

Hints and Tips Getting Organised

Why Get Organised?

Some community groups start small and are very informal. They might need very little organising.

Sometimes things change. A group might start to have new ideas, start to grow or have lots of plans from the very beginning. They need to be more organised and formal so they can:

- Apply for funding.
- Be more organised to manage all the things they want to do.
- Share things out in a more formal way.
- Start doing new things.
- Find new people to join them on their committee and help grow their group.

Other groups start with support from another organisation - a voluntary group or a Council of Health Board. After a while the group becomes independent.

"We started small but now we've got big ideas."

"We can't get funding now through the health group that's helped us from the beginning. We'll have to do it ourselves from now on."

"We knew we had to become more organised and formal. We knew we'd have to have things like minutes of meetings and having a AGM each year. We decided to keep it straightforward and focus on the things that mattered, and have a plan to help us."

Having a constitution

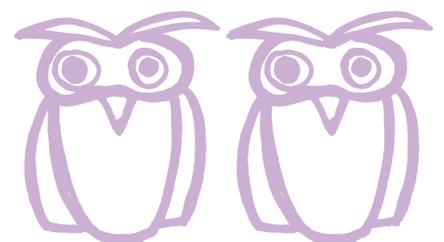
Constitutions usually include the following:

- What the group is called.
- Who can be members.
- In broad terms, what you exist to do.
- The minimum number of the committee (has to be 3 or more) and the maximum.
- How often the committee will meet each year.
- How decisions are made - the committee make decisions as a group.
- Having a bank account in the group's name.
- Keeping records and planning for the future.
- A statement that payments need to be authorised by 2 people.
- A statement that when the group ends any money, equipment or any other resources that are left will be passed on to another voluntary group and not distributed amongst its members.

There is lots of advice and information about setting up groups and writing constitutions.

These are our tips:

- Talk to other groups doing similar things to your group and ask to see their constitution.
- Check out the support that you can access locally. The Third Sector Interface or a similar group will provide this in each area.
- Check out websites with information about committees and groups. Some include examples which you can adapt.



Your committee

Having a committee helps you organise things in a more formal way.

- It is clear to everyone who is taking responsibility for organising things.
- It encourages you all to think about the future of the group as well as the day to day things.
- It makes sense when the numbers in your group are increasing.
- It can reassure other people when your group is organised in the same way as other voluntary groups.

This is how it usually works:

- The group decides its rules on how it works. This is your constitution. It is written down so any member can know how the group works.
- There is a meeting which everyone can come to once a year – the Annual General Meeting or AGM.
- The members choose the committee and the committee are accountable to the members.
- People can take on the role for a year and then stand down, or they can keep going for a couple of years. It is a good idea to have some overlap as that gives continuity and helps the new committee members settle in.
- The good practice is to have a committee of at least 3 people with more if you can do that.
- The traditional roles are someone to chair the committee meetings, someone to look after the paperwork (secretary) and someone to look after the money side (treasurer). The people who do this are sometimes called the office bearers of the group.

Finding committee members feels like a challenge in many groups. Some people enjoy being part of a committee, they like getting involved in organising things. Sometimes groups find it hard to find new committee members to replace their existing committee.

- Ask people as individuals and encourage them to consider it, as well as sending round the general invitation to new members at the time of the AGM.
- Make sure people know that they can get training and can take time to learn about being on a committee.
- Some groups find it helps to write a list of what the different roles in the committee do.
- Writing a list helps people see what they have to do it they take on a particular role. It also helps to make sure one person doesn't end up doing all the work.
- Some groups get one committee member to shadow another one so that they learn the job before being elected to take on a particular role (e.g. chair, secretary, treasurer).
- Some groups that have lots to do sometimes split some roles up, such as secretary and someone else being a minutes secretary for the meetings.

Getting help from members

Some groups write a list of all the other things they need to do that other members, and not just committee members, can help with.

"I joined the committee when we were getting started. We shared the workload and made decisions together. It made it easier as it felt a shared responsibility. I learnt new things but also remembered some of the things from work - some of that came in useful for the committee. It's been good getting to know the other people too."

"We had our committee members but got others to help with some of the things we were doing. That way we used the skills, experience and talents in our members. It meant it didn't all fall on the committee and after a time some people said they'd like to join the committee as it didn't look difficult after all."

"We show everyone how to use the equipment when they first join our group. It is important for themselves and for the other members that they can use the equipment properly and safely".

- It encourages people to get involved and do the things they enjoy doing, and uses their skills and knowledge.
- People like to be involved, but might not want to be involved in the committee (or at least not to begin with).
- It shares the tasks more widely.
- People feel involved – it's the group's group, not the committee's group!
- Sometimes people who help in this way feel more able to join the committee or take on a role in the committee.

Policies – good practice and keeping safe

Many funders will ask if your group has a policy or standards on matters such as Equal opportunities and Protecting Vulnerable Adults. You care about these things too so having a policy just makes sure that you have something written down.

- It makes it clear to everyone.
- It makes you think about how you look after people. For example if you believe in everyone being welcome the policy can remind you to think about people who have disabilities or whose first language is not English.
- You can give a copy to other people who wants to be reassured about how your group works.
- If there is ever a difficulty within the group it sometimes helps to have a policy that you can refer to when you are explaining why someone's behaviour or what they said is not ok.
- The most useful policies are usually quite short, easy to read, clear and used by people.

These are some things to think about.

- Have a conversation about what you feel about these points.
- Start with just writing down what you feel in ordinary language. This is about common sense and treating everyone with respect.
- Ask some other groups if you can see the policies they have.
- You can add points that matter to your circumstances.
- One of the reasons why groups have processes such as 2 people signing cheques and sharing out responsibility for tasks is to keep everyone safe and to let everyone be confident in each other.

Some groups, such as Men's Sheds, want to have written information, guidelines and instructions about some of the things they do, with a strong Health and Safety focus. These usually help people to do things in a safe way.

Do you need to become a charity?

There are lots of successful community groups that aren't charities.

- They don't need to be a charity to do the things that they want to do.
- The benefits of being a charity don't apply to their group or what they do.
- They don't need much funding to start up or keep going – there are many small grants that are available to groups that are not charities.
- The group can be well organised without being a charity.

Why become a charity?

A charity is a voluntary organisation which is recognised as meeting certain standards around what it does and how it is organised.

- Some funders will only provide grants to charities, or only award them smaller grants such as up to £2,000.
- It gives the group some other financial benefits such as not needing to pay some taxes or charges by the Council in the way commercial businesses do.
- The committee becomes the trustees of the charity. The law says what the responsibilities of trustees are.
- The constitutions of charities are more formal because they have to cover more requirements.
- Some groups that want to employ staff, have their own premises, lease premises or take on other similar types of responsibilities might want to become a special type of charity called a SCIO (Scottish Charitable Incorporated Organisation). This has been designed for groups with these types of responsibilities, and means that the individual members of the group and the committee do not have personal liability if anything ever goes wrong.

In Scotland the rules for charities are set out in an Act of Parliament. Charities are regulated by the Office of the Scottish Charity Regulator – OSCR (which everyone calls Oscar).

They have LOTS of advice on how to become a charity and on managing the charity.

These are some of the things that groups who have become a charity have said helped them:



- Remember that the rules are for ALL charities – some very big ones as well as new or small ones, and charities covering a huge range of activities. Some of the rules may seem as if they are not really for you. Bear with it if you think the information does not seem relevant to your situation: it usually is for you.
- Some of the rules are there because there are people who try to set up charities for dishonest purposes. Remember there is a good reason why you are asked for information about what the group does or is planning.
- The good practice on how charities work is also there for a reason. If charities work in these ways they are less likely to get into serious difficulties.
- If you already have a short simple constitution build from there. Ask what you need to add to make it work as a charity.
- If you are not sure about something ask. You can phone OSCR or write or sent an email and someone will get back to you.
- For the basic guidance notes they often have a short version and a longer one with all the details. Read the short version first. That usually gives you what you need. If you do read the long one it will be easier after the summary.
- The forms to get established as a charity are ok if you take your time and read them through. There will be people to help you with them.

About Wisdom in Practice

Wisdom in Practice is a project which supports and promotes the development of services and other activities led by older people. It is funded by the Scottish Government through the Equalities Programme and is run by Outside the Box.

There is a range of resources for groups, including publications, how to guides, events and development support for individual groups and projects.

This is one of a series of Hints and Tips on topics which groups led by older people have said help them in starting their groups, getting organised, keeping going and finding funds.

There is more information at www.wisdominpractice.org.uk



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www.wisdominpractice.org.uk

Further information and advice

Your local Third Sector Interface (TSI), sometimes known locally as CVS and Volunteer Centre, provide support and help to community groups. You can find your local TSI at www.vascotland.org or T. 0141 353 7318. Some TSIs have a community toolkit on their website with lots of information for community groups, including on funding <http://www.slcvo.org.uk/Community-Toolkit/ctoolkit?PageName=toolkit-home.htm>

Your local Council may have community workers who can help local groups.

Committees and constitutions
DIY Committee Guide <http://www.diycommitteeguide.org/>

Small Charities Coalition – Trustees net
<http://www.smallcharities.org.uk/?q=resources/good-governance-code-summary>

Governance Pages <http://www.governancepages.org.uk/>

Know how non profit <http://knowhownonprofit.org/studyzone/trustee-training-pack>

For information about setting up a charity go to: www.oscr.org.uk

Office of the Scottish Charity Regulator (OSCR) 2nd Floor, Quadrant House, 9 Riverside Drive, Dundee, DD1 4NY
E. info@oscr.org.uk. T. 01382 220446

Keeping vulnerable people safe

Act against harm is the website for adult support and protection in Scotland. It gives good advice if you are worried about if someone is being harmed, or if you are harmed or frightened yourself: www.actagainstharm.org

You can also talk to the Adult Protection team at your local Council.