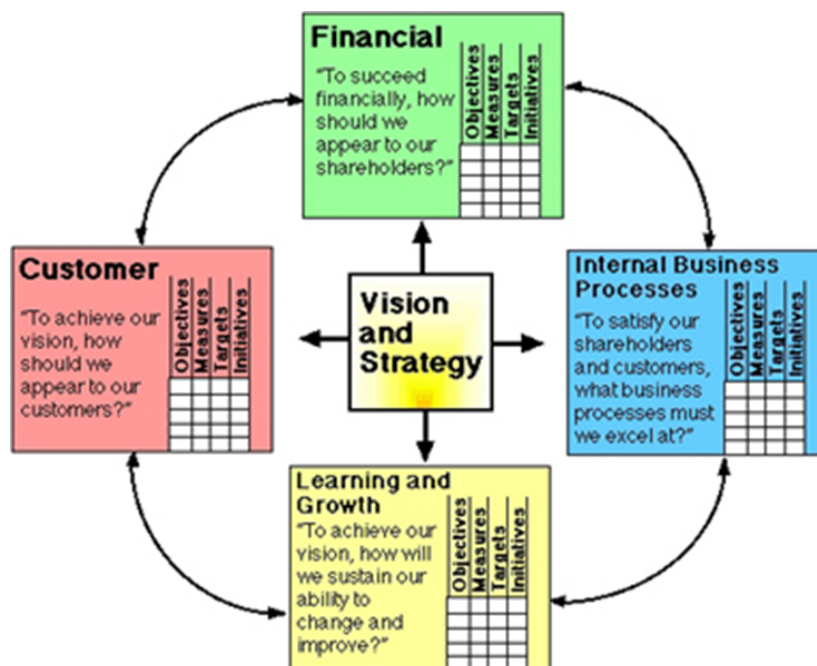


Figure one overview of the balance scorecard

The balance scorecard approach aims to achieve the following:

- To establish direction for the group
- Ensure the 'big picture' is understood by all
- Motivate the Board staff and volunteers
- Put in place the right structures
- Model behaviour and values
- Review, learn, redirect
- Hold to account
- Monitoring of the key indicators.

Recommendations

Before we can add in any recommendations, Muckamore Parish Development Association (MPDA) have to be recognised for their outstanding success. It is very clear there is a strong desire from board, staff and volunteers to grow the Association activities and increase the positive impact it is making to the local community.

MPDA is a model of good practice and should be held up as a flagship community organisation not only in Antrim and Newtownabbey Borough Council but throughout Northern Ireland.

For MPDA to move forward with their ambitious plans of developing the site over stages and becoming more sustainable, there needs to be a review of the structure of the organisation with roles defined and salaries appropriate to the responsibility held now and as the organisation grows. Through the research and facilitation carried out as part of the strategic plan there is an indication of a lack of recognition of the value and roles of the team in way of titles and remuneration. It is recognised within the board, that timely reviews of succession planning are required in order to strengthen the existing board and allow for retirement and individual board development and personal growth.

As noted, the organisation is a model of good practice and its achievements over the last number of years, particularly through and post Covid have been extraordinary. As the organisation grows, some of the current systems could be further strengthened as the group develop new services to meet the ambitions of the board. This will take into consideration the limited resources available to deliver in the short-term. The four key areas which the board have already focused attention on and should regularly review: are: governance, succession planning and the setting up of capital raising funding initiatives. The former is especially important in ensuring there is a team spirit from the top down with directors having equality. The fourth area is that of marketing; the organisation should focus on how it profiles itself, ensuring that stakeholders and users, both current and potential, are aware of the valuable work the group does.

As MPDA continues to grow and evolve, investing in technology will be essential to further enhance the organisation's effectiveness and efficiency. Financial management within MPDA is strong, with a solid track record of good financial practices and accounting. While there is a shared understanding that training in the use of a financial packages would be beneficial, the organisation recognises the importance of continuously reviewing and refining certain areas. MPDA is committed to maintaining its high standards and ensuring that its financial practices remain transparent and effective.

The key catalyst for financial sustainability of the centre will be the development of a new building. The Ballycraig Ward is within the top 20% most deprived areas in NI, disability is ranked at 166, educational attainment is poor and adversity is high. Those living in the Ballycraig Community face multiple barriers that prevent them from accessing services that could improve life and health outcomes, for example, low income. Therefore, it is important that this community has access to an affordable venue that can facilitate essential local services.

Given that build costs are escalating at present and, in order to ensure that MPDA does not put itself under undue financial pressure, there is a need for the organisation to look at the development of the site in different stages. This will also allow for the testing of the services and the needs of the community. The suggestion would be modular buildings extended on the existing site, moving into a more permanent build. To meet the needs of the community profile as it stands at present, a wellbeing theme to the site is being proposed by the Committee to incorporate as much green space as possible and including sensory garden and raised growing beds.

The energies, drive and enthusiasm of the board, staff and volunteers has made the centre the focal point of the community of Ballycraigy, and the surrounding area. For the continuous growth of this organisation there needs to be a continuous recruitment of staff and volunteers at all levels, particularly with respect to fund-raising.

All of the above recommendations have been woven into the strategic plan that is presented in Section 9. The final recommendation is that a strategic plan is only valuable if it is reviewed and used to challenge the development and direction of the organisation. Hence within this plan we have added a status section for each of the objectives. It is recommended that the Board takes the lead on the quarterly review of this plan. We would advise the use of the RAG system (red amber and green) to highlight achievement and objectives that are lagging behind.

2. Background of the group

Back 44 years ago in September 1977, The Church of Ireland signed a long-term lease on behalf of Muckamore Parish on a piece of ground in the middle of Ballycraigy estate, Muckamore. Part of the agreement was that they should maintain a building on the site for the benefit of the local community.

MPDA was established in 2008 by the Church of Ireland Parish of Muckamore. They are a non-profit Association with charitable status and recently set up a Company Limited by Guarantee. They are dedicated to supporting and improving the well-being of families and individuals in Muckamore and the wider Antrim and Newtownabbey Council area.

With support from Antrim and Newtownabbey Borough Council; the Church of Ireland's Children and Orphan's Society and its Priorities fund; the Enkalon Foundation and the White Mountain Fund, in 2022 a modular building was erected for use by the community.



MPDA Family Support offers families a range of services and advice. They facilitate a Drop-in Group where parents and children can meet other families and join together in fun activities.

The Family Support team also regularly collaborate with other local community organisations to provide vital services to families in the community including

- Confidential one to one meetings
- Family Drop In Groups
- Sign posting services
- Food Bank and Financial Inclusion services

- Safe Place Services
- Friendship Group for Older People
- Educational qualifications and training courses
- Well-Being and Fitness
- Activities for the Youth
- Sensory Group
- Play Therapy
- Lego Therapy
- Sensory Play services
- Community Events

MPDA became the first voluntary group in the Borough to receive the King's Award for Voluntary Service in 2023



3 The Approach

The approach that was used in the development of the strategic plan, was based on gathering evidence from six different sources detailed in Figure 2. These sources were then analysed to identify strengths and weaknesses and threats. It was vitally important that the approach did not solely rely on quantitative research but also qualitative engagement with key stakeholders and their support in the review of the quantitative research to ascertain the strategic way forward.

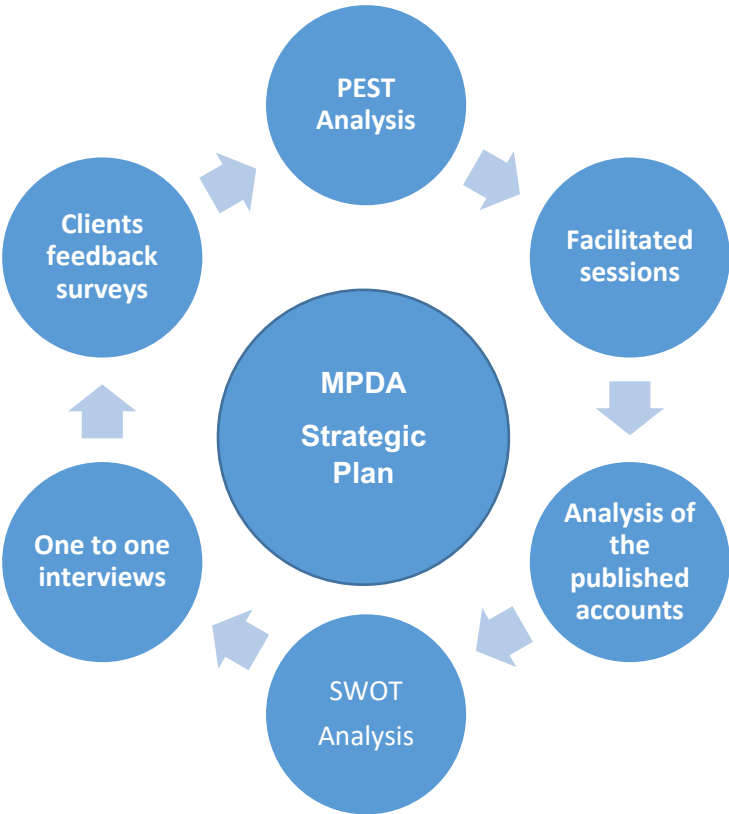


Figure Two methodology use to develop the MPDA five years Strategic Plan

4 PEST Analysis

PEST Analysis	
Political	Economic
Government instability	Inflation and interest rates
Likely changes in the future to the political environment	Unemployment and labour supply
Social and employment legislation	Labour costs – minimum wage
Tax policy, and trade and tariff controls	Welfare reform
Environmental and consumer-protection legislation	Increasing utilities costs
Further Government cuts to the voluntary sector may impact significantly on funding income	Increase in immigrant workers
BREXIT – other impacts that are still unknown	Uncertainty with Pensions
Local departments find it easier to work with larger charities on service delivery	Cost of running a business
Payments claimed in arrears of work	
Social	Technology
Population growth rate and changing age profile	Impact of emerging technologies
Increase in Volunteer numbers	Impact of Internet
Public image, press attitudes, public opinion, social attitudes and social taboos	Increase in competition for donors
Lifestyle choices and attitudes to these or Socio-Cultural changes	Change in giving method
Potential to build Social Capital by generating additional community activity	High costs of investing in new technology
Levels of poverty locally	Increase use of social media

Table One shows the key finding the PEST analysis.

5 Facilitation with the MPDA key personnel, board and stakeholders

One to one surveys were carried out with key stakeholders that included board, PSNI, Antrim and Newtownabbey Borough Council – Community Development. This has been used to support the MPDA one-day facilitated workshop. The key findings of these are listed within this section

When asked what are the core values of the organisation the responses were

- Collaboration
- Community
- Family
- Integration
- Mutual Respect
- Equality
- Accountability
- Reliable
- Confidentiality
- Supportive
- Engagement
- Caring

What would your vision for the centre in five years' time be?

- Reprofiling existing building
- Transformational site
- Establishment of new building
- Meeting Rooms
- Counselling & Wellbeing Space
- Sustainability
- Expansion of programmes and services
- Leap forward in community care & outreach

The last session the participants were asked was to rate the effectiveness of the Board.

When the participants were asked to score the Board from 1 to 10 with 10 being the highest, the average score of the participants was 6.85. This would indicate a need for development of a stronger board through training, particularly around defining the duties and responsibilities, effective use of board time and recruitment of new Board members. In addition, there indicated a need for the board to review its own performance and review of strategy on a regular basis.

6 Mission and Values

Vision:

To be a centre of excellence for family support and development within Ballycraigy and the greater Antrim area

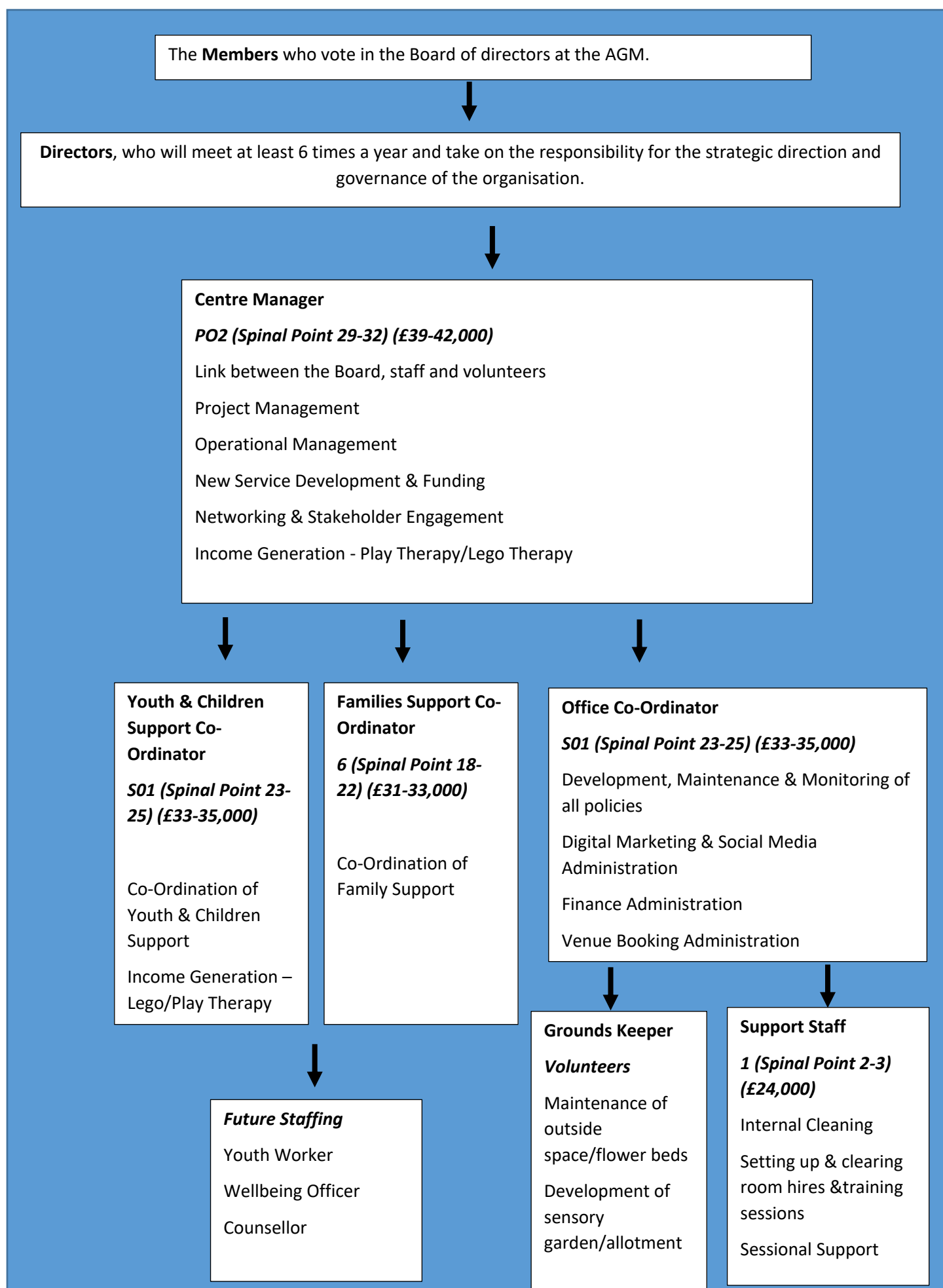
Mission:

To create a positive and lasting impact in the community because we care

Core Values:

To be a vibrant and integrated service provider who CARES, where everyone feels valued and supported, fostering mutual respect and promoting confidentiality in all aspects of our organisation

- **Collaboration** - we believe in the power of co-operation and develop lasting and meaningful relationships
- **Accountability** - each one of us is responsible for our words, our actions and our results
- **Relatable** – everyone is important, we are an empathetic and responsive organisation
- **Equality** - we celebrate difference and treat everyone equitably
- **Supportive** – we are supportive, caring and kind to everyone we encounter



Strengths	Weakness
• Christian Ethos • Staff & Volunteers • Caring Approach • Making a Difference • Food Bank Service • Community Knowledge • Funding Support • Honesty & Integrity • Hardworking Team • Collaboration with likeminded organisations • Site & Building • Creativity of Team • Resilience of Team and Community • Award Winning Community Group • Heart of the Community • Far Reaching Service provider • Listening Organisation • Reputation • Dedicated board • Friendly • Intergenerational Relationships • The people we service • Good Finances	• Lack of own income generation • Too reliant on limited staff • Motivation of staff, volunteers and board • Over commitment of board • Lack of recognition of entire team • Lack of transfer of knowledge • Lack of title of site • Financial stability medium and long term • Sustainability of board • Specific skill gaps • Recruitment of new board members • Marketing weakness • Appropriate buildings • Environmental look of site and building • Paramilitary control growing • Due to recent unrest, safety & welfare of volunteers and staff • Recruitment of volunteers difficult on a regional level • Clarity of organisational structure, roles and responsibilities
• Opportunities	• Threats
• Site has potential for development • Existing building re-purposed • New building erected • Self-sustaining through selling of existing knowledge/skills of staff • Stormont Funding • Training of staff, volunteers and board • Improved Governance to ensure effectiveness	• Alternative Community Group • Burnout of staff, volunteers and directors • Access to Stormont Funding • Civil unrest • Lack of funding to deliver the big vision

Table Two SWOT analysis of MPDA

Financial Objectives	How will this be achieved	What needs to be done	Timescale	By who	Status
To ensure the financial sustainability of MPDA	To ensure that MPDA makes a surplus each year and increase this surplus year on year. This profit is defined as what is stated on the financial accounts.	Year on year increase in revenue from existing services Once Play Therapy training completed to look at building in an income from Lego & Play Therapy service	Over the next five years	Board Coordinator and other staff	
Sustainability of the centre with less reliance on grant funding	To reduce the reliance on grant aid for the core centre costs by identifying services that can be paid for by existing and new customers Maximise revenue capacity of existing assets Increase room hire income by increasing prices or changing price structure	1. Conduct Customer Surveys and Feedback: Survey existing customers to understand their needs and identify potential services they would be willing to pay for. Ask about additional services or upgrades they would find valuable such as extended hours. 2. Market Research: Analyse competitors or similar community groups to identify services they offer that could be adapted to MPDA business model. Look at family support trends to see if there are emerging services or products that MPDA customer base might be interested in. 3. Segment Customer Base:	6 monthly or at end of service/programme delivery Within 3 months Within 4 months and annually thereafter	Coordinator and other staff	

		Identify different customer segments (e.g., individual clients, age groups, etc.) and tailor specific services for each group. Introduce tiered services or packages where different customer groups can access specialised offerings. 4. Leverage Existing Relationships: Reach out to current customers to see if they have unmet needs that could be turned into revenue-generating services. Offer add-on services or upgrades to existing customers who have already shown interest in MPDA current offerings. 5. Utilise Data and Analytics: Analyse customer usage patterns, booking history, to identify services that are in high demand. Use this data to introduce or promote services that align with customer preferences. Maximise Revenue Capacity of Existing Assets: 1. Increase Utilisation of Underused Spaces or Resources:	Within 3 months Within 5 months Within 9 months		
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		Identify underutilised assets or rooms, such as counselling room, kitchen and sensory space, or equipment, and find ways to increase their usage through promotions or strategic marketing. Implement a booking or scheduling system that ensures maximum occupancy or utilisation during both off peak hours and whilst other activities are happening in other rooms to maximise resources.	Within 12 months		
		2. Offer Value-Added Services: Offer additional services that complement existing assets, such as catering, event planning, to generate additional revenue from the same resources. Provide equipment rentals such as kitchen equipment or special packages for customers who use your space or services.	Within 15 months		
		3. Seasonal or Off-Peak Pricing: Offer special pricing or packages during off-peak times to increase demand for existing assets and smooth out seasonal fluctuations in revenue. Promote special deals to boost bookings or usage when demand is low such as book 4	Within 12 months		

		rooms get the 5 th room free.			
		Increase Room Hire Income by Increasing Prices or Changing Price Structure: 1. Review Market Rates and Competitor Pricing: Conduct a competitive analysis to ensure that pricing is in line with or slightly below the market rate, reflecting the value and locality of the rooms or space offered. Increase prices incrementally to avoid shocking loyal customers, while highlighting any improvements or added value. 2. Introduce Tiered Pricing: Offer a range of room hire options, with different price points for varying levels of service, such as bronze, silver, and gold packages, particularly for birthday/celebration events. 3. Implement Dynamic Pricing: Use dynamic pricing strategies, adjusting room hire rates based on demand, time of booking, or booking volume (e.g., higher rates for peak times and lower rates during quieter periods).	Within 3 months Within 6 months Within 9 months		

		Offer discounts for long-term or repeat bookings while maintaining higher prices for one-off or high-demand dates. 4. Create Membership or Loyalty Scheme: Introduce a membership or loyalty scheme where customers can access special rates or discounts based on their booking frequency or value; very similar to stamps in a coffee shop. Offer exclusive benefits for returning customers, such as reduced prices for repeat bookings, early access to special offers, or complimentary services such as free tea/coffee.	Within 3 months		
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Capital Costs of new centre	To look at fund raising initiatives to cover build costs of £300,000 initially - £1.5m	Short-Term Plans: 1. Establish the Sub-Committee Framework: Set up an initial meeting with board members to discuss the formation of a Fundraising Sub-Committee. Define the roles and responsibilities of each member, ensuring a mix of skills in fundraising, strategy, and communications. Identify a chairperson to lead the sub-committee. 2. Identify Key Fundraising Areas: Brainstorm and prioritise fundraising methods such as individual giving, charitable trusts, sponsorships, and the Buy a Brick scheme. Research potential partners and funding opportunities to determine the most effective avenues for immediate action.	Within 1 month Within 1 month Within 1 month Within 3 months	Board	
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		3. Develop a Fundraising Strategy: Draft a short-term fundraising strategy with clear goals, timelines, and actions for the next 6 to 12 months. Set a fundraising target and outline the steps needed to achieve it (e.g., creating fundraising materials, reaching out to potential donors, etc.). 4. Engage the Board and Stakeholders: Hold a meeting to brief all board members and key stakeholders on the fundraising goals and progress. Encourage active participation from the board in initial fundraising efforts and outreach. Long-Term Plans: 5. Build a Sustainable Fundraising Model: Develop a comprehensive, multi-year fundraising strategy that includes ongoing individual giving campaigns, approaches to	£300,000 within 2 years £1.5m within 5 years Every 6 months Within 6 months Within 18 months		
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		charitable trusts and foundations, and corporate partnerships. Create a donor stewardship programme to ensure continued engagement with individual donors and sponsors. 6. Expand Fundraising Channels: Launch a “Buy a Brick” scheme, aiming to involve the community and small donors in supporting long-term capital projects. Grow corporate sponsorships and develop partnerships with companies through their corporate social responsibility programmes. Research and apply for larger grants from foundations and trust funds to ensure steady funding. 7. Leverage Digital and Social Media: Build an online presence for fundraising initiatives, including digital campaigns,	Within 18 months Within 18 months Within 2 years Within 2 years Monthly	Coordinator and other staff	
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		social media drives, and crowdfunding platforms. Create a robust system for tracking donations and engaging with supporters online. 8. Develop a Fundraising Team: As fundraising grows, expand the team beyond the sub-committee to include volunteers or part-time staff to support the fundraising efforts. Invest in training and capacity building to ensure the long-term success of the fundraising initiatives.	Annually Within 2 years	Board, Coordinator and other staff	
Review costs for the centre with the introduction of good practice in all procurement		Start by reviewing all existing procurement processes, suppliers, and contracts to assess current spend, identify inefficiencies, and pinpoint areas where savings could be made.	Month 1 and then Annually		

Customer Objectives	How will this be achieved	What needs to be done	Timescale	By who	Status
To ensure the highest possible levels of customer service	To undertake customer satisfaction survey each year with the aim to achieve 85% excellent rating	A customer survey completed yearly based on a sample of 50 customers.	Each year for five years	Centre Manager/Office Co-Ordinator	
	Mystery shopping activities	Mystery shopper to be engaged to carry out the activity	Each year for five years	Office Co-Ordinator	
	Introduce continuous improvement into the organisation ensuring any negative feedback from the surveys/mystery shopping is acted upon and addressed	Analyse the surveys and mystery shopping report	Each year for five years	Office Co-Ordinator	
To increase the range of activities within the Hub based on community need	Actively lookout for activities that will enhance and develop local residents.	Monitor the activities in the centre and identify any gaps. Introduce one new service every two years	Ongoing	Centre Manager	
To increase the number of users of the Hub	To identify 3 new target users for the Hub	Cross match services with potential users Marketing plan put in place to promote the service Funding plan put in place to cover the costs	Every two years	Centre Manager/Office Co-Ordinator	

To ensure that there is regular stakeholder engagement which includes users, customers and statutory agencies	Yearly stakeholders meetings.	Identify a key list of stakeholders and ensure that these are met annually via one large meeting or series of smaller meetings	Ongoing	Centre Manager	
Promotion of activities in the centre not only organised by the group but also customers using the centre	A yearly marketing & promotional plan	One page, outlining clear marketing targets, outcomes and costs. Targets should be set for social media, postings, press releases and awards entries	Each year for five years	Office Co-Ordinator	
To communicate & raise awareness of MPDA projects amongst customers & stakeholders	To introduce more visible signage outside and promotional materials inside the building stating mission and core values	Mission statement, core values, structures and volunteer opportunities material to be displayed internally for all users and stakeholders. Development of case-studies among users	within one year and ongoing	Office Co-Ordinator	

Learning and Growth Objective	How will this be achieved	What needs to be done	Timescale	By who	Status
To improve confidence within the board To embed a strong positive team spirit across the board	Training for the board Develop the Board of Directors by recruiting new members who have skills necessary to fill any skills gaps. Or who will be prepared to develop their skills needed as a director To complete a Good governance check list (please see appendix)	A quick skill audit has been completed for the board and key training needs identified from this. Prioritised training over the five year period. Development of an introduction pack for the board outlining any new members legal responsibilities along with code of good governance. Through stakeholders groups and users of the centre identifying potential board members for the board. To identify areas for improvement as a board	At least two training sessions per year for five years Ideally recruiting two new board members each year Each year	Chairperson and Board, Centre Manager	
To ensure that the MPDA benchmarks itself against other organisations locally regionally and internationally	Yearly visits to other community projects, to see if there is any learning for MPDA from the visit.	Through organisations such as NIVCA, The Weel (ROI) and the English, Scottish and Welsh equivalents in the organisation to be identified to visit once a year. Arrange a visit for Board staff and volunteers	Once a year for five years	Board and Centre Manager	
To achieve recognition for the work of the board staff of	To achieve recognition for being shortlisted or winning an award.	Read membership bulletins from any community organisations to identifying awards	At least one entry per year	Board Centre Manager	

volunteer by entering and winning awards		including Social Enterprise NI, CO3 and look towards entrance of same.		Office Manager	
To become more efficient and effective as an organisation by adopting new technology within the operating systems and training board staff and volunteers in this technology	To be open for change and adopting new technology were efficiency and effectiveness can be developed, saving the organisation time and money	Identified learning through visits to similar organisations which could be of use in the centre.	Within three years	Board and Centre Manager	
To ensure there is effective management & staff development plan with succession planning	Appraisal system for staff MPDA. Identifying staffing and knowledge gaps. Ensuring that there is a contingency plan in place for any lost of key worker or board member	Adopt an appraisal system and carry out yearly appraisals. Given indications from key staff of the length of time they would like to serve within the organisation and identify any future gaps in staffing.	Yearly	Board/ Centre Manager/Office-Co-Ordinator	
Development of staff and volunteers.	Ensuring that staff and volunteers have the knowledge to carry out their role effectively but also transfer that knowledge so there is not reliance on any single individual	Conduct an internal training audit Arrange and provide training for staff and volunteers in the necessary topics	Three training sessions a year	Centre Manager/Office-Co-Ordinator	

Internal processes	How will can be achieved	What needs to be done	Timescale	By who	Status
Clarity of Organisational Structure	Review of current and future resources [Admin Play Therapy Family Support Youth Support Centre Management Care-taker Cleaner]	Re-defining job roles to take the organisation through the strategic plan Development of new job descriptions Staff Engagement on changes Recruitment of new roles	By 2024	Board & Centre Manager	
Streamlining and Automation	To review the accounting and communication/marketing processes to streamline and automate as much as possible	Accounts package which integrates to bank Setting up of Mail Chimp to communicate with volunteers and users Review the website to integrate booking system	By 2024 and ongoing thereafter	Office Coordinator	
Increase the number of volunteers	Marketing and advertising encouraging volunteers to engage with MPDA Draw up a one-page application form for all volunteers.	To identify all areas actively where volunteers are needed. Identify the time commitment in each of the areas Please remember all board members of volunteers	Ongoing	Office Coordinator A board member takes on the role as	

	Create a volunteer champion that will encourage and support volunteers	Draw up a marketing poster/Facebook posting of the opportunities and the time commitment required.		volunteer champion	
To ensure that the centre is activities and achievements of marketed	To market the centre activities in a positive manner on Facebook and other forms of social media	To ensure 4 postings per month promoting the activities happening in the centre	Ongoing for five years	Office Coordinator	
Title of Site and Development of same	To secure the site to enable development of same		Directors		

Appendix 1 Good Governance Checklist

Key principle	Sub principle	Key performance measurement	Please score your board 1-10 under each of the following	Action points for improvement
1 Board leadership	The role of the Board	- Directing the affairs of the organisation - Ensuring it is solvent - Delivery of the organisation objects		
	Strategic direction	Focused on strategic direction		
2 The Board in control	Compliance	- Complies with governing document - Complies with relevant law		
	Internal controls	- Ensure organisation has internal controls - Performance reports - Policies and procedures		
	Prudence	- Act with prudence's - Income is spent of the objectives of the organisation		
	Managing risk	- Regular review of risk - Action to mitigate risk		
	Equality and diversity	Upholding and apply the principle of equality and diversity		
3 The performance Board	Directors Duties and responsibilities	Statement defining the directors responsibilities		

	The effective Board	• Organisation of work to ensure most effective use of board time		
	Information and advice	• Ensuring receiving advice and information needed in order to make good decisions		
	Skills and experience	• Should have the diverse range of skills, experience and knowledge to run the organisation		
	Development and support The chief executive	• Ensure that they receive the necessary induction training and ongoing support		
4 Board review and renewal	Performance appraisal	• Regularly reviewing the boards own performance		
	Renewal and recruitment	• A board strategy for renewal		
	Review	• Carrying out of strategic review		
5 Board delegation	Clarity of roles	• Define responsibilities of chair and officers		
	Effective Delegation	• Delegation of its work • Compilations to the governing document • Written delegation		
	Term of reference	• Set terms of reference for the board		
	Monitoring	• All delegation subject to monitoring • Sub-committees report back to main board		
6.Board and trustee integrity	No personal benefits			

Appendix 2 Trustee Charter

Muckamore Parish Development Association

VISION

To be a centre of excellence for family support and development within Ballycraigy and the greater Antrim area

CORE PRINCIPLES

As an organisation we will:

To adhere to this charter and code of conduct we will:

- At all times act in the best interest of for the **Muckamore Parish Development Association** and its area of benefit.
- Embrace the aim and vision of **Muckamore Parish Development Association** and its area of benefit.
- Be responsible, professional and show empathy to the community.
- Read and review documents sent in advance of meetings and any new notices.
- Be open about and honest about the needs of the of the community and the centre.
- Attend meetings on a regular basis and give apology when unable to attend.
- Give due respect to all other members and those attending the meeting and in particular those that hold office.
- Commit to continue improvement as an organisation
- At all times act in a confidential manner with fairness and integrity in the best interest of all the members of the **Muckamore Parish Development Association** and its area of benefit.
- Treat all information shared with you as confidential
- Adhere to and respect the implementation of the policies and processes of the group.
- Declare and report all indirect and direct conflicts of interest.

Signed by Trustee/Board Member

Date

Signed by Committee Member

Date

The Company Secretary will keep the signed copy of the charter on file

Appendix 3 Compliance Schedule

Compliance Schedule			
Companies House	Date Due	Owner	Comments
Annual Accounts			
Confirmation Statement			
HMRC			
Tax Return			
Gift Aid Claim			
Charity Commission			
Annual Return			
Banking Covenants			
Details	Owner	Update	