

# WAGGGS' POLICY ON STRUCTURE AND MANAGEMENT OF ASSOCIATIONS



## Introduction

WAGGGS Constitution states that:

A member of the World Association shall be an Association which:

- ◆ is self-governing, with freedom to formulate its policy and put it into practice;
- ◆ is independent of any political organization and any political party.

(Article V - Membership, Section 1 d) and e) )

WAGGGS believes that its Mission can only be fulfilled through an Association that has its own independent structure decided by its members, laid down in its Constitution, which reflects the nature of the Association as a:

- ◆ voluntary non-formal educational movement
- ◆ non-political
- ◆ democratic

## Policy

WAGGGS requires the use of organizational structures that are based on clearly defined areas of responsibility, fair representation and efficient and transparent communication.

WAGGGS recognises the importance of using a flexible organizational structure that is appropriate to the realities in which the Association operates and safeguards WAGGGS' values.

WAGGGS requires high standards of management which ensure efficient and effective use of human, financial and technical resources.

## Explanation

Within WAGGGS there are a variety of structures and management styles. Each Association will choose a suitable structure and management style which is in line with WAGGGS' policy and responds to the contemporary needs and aspirations of its members within its cultural context.

The commitment to fair representation includes ensuring balanced representation of all groups of membership, fair geographical representation and the involvement of young women in decision-making.

WAGGGS' values are expressed in the Promise and Law that each Association adopts. It is the responsibility of each Association to ensure that these values are respected and upheld in all its business.

Self-assessment and strategic planning are important tools of an Association's good management and balanced growth.

An Association's good interaction with and participation in Regional and World structures is a responsibility and privilege of Membership.

*Adopted by the World Board at the 92nd meeting. October 1998*



# WAGGGS' GUIDELINES ON STRUCTURE AND MANAGEMENT OF ASSOCIATIONS

## Contents

<b>Introduction</b>	<b>1</b>
<b>Values in Management</b>	<b>5</b>
<b>Structure and Constitution</b>	<b>12</b>
<b>Leadership in the Association</b>	<b>15</b>
<b>Developing Effective Teams</b>	<b>22</b>
<b>Roles and Responsibilities</b>	<b>26</b>
<b>Staff and Volunteers</b>	<b>29</b>
<b>The Role of a National Office</b>	<b>33</b>
<b>Establishing a National Office</b>	<b>35</b>
<b>Management Skills</b>	<b>38</b>
<b>Communication in Management</b>	<b>39</b>
<b>Delegation</b>	<b>42</b>
<b>Introduction to Strategic Planning</b>	<b>44</b>
<b>Managing Change</b>	<b>49</b>
<b>Monitoring and Evaluation</b>	<b>55</b>



# WAGGGS' GUIDELINES ON STRUCTURE AND MANAGEMENT OF ASSOCIATIONS



## Introduction

### Structure and Management and Girl Guiding/Girl Scouting

WAGGGS' Mission is 'to enable girls and young women to develop their fullest potential as responsible citizens of the world'. In order to achieve that Mission, Girl Guide/Girl Scout Associations need to deliver good quality educational programmes to girls and young women. That can only be done effectively if the Structure and Management of the organization is functioning well. It doesn't matter how large, how rich or how experienced your Association is - you will need an appropriate structure, clear communication, good leadership, effective teams, etc in order to meet the goals of your Association and to fulfil the Mission.

Within WAGGGS there is naturally a great diversity of Associations. All Associations should consider themselves as dynamic living organisations, regularly reviewing all aspects of their structure and management to carry out their work most effectively in an ever-changing world.

For some Associations, these Guidelines will bring very new concepts and challenges in the field of structure and management. For other Associations they may serve as a framework for a review of key aspects of structure and management, or a basis for a fresh check of this area in the Association.

Whether used in parts or as a complete document, we hope the Guidelines will stimulate readers to look deeper in the areas covered, to ask questions, and to recognise the importance of appropriate and effective structure and management in their Associations.

### Why worry about structure?

Most Non Governmental Organizations (NGOs) have much more complex structures than business enterprises. The partnership of volunteers and staff within the management process and the involvement of members at all levels needs to be carefully channelled to work effectively. Hence the structure of an NGO is vital if it is to facilitate the involvement of stakeholders/members and the effective management of the organization.

**The STRUCTURE of an organization defines how individuals and groups relate to one another within the organization and in particular who makes which decisions.**

The structures of many organizations develop over time and as an organization changes it may be necessary to review the structures periodically to ensure they still best meet the needs of the organization. Good managers can be frustrated by a poor structure which limits their ability to manage. Volunteers can be equally frustrated by a structure that prevents their effective participation. So structure and management go hand in hand and support one another.

#### .... so what do we mean by management?

- ◆ the brownie choosing which badge to work on first
- ◆ the patrol leader deciding who should do what in an activity
- ◆ the leader deciding how much subscriptions to charge the girls in her unit



These are all 'management' decisions taken regularly within Girl Guiding/Girl Scouting. We may not see them in this light as management has traditionally been seen to be part of the culture of business and therefore not appropriate in value-led organizations. It is therefore tempting to abandon the word itself, however, in doing that a very useful concept is lost. The dictionary defines management as 'organising, conducting, taking charge of or succeeding in one's aim'.

**Management is the process by which we achieve a task and often includes decisions about how resources are used (people, money, time etc).**

We 'manage' our own lives, our families and our money without even thinking about it. We take decisions about how to use our time which have implications for what we do and for other people. In general we do not lack management experience - however, most of us lack the skills to manage well. The difference between good and poor management is the better use of time, money or other resources.

In a voluntary organization such as Girl Guiding/Girl Scouting, management is crucial as our organizations are characterised by limited resources. Time is precious as it is usually the time of volunteers and money is scarce as it is often donated. Management is therefore absolutely critical for us - some would say more critical than for the commercial sector!

### Structure and Management and WAGGGS

WAGGGS has already addressed these questions related to structure and management in several documents:

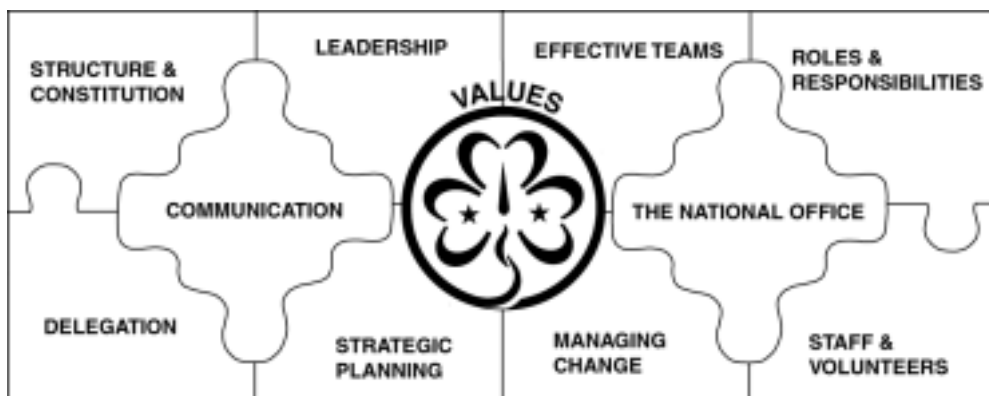
- ◆ Self-assessment document - this deals with all aspects of the life of an organization and one section focuses on Structure and Management. That part has been used as the basis for much of this document.
- ◆ How To Become A Member of WAGGGS.
- ◆ How To Write A Constitution.

WAGGGS Policy on Structure and Management of Associations explain WAGGGS' policy in this area. These Guidelines are designed to assist in the implementation of the policy.

### Structure and Management: A jigsaw puzzle!!

The topic of 'structure and management' has many different areas which all seem to be connected. It's like a jigsaw puzzle!! In order to have the best possible structure and management, you need to 'get' all the pieces and make them fit together!

In these Guidelines we look at the areas of :



- ◆ Values in Management
- ◆ Structure and Constitutions
- ◆ Leadership in the Association
- ◆ Developing Effective Teams
- ◆ Roles and Responsibilities
- ◆ Staff and Volunteers
- ◆ The National Office

These areas are effectively dealt with not only through relevant knowledge and experience but also by using certain skills particularly relevant to the theme of management. Therefore, to support the development of these areas, the second part of the Guidelines covers the following management skills:

- ◆ Communication in Management
- ◆ Delegation
- ◆ Introduction to Strategic Planning
- ◆ Managing Change
- ◆ Monitoring and Evaluation

Throughout these Guidelines you will see links between sections - where the different pieces of the Structure and Management jigsaw puzzle fit together.

### Management in Girl Guiding/Girl Scouting - a special focus on values

The central piece of the WAGGGS Structure and Management jigsaw puzzle is the Values of the movement.

The business sector has taken the lead in management ideas and approaches but these cannot be imported unchanged into voluntary organizations because there are major differences. Management is defined by 'critical issues' and these will differ greatly - for a business the critical issue will usually be profit while for an NGO it will be the values of the organization, usually reflected in the Mission. Hence a different approach is needed. A well-managed NGO is NOT one that is run like a business, but one that is well-managed within its own context.

### The following are some of the characteristics of Girl Guide/Girl Scout Associations which make managing them a challenge:

- ◆ Values have to be cherished
- ◆ Objectives are often vague, e.g. what does it mean to achieve our Mission?
- ◆ Performance is often hard to monitor, e.g. how do we know if we have achieved our Mission?
- ◆ Organizations are equally accountable to many stakeholders i.e. leaders, members, funders, parents etc all have a different stake and yet they have different views on priorities.
- ◆ Volunteerism is an essential ingredient

It is hoped that this document will provide some pointers as to how Girl Guide/Girl Scout Associations can develop a management approach that is appropriate for them and which can best meet their members' needs.

(see section on 'Values in Management')



## Using these Guidelines

These Guidelines aim to provide a framework within which Girl Guide/Girl Scout Associations can review their own Structure and Management and identify areas for change and improvement. This document provides a starting point for discussion. Many resources exist at national/regional/world level that could be used to follow up particular areas or in order to develop particular tools.

Each section starts with an short summary to explain the main issues covered in that section.

The aim of each section is also specified - what action/reflection the section aims to provoke in the Association reading the Guidelines in order to support further development in that area of structure and management. This should be of use to trainers using the Guidelines as a resource base for training on Structure and Management, as well as to individual readers, councils etc using the Guidelines independently.

Why not allocate some time at a National Council/Board meeting in order to consider the area of Structure and Management? You could ask a trainer to study these Guidelines and to take you through them together. Then identify one or two specific areas you would like to work further on in the coming year.



## Values in Management

*Girl Guiding/Girl Scouting Associations are values-based organizations. This influences every area of their work and the way they work. Some common values will link the members of the organization, but differences in interpretation or in ways to put basic values into practice can lead to conflict. We need to learn to use our values base as a stimulus and a strength.*

### Aim:

To consider:

- ◆ the values of our Organization
- ◆ the relationship between individual and organizational values
- ◆ values in different aspects of management of the organization
- ◆ to understand how a higher awareness of values in management can improve our Associations.

### Girl Guiding/Girl Scouting Values

We belong to a movement for whom values are essential, but it is useful to take some time to define what this really means.

Values can be defined as the moral principles and beliefs that an individual or group (organization) recognise as important and try to live by.

The 'universal' values of the Girl Guide / Girl Scout Movement are called the Fundamental Principles. They were conceived by Baden-Powell and are 'packaged' in the Promise and Law.

When working with the Association's membership, the values of the Association are found throughout the educational programme and each member makes her Promise as a commitment to the common values and ideals. However, how to work with values in the management of an Association, with adult volunteers, committees, in relationships with staff and other organizations is not so clear.

Think about the values which are important in your Association as embodied in the Promise and Law. Is it easy to apply these in the management of your Association?  
Discuss what other factors affect the use of these values in management processes.

Thinking further...

Are there other values you find important to recognise which are more specific to management in your Association?  
How do you share these values within your teams/staff etc?

### Using Values in practice

Any organization or individual first needs to identify the values which are considered important in order to use them to give direction to the work being done. In Girl Guiding/Girl Scouting the values and aspirations of the organization as a whole is of vital importance.



We are united by a common set of beliefs and convictions concerning the philosophy of what we are trying to achieve to support the personal development of girls and young women. In the best situation these values translate into a mission and set of goals for the organization to work towards. They are the driving force which works together with other elements of the organization's make up to achieve a great performance.

When planning at any level, the values we hold are an important factor in determining what we are aiming for.

It is important that our values are visible - that our members and those external to the Movement can see 'where we are coming from'. This is necessary for mutual understanding and communication, and to reinforce the credibility of the organization.

Your Association may have some of the following which help to make visible some of our values and what they inspire us to work towards:

- Mission statement
- Vision statement
- Short term/long term goals
- Code of conduct
- Statements on specific issues

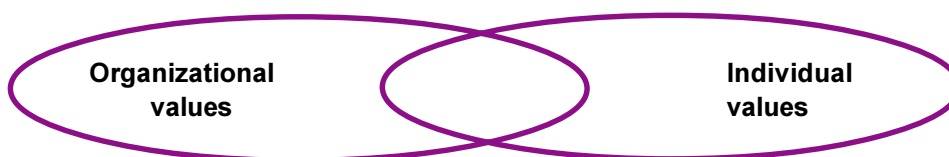
### Values versus traditions

It can be argued that in Girl Guiding/Girl Scouting we sometimes get confused between values and traditions. The values which determine what Girl Guiding/Girl Scouting is about have a wide appeal and proven to last. However, we still need from time to time to check the relevance of the value base for the society in which we operate. Perhaps the language used to talk about our values needs to change. Maybe changes in society mean that the understanding of a particular value needs to be 'updated'.

In some cases the traditions i.e. the 'Guiding way' of doing things can sometimes be mistaken as being part of the value base. The world is constantly changing and the way that Girl Guiding/Girl Scouting operates needs to change too, in response to the needs of the members i.e. the girls and the unit leaders. Traditions are great when they embody values which are still relevant and needed. We should regularly check our motivation for the things we do and the way we do them, to make sure we are still working from the necessary values base.

### Organizational values v Individual values

It is unlikely that any one person's individual values will coincide entirely with the values of the organization. Of course it is likely each member will identify closely with the organizational values, because this is a prime element of a Girl Guide/Girl Scout organization. But personal sets of values are also influenced by individual situations, by the cultural, educational, economic, spiritual, political background of each individual. This situation can be illustrated by the following diagram:



Each individual will have a different area of 'overlap' with the organizational values. Their scale of values i.e. which values they hold in highest priority will also differ. As a result, there will be some difference between individuals' positions and this can lead to conflict of opinion.

When conflict arises, it is important to try to identify if the source is in the underlying values held by individuals as this is one of the most difficult areas to reconcile. This problem can be more extreme in organizations such as Girl Guide/Girl Scout Associations where values are used to give direction to all activities of the organization. A commercial enterprise on the other hand may be united under its main goal of profit making and therefore not experience such 'values conflicts' which can sometimes become very emotional. Of course an organization always experiences greatest commitment and productivity when the individual values coincide as closely as possible with the organizational values.

When experiencing conflict based on values it is important to:

- recognise and respect difference of opinion
- ensure good communication, active listening to each other
- focus on the common values held to keep the organizational strength

WAGGGS' Core Values include:

**PROGRESSIVE**

**RECOGNITION OF A HIGHER BEING/SPIRITUAL DIMENSION**

**OPEN TO ALL, SELF-GOVERNING, DEMOCRACY**

**GLOBAL COMMITMENT**

**RESPONSIBILITY TO OTHERS AND COMMUNITY**

**EQUAL OPPORTUNITIES**

**RESPECT, TOLERANCE**

**SERVICE**

**LOYALTY**

**INTEGRITY**

**VOLUNTARY COMMITMENT**

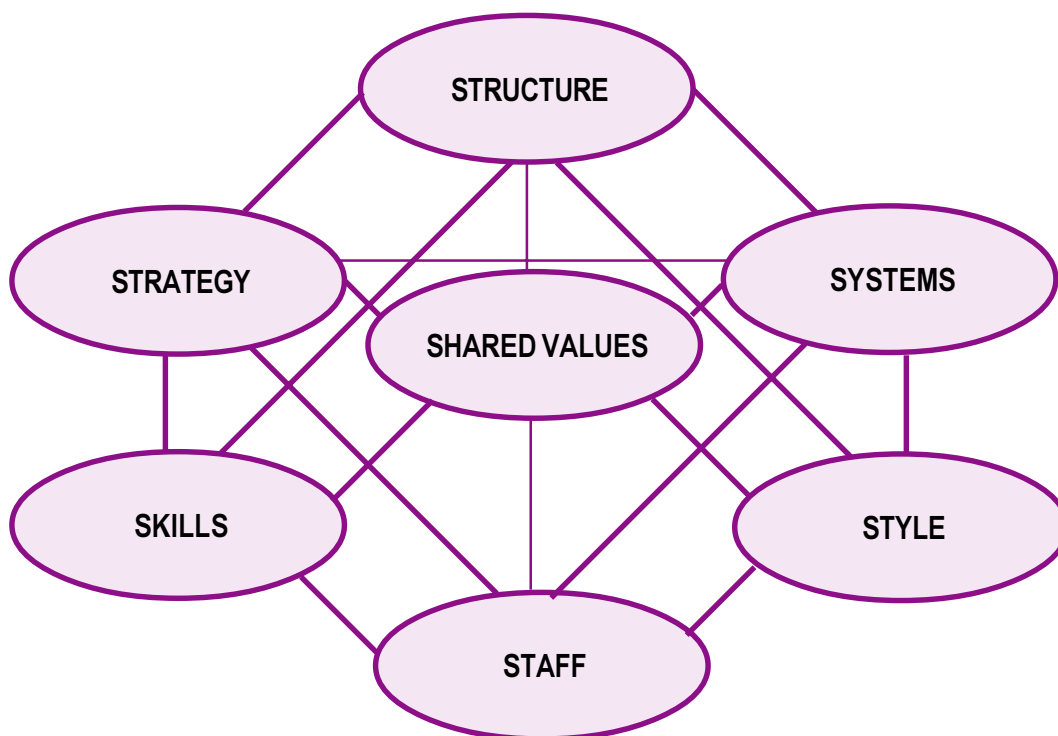
**ENVIRONMENTALLY CONSCIOUS**



## Values in different aspects of management

If we are to use our values actively and consciously in the management of our Associations, we need to take a closer look at how they relate to different aspects of management. Henry Mintzberg and others developed the idea of the framework presented below as a way of identifying the 'critical elements' of organizations. It shows how all the elements of management are linked to each other and to the central core of the shared values of the organization.

**Mintzberg's framework of critical elements of organizations**



Having looked at shared values in previous sections, we can now look at the other elements of the organization and its management, and how they relate to the values which are central to the organization.

### Structure

The structure of the organization is an important feature of the framework. It represents the channels of communication and decision making and how these are set up will have an impact on their effectiveness. (see Structure and Constitution)

What values determine the development of your Association's structure?

Do you use your structure appropriately to support the principles of democracy, fair representation etc?

### Strategy

Strategy here means the actions that the organization plans in response to (or in anticipation of) changes to the external environment. It might be government legislation or competition from another youth organization. It might also be the growth in membership or a decline in numbers in one age section. Developing strategy means working out what action to take to address these problems and at the same time strengthening its position





as a leading supplier of non-formal education for girls and young women. It is very important that the National Board develop strategies that are co-ordinated and achievable. These should be based on the values and aims of the organization, and that priorities are attached so that resources and energy can be directed accordingly. Strategy cannot be developed or carried out effectively without the other elements of organization shown in the framework diagram.

## Systems

These are all the procedures, formal and informal that are at work in the organization. Girl Guiding/Girl Scouting has lots of internal systems and procedures relating to programme, training, meetings, decision making, elections, budgeting and reporting. These are strengths where they are clear and simple to understand and where they have an obvious benefit. They can provide a useful framework for an organization which is small and growing. It is more difficult to retain clarity of purpose for internal procedures when organizations are large. Sometimes the systems can seem like a goal in themselves! Systems are also changeable - it may be tempting to do it 'the way we have always done it' but for efficiency and harmony we should ensure that the systems used are relevant to needs.

Systems should support the recognised values base and make it easier for our values and aims to be translated into action.

## Style

The style of an organization is reflected in the actions of its leaders and managers. This is an area where personal values can show very strongly.

Organizational values need to be clearly defined in advance to give a framework for management style and to enable the individual to be guided by them.

In common with many organizations run largely by volunteers, Girl Guide/Girl Scout Associations need to pay special attention to bringing their management style up to date. For example, an area of action that could be addressed are the style of organising and chairing meetings which are sometimes heavily influenced by tradition.

You may be able to identify other examples in the area of management style which need to be made more relevant, better connected to other elements of the organization and its management, or more closely rooted in the shared values base.

(see also section on 'Leadership in the Association')

Sometimes values-based organizations have a wrong focus on values in their management style and reduce their efficiency. For example the Association may keep a member of staff or volunteer who is not suitable for the job because they are 'too nice' to encourage them to move on. This will lead to dissatisfaction among other volunteers and staff and the work will not be completed effectively. Keep in mind the complete picture of values. In order to effectively implement the Mission it is necessary that work is done efficiently and to professional standards.

## Staff

In this context the management term 'staff' means the adult volunteers who are the workforce of the organization. For some Associations there is another body of staff who are the paid employees. The theory is relevant to both groups of people. The role of the staff in making the organization effective is crucial. It has been observed that organizations which



perform well put a strong emphasis on the 'people' side of their work. In a voluntary organization this is especially important. We need to have well adjusted and well motivated adults throughout the organization in order to make Girl Guiding/Girl Scouting meaningful for girls and young women. (See section on 'Staff and Volunteers').

The personal development of staff through training is also important.

To have a staff which is committed to the organization it is important to keep the values of the organization clear for both volunteers and paid staff. This is a topic which can be returned to regularly to see how the actual work they are carrying out is related to the organization's values base.

## Skills

The range of skills within an organization needs to fit the purpose as times change. For example the skills of administration have been revolutionised by information technology and it may be that the skills and systems within an organization need to change. Our changing ways of communication may also call for new skills. In some countries the changing nature of competition for young people's time means that we need new skills in promoting Girl Guiding/Girl Scouting or that we need to describe ourselves using different language to the outside world. Having the right set of skills for the organization is important as well as recognising that the skills that are needed will change over time.

Acquisition of skills should be linked to the values involved in the application of the new skills. Keep a clear understanding of the skills needed to achieve the goals you have based upon your values.

From the framework diagram it can be seen that the relationship between the elements of any organization will influence its success. There is no obvious order of importance of the elements. But they are all interconnected and linked to the shared values of the organization.

When considering change to any of the elements, the effect on the framework should be taken into account, as should the ongoing relationship to the shared values base.

## Values and decision making

### Consultation

The process of decision making in Girl Guiding/Girl Scouting reflects a democratic tradition. The value base promotes the concept of involvement of all members in determining the way forward for the organization. This may be reflected in the process of elections for regional and national leaders or in the process of consultation with the membership about proposals for change .

The way that consultation is carried out reflects the level of importance attached to this value in Girl Guiding/Girl Scouting. It can be found within General assemblies or at special meetings and events, or can be carried out by a questionnaire issued through newsletters or magazines, or explored via discussions in local areas of the organization with a structured process for feedback to the national board. In the early stages of development an Association will look to consult the members on most items relating to the development of the organization.

For more established Associations the challenge lies in choosing which items to consult on and how to carry out effective consultation. This can be particularly sensitive when the organization needs to introduce fairly substantial change e.g. updating the words of the Promise and Law since this can be seen as a threat to the value base and mission.



## Consensus

This value base is also present within National Board meetings and this is partly why a consensus approach is the most comfortable way of making decisions in Girl Guiding/Girl Scouting organizations. The values of Girl Guiding/Girl Scouting are accepted by each individual who makes her Promise and the level of commitment to the organization is exceptionally high. Everyone will have a view on key areas of development for the organization and this will be reflected in the depth and length of discussions on proposals in the National Board and other committees. This is important as the wider membership will also have a range of opinions and views.

There may be a danger, however, that the whole picture of the organization is not always kept in mind. Sometimes there is an emotional element inside such debates stemming from the high personal commitment to the values. This can distort the rational view which may be needed especially when difficult decisions regarding change are needed.

## Final words

One of the strengths of Girl Guiding and Girl Scouting is the value base on which it stands. It connects all members and can be very emotive. It is therefore important that managers recognise this and that it is taken into consideration in all areas of work and decision making.



## Structure and Constitution

*Every unit of organization develops its own structure, whether it is a simple case of parents making decisions on behalf of their children or whether it involves many hundreds of people at various different levels in a large business. The structure defines how people (both individuals and groups) relate to one another within the organization, for example, the Girl Guide/Girl Scout Association. A Constitution can then be used to define that structure on paper. The structure directly affects how an organization can function so it is very important to take time to get it right.*

### Aim

To think through whether the structure of our Association meets the needs of our Association today and to decide on any changes that are required to improve it.

### How is the structure of an organization determined?

Often we don't know how the structure of an organization came into existence. It is usually a combination of historical factors and constraints of human and other resources. But we can change the structure - it is not fixed - we need to remember it is only there to help us to work efficiently.

So although we define the structure of our organization, we need to recognise that it will be influenced by several factors including:

- ◆ How large is the organization?
- ◆ Is the organization making decisions on a democratic basis?
- ◆ Does the philosophy of the organization support a 'top-down' or 'bottom-up' approach?
- ◆ Are human/financial resources limited?
- ◆ How effective are the means of communication available?

Girl Guide/Girl Scout Associations are based on particular values which influence the structure i.e. Democracy and the Mission, and the needs of the girls should define the organization's work. (see Values in Management) Within Girl Guide/Girl Scout Associations there will be differences in structure due to other differences or influences.

### Why change the structure?

It is important to periodically review your structure to ensure it is still meeting the needs of the organization. This process should not occur too often nor occupy too many resources - however, it is worth putting time and energy into.

Gather together a group of people to do this who include people involved in the Association in different ways e.g. National Board Members, those working at the regional level, young women etc.

You may like to start by considering the following questions:

1. Has the organization changed in size since the current structure was established? i.e., has the organization grown or decreased in size or has the membership shifted geographically?
2. Has the environment in which the organization is operating changed significantly since the current structure was established?



i.e., have there been major social/political changes affecting your membership?  
Have communication methods opened up new opportunities?

3. Is the structure meeting the current needs of membership, i.e., do we have enough people to fill the different positions? (Note: this may not only be related to structure) Are some groups/individuals responsible for large areas while others have much less?

Some of these questions are easy to answer while others require some research and wider consultation. The answers are very important as they will enable you to decide whether change is required and if so to what extent.

### Making Structural Change: Thinking Creatively about Structure

Having established that you could improve your structure you then need to work out how to go about it. It is easy to get trapped into making small adjustments which make little or no impact, rather than looking more widely at changes that could be made. It can be helpful to bring people in who are not already involved to give a fresh view, invite people from other NGOs with different structures and ask some young people to be involved who are less concerned about maintaining the 'status quo'. Maybe give a group the responsibility for the Structural Changes and ask them to come back with several options - it will then be important to consider whether changing the structure will really benefit the organization as a whole.

This group may like to consider the following questions:

- ◆ What are the objectives of the organization and how do they relate to the Mission? (This work on strategic planning is necessary before changing the structure (see section on 'Management Skills') you may decide that you will need to work on that first)
- ◆ Does our structure support those objectives e.g. is one group of people/committee responsible for several while others are only working on peripheral issues?
- ◆ Is there an overlap or gap between different groups/committees?
- ◆ How do we ensure that one group e.g. National Board has an overview of the work of the Association?

*NOTE: The structure of an organization is a tool to achieve the Mission - it is not an end in itself and should never be seen in this light.*

### Finalising a New Structure

It is a good exercise to have a diagram of a new structure in order to see how the different elements inter-relate. Use it to check that the structure is:

- simple → Will people understand it?
- logical → Does it make sense?
- workable → Will it work?

### Where does the Constitution come in?

**The Constitution of an NGO defines the legal parameters within which the organization operates. It defines the aims of the organization, the membership and some aspects of the structure.**

The Constitution should only be changed when the organization makes major changes so it is often better to explain the structure of the organization in the Bye-laws. These will be changed more frequently and do not affect the fundamental principles of the organization.



The Constitution is an important tool for any organization. It is not a document to leave on the shelf but should be referred to regularly to ensure that the organization is operating in line with its Fundamental Principles.

- Are key position holders and members familiar with your Constitution?
- Does your Constitution define what your organisation is and does TODAY?

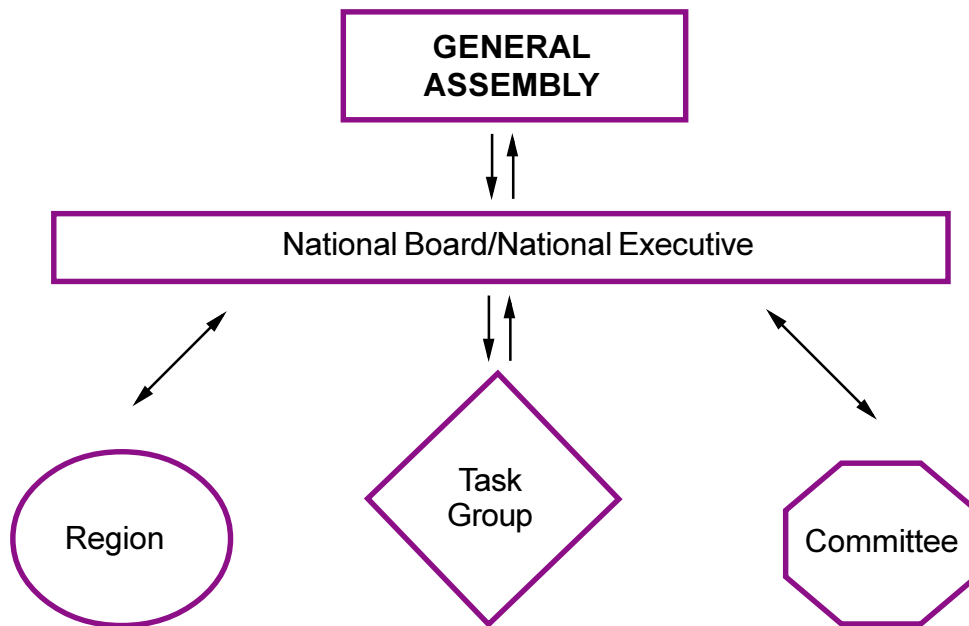
WAGGGS has produced some materials called 'How to write a Constitution' and these can be requested from the World Bureau.

### What is a typical structure within an Association?

The structure of most Girl Guide/Girl Scout Associations would include the following:

- General Assembly
- National Board/National Executive - policy/decision-making, implementing body
- Committees/Task Teams
- Regions/Provinces - Districts/Company/Unit

The General Assembly is the highest decision-making body. The Committees/Task Teams and Regions/Provinces report to the National Board which is accountable to the General Assembly:



### The Next Step: Making the Structure Work

Once you have decided on the structure, you need to make it work. This requires:

- clear definitions of what each person/group should do (see 'Roles and Responsibilities')
- the right people to take on the different jobs (see 'Staff and Volunteers')
- good communication between different groups (see 'Communication')



## Leadership in the Association

*The leaders of an organization (for example National Board or other key position holders) guide the organization in its growth and manage the way it works. An appropriate leadership style is essential to ensure a well-run democratic organization. It is important to find the right persons for positions of leadership in the Association and to plan for changes in leadership.*

### Aims:

- To think about requirements for effective leadership - (are they present in your Association?)
- To consider the role of leaders during the life-span of an Association (how does this relate to your Association?)
- To consider leadership styles (examine leadership style in your own Association and identify if it is appropriate/should changes be made for efficient management?)
- To learn about the importance and mechanism of succession planning in leadership (do you need new strategies to approach this in your Association?)

### Effective leadership

The leadership of the Association should contain a balance of individual leaders to present a range of qualities and skills. The leadership has the responsibility to ensure the organization works to fulfil its mission through appropriate ways of work.

### Effective leadership

- ◆ bases the activity of the organization on the achievement of the mission
- ◆ preserves, uses and promotes the values of the organization
- ◆ operates through democratic processes regardless of the size of the organization. (This ensures the leadership is representative of the association and has the support of the members necessary to work effectively).
- ◆ uses skills such as delegation wisely and visibly
- ◆ listens to the members of the organization, communicates openly to all levels and encourages participation of young women in leadership and decision making

The following characteristics are offered as basic qualities present in a good leader:

<b>Vision</b>	a sense of the direction the organization is going in and what it hopes to achieve
<b>Passion</b>	a living commitment to the values and philosophy of what the whole organization is about
<b>Integrity</b>	a clear self knowledge of own strengths and weaknesses and the maturity and ability to work honestly with other people
<b>Trust</b>	this a product of leadership, it can not be acquired it must be earned through action but lends great strength in leadership.
<b>Curiosity</b>	an openness which allows questioning of everything and is reflected in a willingness to take risks.

Leadership's role is to ensure that the mission of the organization is implemented. However, this implementation is affected by the culture of the organization i.e. the informal way in which the organization works especially in its approach to developments and change. The culture is not dependant on the structure/ nationality/size/status of the Association but is linked to the approach to work and attitude to particular issues and concerns which has largely been defined by the leadership at different stages.



It can be argued that in newer Associations where the culture is less established there is more freedom and space to grow and adapt than in more established Associations where the culture of the organization is influencing very deeply how it works. The role of leaders in defining the culture of the organization is certainly significant in the first stages of growth. However, even in mature Associations the leadership can still influence the culture of the organization - by power of personality, values and attitude and by setting of priorities etc. The leader(s) can cause a change in approach or attitude of the whole Association. This can happen without making management changes to ways of work or established systems.

- ◆ Think about the culture of your own Association

Is there a culture of

- ◆ welcoming diversity of opinion?
- ◆ being open to change?
- ◆ encouraging the active participation of young women in leadership?
- ◆ examining the weaknesses in the Association and addressing problems strategically?
- ◆ ensuring all the qualities noted under 'Effective leadership' are addressed?

The leader is assisted in fulfilling her role by having a clearly defined job description (see *Roles and Responsibilities/Job Descriptions*), appropriate skills for the job and resources (time, material support) to enable her to carry out her work.

## Changing role of leaders during life-span of Associations

It is useful to reflect on the role of leaders in an Association as it develops

### During the early development of an Association:

- The leaders
- are visionary
  - are a collection of individuals united by a common set of beliefs
  - have a shared ideal for what Girl Guiding/Girl Scouting can bring in their country
  - are strong communicators, persuade others, inspire others
  - are influential in establishing norms of behaviour, values of organization

### As the Association develops:

- The leaders
- are people with vision
  - set goals for the organization
  - are role models, demonstrate values by personal example

### As the Association reaches maturity:

- The leaders
- become managers
  - work with strategies to achieve certain goals
  - work on maintaining situation of organization

### The Association may go beyond maturity and reach the a danger point of 'change or die'

- The leaders
- are managers
  - focus only on control elements to maintain organization's ways of work
  - do not focus on vision and diversity

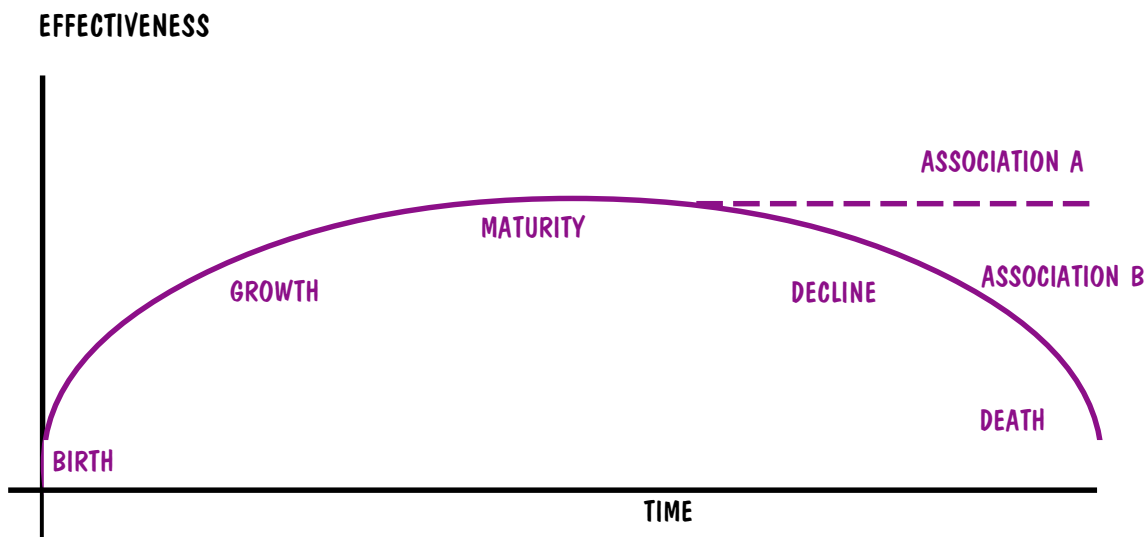
An organization reaching this stage needs to introduce new leaders who once more have vision. They must be willing to change ways of work, culture and traditions of the organization. This does not have to threaten the core values and belief of the organization.





If the organization does not change as the world around it changes, then the organization will no longer be relevant and useful. It stops being effective, loses support and members. In other words it must change or die!

The diagram below shows possible 'life cycles' of organizations, measuring level of effectiveness through time.



- A) **Association A** grew to maturity and maintained a healthy dynamic Association. Even when complicated systems have been established, its leadership is open to change. The leaders are responsive to the world around them and keen to make changes which ensure the Association fulfils its mission and works through its core values in ways which are relevant and appropriate. The leaders have the skills and the vision to keep the organization moving and strong.
- B) **Association B** may have had good leadership with strong management skills. However, as a mature organization they concentrated more on maintaining their established systems and ways of work than on responding to the need to continue encouraging diversity and change. As a mature organization they lost their flexibility and therefore over time the organization failed.

Having examined the comments above,

- identify where your Association is in the life cycle shown.
- consider what changes in approach and leadership may need to be made to ensure the Association's health and survival

## Leadership styles

It is clear that an organization needs different types of leaders at different times in its history. Leadership style is an important factor in how an organization is run.

There are many ways to lead a group or an organization, and leadership depends much more on the way you behave than on the position you hold.



Consider the following leadership styles:

The **AUTOCRAT** derives her absolute power from her position combined with strong personality. She alone is in firm control and commands obedience.

*Source of power:* herself  
*Method of communication:* orders and directives

The **AUTHORITARIAN** has a less absolute style of leadership. She also bears in mind the system (or higher leader) from whom she gets her power. Although she also leads by command, she realises she is dependent on the structure she is part of to carry out her commands.

*Source of power:* position  
*Method of communication:* orders and directives

The **BUREAUCRAT** does not have absolute power. She is part of the system or structure she exists to serve and sees her achievements in terms of fulfilling the requirements of the system. She explains her orders in terms of rules and regulations that need to be obeyed.

*Source of power:* existing system and its rules  
*Method of communication:* explains (how to carry out rules)

'**LAISSEZ-FAIRE**' leadership gives a situation where the activity of the organization is run by neither the leader, nor the members. The leader does not communicate or try to control unless threatened. There will be times when groups of individuals take over some role of leadership to compensate for the inactivity of the leader.

*Source of power:* no-one  
*Method of communication:* none

The **DEMOCRAT** uses majority vote/opinion as her basis of power and decisions, with the understanding that the group / organization she leads is therefore deciding its own policy and destiny. The leader administers the process of working within the limits set by the majority's opinion and co-ordinates the discussions within this area.

*Source of power:* majority  
*Method of communication:* discusses

**PARTICIPATIVE** leadership has many similarities to democratic leadership. However, individuals (not just the majority) can have more influence on the decisions made and directions chosen. Within defined limits, individual opinions are heard.

*Source of power:* collective  
*Method of communication:* joint determination

Of course these are rather theoretical profiles of leadership styles - in reality you may be able to identify elements from more than one profile in a single leader/group in your Association. You will be able to think of many aspects of your Association that depend upon the leadership styles employed - unity, flexibility, image and external relations, attention to detail, attractiveness to new people etc etc.

- Identify leadership style(s) in your Association. Generally, is it appropriate/effective?
- Consider the balance of leadership styles at different levels of your Association- is there flexibility to cope with changing situations? Are any changes of leadership style needed?



## Succession planning

The management of your Association is an ongoing process: the leadership should have fixed terms of office according to the constitution and will therefore change regularly.

It is therefore essential to plan the transfer of responsibility in order to ensure continuity in the management process. This often forgotten process, known as Succession Planning, is vital to the effective management of any organization.

### Why is succession planning important?

In Girl Guide/Girl Scout Associations key volunteers are elected to take up particular positions of responsibility for a fixed period. This ensures that different people get a chance to take on different roles and that the positions of highest responsibility / workload are shared between different individuals over time. In most organizations the term of office will be an average of three years - this means that each year around one third of the decision-makers will change. This is very high - however, it is predictable and so can be managed. Progress made in an organization is frequently lost during the process of handing over to new personnel and so failure to manage this process results in a less effective organization.

#### Exercise

You can demonstrate key points about succession planning by conducting an exercise in which teams are formed to complete a fictional task. While doing the task, remove one or two key members from the team. You can also provide interested observers who could be asked to help with the task. After a period of time, stop the exercise. Ask team members about their observations. As feedback you will probably get a list containing some of the following comments:

### Importance of Succession Planning/What Happens When We Do Not Do It! (a sample list)

- ◆ "our productivity declined when we lost key people from the team; it took time to recover"
- ◆ "we had to change our strategy when we lost people"
- ◆ "new people came in with new skills that were not necessarily the ones that we were looking for or the ones we had lost"
- ◆ "we did not think of asking others to help us"
- ◆ "we did not want to take the time to ask others to help or to train them to do the work because we were too busy completing the work ourselves"
- ◆ "when some people offered to help we mistrusted their motives"
- ◆ "we lost sight of the goal and worked on aspects that were not necessary but that we found were interesting"
- ◆ "some people did not have jobs to do and found it difficult to participate; we did not take the time to be sure all of the team understood the job requirement"

### Whose responsibility is succession planning?

The National Board, as the main implementing body, is responsible for the day-to-day management of the Association. Members of a National Board will often consider that when their term of office is over they have finished their work. If, however, there is not a qualified person to take over from them then their work is not complete and their achievements and work areas is put at risk. So it is part of the role of the National Board to ensure an ongoing supply of skilled people to carry on the work and development of the Association. This does not happen by accident! It requires planning.



## What are some of the Barriers to Succession Planning?

Key volunteers within Associations were asked why they felt they were poor at Succession Planning and the following appeared frequently as reasons:

- ◆ “we think no one else can do what we can do”
- ◆ “we presume people do not have enough time to take on new jobs or that they are not interested”
- ◆ “the job may require too much time for anyone to do it! “
- ◆ “we do not ask people to help”
- ◆ “we make assumptions (maybe wrong assumptions) about what people are interested in doing and what they are prepared to offer”
- ◆ “we have not clearly defined our needs and what we need people to do for us”
- ◆ “we frighten people by describing jobs that appear to be too large”
- ◆ “expectations may not be clear, either on the side of the organization or the volunteer”
- ◆ “we are not clear about what the profile is of the people we need to do specific jobs and therefore do not find the right person”
- ◆ “we do not have a plan that tells us when we will need a new person for a specific job”
- ◆ “we are too busy doing the job to plan for the next stage”

Does this sound familiar? If we are aware of some of these issues then we can begin to plan how to avoid them. The following are some ideas to consider:

### Staggering Terms of Office within Committees

Within a Committee or area of work it is vital that everyone does not change at the same time. However, often we establish a new Committee and appoint everyone at the same time for the same term of office. Three years later we will discover a problem as everyone's term finishes at the same time!! Or we may have several key positions changing in one year which cover different areas of work but which are so important that to change them all would result in instability within the organization. It is necessary to look at all the volunteer positions at the national level and consider the following factors:

- What is an appropriate term of office/number of years to serve in the position for your organization?
- Which positions can change at the same time? Which positions should not change at the same time?

Then establish a system which guarantees maximum stability and continuity. This principle may seem basic, but is often not applied broadly enough. It can be relevant not just to permanent committees, but also ad hoc structures, ongoing project groups etc.

### Developing Job Descriptions for Volunteer Positions

In order to identify suitable people to take on positions, it is vital to know what the job involves and what skills are needed. (See Roles and responsibilities)....

### Making a Succession Plan

Each Committee/Group/Volunteer should consider it part of her job to ensure there is a qualified successor to take over from her. When positions are elected it will be appropriate to encourage qualified candidates to stand in the election but when the position is appointed it may well be necessary to make an actual choice. So each person needs to



begin to identify appropriate 'successors' early on. Some successors may be able to take on some positions immediately while others may require training over a short or longer period. For example, if we need to identify a future treasurer and there is no-one suitable on the existing finance committee then it may be necessary to appoint someone to the finance committee who could be trained up to be treasurer in one or two years time. It is too late if it is left until the treasurer is leaving as the choice will then be between several unqualified people.

### Managing the Handover

The election/appointment of new people is not the end of the process. They will need help and support to work effectively in their new position and to fit into the relevant team. Make sure that a good transition between the outgoing and incoming people is arranged so no information/knowledge is lost. Ensure that the new person is quickly helped to feel part of the team. Then it will be possible for the organization to continue to grow and develop smoothly.

These principles apply to staff as well as volunteers.



## Developing Effective Teams

*Teamwork is an essential element of Girl Guiding/Girl Scouting and teams are found at all levels of the national association, from the patrol system to the national board and so on. The ability to form and manage effective teams is important in good management of an organization.*

### Aim:

To understand the process of how successful teams are developed and be able to apply it to teams within your own Association

### Teams in your Association

You will be able to identify a large number of different teams operating within your Association at any time. These may include:

- ◆ teams of girls, e.g. patrols
- ◆ teams as an element of Association's structure e.g. regional council, finance committee, national board
- ◆ teams operating in a particular work area on a particular level e.g. a training team
- ◆ teams formed for a specific task e.g. project group, group to write a handbook, group to run a national camp etc
- ◆ staff teams

In forming teams it is important to bear in mind the function of the team and therefore the characteristics and qualities required within that team. One person will not have all the required skills or be able to do all the work by herself - this is what teams are for!! The role of each member of the team should be considered individually..... then in total. Do you have the skills, resources and abilities present within the team to carry out the team's task?

Some teams will not change in their composition during their lifetime - having been formed, they carry out their task and having achieved their purpose the team is disbanded. This could be a project group for example.

Other teams will be more fluid - for example a National Board. The team unit (National Board) exists over a long period of time, but within that unit the members of the team change (according to their terms of office, for example). This will of course affect the dynamics of the team, the relationships within the team. Attention should be paid to teambuilding as an ongoing process in order to make the team as effective as possible.

### Teambuilding

Teambuilding is partly a natural process over time. As team members become familiar with each other with each other's style of work and qualities, patterns of relationships (or even a hierarchy) is established become established and the team develops a certain style as a group.

Teambuilding can also be supported and managed by specific teambuilding exercises. These are often unrelated to the work of the group, but facilitate people learning more about their own and other people's style of work and trying to 'fit' these together for greater ease of work and effectiveness. The key to teambuilding is remembering that teams are made of



individuals!! Teambuilding is a good chance to find out more about yourself as an individual and how that can be combined to best use with other people's character, styles and skills.

You may find it useful to use 'external facilitators' i.e. people outside of the team (trainers etc) to organise teambuilding exercises. They will be able to assist from an objective, 'neutral' point of view.

Teams will exist for different reasons and for varying lengths of time but you may see them experience similar processes over the course of their development. Understanding these processes and how to manage them can enhance the effectiveness of working with teams in your association.

Below some stages in team development / relationships are discussed. Most teams go through stages, at varying speeds and some reach a more advanced stage of maturity than others. It is important to remember that there is no 'right' or 'wrong' stage for a team to be at as there are always more possibilities for learning. The model includes suggested action the team can take to assist it to move on to the next stage.

**THE UNDERDEVELOPED TEAM (Forming)**

- Feelings not dealt with
- No shared understanding
- Conforms to established norm
- No one challenges the 'status quo'
- Poor listening
- Weaknesses covered up
- Unclear objectives
- Low improvement
- Bureaucracy
- Leader takes most decisions

This represents the 'under developed' team which could also be a new team which has just been put together for a project. The team members are initially cautious with each other as they do not know each other well. What is expected of them may also be unclear.

The lack of shared understanding / vision of the team's task means that the members stick to traditional ways of work of the organization to be 'safe'. Most decisions will be taken by the leader as members are reluctant to 'cause problems'. Members are not keen to share their feelings about the work and any weakness will be 'hidden'. The progress of the team and its task will be slow.

*Action to support team development*

- Develop relationships by introductory and teambuilding exercises.
- Be open with team members about the group and about the task.
- Encourage consideration of team strengths and weaknesses in order to build a balanced team.
- Value all members of the team for the part they can play
- Encourage sharing of concerns without fear of criticism
- Try to make team activities enjoyable!!

**THE EXPERIMENTING TEAM (Storming)**

- Experimentation
- Risky issues debated
- Wider options considered
- Personal feelings raised
- Increased listening
- Team working reviewed

The team members begin to feel more united. Individuals more confident about their own contribution to the group and can take risks with raising issues that need to be and discussed. The group can question its objectives until all members share a common understanding of the group's purpose. The group is rather inward looking as it listens more closely to the contribution of its members and works out some of the difference in views that may be held. The group begins to take risks in its work to find solutions to the problems the project presents.



*Action to support team development*

- Encourage continued openness
- Allow conflicts to surface and deal with them positively
- Work on specific relationships between individuals where there are problems
- Encourage team to seek collective approach to problem solving
- Encourage self-evaluation by team of ways of work and results - this leads to more creative experimentation in working strategies

**THE CONSOLIDATING TEAM (Norming)**

- Experimentation
- Methodical working
- Agreed procedures
- Establish ground rules
- Meetings effective
- Problem-solving techniques the norm

The team is now confident in itself and a high degree of trust between members has developed. A methodical way of working has been adopted and a shared and systematic approach to problem solving is used. Meetings of the group are effective as everyone is committed to playing their part to get the job done and because everyone is clear what their role is. It is still possible for the team to experiment and try new things as they push forward with the work according to an agreed time scale.

*Actions to support team development*

- Improve problem solving skills further
- Develop decision-making strategies
- Ongoing evaluation of team performance and planning of improvements
- Celebrate team successes!

**THE MATURE TEAM (Performing)**

- Experimentation, consolidation and flexibility
- Appropriate leadership
- Maximum use of energy
- Principles considered
- Needs of individuals met
- Development a priority
- New members integrated

This team is a confident and competent group which is tolerant and supportive of its members and proud of the work it has achieved. It has a "collective" attitude and is less dependant on the leader. The team is prepared to be open and critical of itself and can review the results of the work looking to the future and make recommendations for improved success of any further work.

*Action to support team development*

- Experiment with style of group leadership (change leadership according to nature of task?)
- Encourage further informal communication between group members
- Clarify further values base of team
- Avoid inward-looking by examination of team by other parts of organization
- Build relationships/co-operation with other teams



## Some notes...

Of course each team will demonstrate its own version of these characteristics and some combination of the elements of behaviour will be present in all teams at all times. Important considerations include how will the team react if a new member joins. This may slow the team's development, especially if the additional person has been 'put' into the group rather than invited to join.

Attention should be paid to how the group will feel when their work reaches completion and their team is no longer needed. At this time it is important that the group is appropriately rewarded by the organization for its contribution and that continued informal contact is allowed.

Developing effective teams is a continuous and dynamic process.

Work with teams is also supported by clear definition of a team's task as well as the roles within the team (see Roles and responsibilities)

Some teams may be entirely volunteers (e.g. project group) , some entirely staff (e.g. office team), some volunteers supported by staff (e.g. national board?) These relationships should also be taken into account in developing effective teams. (see Staff and volunteers)

## ... into action!!

- Identify the different teams in your Association
- Invite someone to lead a team-building session for your National Board
- Train your trainers in teambuilding and offer training at all levels (local, regional...)
- What teambuilding strategies do other NGOs in your country use?





## Roles and Responsibilities ....or Who does what?

*For an organization to function well, everyone needs to know who is doing what, that is, what is their role. Often we assume this is just the name of their position e.g. chairman, but this can mean many different things to different people. It is therefore helpful to have job descriptions, both for individuals and for committees/groups which define what their role is and who they are accountable to.*

### Aim:

To understand the importance of clarity in roles and responsibilities within an Association for effective work, and consider some tools for achieving this.

It is not enough just to have skilled people in your organisation - you need skilled people who know exactly what their task is and how they interact with the other members of the organisation. Clarity of roles and responsibilities is an issue equally important for both staff and volunteers. It ensures everyone is clear, prevents overlap and helps us find the right people for different roles.

Who does what, i.e. the roles played by different staff and volunteers will naturally change over time. It is important to ensure that people know this is happening, and that all persons involved have up-to-date information about the real situation and interaction in the Association.,

### Job Descriptions

A Job description should be developed before the particular job begins and used to recruit suitable people

(if the roles are ongoing, the job descriptions should be reviewed regularly and all persons affected should be aware of changes).

When composing a job description for a particular role, decide who is in the best position to write it. If it is in a technical area e.g. finance then maybe an expert is required, otherwise it could be best for the group or committee defining the task to do it.

A Job description should include:

- ◆ the title of the job
  - ◆ the tasks
  - ◆ the time involved
  - ◆ the areas of responsibility
  - ◆ the relationships (who the person works with and who they work for)
  - ◆ the qualifications required (skills, knowledge and experience)
  - ◆ the training (which will be made available)
- Do all your key volunteer positions have appropriate, up-to-date job descriptions?
  - Do the job descriptions match the real work your staff / volunteers are doing?
  - How do you make sure your members know who does what (i.e. who they can ask which questions?)



## Terms of Reference

In a similar way, committees and working groups benefit from clear terms of reference. This is necessary in order that everyone understands the task of the committee/ group and the role it plays in the work of the organisation

Terms of reference can include:

- ◆ Aim and tasks of the group
- ◆ Who the group is responsible to
- ◆ If the group is permanent or for a fixed time
- ◆ Membership of the group/ committee
- ◆ Recommended frequency of meeting

## Preparing People for their Roles

With a clear job description, (/ terms of reference) it is easier to find the right person for the task. Circulate the job description where you think you are likely to find the person required. But also make efforts to share it as widely as realistic and as your resources allow. We are often tempted to consider only people we know which excludes many qualified people. Think wide!!

Having found the right person for a role, you then need to ensure they can carry out the role effectively. This means:

- ◆ briefing them on their area of work
- ◆ introducing them to those they will work with
- ◆ providing any training required
- ◆ reviewing their performance against the job description

## Evaluating Performance

It is important for the satisfaction of individuals and for the effectiveness of the Association to evaluate work done. This means monitoring (during the term of office) and evaluating (at the end) the work of committees and individuals against the objectives set in the Job Description. This helps us to know if the person needs more support or training to fulfil the role or whether the objectives are unrealistic. It should be a supportive and not a threatening process carried out in a co-operative manner.

### **BUT.....Some Common Statements about Roles**

#### **1. “The organization is very small and there are not enough volunteers to do all the work”**

It is important that the plans of the organization take into account the resources available to it. The number and availability of volunteers is an important source to consider. However, it is also necessary to be sure that the work is not done just to fulfil an unnecessary role. The members of a small organization are able to communicate much more easily than a large organization. It would not be so necessary to have a very formal structure with as many roles as a larger organization.

In all organisations, but especially smaller ones it is also important to prioritise as it may not be possible to do everything at the same time.

#### **2. “Even though we try, some of the work seems to be either not done or ‘someone else’ was supposed to do it”**

Having clear Job Descriptions is the first step, but there may still be work not covered. Try the following at your National Board Meeting:



- ◆ brainstorm with everyone what are all aspects of the work of the organization -think of everything, from cleaning the national headquarters to networking with government and other NGOs
- ◆ group these activities under the following headings (structure and management, finance, relationship to society, training, educational programme, membership)
- ◆ identify any activities not listed
- ◆ identify who is responsible for activities under these headings
- ◆ ask
  - is there duplication
  - is the work appropriate to the objectives of the organization
  - is the work necessary to further the objectives
  - can any of the work be carried out differently

**3. “We can never find people for certain roles so the same people stay for years.”**

Terms of office are NOT optional and we must work harder to find new people. Often if there is someone doing the job we don't bother to look for anyone else and new people can be put off by assuming they are not welcome. We need to ask if we have advertised the job widely enough.... if we have, then maybe the job is unrealistic and needs to be reconsidered.

It is dangerous for the health of an organisation if the same people remain in the same positions for long periods of time. They may be skilled at their work but the organisation still needs to find new people to fulfil its obligation to operate democratically, and to bring new ideas and new approaches which are the key to a living organisation.



## Staff and Volunteers

*One of the unique aspects of Girl Guide/Girl Scout Associations is that their human resources are provided by a mixture of paid staff and volunteers. The proportion of each will vary from Association to Association. Many have only volunteers while others rely heavily on paid staff for their day-to-day operation. This combination of staff and volunteers creates both opportunities and challenges:*

- *The pool of expertise is wide and many different skills can be available*
- *A larger number of people will be involved each often giving a small amount of time*
- *There may well be parallel management structures of volunteers and staff*
- *Volunteers have traditionally been more challenging to manage than staff because the expectations/job descriptions are often unclear*

### Aims:

To consider how we manage human resources (staff and volunteers) and whether this could be done better.

To think through the implications and particular responsibilities of employing staff.

### What's the difference between Staff and Volunteers?

- ◆ The elected volunteers of an Association have the responsibility for the association, they will take responsibility for setting the strategic vision, direction of work, priorities and policies of the Association.
- ◆ The staff are employed to support them in the implementation of these strategies and decisions

This means that staff are usually carrying out decisions taken by the National Board or other bodies- although of course they will usually have input into those decisions, especially as a source of expertise and information.

The relationship between staff and volunteers is essential to the effective management of any NGO. A partnership between staff and volunteers will ensure that each is valued and can contribute effectively. Competition or lack of clarity in the different roles will result in conflict and inefficiency.

### Working with Staff: reviewing your approach

The Association may have been employing staff for a long period but as volunteers and staff change it is helpful to periodically review staffing practices. Consider the following questions:

- ◆ How often do you review the staffing structure - does this relate to changed priorities of the organization e.g. at the General Assembly?
- ◆ Are your staff generally happy or is there a high turnover?
- ◆ Who is responsible for staffing among the volunteers and how well does this work?
- ◆ Do staff and volunteers understand their respective roles?
- ◆ Are staff/volunteer expectations of each other clear on both sides?
- ◆ Are new volunteers briefed on working with staff and on any responsibilities they have in this area?
- ◆ Do you find it easy to recruit staff when you need to?



We must not assume that volunteer members of a National Board have experience of managing staff. It is a major responsibility and it may well be necessary to seek outside help to ensure it is done well. Often NGOs have common needs in this area and can work together to provide training and advice.

## Working with Staff: the first steps

*Associations which do not have a large experience of working with staff may find the following useful.*

Often an Association will start as a small volunteer-run Association and will then get to a stage when a staff member is appointed. This is a critical time to establish good volunteer/staff relationships and yet often an Association moves into this new phase of development without really considering the effect that having a staff member will have on the organization as a whole. Often the first staff member will have been involved as a volunteer and the temptation is to treat him/her as a full-time volunteer. However, employing staff brings responsibilities and the following may help the organization to fulfil those responsibilities:

- ◆ Spend time as a National Board preparing a job description (see 'Job Descriptions') - this is the time to clarify precisely the expectations of the new staff member. Decide also on the salary and other conditions of employment.
- ◆ Advertise the job (maybe within membership or locally) to ensure a choice of candidates and that the job is not just 'given to someone in the know'.
- ◆ Set up an interview panel and interview several candidates - consider showing them something of the organization and maybe include an activity that shows how they will relate to your Mission.
- ◆ Discuss the candidates together as a panel and try to come to a consensus on which candidate best fits the job description.
- ◆ When the staff member is appointed it will be important to plan and carry out an induction programme that enables him/her to understand how the organization operates and to carry out his/her responsibilities effectively.
- ◆ Develop a system of appraisals to review the work being done and working relationships from both sides. This could include any further support required and any significant changes to the Job Description.
- ◆ A clear management structure and channels of communication will ensure that a positive relationship can develop with the staff member and any difficulties can be anticipated.
- ◆ As numbers of staff increase; it will be important to set up a staff management structure and to consider how staff and volunteers interact at all levels. It will also be necessary to consider the issues raised in 'Developing Effective Teams'.

## Working With Volunteers

Committed volunteers are the core of the movement. Attention must be given to how Associations find and retain them and how to keep them satisfied, supported and enthusiastic.

## Why do people volunteer?

People join organizations for a variety of reasons and to satisfy different needs. When their needs are not met, they will leave - often without knowing why, exactly. When people feel accepted, respected, challenged and needed, and they get genuine satisfaction from their work, they tend to stay with the group and become very effective members. If the members of the team enjoy the job they are doing, feel appreciated, and have a good relationship with other team members, then they are likely to continue to serve on the team. However, they



must also have the opportunity to grow by taking more or wider responsibility. Building those opportunities for growth is part of the role of managing when working with volunteers.

## Matching Volunteers and Tasks

One aspect of keeping volunteers satisfied is the “matching” of a volunteer’s needs and interests to the volunteer job we ask them to do. It is important to recognize that there are different reasons why people volunteer. Consider the many different reasons for volunteering and the tasks that need to be done by volunteers in order to understand the relationships between those needs and tasks. The following provides some ideas:

### a. Volunteers’ Needs and Interests:

*Service:* to help others; wanting to make a difference; improving the community; being a role model; being needed; helping my daughter and/or other children; doing satisfying work; showing that you care.

*Learning new skills:* gaining knowledge and experience; learning specific skills, e.g., training, camping; gaining academic credit.

*Business:* testing a new career; making professional contacts; using skills learned through education; building a “network”; learning new skills related to your job.

*Social:* making new friends; getting out of the house; sharing fun times with family and friends; meeting and working with others with similar values.

*Personal Growth:* building self-confidence; learning responsibility; learning to set and achieve goals; & using natural gifts and talents.

### b. Characteristics and Skills of the effective Volunteer:

Ability to keep many things going; clever; wise; able to be on time; flexible; creative; capable of understanding other people; tolerant; can be strict when necessary; responsible; kind-hearted; humane; optimistic; focused on aim; good organizer; willing to give and to get; can generate ideas; organized; uses head, heart and hands; good communicator; decisive; shares others’ feelings; hard-working.

### c. Jobs for Volunteers:

There are many different kinds of jobs that are there for volunteers in our organizations, e.g., working directly with girls, helping other adults learn new skills, administrative, etc. You can improve your success in working with volunteers when you connect volunteer interests and skills with jobs that you need volunteers to do in our organizations.

## When Things Go Wrong

Some observations about the ‘unsatisfied volunteer’:

- ◆ although all initial signs suggested the organization would meet the volunteer’s needs, the needs were not in fact satisfied  
failed expectations
- ◆ volunteer was asked to do too many jobs!  
diffusion of effort
- ◆ unexpected difficulties affected the work
- ◆ lack of or not enough appreciation; appreciation or recognition comes too late
- ◆ unclear needs of the volunteer herself
- ◆ lack of understanding of the aim of the organization
- ◆ growing demands



## Managing Staff and Volunteers Successfully

Many of the points in the sections above also apply to staff, and can be useful to consider when looking at if you have a 'happy' (fulfilled, stimulated etc) staff or not.

In a large organisation, there may be quite developed separate structures for staff and decision-making volunteers. It is important to pay attention to where these structures interact and ensure work plans and responsibilities are clear. Otherwise there can be a danger of staff being uncertain who they are responsible to, and of volunteers feeling they do not have the full support of the staff.

Discussion of all these issues highlights the importance of understanding the needs of both our volunteers and staff, making the best use of their skills and talents, and recognizing their contributions to the work of the organization. Although this process may take place in a different way for staff and volunteers it is equally important for both - recognizing them both as equally important human resources for the implementation of the aims.

*(See also Values in Management, Roles and Responsibilities)*



## The Role of a National Office

*For a large organization, the National Office is often the central focus of the organization providing support to volunteers all over the country and fulfilling central functions such as communication and finance. A well-run office can play a key role in improving the management of an organization and in enabling the membership to grow.*

### Aim:

To consider how to run an effective National Office including reviewing an existing Office.

### Why have a National Office

A National Office is a key element in the development of a stable and visible national Association. It is important for:

- ◆ effective communication and efficient administration of the organization
- ◆ providing services and support to members, committees, key volunteers
- ◆ assisting in implementing decisions taken by volunteer structures
- ◆ affirming the independence of the organization
- ◆ accessibility of the organization to its own members and other organizations and persons
- ◆ status and image of the organization

### Reviewing the working of a National Office

You may have had a National Office for many years or just for a few. The next section should help you identify whether you are getting the most out of your Office.

### Managing the Office

- ◆ Who monitors the work of the office? (within the staff structure...? within the volunteer structure?)
- ◆ Do you have regular reviews of how the office is working in order to identify changes to be made with clear criteria?
- ◆ Do you monitor closely the running costs and expenditure of the office and adjust your budget accordingly?
- ◆ Do you have the right staff with the right skills?
- ◆ Do you have a long term vision in terms of staffing in keeping with your work plan? ('in 2 years time we will need x persons to do the work with skills of....')
- ◆ Are your staff happy? Do they need more support/training? Do their job descriptions match the real work they are doing? (see 'Staff and Volunteers')

### Communication

- ◆ Does everyone know the contact number/address for the office (your members, other organizations, authorities etc).
- ◆ Do all your paths of communication work i.e. do your post and e-mails arrive safely etc. You may need to seek alternative solutions if there are problems (e.g. using a P O Box, changing service provider.)
- ◆ Are you using the best system of communicating to meet the demands of everyone you communicate with? You may have to balance communications between people working at different speeds. For example communications with WAGGGS





and other Associations may be carried out via e-mail and fax, while it could be that at the same time the main means of communication within your own country is by mail.

- ◆ Consider carefully the issue of language in your communications system - which language so you use to communicate with WAGGGS/other countries/speakers of other languages? Are the necessary language skills available in the office or do you need to find alternative solutions?
- ◆ How is the information in the office available to key volunteers? Do they have/ receive sufficient access to files and informal knowledge of staff to give maximum information upon which to take decisions?

*(see also 'Communication in Management')*



## Establishing a National Office

*A small or new organization may have an office which is not really well used or may be considering whether it is a good use of resources to get an office. The following information may help the process of establishing an effective office that really meets the needs of the organisation.*

### Aim

To consider key issues in establishment of a National Office

Many new organizations begin their life being run by a small group of volunteers from their own homes. Some may remain at this stage for years. However, as the healthy organization grows, the need for a focus for communications and an administrative base to support the volunteers increases. Often in the initial stages of the organization, this role falls to the senior volunteer(s). The establishment of an office as soon as it is viable can help make the work of the organization as effective as possible, by ensuring that the volunteer body of the organization does not lose time on administrative tasks when it could be developing the organization and its membership, and by providing support for co-ordination of the volunteers.

### Setting up a National Office

#### 1. What are we looking for?

It is important to know your needs before taking practical steps in the establishment of the office. It is likely that the key decisions about setting up an office will be made by the National Board, or equivalent, of your Association. It is important that everyone has a shared idea of the what sort of requirements there are for your Association's office so you are working in the same direction.

Keep in mind that, in order to be effective, a national office must be appropriate to the Association right from the start. A big office does not automatically result in a big membership! The National office exists to serve the Association and should not be a financial, practical or political burden.

You may have been discussing the need for an office for a long time already! Check if you have considered the following points (this is by no means an exhaustive list)

- ◆ the general function of the new office
  - what job will the office do?
  - what difference does this make to the practical requirements?
  - will the role and requirements stay the same for the near future?
  - how long before you may have different practical demands?)
- ◆ positioning and accessibility
- ◆ staffing
- ◆ security
- ◆ practical requirements  
(You can begin with the basics - electricity, phone lines ..... through to more detailed needs. Be clear what is essential and what is for future reference.)



- ◆ size, space needed  
(look carefully at the function you have defined for the office, do you intend to hold meetings there etc?)

## 2. What are our possibilities?

**Money** - Finance is normally the first question which arises!! The National Office should be realistic in terms of expense for the organization. It is important to have a budget and to know what is a realistic possible expenditure for the Association and where this money will come from.

**Location** - Think as widely as possible to begin with. Try to identify the relative advantages and disadvantages of the options available from all points of view, (not only financial considerations). Remember that your Association is not a static body, but subject to changing circumstances.

## 3. Finding Premises

Finding a suitable premises can be a difficult task. But there are always more places to look at than it may appear at first.

You could look at the possibilities of

- ◆ renting (/buying) commercial premises
- ◆ co-ordination with other NGOs
- ◆ opportunities available through youth/education structures
- ◆ renting (/buying) a private apartment or property
- ◆ building your own office

Investigate all your options as thoroughly as possible, talk to other NGOs, friends, colleagues. Look at the people/other organizations/businesses around the possible premises ... it is both pleasant and useful to have sympathetic neighbours!

**NOTE:** Remember to check the legal implications of all the options you are considering. This can sometimes be an area of concern for new Associations. Be clear of your Association's status in the eyes of the law. Who is legally responsible....?, Who would sign a contract on behalf of the Association...? Are there restrictions on running non-governmental organizations from a private apartment etc? Other more experienced NGOs are likely to be a good source of information for these questions.

## 4. Equipping the Office

It is likely that you will also need to purchase equipment (fax, computer etc) for your office. This can be a considerable expense for an Association and should be approached with good research and planning. The following points should be taken into account:

- ◆ What equipment do you need? Think of the role of the office, and who will be working there.
- ◆ Your budget!!! Think about not just the cost of purchase but how much the equipment will cost to run
- ◆ Reliability - find a good supplier and try to buy equipment which is supported by guarantees.
- ◆ Who will use the equipment? Will they need some special training?

Set your priorities and don't get carried away!! It is really exciting to have a new office, but an answerphone or a secure steel door could be more important than a scanner or a colour photocopier. Having thought about the equipment, look at the other plans and issues you have identified so far - do you need to think more about insurance, security etc?



## 5. Staffing the office

Some (generally very small) Associations may run their offices entirely on a volunteer rota basis. Many Associations find it most convenient to employ an office worker(s) to run the office and carry out administrative and other functions for the Association. Some Associations may use a combination of volunteers and staff. Be careful if it is your first experience of employing staff that your Association and your employees are working within the proper legislation.

*(See also Staff and volunteers)*

## 6. Starting up

***You have an office..... now use it!!***

Starting to use the office may involve changes in ways of work and it is important that everyone is aware of this and prepared to work in new ways together in order to make the most of the National Office.

Volunteers may have become accustomed to a certain 'home-based' or 'person X-based' system of communication and operation. Often it is hard to change ways of work quickly, but the office should be used to the full as soon as possible. It should be borne in mind that this transition can be a difficult one, but that every effort should be made to make any changes as smoothly and clearly as possible in order to continue providing the constant support required by the organization's members.

There can be personal barriers to overcome. Remember that information is power!! Sometimes it is difficult to hand over control even of administrative tasks.. There needs to be trust that even under a different system of work an effective job will still be done and the relevant information will continue to be accessible and available to all concerned.

The establishment of the National Office is the moment when volunteers who were previously carrying out office-type tasks may have to reconsider their roles. The role and functions of the new office should be made clear to all members so they know who to ask what!!

With good planning, clear aims and realistic expectations, the establishment of a National Office is an important landmark in the life of an Association.



## Management Skills

### Introduction

The areas covered so far in these Guidelines have been key areas /issues connected with the developing good structure and management of Girl Guide/Girl Scout Associations.

Working effectively in all these areas however, requires not only effort and information, but also specific skills. The next sections look more closely at some management skills which will be vital for the implementation of ideas gained in the first part of the Guidelines. You will have already noticed links to these skills indicated in several places in previous sections.

An appreciation of the importance of these skills, and experience of using them wisely and effectively will be important for individuals and groups (committees etc) at many levels of the Association. As with any skills, these management skills cannot be mastered by study / training alone, but can only be made effective through practice!

The following management skills are covered:

- ◆ Communication in management
- ◆ Delegation
- ◆ Introduction to Strategic Planning
- ◆ Managing Change
- ◆ Monitoring and Evaluation in Management



## Communication in Management

*Good communication is vital for effective functioning of any organization. This applies to all levels of the organization and to formal and informal contexts. We need to have systems and skills that enable us to communicate with each other in order to get the work done!*

### Aim:

To consider the communication within your association and how to make communication more effective

Communication is often divided into internal and external. The topic of external communication (communication with the outside world ) is covered in WAGGGS Guidelines on Relationship to Society.

### Why is communication so important?

The good management of your Association is closely linked to its internal communication. All Associations rely on effective internal communication to:

- ◆ transfer the information needed by members in order to achieve the goals of the organization (decisions, current events, programme information, knowledge....)
- ◆ ensure unity within the organization, so that members feel involved and are fulfilling appropriate roles
- ◆ ensure democracy in the organization's ways of work
- ◆ ensure that decision-makers are aware of the needs of the members

### Who is communicating?

Attention should be paid to methods, structures and styles of communication between members at / across all different levels of the association, between volunteer and staff structures, between decision-making bodies and executive bodies etc.

Of course, not everyone in the organization needs or wants to receive the same message or communicate in the same way. But, at all levels of the organization, every member should know how they can participate appropriate communications; where they can find the information they need; what information is needed by others; and how they can make their voice heard.

### Methods of internal communication

It is important to choose the right methods of communication and the appropriate form for your message. Too little or unclear information will result in misunderstanding, uncompleted work and dissatisfaction. Too much information will mean that the key parts may be lost, time is wasted, people may become bored or confused.

Communication can happen:

- ◆ Through meetings (these should be appropriate to the structure of your organization)  
Do you run meetings effectively? Often enough? too often?  
Is information given in meetings which could be transferred more effectively on paper?



- ◆ Through personal contact (letters, fax, e-mail, phone)  
Is it clear who should contact who about what (lines of communication)?  
Always be specific about if you require feedback, in what form and when.  
Do you keep good records of your communications?
- ◆ Through wide circulation (newsletters, materials etc)  
Do you review the effectiveness of these communication tools regularly?  
Are they open to contribution from the members of the Association?  
Do members respond to information contained in them?  
Are they successfully passed through all appropriate levels of the Association?

A well defined structure combined with appropriate methods is essential for good communications. You may find it useful to try the following exercise:

**Exercise:** Draw a flow-chart to show how information is communicated in your Association. How does it relate to the structure of your Association? How could it be improved? Is communication flow at each point a one-way or a two-way process?

Imagine some 'test messages' at different levels, on various topics and scales e.g.

- ◆ a call to find trainers for a regional event
- ◆ an enquiry to see what the Girl Scouts would like as a new uniform
- ◆ a comment about how the Association was portrayed in a recent publication
- ◆ a decision taken at World Conference which affects the internal policy of the Association

Would your communication systems ensure that each message was dealt with effectively?  
Are the most appropriate methods being used in each situation?

Often communications systems and structure in an Association exist because they have 'evolved' over time. However, they can be changed! When was the last time your Association had a communications review????!!

## Some principles of good communication

### Timing

It is important to be able to contact your target person / group of communication reliably and within a known time frame. It is likely that you will require a response within a given time frame, either to make a decision, carry out a task, or just to know that your information has been received and understood. An awareness of timing is important to plan communications and work.

### Democracy

It is important that your communications system allows your members to take part in decision-making processes and receive necessary information. You may have to bear in mind that people are communicating across large geographical area, or through many levels of structure in a large Association.

### Clarity

Remember that the more times a message is passed from person to person, the more opportunities there are for mistakes to appear. Consider who needs to know your message and the most effective means of transfer of information.



**IT (Information Technology)**

Use of IT (e.g. fax and e-mail) can make communications, especially between individuals, more effective, faster and cheaper. While making the most of these advantages it is important that there is still a place in the communications system for people without access to these technologies and that they are not excluded from the information exchange.

Because of the ease of communication IT can also lead to 'information overload'. Care should also be taken to preserve appropriate confidentiality

**Final Points to Remember:**

- ◆ Information is power!! Access to appropriate information should be shared to ensure a democratic organization.
- ◆ Communication is a two-way process! Feedback is essential to check your message is being understood
- ◆ Communication is a skill - practise! Take time to set up appropriate structures and systems. Consider training in communications for key volunteers, trainers, staff etc





## Delegation

*The key to the success of any organizational structure is the effective delegation of tasks. However, we all know the frustration of not knowing who is responsible for what or of feeling overwhelmed with too much to do when delegation is poor. Good management of both staff and volunteers will benefit from improved delegation.*

### Aim:

To improve the way we delegate tasks within our Association.

### Who delegates to whom?

Its worth thinking about an example of what we delegate in our home or work life as a starting point including:

- ◆ Identify a task we delegate
- ◆ To whom do we delegate?
- ◆ Why do we delegate this task?
- ◆ How do you know that it was completed?
- ◆ What kind of things can go wrong?

We cannot do everything, we do not have the time or the skills - delegation is essential in all areas of our lives and Girl Guiding/Girl Scouting is no exception.

### Delegation and Responsibility

All members of the National Board have overall responsibility to the membership and the community for ensuring that the work of the Association is carried out. However, it would be very difficult to carry out the work of the Association just as a body of people. It is not practical to expect the work to be done if there is no-one with specific responsibilities. It is much easier to achieve objectives if tasks are shared and certain people have specific roles and responsibilities. To delegate means to entrust and authorise someone or some body to perform a specific task for a particular person or body. The Legislative Body delegates to the Executive Body and other Committees the task of carrying out some of its role and responsibilities. It does not give up its overall responsibilities but entrusts the management of the Association to a smaller body.

People holding specific roles in a WAGGGS organization need to delegate some of the work to achieve the aim agreed. They are often required to form a committee. One of the most common mistakes made is for members of a committee to believe that the chairperson of that committee is the only one responsible for carrying out the role of the committee. **It is the role of each member of a committee to ensure that the purpose of the committee is achieved.**

When many people work together for a purpose they can achieve a great deal if they work as a team. This means that each member must know what the overall objective is and what their specific job is. Communication is a key to delegation. The committee or team needs a role definition and each member needs a job description (see 'Job Descriptions'). Each member can ask others to help. Some people might be willing to carry out a particular task but not fulfil a specific role. Some people might be willing to help but do not have the skills to carry out the job. It is useful to consider offering training to those people you ask to serve on a committee.



## Why delegation goes wrong

We all know how frustrating it is when someone doesn't do what you thought they were supposed to do. Identifying why this happens helps us to learn how to delegate better - it may be due to:

- ◆ misunderstandings/communication difficulties and knowing the goal but not knowing how to get there
- ◆ lack of agreement on how to proceed
- ◆ the person not doing the task but not telling you

## How to delegate better

If a task is delegated to an individual or group then it is essential to:

- ◆ Establish clearly what the task is:
  - the objective of the work.
  - the roles of persons involved.
  - their own individual role.
  - provide the opportunity to ask questions and discuss issues that arise
  - discuss together how the work will proceed.
- ◆ Agree limits of the authority you are delegating i.e. what decisions can be made without coming back to you?
- ◆ Agree the time-scale and how often you expect reporting back (interim reporting is essential otherwise you risk only hearing the task has not been completed when it is too late!)
- ◆ Provide support to enable the task to be completed
- ◆ Leave them to it and do not interfere!

These principles are equally valid when you are delegating an ongoing area of work to a person/group of people within the organization.

## Barriers to delegation

Its worth thinking why we don't delegate more and to work on removing those barriers which may include:

- ◆ not trusting others to do the tasks
- ◆ lack of time
- ◆ desire to be in control
- ◆ 'emotional' attachment to the work
- ◆ communication difficulties
- ◆ lack of qualified people
- ◆ interpreting a sense of responsibility as the need to do it personally

Many people find it difficult to delegate but this can delay work and hold up the progress of the organization. More seriously, people do not feel needed and involved and in the end will probably leave the organization.



## Introduction to Strategic Planning

*Strategic planning is the process of developing a shared vision of your organization's future, and deciding the major steps you will take to move the organization in that direction. Such planning will help an organization find the best way to achieve its mission, taking into account its capabilities and its opportunities.*

### Aim:

To understand the principles of strategic planning and how to apply them to planning in your Association

### What is strategic planning?

Strategic planning is a process whereby your Association can influence the direction of its future by

- ◆ defining the SHARED VISION of your Association's future
- ◆ determining what your Association intends to accomplish, expresses as specific GOALS
- ◆ and defining the MAJOR STEPS you will take to move the Association in that direction.

A Strategic Plan should give an overview of your Associations goals and how you intend to achieve them over a long period (for example 3 or 5 years). Shorter term work plans can then be drawn up to describe how you will implement the different elements of the strategic plan.

Used properly, a strategic plan can give unity to the vision and purpose of your Association and ensure everyone is working in the same direction, with most effective use of resources.

### Looking at the future

One key to determining the best future, or your vision for your organization, is to consider the following three elements and try to find 'the fit' i.e. the area where they overlap.

1. The mission of your Association - what you intend to accomplish, your Association's overall goal, the reason you exist.
2. Opportunities or threats your Association faces - external factors (positive and negative) influencing your success, related to resources, social, political or economic factors, competitors etc
3. Your Association's strengths and weaknesses - the resources, skills etc that your Association has or could develop (internal).



If there is not sufficient overlap (fit) between your organization's mission, its strengths and the needs and opportunities of your target area, then your Association is in danger! Your strategic planning should help you understand what is happening, then develop a much better approach for the future. If you have planned well, your Association's mission, its capabilities and external forces and opportunities will be much better aligned.

**Some basic steps in strategic planning**

While the exact process of strategic planning will vary from Association to Association, here are some basic steps that can be used as a framework. If you are already strategic planning on a regular basis look again at the process you use. Is it the most efficient/ satisfactory planning process for your Association?

**Step 1)**



**Getting started**

- Decide why you are carrying out strategic planning - is this the right time? Will a plan be used?
- Select a group / person to co-ordinate the planning process
- Outline a timetable and the planning steps you will use
- Decide if you need extra help (e.g. external consultant) and resources needed for planning process
- Get agreement and commitment to proceed from others in your Association

**Step 2a)**



**Analysing the situation**

- Review the current situation of your Association, reasons for current trends / problems / achievements and start to identify future possibilities and choices.
- This can be done through analysis of existing information, questionnaires or worksheets, SWOT analyses, interviews or discussions
- Remember to look at internal and external factors.
- Summarise the most important issues or choices that your Association faces in the near future. These can be formulated as questions or goals.

**Step 2b)**



**Discuss future vision**

- (This can be done in parallel to step 2a)
- Check the Mission of your Association
- Discuss the vision you want your Association to work towards. The vision is a shared picture of the future you want to create, i.e. what you believe your Association can accomplish. It helps to make sure everyone shares an idea of where the Association should be going (guided by the Mission) and to put a timeframe on the vision you are building. ('in three years our Association will be.....')



**Step 3)**



**Setting the direction**

Reach a consensus on the mission and vision of the Association.  
 Identify specific goals necessary to achieve this vision  
 Add these to goals identified in response to 2a (situation analysis)  
 Look at all the goals and combine/prioritise/refine them until you have a realistic set of specific goals to give direction to your association's work over the identified time period.  
 Do you have the right goals/enough goals to respond to you Association's situation and to achieve your vision?  
 Do you have too many goals? What is achievable? Are they specific enough? What is most important?

Note - This process of sorting through issues and identifying the specific goals ('setting the direction') is a very important stage and there are many different approaches that can be taken. Instead of the above 'goals-based approach you may like to prioritise critical issues for your Association as a first step and work from there. Or you may prefer to identify possible major scenarios - 'alternative futures' resulting from different paths of action - and choose your preferred scenario.

**Step 4)**



**Refine and adopt plan**

This stage is to make sure your plan which is developing will be carried out effectively.  
 Share overview of plan (vision, goals etc) with key people  
 Assess reaction to the plan, try to get commitment to proposed direction of work  
 Identify 'problem areas' which may be difficult to implement or may be controversial and discuss how to deal with these  
 When consensus is reached, develop the plan further to make it easier to carry out -  
 Each goal can be divided into specific objectives.  
 Indicators should be identified so that the basis of evaluation of the plan is clear.

**Step 5)**



**Implementing the plan**

When your plan has been adopted within your Association it will be a useful tool for building your Association's future.  
 Translate your strategic plan into yearly work plans/budgets. Activities should be planned in order to achieve the objectives identified.  
 Do you have the right activities/enough activities to achieve the set objectives?  
 As you work, keep your focus on the goals you are trying to achieve. Don't be tempted to plan things just because 'we've always done that' if it doesn't fit in with what you are trying to achieve.  
 Be aware of changes and factors that might affect the implementation of the plan, or even influence the goals you have set.  
 Monitor what happens as a result of the plan, and also the way it happens.  
 Keep people informed of progress, plans and changes.  
 Update the plan - be prepared to change when needed.



**Step 6)****Evaluate and carry on...!!**

Evaluate regularly your short-term work plans and use the results to make effective future work plans

Evaluate your strategic plan and also the whole planning process used. Use the results to do it better next time!

What was achieved as planned? What was not achieved? Why

Did we reach our goals? Has the situation of our association changed?

Where do we need to go next (what information do we use for the next plan?)

Was the plan clear? Did people feel involved/informed?

What changes were made? Why?

Celebrate the results of your strategic plan and the birth of the next one!!!

**Making Strategic Planning relevant**

The style and extent of strategic planning you carry out within your Association should fit the needs and situation of the Association. It is important to consider WHO is involved in the whole process of strategic planning. Having input into determining the future paths of the Association gives a sense of commitment and ownership to leaders/members of the Association. While it may not be practical to involve large numbers of people, the plan must still be well presented and explained, in order to be accepted as a positive tool by all the members affected by it.

You cannot develop a perfect strategic plan. You can develop one which is wise then adjust it as you gain more information and experience. Many organizations formally update their strategic plan regularly (every one to three years) and make more frequent adjustments in strategy as they learn what works.

**What are the potential benefits?**

Strategic planning can bring benefits through the improved results which come from a greater sense of unity, purpose, progress and accountability.

It gives clear focus and direction based upon the Association's needs, problems and opportunities.

It is a good chance for teamwork and building commitment.

Other organizations and potential donors etc will be pleased to see a clear vision and plan of work for your Association.

**What are the limitations?**

It is important to bear in mind the potential negative aspects of strategic planning in order to choose the best level of planning for your Association.

Strategic planning can consume time and money, especially if planning efforts get off track.

If wrong assumptions are made about the future, if there is poor assessment of an organization's capabilities, poor group dynamics or information overload then weak, unrealistic or ineffective plans may result.

Even the best plans depend on the commitment of people to invest time and energy into carrying them out. If an effort is made to develop a plan which is never carried out, then the people involved in the planning may feel disillusioned and powerless.



**Remember**

Make a plan which is realistic for your Association in terms of your experience with planning, the time available, leadership available, number of people and groups involved. Stay focused on the important issues - don't get distracted by questions which have little influence on your Association's future.



## Managing Change

*Change is necessary for progress and growth. However, if not handled well, change in structures, in ways of work etc can be frightening and cause uncertainty, discomfort and conflict. Change needs to be properly planned and well-managed in order to be a positive experience for growth.*

### Aims:

To learn about the process of managing change.

To develop a positive and proactive approach to change as a means of promoting growth and efficiency in an Association,

### Reasons for change

Sometimes it seems that change 'happens' beyond our control, for reasons which do not depend on the Association. In order to react appropriately it is important to understand the reasons behind the change.

**Example 1** - a change in the makeup of a key committee demands a change in the working language used.

This is an internal reason for change, but even though the 'cause' is within the Association, it is not necessarily something you had planned.

**Example 2** - you experience sudden loss of membership due to a new youth organization targeting girls and young women..... - This is a change caused by external reasons but it is still necessary to understand these reasons well in order to react to the change which results from the situation and plan how to manage the situation further.

People need to understand the reasons for change in order to react positively to change. It is important that all who need to participate in the change are well-informed in order that they do not experience the 'fear of the unknown' which can lead to resistance. Change can be disorientating and unpopular and the process of adapting to change must be born in mind when introducing change at any level in your Association.

### The Change Process

The change process can be illustrated as follows

#### Case A - successful change

Association A was informed by its landlord that they would have to move out of their headquarters. At first they were very angry as it was a great inconvenience and expense. They could only think of how much it would cost and the problems of moving. Then they began to look for different properties, and considered the advantages or disadvantages of renting, buying, building.... They thought about how much room they needed, where they wanted to be located, how much they could afford. After consultation with staff and members a decision was taken and the resulting premises was the best possible combination of all the requirements.

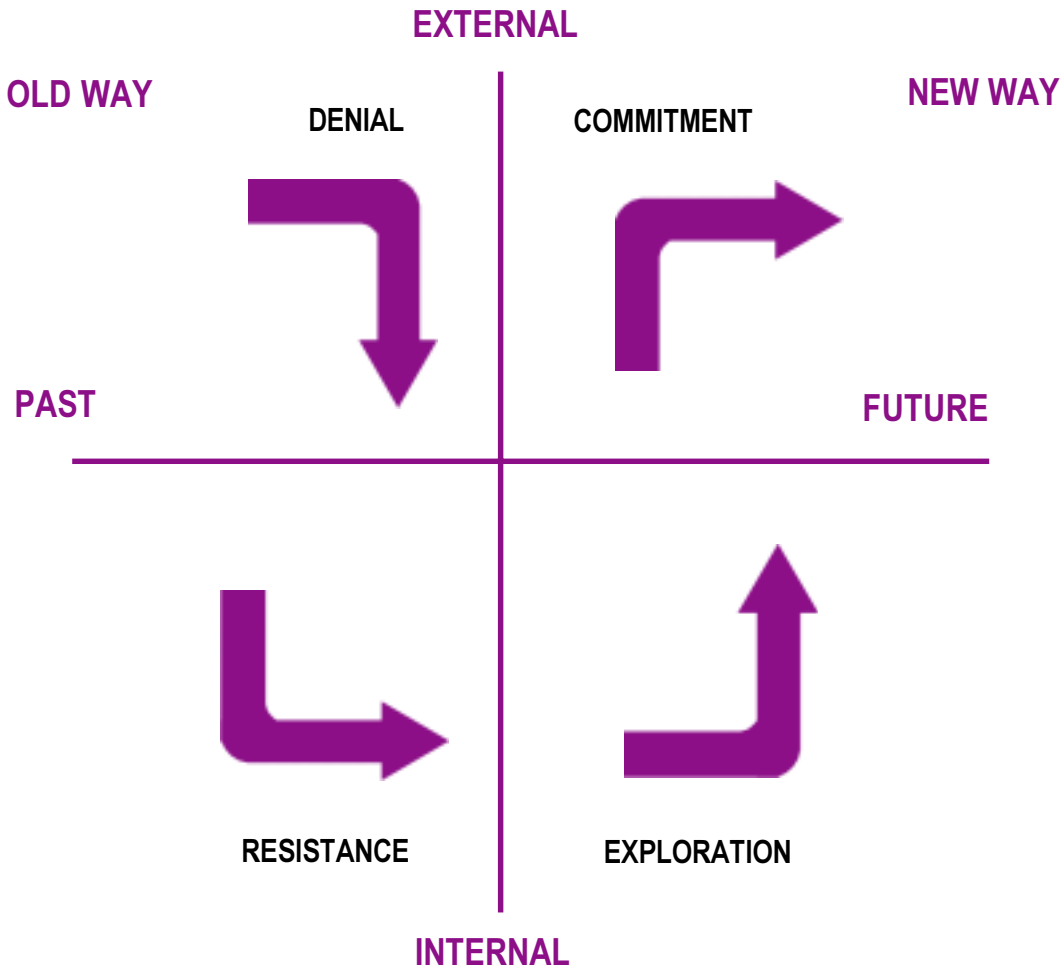
#### Theory

**The need for change arises and a natural first reaction is denial. The next phase is described as resistance ..... the subject is still in a negative frame of mind concerning the situation one finds oneself in ..... but because one has no solution one must move into the process of exploration, to find possibilities and opportunities in the light of the new information. After exploring different options, one will choose the option that best suits one's needs/interests and make a commitment to the new situation, thus moving into the future.**





This can be illustrated by the diagram below:



It is important to go through the whole process in order to achieve real commitment to the new situation.

Case B below shows what happens if the internal process (resistance to exploration) is missed.

**Case B - unsuccessful change**

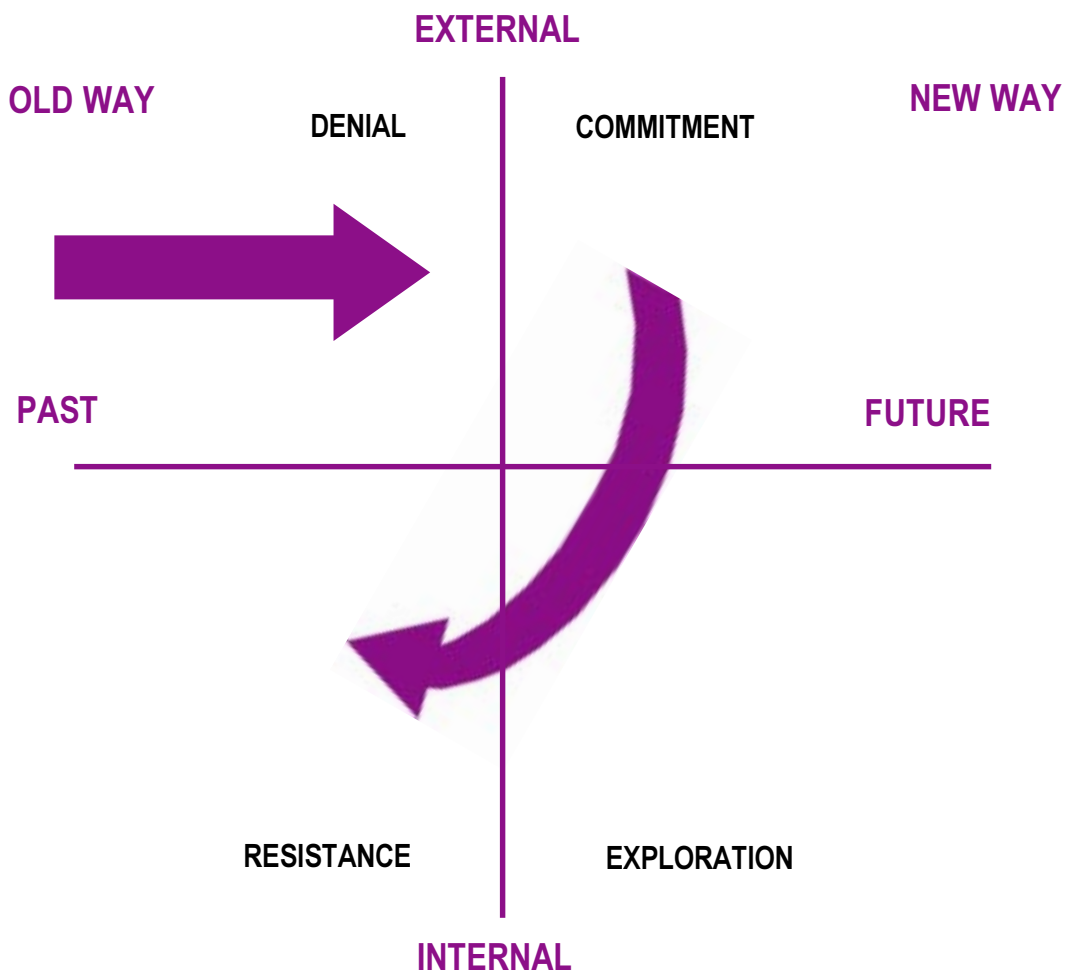
Association B had the same problem. They did not deal with it thoroughly but decided to move to a nearby premises which was vacant in order to have a quick solution. However, the building was not suitable, so the staff were unhappy and the work was not done efficiently. Having found an unsatisfactory solution, there was resistance to the idea of any further change and the Association could not afford to move again. They could not proceed to exploring options for improvement.

**Theory**

**Moving too quickly from Denial to Commitment will not succeed - commitment made too early and not on the basis of reasoned exploration will not last. There will be a 'swing' downwards to a state of deep resistance as the new situation has been entered without proper consideration, and this leads to the inability to move through exploration to true commitment.**



This can be illustrated by diagram 2 (below)



## Change Management

Managing change is in some ways like managing a project; it needs planning, control, monitoring. It may have a defined starting point, but unlike project management however, it may not have a clearly defined end point.

Change management can be viewed as a process involving a series of stages. The following steps are the key points which could be useful in your Association:

### 1. Why Change??

Change can cause all kinds of fears and uncertainties. Therefore, we tend only to change when we have to. It is difficult to get an organization to change unless the people inside it can see the reason for change, believe it to be valid and accept it as necessary.

*A catalyst for change has to be powerful if we are to face the uncertainty of change.* Often it is difficult circumstances that prove the most powerful catalysts for change.

**Identifying and understanding the catalysts for change**, whether internal or external, is always the first step in introducing change.

Key questions you could ask yourself:

- ◆ What are the key internal catalysts for change?
- ◆ What are the key external catalysts for change?
- ◆ What are the main barriers to change?

It is also important to have a realistic picture of where you are starting from, i.e. conduct an analysis of the current situation.

### 2. Where are we going?

When planning change, your Association will need a clear idea of where it wants to get to based on its Mission and values, the opportunities open to it etc. Take time to draw up a **shared clear vision of the future**.

Begin to think in general terms about the actions needed to get to your vision

### 3. How will the change happen?

The change should be consciously managed - nothing should happen 'by chance'. Plan together and take into consideration who is managing and co-ordinating the change **who will lead the change process**.

There maybe be several stages to the change. Plan the **timetable for change** and make sure everyone affected understands each step.

### 4. How will the change be communicated?

**Keep everyone informed!!** People need to feel involved and up-to-date in order to take part in the change and not to resist. In order to monitor the effects of the change upon the people affected, and to ensure everything goes as smoothly as possible it is vitally important to ask for and **listen to feedback**.



## 5. What are the implications/results?

Look at the implications of the proposed change (and then the real results) **at all levels**. There will be certain implications at a personal level, others at an organizational level..

Summary

1	Why change?	Identify catalysts for change Analyse current situation
2	Where are we going?	Shared, clear vision of the future Consider necessary actions
3	How will the change happen?	Who will lead the change process? Timetable for change
4	How will the change be communicated?	Keep everyone informed! Listen to feedback
5	What are the implications / results?	.... on a personal level? .... on an organizational level?

Was the change successful and appropriate? ..... Have you achieved your vision?

### Organizations ready for change

Organizations which are responsive to change and manage it well show the following characteristics:

- ◆ **Access to Information** - people are aware of the changes made in order to achieve the aims of the organization because there is good exchange
- ◆ **Ability to Handle Ambiguity** - any organization needs to learn how to operate in uncertainty. People need to be able to tolerate not having all the answers, to learn to keep questioning and to be ready to change as new opportunities (or threats) appear.
- ◆ **Being Innovative** - successful, flexible organizations use the innovative, creative potential of their members
- ◆ **Taking Risks** - the freedom to take risks must be part of the culture of the organization. The "attitude to mistakes" needs to be explored throughout the organization.
- ◆ **Team Spirit** - the organization needs a feeling of coping together, rather than encouraging individuality.
- ◆ **Flexible but Strong Systems** - organizations which manage change effectively keep their procedures, policies and systems simple.
- ◆ **Ability to handle conflict** - organizations which are successful do not avoid conflict but manage to use it as part of the creative process.



## Final Words

- ◆ It is important to increase communication (not just quantity, but also quality) within and organization during a time of change. Everyone should be well-informed and have the opportunity to express how they feel about the change taking place.
- ◆ Good change needs good leadership. A leader should be clear about the vision and aims throughout the change process.
- ◆ Successful organizations are those that handle change well, to remain responsive, up-to date and relevant to the needs of the people it serves.
- ◆ Successful change always takes into account the fundamental values of the organization.



## Monitoring and Evaluation

*Monitoring and evaluation are concepts often associated with project work, or with training. It is important to be able to apply them as tools for effective management. Monitoring and evaluation are means of learning - they will help us to measure the success of procedures or activities we are involved in the field of management and to improve our strategies for the future.*

### Aim

To understand the principles of Monitoring and Evaluation in management and how to apply them effectively in an Association.

### Definitions

**Monitoring** is the continuous or periodic review ('checking'), during a process, or during the implementation of an activity. Its purpose is to achieve efficient and effective performance, and to enable corrective decisions to be taken if necessary.

**Evaluation** is a process which aims to assess the effectiveness / impact of identified activities or strategies in the light of previously identified objectives. It can be carried out

- during the implementation of an activity or strategy,
- upon completion of an activity or strategy
- some time after completion (to measure long-term impact)

Within the structure and management area of your Association you may wish to monitor / evaluate

- ◆ the work of a committee / working group
- ◆ implementation of a work plan
- ◆ success of a particular seminar or conference
- ◆ a change in structure / communications system etc

### Principles of monitoring and evaluation

Monitoring and evaluation can be made more effective by some basic principles

**Participation** .... both staff and volunteers should be involved in the monitoring / evaluation of their own work. External support in monitoring and evaluation can sometimes be useful for a more professional approach but is often expensive or non-productive. The best people for understanding the work and its aims are those involved!! Everyone should know how the process of monitoring or evaluation works, see the purpose of the monitoring / evaluation process, and understand their own role.

**Positive approach** .... think about the style of your monitoring / evaluation. It should be a positive and empowering process, not a threatening experience. It is a means of learning in order to adjust and improve, to celebrate successes and work out how to do better next time, it is a chance to contribute to change, not to make judgement or be judged.

**PLANNING!!!** All monitoring and evaluation should be carefully planned, with

- ◆ clear timeframe,
- ◆ clear responsibilities
- ◆ agreed budget

Good planning will prevent your monitoring / evaluation from being over intensive or using up too many resources (time and money).



**Planning a monitoring/evaluation system**

Your plan should be specific to the subject of your monitoring / evaluation. It should be practical and realistic. It should explain clearly for all involved the monitoring / evaluation process and its significance.

The following questions may help you to plan the best system for your evaluation. You could also use them to set up / review monitoring systems in your management.

<p>Why and what are we evaluating?</p>	<ul style="list-style-type: none"> <li>◆</li> <li>◆</li> <li>◆</li> <li>◆</li> </ul>	<p>What is the aim of the evaluation?                  What do we want to find out?                  Were our original objectives clear enough to evaluate?                  Are we prepared to make changes that an evaluation may show to be needed?</p>
<p>What will be accepted as evidence of success / change / impact?</p>	<ul style="list-style-type: none"> <li>◆</li> </ul>	<p>Which (measurable) facts clearly show the impact/ influence/ consequences of the subject of our evaluation? (see 'Indicators')</p>
<p>How do we collect this evidence?</p>	<ul style="list-style-type: none"> <li>◆</li> <li>◆</li> <li>◆</li> <li>◆</li> <li>◆</li> </ul>	<p>What information do we need?                  Where do we find it?                  How do we collect the data?                  How much will the process cost? (see 'Tools')                  Means of verification. (see 'Tools')</p>
<p>How will the information be used?</p>	<ul style="list-style-type: none"> <li>◆</li> <li>◆</li> <li>◆</li> </ul>	<p>What will happen with the results of the evaluation?                  Who will use the information?                  How will it be used to change things?</p>

**Indicators**

In order to carry out an effective evaluation we need to have clearly defined indicators. These will show if our objectives in the subject of our evaluation have been achieved or not. In project work, and in some processes/activities that you will evaluate indicators are often identified in advance i.e. from the start of the relevant activity. For example, a strategic work plan will have clearly defined indicators to facilitate measurement of whether the goals set in the plan have been achieved.

In other words indicators identify the evidence that will demonstrate achievement at each step or level of the process or activity being evaluated.



Indicators should be targeted - they should be specific in

	<b>Quality</b> <i>(what achievement)</i>	<b>Quantity</b> <i>(how much)</i>	<b>&amp; Time</b> <i>(in what time period)</i>
Example a)	reduce time taken to reply to website enquiries	by 30%	in 6 months
Example b)	regional commissioners to receive management training	4 commissioners receive 3 day training	within 1 year

Often indicators are said to be 'SMART' -

- S**pecific
- M**easurable
- A**chievable
- R**elevant
- T**imely

Choosing appropriate indicators is the key to good evaluation. In example a) for example you need to have information in advance - you cannot measure if you have reduced the average time taken to respond to enquiries if you do not know what the average time is when you start your action/changes.

It is also important to be sure that the information given in the indicator is really a result of what you are trying to measure and does not arise from different sources.

E.g. Goal: to improve use of information technology in Association  
 Indicator: 50% of regional centres use e-mail as a means of communication by end of 2000

In this example the increase in use of e-mail may arise from different sources and influences, not just by your own strategy and actions .... so be careful what you are trying to measure and why.

**Means of Verification (Tools)**

Tools (or 'means of verification') are how we check our indicators. In other words, what information do we need and how are we going to collect that information (who, how much will it cost, how much time will it take?)

Tools can range from a questionnaire sent to all leaders of your Association to an informal chat over lunch. It is important to choose an appropriate tool which will provide you with enough, but not too much, information.

When selecting tools it is vital to bear in mind available resources (human, time, financial.....) - is the information you receive worth the effort to collect it?

Sometimes when we think about tools we may discover that we cannot get the information needed (or it takes too much effort); our indicators may be uncheckable. This could force us to choose other indicators, or to leave out part of the evaluation.

We should also bear in mind that there may be a certain 'error margin' associated with tools and we should take this into account when using evaluation results. For example some of the information we have might be out of date or insufficient, biased or inaccurate.





In brief, are your tools

- effective?
- possible?
- affordable?

### Appraisal as an evaluation tool

An appraisal is a formal assessment of performance over an agreed period. This is a valuable tool in management if carried out well. It can be used with both staff and key volunteers and should be seen as a positive process, not an examination or a threat. It should be a way to improve ways of work in order to carry out our tasks more effectively.

- Appraisals
- should be carried out regularly (once a year),
  - should not be rushed (space to express all matters arising)
  - should be recorded in a manner agreed by both parties.

### Appraisal includes

- ◆ the views of both people involved
- ◆ facts, but also feelings
- ◆ plans for the future, actions to be taken
- ◆ information/feelings on the relationship between the persons involved
- ◆ agreements reached

### Using evaluation

*“we always evaluate our conferences but it never seems to change anything...”*

*“we tried to draw up a plan for the work in the office, but didn't have full information about what the problems were with the previous system..”*

*“we seem to spend so much time evaluating work done that we never have time to start any new work..”*

Do these comments sound familiar? They reflect poor use of evaluation. We all know that in theory we should evaluate our work, but sometimes it is harder to really use what we find out in order to improve things.

Try to ensure that everyone understands the basic principles below from the beginning:

- 1) If we are going to spend time on evaluation, we have to be prepared to use the results of the evaluation **to make changes** where needed.
- 2) Using evaluation results is therefore **part of our ongoing planning process**.
- 3) In order to act wisely upon evaluation results we need the **right amount of information** to have a clear view of what we are making decisions about without becoming lost or distracted by too much detail.

\* for more information on monitoring / evaluating projects, see WAGGGS Project Management Kit

