

# Discovery

## Toolkit 6: Organising Ourselves



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# Discovery

By Bill Crooks and Jackie Mouradian

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**Toolkit 6 - Organising Ourselves**



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## Introduction

### The Objectives of This Toolkit

To provide a range of resources for helping a small group run a project effectively. You can do these in any order you like and tailor them to the needs of your participants.

There are four key sections in this toolkit:

1. Volunteer management - how to recruit volunteers, how to value them and how to develop them.
2. Building a team - a range of simple, easy to use tools for building teams.
3. Effective Meetings - some practical tips and templates for planning, participating and running a meeting
4. Good Governance - some key principles of governance along with activities and checklists to help you think things through



## **Volunteer Management**

### **Activity 1: Recruiting Volunteers**

#### **Purpose:**

To help participants look at what motivates people to volunteer and to use this in order to recruit people.

#### **Contents:**

- Step by step guide
- Purple motivation cards
- Case study cards
- Principles for recruiting volunteers
- Tips for interviewing a new volunteer
- Action plan

## Step By Step Guide



Step 1: Brainstorm the reasons people volunteer

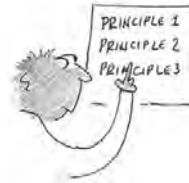
Step 3: Print off the purple motivation cards from the disk and use them to get people to reflect on what motivates them and others to volunteer

Step 2: Discuss how understanding people's motivations is key to recruiting them and retaining them. Get the group to suggest examples of this

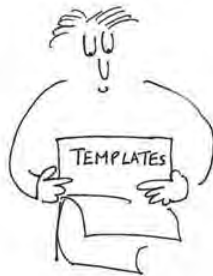




Step 4: Have a look at the Change for Good Café exercise. Print off and read the character descriptions and ask the group the questions on the card



Step 5: Present the 3 principles of recruiting which can be found on the disk and get the group to discuss to what extent these are being followed in their project. Use the action plan to guide the discussion



Step 6: Get the participants to look at the examples of interview questions and discuss which would be the best to use.

## Why people volunteer

To make a transition from prison, mental illness or similar situations to the wider community

To test the waters before a career change

To make new friends

To gain new skills which might improve employment prospects

To maintain skills they no longer use otherwise

To get out of the house

To be with friends already volunteering

To be part of a team

To be part of something worthwhile

**To impress a present employer**

To build confidence

To give something back

To be part of doing something new and exciting

**To feel part of a group**

As an expression of faith

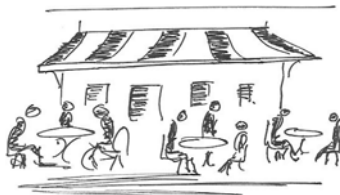
To make a difference to our community

## Change for Good Café

This is a community café set up by a small group of churches in the inner city community of Trusssockside. The café seeks to serve the community by being a drop in centre as well as have a shop with good quality second hand clothes and books. The shop and the café stock Fairtrade items and seek to raise awareness of the issues in the developing world.

The café is looking to expand its services to a new site and share the existing volunteers between the two sites. There is an urgent need to recruit more volunteers at the same time as raise the profile of the shop and café and make them both attractive venues for people to visit.

Your task is to read the profiles of the following characters and decide what their motivations are and also what roles they could play in the café or shop. It would also be good for you to consider what support they might need in order to settle in and be part of the team.





## Tim

My name's Tim. Since I left school with very few exams I've been stuck in boring jobs with very little sense of fulfilment. However, last year I inherited a large amount of money and decided that I would leave work and go to university as a mature student - to study something that really interested me.

Before starting the course I decided to take a year out to travel - I particularly wanted to see some of Africa. My travels took me to North Kenya and to some of the refugee camps where I saw for myself the devastation caused by the drought. What I saw and experienced out there has made me want to do something about it, so I have abandoned the rest of my travelling this year and decided to do some volunteer work in the church café. It's not much but at least I would be able to do something for people who have fallen on hard times.



## Robert

My name's Robert and I work in retail. I used to work on the shop floor but now I'm in management. It's great from a status and financial point of view obviously, but I do miss the customer contact as I like to help people directly.

I don't have any regular commitments on a Saturday so I thought I might volunteer for the Change for Good Cafe. It will give me a chance to do something I'm good at without having to get a suit and tie on. It wouldn't do me any harm if the boss got to know about it either.



## Maggie

I'm Maggie. I'm now divorced thank goodness - though our marriage break up was costly. My darling ex husband thought it would be OK to walk out on me and the boys in favour of a much younger model. I completely lost my mind one night after having too many drinks and did some serious damage to his car and their little love nest.

He called the police and it's community service for me - so here I am working in a church café. Well, I suppose it could be worse - I've been lucky in a way. I could be in prison. Who knows, I might even enjoy it here. I just hope I don't get stuck with a load of judgmental old biddies.



## Sarah

Hi, I'm Sarah. I'm married to Tom and we have 3 wonderful children, Ben who's 5, Jack who's 3 and Emma who's 18 months. Someone told me it was a good idea to have kids close together - I'm not sure who that was otherwise I'd sue.

Tom works from home but he's shut away in his office which means everything is down to me and to be honest I'm exhausted and there's times when I feel close to doing some physical damage. I have talked to Tom about this and he has agreed to take Tuesday mornings off and to take charge on Saturday mornings too. I'm thinking of volunteering for the Change for Good Cafe. I used to work in a shop and I enjoyed that - it would be a chance to get out and not be someone's mother or wife - a chance to breathe. Sometimes you feel like you're losing your identity.



## Questions

1. What is motivating these characters?
2. What roles could they take on in the café/shop?
3. What support will they need to settle in?



## Principles of Volunteer Recruitment

Look at the following principles and discuss to what extent are they being applied in your project. Use the action planner at the end of this section to plan for addressing gaps or weaknesses

- Show how the volunteer can help solve the problem
- Introduce them properly to the people and the environment
- Stress positive elements but also be completely honest
- Don't glamorise or misrepresent the job
- Interview selectively
- Take up references if appropriate
- Agree a trial period
- Brief your volunteers well
- Support your volunteers
- Reimburse expenses and provide insurance cover
- Don't expect results too quickly
- Don't waste talent
- Don't take on someone you do not need
- Give your volunteer plenty to do - if they are not occupied they will think this is a waste of time
- Ask your volunteers what they want to be doing



## Examples of questions that can be used at an interview

What can I tell you about the organisation?

What attracted you to the organisation?

What would you like to get out of volunteering here?

What have you enjoyed most or least about your previous volunteer work?

About your paid employment?

Describe your ideal supervisor.

Would you rather work on your own, with a group, or with a partner? Why?

What skills do you think you have to contribute?

How would you spend the day if you could go anywhere and do anything?



## Action Planner

Yes/No

Do we interview volunteers?

Do we try and find out motivations?

Are we clear about the different roles we can offer?

Can we explain some of the benefits of volunteering in this project?

Are we honest about some of the challenges about the role?

Do we have role descriptions so volunteers know what is expected of them?

Do we encourage and support them when they start?

Do we take time to find out how it is going?



If no, what are we going to do?

By when



## **Volunteer Management**

### **Activity 2: Valuing Volunteers**

#### **Purpose:**

To look at a range of methods for keeping volunteers motivated and committed to the project

#### **Contents:**

- Step by step guide
- Brainstorm card
- Lists of ways to give recognition
- Principles of valuing volunteers
- Action planner

## Step by step guide

Step 1: In pairs role play examples of volunteers not being valued.



Step 2: As an alternative, print off two copies of the coffee shop sketch and invite two people to read it - then discuss the questions

Step 3: Using the brainstorm card, discuss ways we currently value our volunteers



Step 4: Discuss if the current ways we value volunteers is good enough and what gaps do we think there are





Step 5: Look at the cards with suggested ways of valuing volunteers and discuss which ones would work in your organisation

Step 6: Print off several copies of the action plan template and use it to decide which methods should be used in your project in the future



## Brainstorm

How can we show that we value our volunteers on a daily basis?

How can we show we value our volunteers for their achievements or significant events?



## Daily means of providing recognition

Saying 'Thank you'

Telling them they did a good job

Suggesting they join you for coffee

Asking for their opinions

Showing interest in their personal interests

Bragging about them to your boss in their presence

Jotting small thank you notes to them

Having a drink with them after work

Saying something personal about their personal qualities

Smiling when you see them



## Ways of celebrating achievements and marking significant events

Taking them to lunch

Writing them a letter of commendation  
(with copies to personnel file)

Getting local radio station to mention them

Putting them on important task forces or committees

Having them present their results to higher-ups

Suggesting they go to a seminar, convention or professional meeting at the organisation's expense

Writing articles about their performance for newsletters or newspapers

Having them present a training session to co-workers

Having them represent you at important meetings

## Major ways of showing recognition

Encouraging them to write an article about some accomplishment at work

Giving a plaque/certificate/trophy for being best employee/most improved results etc

Offering them tuition assistance

Getting their picture in the paper for outstanding accomplishment

Renting newspaper space to thank them

Honouring them for years of service to the organisation

Giving them a bigger office

Enlisting them in training staff and other volunteers

Involving them in the annual planning process



## Creating the right atmosphere

Volunteers are more likely to stay in an organisation which has a positive environment. A good atmosphere includes:

A clear sense of individual roles, with respect for the roles of others

A willingness to sacrifice for a goal

Trust

Tolerance and acceptance

Open and honest communication

Group identity: 'we're in this together'

Inclusion not exclusion

Mutual support and interdependence



## Action Plan

Make a list of the ways you currently value your volunteers and using the lists in this pack, look at ways in which this could be improved. Use the action plan template on the back of this card to help you identify areas for improvement.

## Rules for Recognition

Give it or else

Give it frequently

It must be varied

It must be honest

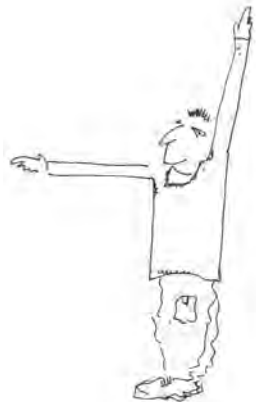
It should be given to the person, not the work

It should be appropriate to the achievement

It should be consistent

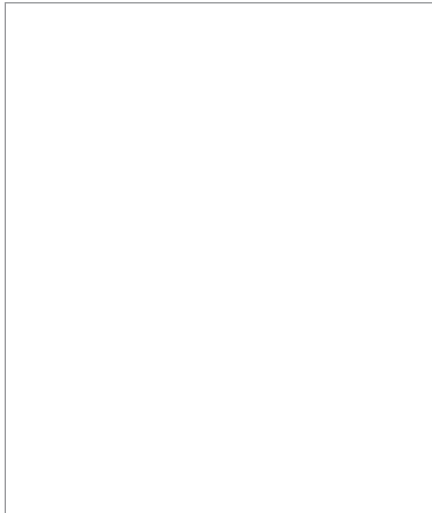
It must be timely

It should be individualised as much as possible

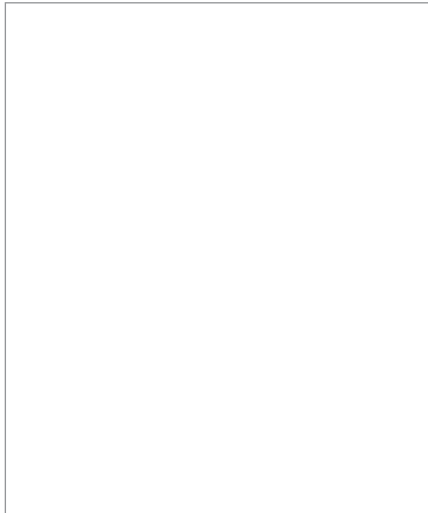


## Action Planner

Areas to improve

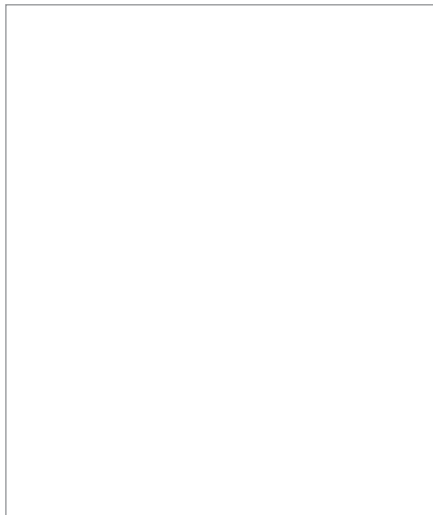


Things we will do

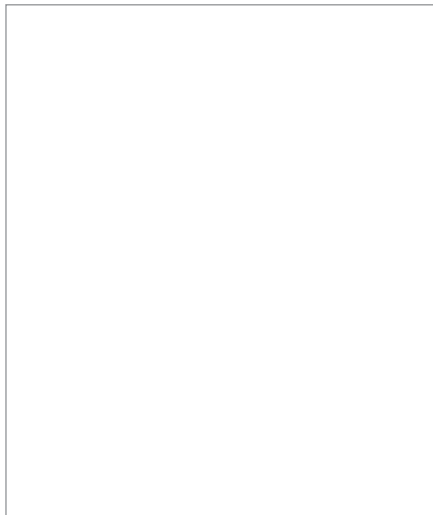




By when



By whom





## **Volunteer Management**

### **Activity 3: Developing Volunteers**

#### **Purpose:**

To help participants recognise that volunteers go through different stages and each stage requires a different type of support and encouragement.

#### **Contents:**

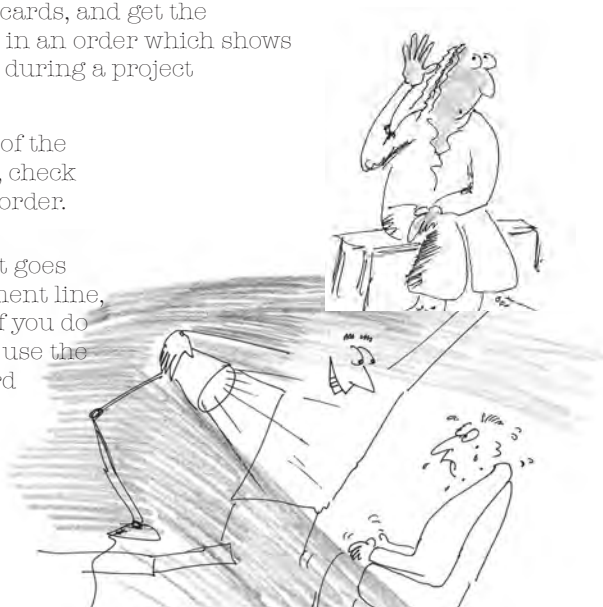
- Step by step guide
- Volunteer development line overview
- Individual picture cards for development line
- Volunteer development poster (disk)
- 8 steps to delegation
- Action plan

## Step by step guide

Step 1: Print off the picture cards, and get the participants to lay them out in an order which shows how a volunteer progresses during a project

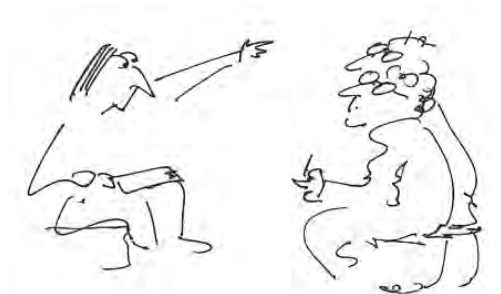
Step 2: Using the summary of the volunteer development line, check that they are in the correct order.

Step 3: Using the poster that goes with the volunteer development line, explain each of the stages. If you do not have an A3 printer, just use the explanations on the postcard

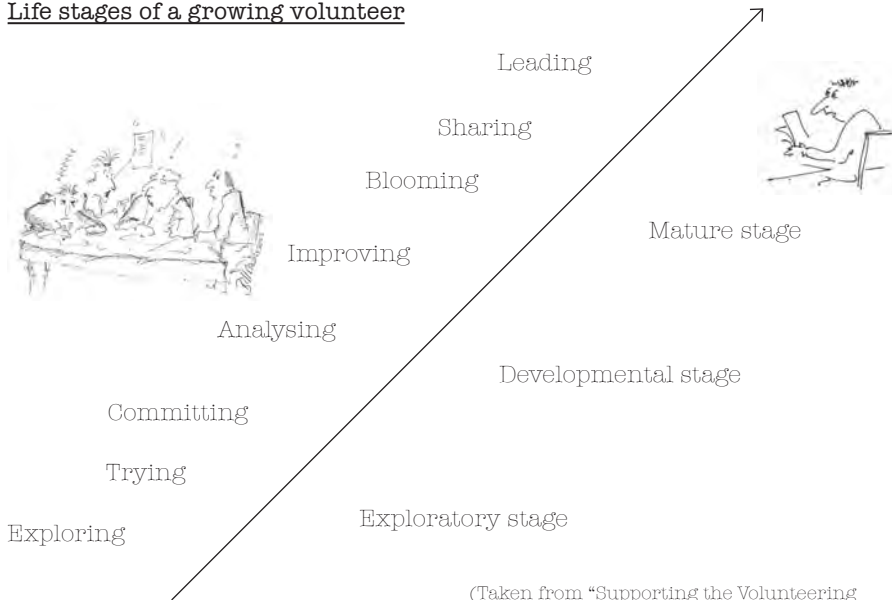


Step 4: Divide the group up and get them to stand at different points on the line and discuss what things their project could do to help a volunteer at that point

Step 5: Discuss where the project is strongest and where it is weakest in its management of volunteers



Life stages of a growing volunteer



(Taken from "Supporting the Volunteering Life Cycle" by Paula Beuhen in Voluntary Action Leadership, 1985, New York)

## Explanation of the different stages

**Exploring:** First steps into something new - not sure if they're doing the right thing

**Trying:** Learning any new skills involved and getting to know other volunteers

**Committing:** Deciding this is worth putting energy into

**Analysing:** Starting to feel more comfortable and therefore noticing what is wrong with the organisation and whether they are being under-used

**Improving:** Now being pushed into new areas and learning new skills

**Blooming:** Happy and sure of what they're doing - using skills and experience

**Sharing:** Becoming more creative with ideas and happy to share with colleagues

**Leading:** Now able to manage projects having mastered everything involved

## Some things to bear in mind in developing volunteers

1. Not all volunteers want to take on leadership roles but may just be happy doing simple tasks.
2. Short term volunteers such as students, progress very quickly from exploring to blooming. However, they tend to be more committed to short term or one off projects rather than being involved in a long term commitment.
3. People who manage volunteers need to be aware of the different stages volunteers are at and provide appropriate support accordingly.
4. When volunteers first commit, they need a lot of support and direction. But as they grow and develop and become confident, the volunteer manager needs to be less hands on and allow them space to develop themselves.



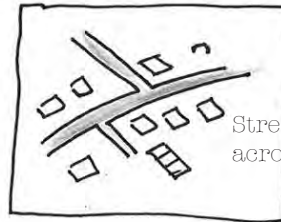


## Why delegate?

More time available for essential managerial tasks

All tasks are completed effectively

Volunteers are more motivated and more confident, as they become more skilled



Stress levels decrease across the organisation

11-02

Talk through the 8 steps to delegation as illustrated on the next card and do the delegation activity

Make an action plan for areas that could be delegated and support that would be needed

## Delegation activity

Divide into three groups and think through three tasks that could be delegated to:



A new volunteer



An experienced  
volunteer

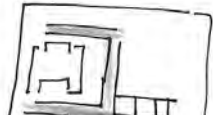


A volunteer with  
leadership potential

Using the 8 steps, discuss the best way to delegate these tasks. Share with the other two groups

## The 8 steps to successful delegation

It's best to print these steps from the disk

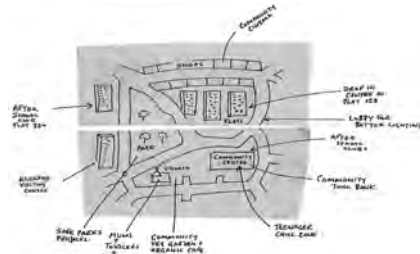


Step 1: Decide who to delegate to

Step 2: Show the benefit or importance of delegating a task

Step 3: Break down the task, and decide with the volunteer the level of support needed for each aspect

Step 4: Make the time to train the volunteer

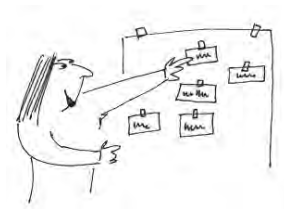


Step 5: Allow the volunteer time to practise carrying out the task in a safe environment, followed by feedback

Step 6: The volunteer then does the task under supervision, if appropriate

Step 7: Two way feedback session

Step 8: Affirm your volunteer



## Action Plan

Areas to  
delegate

--

To whom

--

By when

--

What support  
do they need

--



## **Team Building**

### **Purpose:**

To help participants reflect on and improve the quality of their team working.

### **Contents:**

- Self-renewal
- Traffic Light
- Team Process review
- Tower of straws
- Draw team as an animal
- Toxic waste
- Yellow Brick Road
- Building a team by asking the right questions

## Activity 1: Self renewal

### **Purpose:**

To help a team engage in self-examination

### **Process:**

Draw a line down the middle of a flip chart and head one side “Things we should preserve” and the other side “Things we should change”

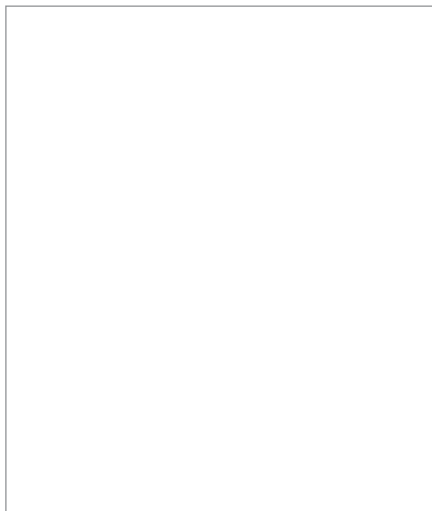
Invite team members to write ideas on post-it notes and stick them on the appropriate side of the chart.

### **Discuss**

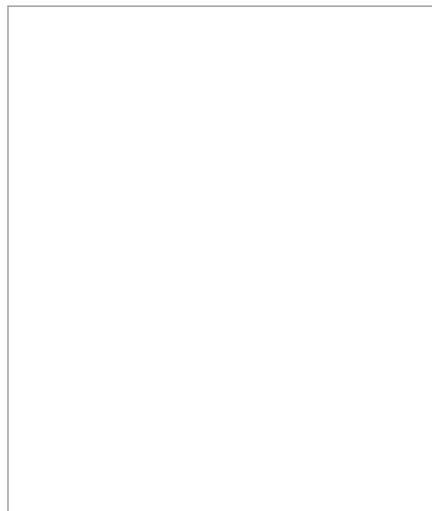




Things we should preserve

A large, empty rectangular box with a thin black border, intended for writing or drawing. It occupies the left half of the page below the heading.

Things we should change

A large, empty rectangular box with a thin black border, intended for writing or drawing. It occupies the right half of the page below the heading.

## Activity 2: The Traffic Light

### **Purpose:**

To provide feedback to team members in a way that will benefit the team.

### **Process:**

Think of your team in terms of behaviours and write on the appropriate coloured card, (red, yellow or green) suggesting what the team should:

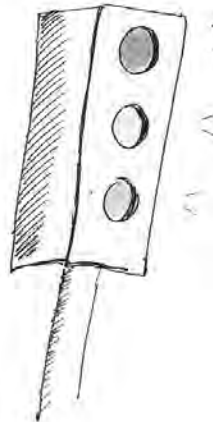
Stop doing because it is not helping the team

Start doing because it would help the team

Continue doing because it is helpful to the team

### **Variation:**

Where there is high level of candour in a team the suggestions could relate to specific team members



### Activity 3: Team Process Review

What did your team do that helped complete the task?

What things hindered the completion of the task?



What did you learn about team effectiveness?

What would you do differently?

#### Activity 4: Tower of Straws

##### **Purpose:**

Exploring teamwork and working together

**Time required:** 30 mins

**Materials required:** 2 boxes of straws, sellotape



##### **Essential steps:**

- Divide the group into 2 teams and explain that this is a race to build the highest tower which is self supporting.
- Give the group 10 minutes to achieve the task and award a prize for the team with the highest tower built in the time available.
- Get the group to reflect on how they worked as a team and what did they do that was helpful and what was not helpful and what they could have done differently.
- Get the group to think about any insights they have gained from this activity that they can apply to their work as a group. Key areas could include - involvement of everyone in decision making and sharing ideas, identifying skills and experiences, organising roles and contributions

### Activity 5: Drawing the team as an animal

**Purpose:** To clarify what the team is like

**Time required:** 15 mins

**Materials required:** Paper, marker pens, crayons



#### **Essential steps:**

- Explain to the group that we are going to think about the character and nature of the group or organisational church.
- Invite each member to draw a picture of an animal that represents the character and nature of the group.
- Put the pictures up on the wall and get each person to present their picture explaining why they drew it.
- Use flip chart paper to write down the common themes and differences.
- Discuss what this might mean for how the group could work better in the future.

## Activity 6: Toxic Waste

**Purpose:** Practical teamwork task to see how members work together.

**Time required:** 45 mins

**Materials required:** String to mark out an area 3m square, 3 x 4m length of rope, a large orange juice bottle filled with water (3-5l), a range of objects to distract group from the task – brooms, dustbin

### **Essential steps:**

- Mark out a square measuring 3m x 3m and place the bottle full of water in the middle.
- Explain to the group that they have to rescue the bottle only using the materials provided. They must not reach over into the square or they will be burned by the toxic gases. The bottle must be lifted directly up and away from the square and must not be dragged or pulled across the ground.
- Divide the group into 2 teams and give each team 2 mins to plan how they might achieve this task.. Each group takes it in turns to attempt to achieve the task.
- Once they have achieved the task, debrief and review. Key areas could include – involvement of everyone in decision making and sharing ideas, identifying skills and experiences, organising roles and contributions.

### Activity 7: Yellow Brick Road

**Purpose:** To work as a team to solve a problem

**Time required:** 30 mins - 1 hour

**Materials required:** Brick wall to represent the problem, Footprints to show how to get round the brick wall, Blue toolbox, Yellow cloth. All except the yellow cloth can be found on the disk

**Essential steps:**

- You will need to find some yellow cloth and print off the wall, footprints and toolbox from the disk.
- Lay out the cloth and as a team choose a problem that is challenging the team at the moment
- Place a brick wall on the yellow cloth to represent the problem. Write the problem on the wall.
- Brainstorm a number of options for getting round it. Once you've decided the best option, place the footprints to represent the key steps in addressing the problem.
- Use the blue toolbox to discuss what resources you need to resolve the problem (funds, expertise, equipment). Write on the toolbox what resources you require for your best option

## Tips

### **Tower of Straws:**

A different version of this can be done by getting the group to build a structure that will support a cup of water or an orange.

### **Drawing the team as an Animal:**

Make sure the pictures are big enough for everyone to see. If people are not happy with drawing or not confident, an alternative approach would be to give them pictures of animals for them to select and talk about.

### **Toxic Waste:**

The bottle can be removed by running two parallel ropes either side of the bottle, then gently twisting each end of the parallel ropes together so that they tighten round the body of the bottle. This will take a few minutes until the bottle is caught in a tight grip of the twisted ropes. It can then be lifted easily and smoothly off the ground.

### **Yellow Brick Road:**

Start with a fairly simple problem to get the idea of the tool. Once you have gone through the exercise, write it up as an action plan and decide who will do what.



## Activity 8: Managing by asking questions

The process of management is divided into three functions:

1. Planning



2. Empowering



3. Evaluating



## Planning questions

Always seek to involve all the volunteers in the planning process, so that they feel ownership and the plan is based on the realistic capacities of the volunteers.

Why are we doing this?

What do we want to achieve?

How are we going to achieve it?

Who needs to be involved?

When shall we do what?

What might be some of the barriers?

What resources do we have?

What did we learn last time?

Who else has done this? and what did they do?

If we did this again how would we do this differently?



Here are some questions to help volunteers to set short term goals:

What do you want to accomplish next month?

What can you do today to help you achieve your goal?

What can you do today that will make the most difference?

## Empowering questions

These are important questions to ask on a regular basis to help the volunteers to know you are concerned about the work they do and how much you value them.

- How do you feel about your job?
- What are your frustrations?
- What do you need to make your job better?
- What would you like to see change?
- Would you like more responsibility?



### **When volunteers struggle with their job these types of questions are useful:**

- Why do you think this problem exists?
- What alternatives do you see?
- What are the pros and cons of those alternatives?
- How can we look at this situation differently?

### **To enable the volunteer to direct the future action these questions are useful:**

- What actions do you recommend to solve the problem?
- What will help you to get back into things again?
- What key steps will help things improve?
- What do you wish would happen to move things forward?

## Evaluating questions

These questions help you to evaluate the effectiveness of a volunteer's performance.

How do you feel things are going for you?

What do you think has gone well?

What has helped things go well?

What has been most challenging?

Why has this been challenging?

What could you do differently?

Questions for yourself as a manager

What is the volunteers' morale like?

Do my volunteers know what they are meant to achieve?

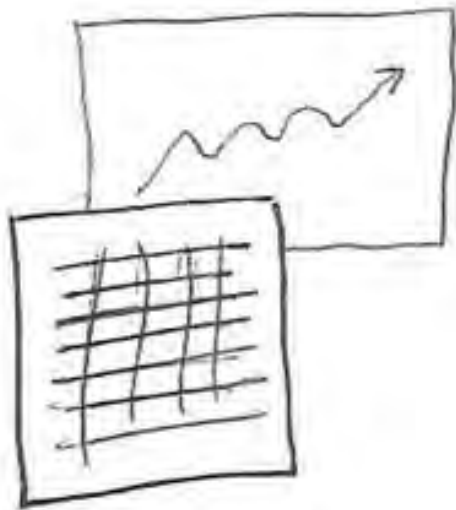
Do they have sufficient authority to achieve it?

Do they have the skills and knowledge to succeed?

Are things organised so their responsibilities are clear?

How long has it been since I gave each of them recognition for their contribution and achievements?





## **How to have an effective meeting**

### **Activity 1: Thinking about meetings**

#### **Purpose:**

To help participants think about how their meetings are at the moment and how they would like them to be

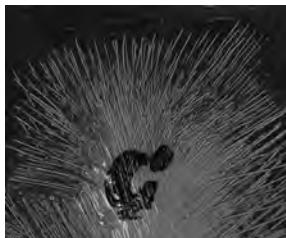
#### **Contents:**

- Step by step guide
- Transport activity
- Blob tree poster (disk)
- Self Assessment for the Chair (disk)
- Self assessment for the participant (disk)
- How to have an effective meeting checklist

## Step by step guide

Step 1: Invite the participants to think about the quality and nature of their meetings and draw it as a form of transport

Step 2: Discuss the pictures drawn, starting with the positive things and concluding with the challenging things



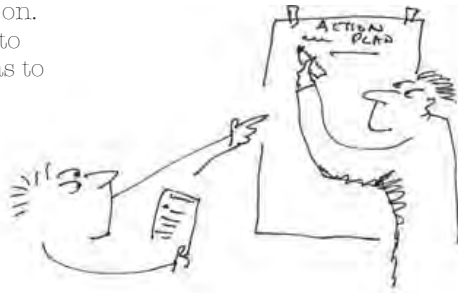
Step 3: As an alternative, if you have an A3 printer, print off the Blob tree poster and invite the participants to look at it and decide where they put themselves on the tree



Step 4: Ask the participants to assess themselves using the chair and participant self assessment posters (again, you will need an A3 printer for these)



Step 5: Use the effective meeting checklist to see what the strengths are and what you need to work on. Fill in the action plan together to decide which are the main areas to work on



## Checklist for having an effective meeting

### Before the meeting:

- Is everyone clear why we are meeting?
- Has everybody had enough notice about when the meeting is happening?
- Do people need the agenda in advance and any additional paperwork?
- If there are going to be presentations, have the presenters had enough time to prepare?
- Is any equipment needed for the presentations?
- Do we need snacks/nibbles and has a break been planned?
- Does the room/venue need setting up before people arrive?



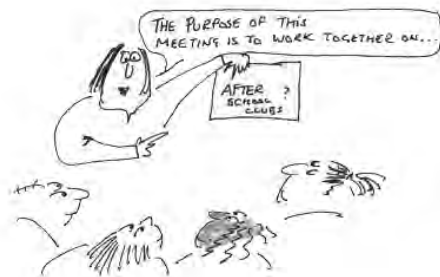
## During the meeting

- Were the new members or visitors welcomed and introduced?
- Are people aware of the ground rules and do they refer to them?
- Are people listened to?
- Are the discussions constructive?
- Are decisions made?
- Does everyone participate?
- Does the chairperson ensure the agenda is followed?
- Does the meeting run to time?
- Does the chair summarise the key points before a decision is made?
- Is there a record of decisions made and who is going to do what actions?



### After the meeting

- Are the minutes reviewed by key members of the meeting before being typed up?
- Is there a reminder sent out to all the members about when the next meeting is to be held?
- Are the minutes sent out before the next meeting?
- Is there time allocated for setting the next meeting agenda?





## **How to have an effective meeting**

### **Activity 2: Having a good meeting**

#### **Purpose:**

To give participants the skills they need to have effective meetings.

#### **Contents:**

- Step by step guides
- Agenda pack - including templates and worked examples
- Listening skills - including poor listening habits
- Listening pairs exercise
- Listening skills activity
- Brainstorm cards for key positions on the committee and minutes

## Step by step guide



Step 1: Print off “Having a good meeting” and using the question cards, brainstorm why agendas are important and what makes a good agenda.

Step 2: Invite participants to look at the worked example, with notes on designing and preparing an agenda.

Step 3: Ask the participants to design their own agenda using the agenda template

Step 4: Everyone then shares their agendas with a neighbour and then discusses what they have learnt





## Designing a good agenda

### **Timing**

It's useful to place an amount of time to discuss an item on the agenda. This helps the chairperson to manage the meeting and to guide a discussion to a conclusion or decision.

### **Issue**

In this column a brief description of what is to be discussed by the group

### **Type of decision required**

This clarifies what is being asked of the group in regard to the issue. There are 3 options for this which include approval, review or just information sharing. It is important that information sharing is relevant to the meeting and could not be done any other way (email).

**Action required**

This column is filled in once the decision has been made and should be focused on practical responsibilities individual members might need to do.

**Who**

This column is the person(s) who will be responsible for carrying out the actions.

**By when**

This column is agreed by the meeting for when the practical action can be carried out by and reported back to the meeting.

## Preparing an agenda

The best way to ensure that those attending a meeting are sure about its purpose is to send them a clear agenda well in advance. There are several ways to prepare an agenda, so find and utilise the best one suited to your purposes.

- Avoid meetings at low-energy times of day, such as straight after lunch.
- Ensure the chairperson is informed of any agenda changes.
- Keep an agenda as short as possible.
- Try to restrict an agenda to one sheet of paper.
- Discuss the most important items early in the proceedings, when participants are most alert.





### Compiling an agenda

Gather relevant information

What items need to be discussed?

In how much detail?

Assign time limit to each one

BE SPECIFIC

AGENDA	
①	~~~~~
②	~~~~~
③	~~~~~

### Structuring an agenda

Order topics logically

Group similar items

Start with 'housekeeping matters'

Then minutes from the last meeting

Then current issues

Finally AOB



### Writing an agenda

At top, put place, time and date of meeting

Number each item

Assign start time to each one

At end put details of next meeting



### Distributing an agenda

After drafting, send to participants for comment

Do not present participants with a revised agenda at the start of the meeting.

Distribute final agenda as far as possible in advance of the meeting.

### Meeting Agenda Template worked example

Item	Timing	Issue	Type of decision required	Action required	Who	By when
1	6.30	Minutes of last meeting	Clarification and approval	File	Chair	At the meeting
2	6.45	Financial report	Review and approval of budget	circulate report by email	Treasurer	By the end of the week
3	7.00	Staff and volunteer updates	Information sharing	discuss volunteer social night with volunteers	Volunteer coordinator	Before next meeting
4	7.30	Coffee break				
5	7.45	New minibus	Approval of model and price	visit dealer to finalise purchase	Chair and CEO	Before next meeting
6	8.00	Holiday club report	Information sharing	send volunteers the report	Club coordinator	Before next meeting
7	8.15	Any other business				
8	8.30	Close				

## Meeting Agenda Template

Item	Timing	Issue	Type of decision required	Action required	Who	By when

## **Developing Good Listening Skills**

Developing good listening skills is essential for building good teams and having effective meetings. The following cards give suggestions for how to develop good listening skills as well as understanding some of the barriers to listening.

The objectives when we listen to people are both basic and simple:

1. We want people to talk freely and frankly
2. We want them to cover matters and problems that are important to them
3. We want them to furnish as much information as they can
4. We want them to get greater insight and understanding of their problem as they talk it out
5. We want them to try to see the causes and reasons for their problems and to figure out what can be done about them.



## Step by step guide - Listening skills

Step 1: Look at the card on poor listening habits

Step 2: Using the step by step guide divide the group into pairs to do the Listening pairs exercise



Step 3: Alternatively or maybe in addition, divide the group into 3s to do the Listening skills brainstorm activity



Step 4: In the groups of 3, add the results of the brainstorm to the ideas on the cards and then share with the rest of the group



## The Listening Pairs Exercise - for groups that know each other well

Step 1: Divide the group into pairs and give them a controversial topic to discuss, eg abortion, divorce, civil marriages.

Step 2: One of the pair talks to the other on that subject for 2 minutes.

Step 3: After one has spoken, the other summarises what has just been said.

Step 4: Then the other one gives their point of view with the first speaker listening.

Step 5: After both have spoken and summarised, ask the group what difficulties they experienced in listening. List these on a flipchart.

Step 6: Then ask what they can do to improve communication in the group.



## Listening Skills Activity

Divide the group into 3s and then give them one of the following to brainstorm before giving them the input cards.

Objectives in listening

Do's and Don'ts of Listening

Responses to encourage - further talking  
restatement  
deeper reflection  
summarising  
decision-making

## The Do's and Don'ts of Listening

### DO

- Show interest
- Be understanding of the other person
- Express empathy
- Single out the problem if there is one
- Listen for causes of the problem
- Help the speaker associate the problem with the cause
- Encourage the speaker to develop competence and motivation to solve his or her own problems
- Cultivate the ability to be silent when silence is needed

### DON'T

- Argue
- Interrupt
- Pass judgment too quickly or in advance
- Give advice unless it is requested by the other
- Jump to conclusions
- Let the speaker's emotions react too directly on your own

## Poor Listening Habits - More copies of this can be printed from the disk

### **On-off listening**

This arises from the fact that we think 4 times as fast as we can speak, giving us spare thinking time for personal concerns etc. To overcome this, pay more attention to the non-verbal signs like gestures, hesitation etc to pick up the feeling level.



### **Red Flag Listening**

To some people, certain words are like a red flag to a bull. When we hear them we get upset and stop listening. To overcome this barrier, find out which words affect us personally and try to listen attentively to someone more sympathetic to this issue.



### **Open ears - closed mind listening**

Sometimes we quickly decide that the subject or speaker is boring. Often we think we can predict what is going to be said and so there is no need to listen. It is better to listen and find out if this is true or not.



### **Glassy-eyed listening**

Sometimes we look at the speaker but our minds are somewhere else and our dreamy expression gives us away. If you notice people looking glassy-eyed, suggest a break or change the pace.



### **Too-deep for me listening**

When ideas are too complex and complicated, we should force ourselves to follow the discussion. Often, if we don't understand, others don't either, and it may help the group to ask for clarification or an example when possible.

### **Don't rock the boat listening**

People do not like to have their favourite ideas, prejudices and points of view overturned. When that happens we may stop listening or become defensive. However, if we listen we can understand the other viewpoint and respond constructively.





## **How to have an effective meeting**

### **Activity 3: Tips for Meetings**

#### **Purpose:**

To give participants some helpful tips for getting the most out of their meetings

#### **Contents:**

- Ground rules including ground rules game
- Buzz groups
- Brainstorming
- 10 top tips for effective meetings

## Step by step guide

Step 1: Imagine the group is having a meeting and play the ground rules game, using the rules sheet

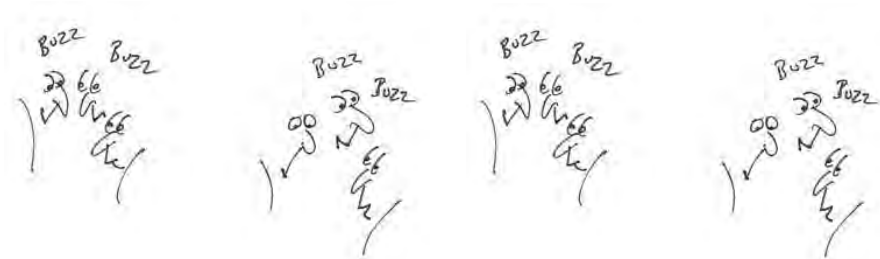
Step 2: Following the game, make a list of ground rules that you will use for all your meetings

Step 3: Have a look at the cards on buzz groups and brainstorming





Step 4: Have a mock meeting and using one of the topics, divide the group into buzz groups to discuss it



Step 5: Choose another topic and have a 5 minute brainstorm

Step 6: Discuss the ten top tips - is there anything else you would add?



## Ground Rules

For a meeting to take place effectively there must be ground rules that everyone is aware of and stick to at all times.

Examples of ground rules could be:

- Turn up on time
- Read the minutes before the meeting
- Treat each other with mutual respect
- Stick to the agenda
- Mobile phones must be switched off
- No interrupting

### **Suggestion:**

Buy a toblerone. Stick the ground rules on it. If everyone keeps to the ground rules for 3 meetings, eat the toblerone and buy another one.

### The Ground Rules Game

- Decide what your ground rules are going to be and write them on a toberone bar or other suitable item.
- Brainstorm some controversial topics and put them in a hat.
- Nominate a chair who picks a topic out of the hat.
- Discuss this topic for 3 minutes, after which, choose a new chair and a new topic. Do this every 3 minutes.
- Select a referee who gives out yellow cards when a ground rule is broken.
- Any member breaking a rule a second time will receive a red card and can take no further part in the discussion.
- After several rounds, stop the game and discuss what the group learnt from this exercise.

## Buzz Groups

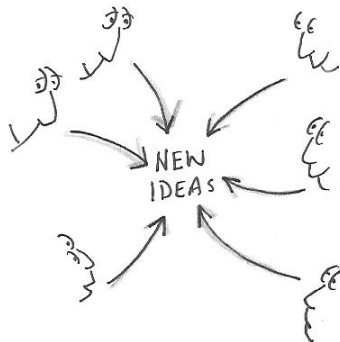
Sometimes it's a good idea to split the meeting into buzz groups to discuss a certain question or issue. This is a good way to make sure everyone gets involved. Buzz groups can be pairs, threes or more depending on the size of the group. While "buzzing" participants can exchange ideas and draw on their wide collective experience. If appropriate, after the discussion, one member from each buzz group can report back to the meeting.

The main obstacles to using buzz sessions are the time required and the need to have tables and chairs arranged for quick discussions. In particular feedback may take some time. One way to shorten this would be to have one group present their ideas, with other groups only contributing new ideas, avoiding any repetition.



## Brainstorming

The purpose of a brainstorming session is to discover new ideas and responses very quickly. It differs from the buzz group in that the focus is to generate as many ideas as possible without judging them. These ideas are then listed exactly as they are expressed on a board or flipchart. This is usually a very animated session with even the most reserved participants feeling bold enough to contribute.



After a brainstorm session, the ideas can be discussed further and evaluated, listing the best options in a systematic way. Ideas can be grouped and analysed so they belong to the group rather than individuals. Unlike a buzz session, a brainstorm can work well with a large group and normally takes less time.

## Ten Top Tips for Effective Meetings

1. Provide snacks/nibbles to welcome people to the meeting.
2. Make sure everyone has all the relevant information well in advance.
3. Keep the agenda as short as possible – ideally one piece of paper.
4. Discuss the most important items early in the meeting when participants are most alert.
5. Place a watch or clock in a prominent position so you are able to keep an eye on the time.



6. Remind people of the agenda when they stray away from it.

7. Be selective with information and avoid overload.

8. Encourage members to give their opinions by asking open questions (Why do you think that? What do you think about that? How do you think this can be done?)

9. Write up minutes straight away using notes taken at the meeting.

10. Ask members to give honest feedback on your performance as a chairperson.





## **Good Governance**

### **Purpose:**

To look at a range of simple explanations and exercises to help participants learn about good governance.

### **Contents:**

Governance cards on the following subjects:

Accountability  
Boards  
Equality & diversity, Governance  
Liabilities, Nolan Principles  
Principles of the Code  
Trustees  
Working within objects  
Experts  
Youth  
Glossary of terms

## A-Z cards

In this pack are a selection of cards from the A-Z of Good Governance. These are cards with simple, illustrated explanations of some of the terms used in governance. Larger cards and extra copies can be printed from the disk. Some cards also include questions or exercises aimed at helping you and your organisation reflect on how you operate as a board or team.

You might like to use these cards in your board meetings or project team meetings. You could put a card up once a week and discuss it in a tea break. Alternatively, use them as part of an awayday activity for developing your team.



## Accountability



Accountability is where a person or an organisation is expected to explain their decisions and actions to others.

You can think of accountability as being two sides of a coin. Your organisation has a moral accountability to the people you serve, the people who fund your work and your staff who work for you.

The flip side is the legal side which might include producing annual reports, financial audits, keeping to health and safety or child protection laws.

## Things to think about

1. Make a list of all the people you think you are accountable to.
2. Decide which people you are legally accountable to and which people you are morally accountable to.
3. In what ways are we demonstrating how we are accountable to these different groups?  
Are these effective?



## Board



What do you call yours? A committee? A council?

The board is the governing body of a voluntary or community organisation. The people that make up the board should have a good range of different skills, knowledge and experience, which when combined can be used to steer the organisation effectively.

## Questions

1. What do we most value about being a board member and how do we appreciate each other?
2. How many people serve on our board? Is this too many, too few or about right?
3. Do we have the right skills and experience to help us work effectively?



## Delegation

1. Make a list of typical tasks that are delegated in your organisation.
2. How well are they delegated? - is there enough explanation about what is involved?
3. Are we burdening some people and under-using others?
4. What can we do to improve the way in which tasks are delegated so that they can be completed effectively?



The board cannot run the organisation alone - it must delegate some authority and responsibility to the organisation's staff and volunteers, sub-committees and working groups, through the chief officer if there is one. Some may be tempted to delegate the things they don't want to be involved with.

However, the person who delegates the task is responsible for seeing the task carried through. Delegation is about sharing the burden, not giving up ownership.





## Equality and Diversity

A diverse board will:

Be more responsive to the community it serves.

Bring fresh perspectives to the way the organisation is governed.

Be more inclusive in the way its mission is fulfilled.



## Questions

1. How could your board be more representative of people from different ethnic and cultural backgrounds, people with disabilities and young people?
2. How can your board value and celebrate the contribution of people from diverse groups?
3. What contribution could a more diverse board make to the success of the organisation?

## Fruit Tree

Think of your organisation or project as a fruit tree

Which parts of the tree represent the different aspects of your organisation?

roots?  
trunk?  
branches?  
leaves?  
fruit?



Fruit  
what are we achieving?

Trunk  
how are we organised -  
board, staff, volunteers?

Roots  
what are our values and  
what are we about?



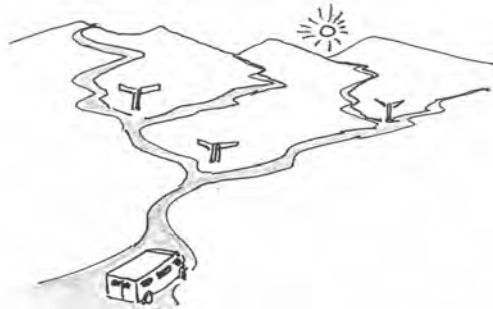
Branches/leaves  
what projects/activities  
are we working on?

## Governance



Governance is the process of overseeing an organisation. It is about having overall responsibility. This involves ensuring that an organisation's work contributes to its mission and purpose and its resources are used wisely and effectively.

Think of your Organisation as a Minibus



Who is driving?

Who decides the direction?

Who maintains the bus?

What represents the map?

## Joining the Board

Cast your mind back to when you came to your first board meeting.

What did you feel?

What did you need to know?



## Ideas for the perfect induction pack

1. Exciting, colourful folder to carry important documents.
2. A page of photographs of what the organisation does and who's in it.
3. Recent newsletter/publications about the organisation.
4. Role description for being a board member or specific role on the board.
5. List of board members and contact details.
6. List of key dates for the board and key events in the life of the organisation.
7. Copy of recent minutes and annual report.
8. Organisational strategy or business plan.
9. Governing document.
10. Questionnaire about your expectations for being a board member (to be discussed with the chair in a nice coffee shop).





## Liabilities

What are we liable for?



Spending charity money on activity outside objects

Unpermitted political activity

Fraud

Serious negligence

Failing to protect trust property

Trustee receiving personal benefit

Acting as trustees or chief officer when disqualified

Failure to deduct employee's PAYE

Failure to comply with health and safety, trade descriptions and financial services

## How do we manage our liabilities?



Ensuring there are clear roles and responsibilities

Keeping a record of decisions

Regularly reviewing and keeping to the Governing Document

Ensuring the board gets training

Ensuring good management

Obtaining professional advice

### **Question?**

Discuss which of these areas in your organisation is strongest and which it needs to improve in

## The Nolan Principles

Many organisations have found these principles a useful basis for understanding the role of the trustee and they often appear in trustee role descriptions or codes of conduct.

Look at the explanation of the principles on the back of this card and discuss the extent to which your organisation models these principles.



Selflessness – Decisions are taken solely in terms of public interest, not for personal benefit or financial gain.

Integrity – Trustees should not place themselves under financial or other obligation to outside organisations or individuals that might influence them in the performance of their official duties.

Objectivity – whether recruiting, awarding contracts, or recommending individuals for rewards or benefits, choices should be made on merit.

Accountability – Trustees are accountable for their decisions to the public and must submit themselves to the appropriate scrutiny.

Openness – Trustees should be open about all decisions and actions, they should give reasons for their decisions and restrict information only when the wider public interest demands.

Honesty – Trustees have a duty to declare any private interests relating to their public duties and to take steps to resolve any conflicts arising in a way that protects the public interest.

Leadership – Trustees should promote and support these principles by leadership and example.

## Outcomes

Make a list of the results you hope to see as a result of your activities.

Which activities are most successful and worth repeating?

Which activities do your staff and volunteers enjoy most?

Have there been any unexpected outcomes as a result of your activities?



## What are outcomes?

Outcomes are changes that happen as a result of carrying out an activity. Reports to boards often focus on what activities have taken place but rarely talk about the results and changes that have happened as a result of the activities.

The role of the board is to look at what has changed as a result of the organisation's activities and how these are helping to fulfil the purpose of the organisation.

Information about outcomes can be gathered from questionnaires, interviews, stories of change, and facts and figures from the people the organisation is trying to help.



## Principles of the Code of Governance

The Code of Governance has been developed by the National Governance Hub to help trustees lead their organisations and achieve excellent governance. The main principles of the code are intended to be relevant to all sizes and types of voluntary and community organisations.

How could a Code of Governance help your board?



## The 7 Key Principles

1. Board leadership - trustees to collectively ensure delivery of objects, strategic direction and the upholding of values.

2. The Board in Control - trustees to be responsible and accountable for ensuring and monitoring that the organisation is performing well, is solvent and complies with its obligations.

3. The High Performance Board - trustees should have clear responsibilities and functions, and should compose and organise itself to discharge them effectively.

4. Board Review and Renewal - trustees to periodically review their own and the organisation's effectiveness and take steps to ensure both continue to work well.

5. Board Delegation - trustees to set out functions of sub-committees, the chief officer and other staff and monitor their performance.

6. Board Integrity - trustees to act according to high ethical standards and deal with conflicts of interest effectively.

7. The Open Board - trustees to be accountable to stakeholders.



## Trustees

What are the qualities of a good trustee? What would you add?

Committed to the organisation

Good listening skills

Contributes to planning the future



Good team player

Time to give

Aware of liabilities

Promotes the organisation

## Trustees have 12 main roles

1. Set and maintain vision, mission and values
2. Develop strategy
3. Establish and monitor policies
4. Set up employment procedures
5. Ensure compliance with the Governing Document
6. Ensure accountability
7. Ensure compliance with the law
8. Maintain proper financial oversight
9. Select and support chief executive
10. Respect the role of staff
11. Maintain effective board performance
12. Promote the organisation

In which of these areas do you think your organisation is strong, and in which areas do you think you need to improve?

## Working within your Objects

“Objects” is the term we use to describe and identify the purposes for which the organisation has been set up and it is the board’s responsibility to ensure the organisation sticks to these. The objects should be stated in the Governing Document.

It may be tempting to stray from the original objects for various reasons - maybe because of personal aspirations or you may be looking for new opportunities which could bring in much needed funding. However, the implications of doing so can result in legal and financial problems for the organisation.



## Questions

1. Are all board members aware of the objects of the organisation?
2. Do we have regular reviews to make sure the organisation is keeping to its objects?
3. What are the factors that may cause us to stray from our objects?



## Experts

Even the most qualified committee may need financial, legal or technical advice to help them make good decisions. There are plenty of organisations out there, whose job it is to help you. The Code of Good Governance lists these organisations.

Some of the main ones are listed on the back of this card:

1. Make a list of the areas in which you think you might need expert advice.
2. Prioritise the areas which need most attention.
3. Agree who will contact the appropriate expert or organisation and by when.



## Organisations that can assist trustees

### **Charities Evaluation Services**

[www.ces-vol.org.uk](http://www.ces-vol.org.uk)

0207 713 5722

### **Charity Commission**

[www.charitycommission.gov.uk](http://www.charitycommission.gov.uk)

0870 333 0123

### **Black Training and Enterprise Group**

[www.bteg.co.uk](http://www.bteg.co.uk)

0207 713 6161

### **Community Matters**

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

0207 837 7887

### **Institute of Fundraising**

[www.institute-of-fundraising.org.uk](http://www.institute-of-fundraising.org.uk)

0207 840 1000

### **Volunteering England**

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

0845 305 6979

### **Voluntary Sector National Training Organisation**

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

0207 713 6161

## Young people

Youth is no bar to becoming an effective trustee. Young people may lack experience but can bring energy, creativity and enthusiasm to a board, and therefore have an important part to play.

It is especially important for organisations who exist for the benefit of young people to have young people involved in their decision making process.

And it's a two way thing - the organisation benefits and so do the young people. For some still involved in full time education, it is a fantastic opportunity. Having a role in making long term decisions about a voluntary organisation can create skills that are directly transferable to paid work



## Questions

1. Are young people represented on our board?
2. What are the strengths of the young people on the board?
3. Are the views of young people listened to?
4. How can we get more young people involved?





## Glossary of terms

### Governance

“the systems and processes concerned with ensuring the overall direction, effectiveness, supervision and accountability of an organisation”.

### Trustee

Another name for a Board member. Trustees are the people responsible for ensuring the organisation has a clear strategy, that it remains true to its original vision and that it complies with all necessary rules and legal obligations.

### Governing Document

A charity’s governing document is any document which sets out the charity’s purposes and, usually, how it is to be administered. It may be a trust deed, constitution, memorandum and articles of association, conveyance, will, Royal Charter, Scheme of the Commission, or other formal document.

### Members

The owners of the organisation who give authority to the board. Not all organisations have members. They are different from board members or members of staff.

### Mission

What an organisation commits itself to do.

### Stakeholder

A person with an interest in or concern for an organisation.

### Strategic plan

A document that outlines an organisation's wider objectives for the coming years

### Accountability

Situation where a person or organisation is expected to explain their decisions and actions to others.

### Audit

A formal examination of an organisation's accounts, efficiency or effectiveness. An audit is usually carried out by an independent consultant.

### Beneficiary

Someone who directly benefits from an organisation's work.

### Board

A group of people with overall responsibility for an organisation.

### Chief Executive Officer

The operational manager of an organisation with responsibility for the organisation's staff

### Evaluate

To assess the value, quality, importance or impact of something.

## **Spiritual reflection**

This toolkit is about taking on a leadership role in the different aspects of volunteer management, running effective meetings, building a team and governance.

A key value is humility and what is referred to as servant leadership. This story of Jesus washing the feet captures this very well and we use this theme across the different packs of this toolkit.

Read John 13 vs 1-15

Brother let me be your servant  
Let me be as Christ to you  
Pray that I may have the grace  
To let you be my servant too.



### Team Building Questions

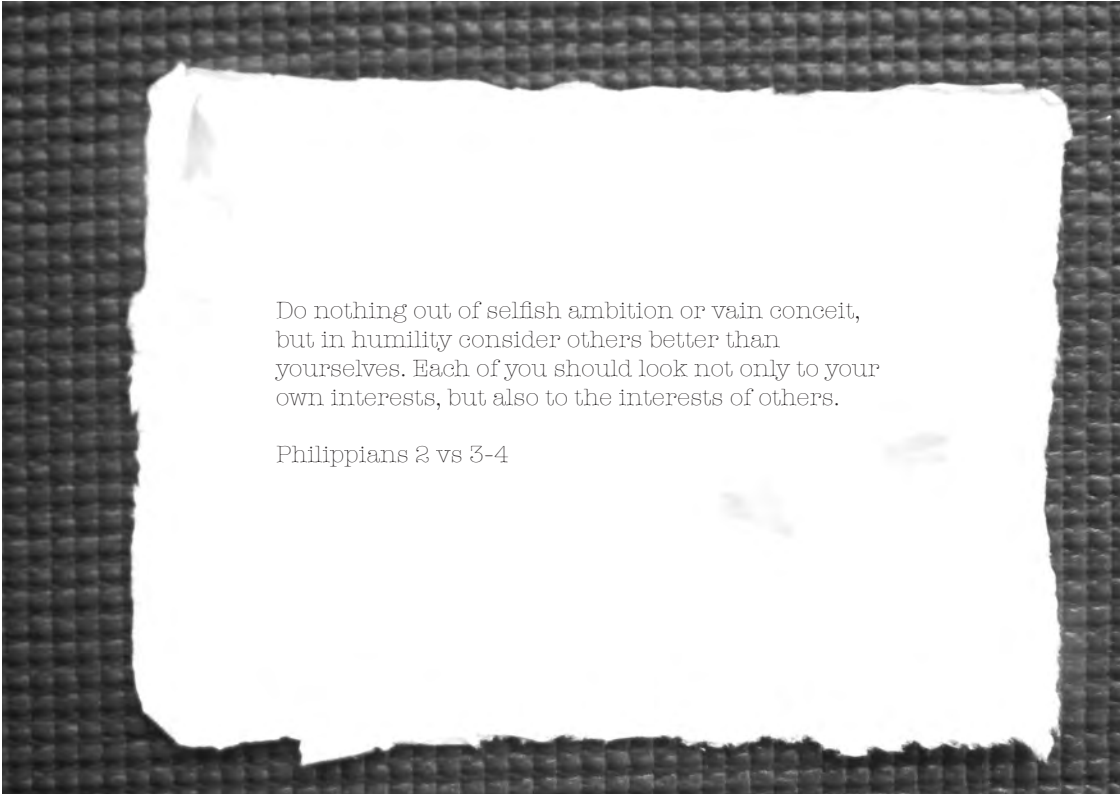
1. Consider Peter's initial reaction to Jesus wanting to wash his feet. In what ways do we turn down help?
2. In what situations in working with a team, do we need to demonstrate Christ's humility in washing his disciples' feet?
3. What tasks should we be prepared to do?

Peter's initial refusal to let Jesus wash his feet is not uncommon today. How many of us are too proud to ask for help or turn down offers of help because we want to manage on our own. This is false pride. God's intention is that we are there for each other. It is through his people that Jesus ministers to us in times of need. If we say no, in effect we are saying no to our saviour.

## Volunteer Management Questions

1. In developing volunteers, in what areas are we required to put on the humility of Christ?
2. What might be some of the barriers to delegating responsibility and developing others?

Good volunteer management requires recognition of volunteers' gifts and potential. This means valuing them more than ourselves, and being committed to helping them to grow.



Do nothing out of selfish ambition or vain conceit,  
but in humility consider others better than  
yourselves. Each of you should look not only to your  
own interests, but also to the interests of others.

Philippians 2 vs 3-4

### Effective meetings questions

1. How can we encourage the people who lack confidence to share feelings and ideas?
2. How can we apply the lessons learnt by Jesus washing his disciples' feet to how we listen and value people at meetings?

Sometimes it is difficult to listen respectfully to people we don't agree with. What is so remarkable about Jesus' leadership style here is how all-inclusive it is, knowing what he knows. He washes Judas' feet even though he knows he is about to betray him.



### Governance questions

1. A board has specific roles - but its underlying key role is to serve the organisation. In what ways can this be demonstrated?

2. While serving the organisation there is often a pressure to please other people so that we are valued and appreciated. What is the danger of trying to win the approval of other people?

3. How often do we do things in order to please God? What will help us do this more?

It is tempting for leaders to abuse their responsibility. The worldly view of leadership is that leaders should be served by the people they lead. However, a God-centred view of leadership turns this idea upside down.



Diocese of Liverpool



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