



Managing Staff and Volunteers

Course Toolkit

Cyprus
29th February – 5th March 2008

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Introduction – About the Toolkit

This Managing Staff and Volunteers Course Toolkit has been produced as part of the broader **Cypriot Civil Society Strengthening Programme** implemented by **INTRAC** (International NGO Training and Research Centre) www.intrac.org, UK, The Management Centre of the Mediterranean www.mc-med.org and NGO Support Centre, www.ngo-sc.org, Cyprus.

This toolkit is intended for use by Cypriot CSOs – we hope you find these materials useful – please let us know if you have any feedback!

Course Objectives

Volunteers and paid staff are key to the success of Cypriot Civil Society Organisations. The aim of this course is to help CSO leaders and board members develop a strategic approach to managing such a treasured resource.

Objectives:

- Provide an overview on the strategic approach to recruiting and managing volunteers and staff
- Share 'good practice' in people management
- Introduce the key elements of recruiting and retaining volunteers and staff
- Provide an opportunity to exchange experiences and concerns regarding volunteer and staff management.

MANAGING STAFF AND VOLUNTEERS IN CSOs COURSE OVERVIEW

Volunteers and paid staff are key to the success of Cypriot CSOs. The aim of this course is to help CSO leaders and board members develop a strategic approach to managing such a treasured resource.

Objectives:

- Provide an overview on the strategic approach to recruiting and managing volunteers and staff
- Introduce the key elements of a volunteer recruitment and retention strategy
- Share 'good practice' in people management
- Provide an opportunity to exchange experiences and concerns regarding volunteer and staff management.

The course operates for a total of 18 hours, made up of 12 sessions of 1hr 30 mins each. The content of the different sessions is described below.

Course Outline:

Session	Objectives	Topics
<p>Session 1: Overview on People Management</p> <p>Friday 29th Feb</p>	<ul style="list-style-type: none"> • To introduce the participants and facilitators • Provide an overview of the course and enable participants to identify a key learning objective • Identify the range of Human Resource issues that the participants are facing in their organisations 	<ul style="list-style-type: none"> • Introductions and logistics • Course objectives, 'flow' and timetable • identification of personal learning objective • HR challenges in Cypriot CSOs
<p>Session 2: Introducing the Case Study</p> <p>Friday 29th Feb</p>	<ul style="list-style-type: none"> • Explore the Case study that will be used for group work throughout the course • Enable participants to identify and reflect on a range of People Management issues • Build understanding of Human Resource Management 	<ul style="list-style-type: none"> • Case Study introducing the CSO, and asking participants to identify the HR challenges • Different elements in HR Management • HR Policies

Session	Objectives	Topics
Session 3: Recruiting your people 1 – Staff Saturday 1 st March	<ul style="list-style-type: none"> • Provide an overview on staff recruitment • Facilitate reflection on current practice 	<ul style="list-style-type: none"> • Job descriptions • Interviews and selection procedures
Session 4: Recruiting your people 2 – Volunteers Saturday 1 st March	<ul style="list-style-type: none"> • Provide overview on volunteer recruitment strategies • Share information on best practice • Facilitate reflection on current practice 	<ul style="list-style-type: none"> • Strategic approach to identifying sources & attracting interest • Selection or identifying the 'fit'/agreeing TOR
Session 5: Case Study 2 Saturday 1 st March	<ul style="list-style-type: none"> • Consolidate understanding on recruiting through case study discussion • Introduce concept of 'competencies' 	<ul style="list-style-type: none"> • Same CSO as in Case Study 1 • Range of recruitment challenges illustrated in new scenario • Using the 'competencies' concept
Session 6: Volunteer Retention Saturday 1 st March	<ul style="list-style-type: none"> • Introduce approaches to retaining volunteers • Share good practice tips 	<ul style="list-style-type: none"> • Volunteer motivation • Rewarding and recognising volunteers' contributions
Session 7: Managing Individuals 1 Monday 3 rd March	<ul style="list-style-type: none"> • Develop an understanding of performance measurement • Explore issues related to appraising performance • Share good practice tips 	<ul style="list-style-type: none"> • What individuals need • Performance objectives • Appraisals (including variations)
Session 8: Managing Individuals 2 Monday 3 rd March	<ul style="list-style-type: none"> • Explore issues of ongoing support & supervision • Introduce techniques for positive 1-1 sessions • Practice listening & feedback skills 	<ul style="list-style-type: none"> • Setting the scene • Active listening skills • Role play

<p>Session 9: Managing Teams 1 Tuesday 4th March</p>	<ul style="list-style-type: none"> • Introduce ways of viewing the characteristics of teams • develop an understanding on group dynamics and how to manage them 	<ul style="list-style-type: none"> • What is a team? • Team composition (belbin) • Team formation & dynamics • Conflict in teams
<p>Session 10: Managing Teams 2 Tuesday 4th March</p>	<ul style="list-style-type: none"> • Explore issues of communication within teams • Share some practical tips on managing interactions within teams • Reflect on team building experiences 	<ul style="list-style-type: none"> • Communications exercise • Managing interactions • What are useful team building exercises?
<p>Session 11: Staff/Volunteer Development Wednesday 5th March</p>	<ul style="list-style-type: none"> • Develop an understanding on approaches to supporting individual learning and development 	<ul style="list-style-type: none"> • Why invest in staff/volunteer learning? • Prioritising • Different ways of supporting development • Learning styles
<p>Session 12: Pulling it together Wednesday 5th March</p>	<ul style="list-style-type: none"> • Leadership styles and people management • Provide an opportunity to review course content • Participants identify action steps • Closure/evaluation 	<ul style="list-style-type: none"> • Adapting your style (situational leadership) • Personal Action Plans • Evaluation

HOME GROUP RESPONSIBILITIES

You will be in your Home Group for the duration of the Training Programme.

You should agree a name for the group.

During each day, Home Group members should check with each other that there are no language or other practical problems. If there are, these should be raised with the facilitators.

At the end of each day, all Home Groups should meet together for about 15 minutes to discuss the following:

- What went well today.
- What could have been better.
- Suggestions for the remainder of the workshop.

Each group should select one workshop member to represent the group's views to the facilitators at the End-of-Day Review Meeting.

In addition, on a rota basis, each of the Home Groups will take it in turn to carry out the following responsibilities:

1. Time-keeping to ensure that facilitators and participants keep to time.
2. Monitoring energy levels and introducing energiser exercises when appropriate.
3. Start the day with an energiser exercise and conduct a participatory review of the previous day's learning. The review should be fun and take no more than 10 minutes.

SAMIA AL HASANI at VISION SAVER

Case Study 1

Wednesday was a beautiful day – it was that time of year when the temperatures are perfect. The sun shone brightly with not a cloud in the sky as Samia Al Hasani, a member of the Board of 'Vision Saver', made her way to the NGO's centre from her home. It was 7.15 in the morning and the 25 minute journey gave Samia the opportunity to think about the organisation.

'Vision Saver' was an Omani NGO founded by Samia and three other colleagues nearly five years ago. The organisation focused on sight-related issues and they had grown very quickly since the first year when they just worked on providing eye tests and glasses to people who could not access these services elsewhere. They still kept their priority on working with migrants and poor people in Muscat but were now expanding their services to other towns and rural areas. They had also extended the range of services, to include advice and treatment of eye diseases and were about to start a new public awareness programme. The organisation had attracted financial support from specialised International Trusts and Foundations and fundraising efforts in Oman had been very effective – especially the public campaigns carried in the media. They also had very good international links with similar types of NGOs who worked in many different countries, and with whom they had initially worked to get hold of second-hand frames and basic equipment.

'Vision Saver' now had three paid staff – Mohamed who recently took on the new post of General Manager; Fathia who joined a year ago to lead the team of volunteer optometrists and Salem who was in charge of the Centre and who had been with them from the beginning.

Samia herself, together with the three founding members, worked in the Optometry Department of the X...Hospital in Muscat. She had over 20 years of professional experience, and loved her work. But there was something special about the time she spent with 'Vision Saver'. When they set up the NGO, the four of them had dreamt of helping people who normally couldn't access the kind of services they provided at the hospital. They felt that everyone in Oman should have the right to good and healthy vision.

Now, as she travelled to the Centre, she thought about all the progress they had made over these five years. But she also started to think about some of the challenges they were facing and she started to worry about how they would deal with them. In particular, the new public awareness programme was a concern. They had been successful in raising the money for the two-year initiative, but they still hadn't made a start. The planning committee had developed a good proposal, but they didn't yet have a team in place to implement it. None of them had experience in that kind of work and they didn't really know where to begin.

A blast from a passing horn startled her, and she began to think about other initiatives that needed to get under way. There was the expansion of the sight-testing services to the west of the country and they wanted to explore the possibility of providing cataract removal services in the future. They had heard about NGOs providing this in other countries and thought it was a good idea. It really was all very exciting.

Samia's thoughts were interrupted as she walked into the Centre. As she entered the building she knew there was something wrong when she saw Salem looking troubled. "It's a lovely day", Chinara greeted him cheerfully. "Maybe for you, but not for me. Mohamed wants to reorganise the consulting rooms. I think that really isn't necessary – they're fine as they are."

Samia frowned as she commented "Well that does sound a bit strange. Have you discussed this with any other Board members?" Salem said that he had raised it with Issa, the Treasurer of the Board, who had popped into the Centre yesterday evening. Issa had said he thought it sounded a good idea, but Salem hadn't been convinced. "Well, let me talk to Mohamed about this and I'll let you know what we decide" responded Samia and she walked away towards the Manager's office. Salem shrugged his shoulders and went to make himself a cup of coffee.

On her way to the Manager's office she bumped into Fathia, who stopped her. "Oh I am pleased you came in this morning, two volunteers didn't turn up for their sessions yesterday and we had to turn people away. This is the third time this month that we haven't had enough optometrists to run the sessions – we need to do something about it." "Oh dear, yes we will need to see what we can do" replied Samia. "Let's meet to talk about it in an hour's time – are you free?". With Fathia's agreement to the meeting, Samia moved on and entered the Manager's office.

Mohamed was working on the computer, and Samia could see that he had the financial accounts open. "Hello Mohamed, I don't want to interrupt you. Could we talk later?" Samia wanted to find out more about his ideas for the consulting rooms, but didn't want to stop him from working on the accounts. The reports were overdue and the International donors had written asking when they could expect to receive them. "Oh hello Samia, how are you? Actually, we could talk now – I have time."

So, they discussed Mohamed's ideas about rearranging the consulting rooms and Samia was convinced by his arguments. She said she would talk to Salem and let him know their decision. After that meeting she went to look for Fathia – it was important to resolve the problem of cancelled sessions. If people were turned away from the Centre, then the organisation would start to get a bad reputation and may lose some support.

Just then a group of volunteers arrived, ready to start on the morning clinic. She greeted them and one or two smiled back. Samia recognised a young man who worked at the same hospital as she did, and so she went up to say hello. "How are you Masoud? I am very pleased to see you here. How are you finding things at 'Vision Saver'?" The young man greeted her politely and said that things were fine. However, he added "I've been coming here for the past three months – once a week. I'm pleased to be able to help out but I do have some questions about any support I might get. Who should I speak to about that?" Samia enquired about the kind of support he was interested in, and Masoud indicated that he needed a bit of help with the financial costs of travelling to/from the Centre and also he wanted to know whether he could get some help in learning some new skills. Samia replied quickly, "Well, I don't think that's a problem – of course we can pay your travel costs. And I will look into the kind of training or further learning you can do, if you let me know the details of what you are interested in. Thank you for your support to 'Vision Saver'. It means a lot to us." With that she said goodbye to the group and continued on her journey to look for Fathia.

Questions for Group Work

- 1. What do you think are the Human Resource issues that 'Vision Saver' need to address?**
- 2. What other issues do you think the organization needs to address, if they are to effectively manage their people?**

SELECTION METHODS

A variety of methods for selecting the most suitable candidate are available:

- **Application Forms** – useful if well designed. Should contain a section asking the applicant why they are interested in the job. Used for shortlisting.
- **CV's** – a useful summary of the individual's history but needs validating.
- **References** – not always truthful. Best to ask the person to comment on specific issues, and also whether they would be prepared to employ, or work with, the applicant again.
- **Panel Interview** – the most conventional method. Good for exploring issues and getting a sense of the individual's ability to present themselves. Try to ensure they give as many illustrations of their points as possible.
- **Practical Exercise – e.g. typing/driving** – good for checking practical skills where these form a significant part of the job.
- **Written Exercise e.g. report writing, financial exercise** good for testing writing communication or numeracy skills and the ability to work to a deadline.
- **Portfolio of work** – e.g. Articles, materials etc produced by the candidate. However it may be difficult to prove they were produced by the candidate unless verified.
- **Individual Presentation exercise** - good for judging verbal communication skills as well as presentation skills. Essential for any job involving communication to an audience e.g. training.
- **Group exercise or discussion** – e.g. getting a group of applicants to discuss an important issue, with staff/Board members as observers or participants. It can seem rather artificial but may be very illuminating on their views, as well as how they discuss with others.

STAFF SELECTION EXERCISE

Instructions for groupwork – 30 minutes

1. Read the job description below
2. Based on group discussion, write on a flipchart :
 - a. The selection methods you think would be appropriate for this post
 - b. Any issues that you think should be considered during the selection process

JOB DESCRIPTION:

HEALTH EDUCATION WORKER

'VISION SAVER'

Post:	Health Education Worker
Reports to:	General Manager
Duration:	2 years initially – possibly will be extended if funding is obtained.
Salary:	
Location:	Vision Saver Centre, Muscat

Background

'Vision Saver' is a non-governmental organisation working to combat avoidable blindness and ensure healthy and effective vision. We provide a variety of services to those who can not normally access the services provided by private clinics or the government. These services include:

- Eyesight testing
- Treatment of low vision including provision of spectacles when appropriate
- Diagnosis and treatment of ocular diseases, including glaucoma and trachoma

We are about to start a new programme of public education and awareness-raising of issues related to poor vision and avoidable blindness. This includes raising awareness of the links between poor sanitation and eye infections that can potentially lead to Trachoma and education on symptoms of low vision and what can be done. We need a specialist in Health Education to help us develop this new initiative.

Job Responsibilities

1. Development of the new programme:

Based on the original programme design, the Health Educator will develop the ideas so that they can be put into practice as soon as possible. This will include:

- identifying the range of activities that should be carried out
- selecting the schools and community locations for the education work

2. Implementation of the new programme:

The Health Educator will lead a team of volunteers and members in the :

- Preparation of education and awareness raising materials
- Delivery of these materials at events, schools, community locations
- Design and delivery of the annual campaign for World Sight Day (in October)
- Monitoring and reviewing progress of the programme
- Providing reports to the programme donors, Vision Saver Board and government authorities as required.

3. Liaison and public relationships:

In order to help Vision Saver meet its public education and awareness-raising objectives, the Health Educator will need to:

- analyse the media and selecting the initial options for broader media awareness-raising work
- develop relationships with the appropriate Ministries, Health Authorities, Schools etc.

4. Financial management and administration:

The Health Educator will be responsible for the budget and administration of the new programme.

Person Specification

We are looking for someone with the following:

Essential:

1. Experience in carrying out public education or awareness-raising campaigns
2. Experience in the preparation and delivery of training and education materials
3. Strong communication skills
4. Good financial and administration skills
5. Commitment to the core values of Vision Saver – that is, a belief that everyone has a right to good health and access to services that will ensure healthy and effective vision.
6. Good teamworker

Desirable:

1. Experience of working in health services
2. Knowledge of the communities where Vision Saver works.
3. Experience of report writing
4. Experience of leading a team of volunteers

Terms and Conditions

The successful candidate is expected to work a minimum of 30 hours a week. She or he must be prepared to be flexible as there will be some working in the evenings or on rest days.

The benefits include:

- Four weeks paid holiday a year
- Use of the organisation's vehicle for work purposes
- Maternity leave

CHECKLIST FOR RECRUITMENT AND SELECTION OF STAFF

Appointing suitable people as paid employees of the NGO is a key task which involves a number of steps that are outlined below. Recruitment involves finding suitable candidates for vacant posts in a cost-effective way and encouraging them to express their interest by making an application for the job. Selection is a two-way process in which the organisation chooses a suitable candidate who can fulfil all the essential factors in the person specification, and the candidate decides whether they want to work for the NGO.

Initial Steps

- Current postholder gives notice of intention to resign or the Board committee decides to create a new post.
- Decisions are taken on the overall recruitment process and whether a special recruitment task group should be formed.
- It is common practice at this stage to form a selection panel . This is a small number (usually three or four) and will contain a mix of people depending on the post. It is essential that there be someone on the panel with the technical or professional knowledge that the post covers, and it is good practice to have someone from the client base if the NGO is involved in providing services to a specific community. The leader of the panel will be the person who will be directly supervising the successful candidate.
- A timetable for recruitment and selection is drawn up. This includes allowing for time for the job advert to circulate before the closing date for applications, together with enough time between pre-selection (shortlisting) and the actual selection meeting/s.

Defining the requirements

- Analyse the tasks that need doing. This will help in determining the qualities and qualifications genuinely needed for the job.
- Produce the job description - an outline of the broad responsibilities rather than detailed tasks, with a clear indication of who the person will be supervised by.
- Produce the person specification: outlining the experience, skills, knowledge, abilities, qualifications, personal attributes and personal circumstances required to be able to fulfil the responsibilities. These can be divided into those that are *essential* to carry out the job responsibilities, and those that are *desirable* qualities.

- An advertisement is produced, drawing on the key points in the job description and person specification. It needs to clearly state when the deadline is for receiving applications.
- Application forms may be used and these may need to be adapted to fit the specific requirements of the job being advertised. They should try to get information about the person's ability and willingness to do the job. They should state the deadline for applications. They should also provide space for the applicant to give details of several people who could provide a reference regarding their past employment history or their past work as a volunteer.

Before the Selection meeting

- Placing the advertisements, preparing the necessary background material, job descriptions and application forms all needs to be done in plenty of time before the deadline for receiving applications.
- You are likely to want to do a pre-selection to reduce the number of people that will come to meet the selection panel. This is called shortlisting and is done once the deadline for applications has passed. The selection panel (or at least two members) assess the applications against the person specification. Elimination of all candidates who do not fit the essential criteria is the first step. Then, depending on how many are left and how many people the selection panel feel that they would like to meet, the remaining candidates are assessed against the desirable criteria. It is possible to consider someone who doesn't meet these at all, but who looks interesting on paper. The important thing is to discuss it with the selection panel and for there to be agreement to invite that person to meet them.
- Informal contact: decide whether the shortlisted candidates will be encouraged to come for an informal look around the organisation, or whether there will only be the formal selection meeting. There are different points of view on this, but the key point is to be consistent with all candidates. Everyone should understand that this contact is for the benefit of the candidates and is not part of the selection process.
- Preparing the selection meeting: decide on the selection methods to be used. If an exercise or presentation is to be included, then make the instructions available to the candidate in plenty of time for them to adequately prepare. Prepare the questions for interview, agreeing the areas that need to be covered and who will ask the questions for each area. The job description and person specification will be the guide for this. Discuss and agree how the final decision will be made. Do all the panel have to agree? If there is a tie, who decides? Finally, it may help to have standard forms for the panel to write their comments on.

The Selection meeting

- Make sure appropriate space is available for the meeting. It needs to be somewhere without interruptions or too much noise or other distractions. The physical arrangements (table, chairs etc) should be set up in advance and should consider the best way to make the candidates feel at ease.
- If there are many candidates, make sure that sufficient time is given to each. Timing is controlled by the leader of the panel and every effort should be made not to over-run the allotted time. If there is a presentation or exercise, the candidates should be warned shortly before it is due to end. Make sure the panel has breaks between interviews.
- It is good practice not to discuss each candidate between interviews. Use the time to write down, individually, your impressions and conclusions on the candidate. Then when all the interviews have finished and the panel has taken a break and feels refreshed, the discussion should begin. The leader of the panel should chair the discussion, and try to ensure that there is sufficient opportunity for every member to give his or her opinion on each candidate. Some panels find it easiest to start with an initial round of opinion regarding any candidates who members feel would definitely NOT be suitable. If there is clear agreement then it is not necessary to discuss those people in detail and more time is available for reflection on the remaining candidates. Once agreement is reached on the preferred candidate, it is helpful to ask the members to indicate any areas where they felt that person might need extra support. This will help in preparing the induction and in providing appropriate support and supervision during the first months of their employment.

After the selection

- The successful candidate should be informed verbally as soon as possible. However, the panel may decide that they wish to see references before confirming the selection. In this case, every effort should be made to get in touch as soon as possible with the people indicated in the application form.
- It is good practice to notify the unsuccessful candidates of the decision as soon as possible, and to give them some kind of brief feedback as to the reasons why they were not the preferred candidates.
- Once the successful candidate has accepted, then the formal procedures of contracts, setting the start dates, preparing induction programmes etc. can start.

RECRUITING VOLUNTEERS

The process of recruiting volunteers to your organisation can be divided into 4 separate elements:

1. **Promoting** the idea of volunteering to individuals who are potential volunteers
2. **Identifying the need** for volunteers within your organisation and developing volunteer roles or Terms of Reference.
3. **Advertising** for volunteers to fill those roles
4. **Selecting** individuals to fit the roles.

1. Promoting volunteering to potential volunteers

To effectively promote the idea of volunteering to individuals who may potentially be interested in helping your organisation, you need to:

1. Involve relevant people and use creative methods to identify:
 - the types of people who may wish to volunteer
 - ways of accessing potential volunteers
 - the key motivations people may have for wishing to volunteer with your organisation
2. Use appropriate cost and time-effective communication methods to access groups of potential volunteers.
3. Help potential volunteers clearly to understand:
 - The importance of volunteering in meeting the organisation's goals
 - How people with diverse abilities, styles and motivations can make valuable contributions as volunteers
 - The volunteering opportunities available and what is involved
 - The commitment they need to make as volunteers
 - The potential benefits of volunteering and how volunteering can meet their needs and expectations
4. Provide factual evidence to illustrate how volunteers have contributed in the past and how they have benefited personally from doing so
5. Provide opportunities for people to investigate volunteering opportunities further and make a commitment to becoming a volunteer
6. Refer people to other volunteering organisations where appropriate
7. Evaluate and analyse the response to your promotional activities and use this information to improve future activities

2. Identifying the need for volunteers – developing the volunteer role

It is necessary to obtain a broad view on the need for volunteers within your organisation, before developing specific descriptions of how individual volunteers may contribute. Thus, there are a number of steps to be taken before you can attract and select the right people as volunteers. You need to:

1. Identify the contributions that volunteers can make to your organisation's goals.
2. Identify roles that are suitable for volunteers with a diverse range of abilities, styles and motivations.
3. Identify the potential benefits of roles to volunteers
4. Ensure that roles for volunteers do not undermine or substitute the work of paid staff and vice versa.
5. Prepare role descriptions for proposed volunteer roles that clearly:
 - Identify the role's purpose, responsibilities and requirements and working relationships
 - Define the limits of the volunteer's role
6. Prepare person specifications for proposed volunteer roles that clearly identify the knowledge, skills, experience and personal qualities required
7. Ensure that role descriptions and person specifications comply with relevant legislation and organisational policies.

See separate handout for more information on building up a volunteer role.

3. Advertising for volunteers

In addition to engaging in a general promotion of the idea of volunteering, you will need to attract individuals to the particular volunteering opportunities that you have identified in point 2 above. A range of communication opportunities will need to be identified, including that of advertising. The advertising media you use could be free, subsidised or paid-for, and include newspapers, magazines, journals, broadcast media, local notice boards, websites or leaflets.

You may need the help of other people such as colleagues who experience of advertising, media buying agencies or advertising agencies. It is important that you have a clear idea of the audience that you are aiming at, and take account of the diverse needs of potential

volunteers when drafting and placing advertisements. You may need to give special attention to literacy levels and disabilities, including physical and sensory disabilities, mental health difficulties and learning difficulties.

The steps to consider when selecting advertising media are:

1. Identify advertising media that are appropriate for reaching diverse groups of potential volunteers.
2. Identify the budget available for recruiting volunteers and select the most appropriate advertising media in order to reach potential volunteers cost-effectively within the budget.
3. Select advertising media that comply with relevant legislation and your organisation's policies.
4. Get help from competent specialists to identify and select appropriate media where necessary.
5. Monitor and evaluate the responses from different media and use this information to improve your selection of media in the future.

Once the media is selected, it is necessary to draw up clear, concise and interesting advertisements that cover the following items, as appropriate:

- Your organisation's goals and the importance of volunteering in achieving them
- The volunteering opportunities available
- The roles and activities involved
- The knowledge, skills, experience and personal qualities required
- The geographical location(s) of the volunteering opportunities
- The time commitment required of the volunteers
- The potential benefits of the volunteering opportunities for volunteers
- What people have to do to apply to become a volunteer
- What people have to do if they want further information

Ensure systems are in place to deal with responses and any queries from advertisements, and to help respondents decide whether to volunteer.

4. Selecting the volunteers

Once individuals have decided that they would like to volunteer with your organisation, and are interested in the role that you have advertised, then there needs to be a consistent approach to selecting the right people:

1. involve relevant people from your organisation in the process of selection
2. meet with interested individuals in order to:
 - help them to express their motivations for volunteering
 - provide sufficient information to allow them to identify how the volunteer role/s available could meet their needs and expectations
 - assess their experience and the extent to which they possess the knowledge, skills and personal qualities required for the role/s
 - identify what support and supervision they may require
3. After the meeting discuss with your colleagues whether the individual does provide a good fit with available role/s. If they appear to be good volunteer potential but do not meet the specific requirements of that role, then there may be other volunteering opportunities within the organisation and it would be important to explore these with the individual.
4. Take up references if possible, and check the individual's qualifications and background where appropriate. If the individual will be working with children or vulnerable adults it would be advisable to check that they do not have any record of abuse or maltreatment.

Once verbal agreement is reached, it is good practice to enter into a formal **written volunteering agreement**. These are in common use, and would tend to state the following:

- The volunteer role and the activities involved
- The code of conduct expected of volunteers
- The training, support and supervision the volunteer can expect from your organisation
- The out-of-pocket expenses that will be reimbursed by your organisation
- Any organisational policies that are relevant to the volunteer role

Getting People to Volunteer – an extract from 'Volunteer Management': a manual from the National Minority Aids Council, USA.

Getting people to support a cause by giving their time is an ongoing challenge for most non-profit organizations. It's recommended that you appoint a volunteer manager to serve as the liaison among the volunteers, staff and public. The volunteer manager also will help the staff understand the need for volunteers, the costs associated with volunteers and the commitment required from both staff and volunteer perspectives, which should be discussed prior to starting the volunteer recruitment campaign.

Ask the following questions as a guide for launching your recruitment campaign:

A. Who Are We Trying to Recruit?

In trying to fill volunteer positions, focus first on which specific skills, interests, viewpoints, prior experiences, personality traits and resources you need. Make a list, then focus on the top two or three items. Your objective is to match the needs of the position with the skills and interests of the individual. People tend to respond favourably to an appeal to their unique abilities and interests.

Having decided what is needed and who would be well-suited to that type of position, you are now, and only now, ready to recruit volunteers. Recruiting is easier if you have some particular types of people in mind, because that lets you target your message to the needs of that group. Conversely, messages sent to the general community have to apply to everyone and often wind up speaking to no one.

Decide who in your organization is best suited to coordinate the recruitment campaign. Look for someone who is enthusiastic and knowledgeable about the work of your organisation.

In drafting your recruitment message, use a personal appeal; indicate in very specific terms what someone would gain from joining your organization as a volunteer. Indicate how particular interests, hobbies, skills, prior experiences, contacts and personality would be well suited to volunteering. Clearly and honestly explain what type of tasks are involved, how much time volunteering requires, and what is expected. Do not downplay the time or tasks involved. We often tell people, "It won't take much time," and then complain afterwards when they do not give it much time.

Clarify your expectations. People are reluctant to take on tasks for indefinite periods of time. When your request includes a specific time commitment, the response is often, "Oh, if that is what you want, I can handle that." If you find that everyone is turning you down, go back to the drawing board and redefine the position to make it more realistic and attractive in terms of tasks and time commitment.

Be positive. Focus on the personal benefits to be gained from serving as a volunteer. Convey your own enthusiasm and commitment to the project. If you are not excited, it is hard to excite others. The way you recruit clearly conveys how important you feel the position is. Casual and careless recruitment will likely lead to casual and careless participation.

B. Where Will We Find Volunteers?

In identifying the types of people you're seeking and where they might be found, you move toward identifying the circles of people you want to reach to present your message. Word of mouth can be one of the best ways to recruit volunteers. Ask board and staff members for help or suggestions about where to find volunteers. Current volunteers also are excellent recruiters if their experience has been rewarding. And people who are familiar with your organization and its work can also offer suggestions because they know your "product."

Target your audience as much as possible to assist with matching skills and interests to the needs of your organization. You may need a volunteer to assist with activities for children of parents living with HIV/AIDS. Likely places to look for volunteers include: students majoring in counselling, health-related areas, youth development, local health departments and hospitals.

C. How Should We Communicate with Them?

In general, the most effective means of recruiting volunteers are those in which two-way communication is possible. Information and orientation meetings, courses, speaking engagements and one-to-one appeals are effective recruitment techniques because of their direct, personal nature. Another way to communicate your message is to offer a course to the public on what your organization does. This not only serves as a first step in training new volunteers, but also provides a significant service to the community and has public relations value for the organization. You could offer a course on "Counselling for Children of HIV/AIDS Parents," for example. Throughout the course you can talk about your volunteer program and have information available at the end of the session.

Recruitment messages should have three parts:

1) Statement of Need:

Most recruiting messages seldom talk about why we want the person to do a certain job. They only talk about the activities the person will perform. By including a statement of need, people know how they can help solve a problem rather than merely doing some activity. Rather than saying, "Our centre needs volunteers to tutor children," it is better to say, "Many children are failing in school because of a lack of affordable after-school/tutorial services." The statement of need prompts a potential volunteer to think, "Somebody ought to do something about that."

2) Job Description:

Your message will be more powerful if you describe tasks and activities in terms of the need because not everyone will be able to figure out why such activities are important. For example, volunteers will provide one-on-one tutoring to youth to reduce the tutor/student ratio. This will give the youth greater assistance in improving academic performance

3) Benefits:

Doing something worthwhile is not the only reason why people volunteer. Your message should show potential volunteers that other needs could be met by doing volunteer work at your organization. For example, experience will be gained in teambuilding, conflict resolution, effective communication and networking. This will also help reduce turnover and burnout.

Volunteer managers must make good use of marketing techniques to ensure that volunteer work competes with all the other ways people can spend their free time. Know to whom your volunteer jobs appeal and why, then use that information to decide where to recruit and which methods to use. This may sound like manipulation, but it's not. It's marketing:

Your organization has something to offer potential volunteers and your message and materials should state your case honestly and directly. A year-round public relations program is a valuable adjunct to any successful recruitment drive. The more visible your name, the better.

Thirty-Five Recruitment Ideas

1. Offer presentations illustrating clients being served by volunteers at neighbourhood association meetings.
2. Offer a program for large companies on ways to volunteer in your organization for use in their pre-retirement seminars.
3. Talk to the manager of your local cable TV program at a high school or college station about an opportunity to present a program on your organization.
4. Never leave a meeting where you have given a talk about your organization without getting the name and contact information of everyone interested.
5. When you make a presentation to a large group, take several volunteers with you.
6. Get lists of other organizations in your area to see if they can help your recruitment effort.
7. Research clubs, groups and schools that include among their activities a project similar to the work of your organization.
8. When speaking with potential volunteers, consider ways to focus the message on your client needs, not your organizational history.
9. Work with other volunteer groups in your community to sponsor a volunteer fair at a mall or local company.
10. Ask your newspaper to donate space in its classified ad section for volunteer job openings.
11. Ask churches to announce your volunteer needs to their congregations.
12. Contact high school and college department heads to see if volunteering with you can become a part of a class assignment.
13. Talk to personnel directors of companies to see if they can direct retirees and current employees to you.
14. Create a "Resource Inventory" file of groups, individuals, media and businesses.
15. Don't forget that you can recruit whole groups of volunteers to help you with a project.
16. When trying to involve minorities, find leaders in that community to help you recruit.
17. When trying to enlist teachers, pastors or community leaders, ask one of their colleagues or members to help persuade them.
18. Speak the language of the person you are trying to recruit. For example, if you are trying to recruit college students, explain how their volunteer experience can be good for gaining related work experience and establishing networks in their field of study.
19. When trying to recruit a group, look at its creed or mission and use some of its wording in your presentation. Some of these groups may include the Girl Scouts or college organizations.
20. When enlisting others, always tell why you are personally committed to your work.
21. Always recruit volunteers on the basis of the service to clients.
22. When trying to recruit businesses, look up their advertising slogan and build it into your presentation.
23. Tell people what they will do, how long they will be expected to do it. Talk about who will benefit.
24. Remember that you are trying to encourage volunteers to say "yes" — not twist their arms into volunteering.
25. Never use guilt when trying to recruit.
26. Be honest and up front with people when trying to recruit.
27. Avoid "first warm body through the door" methods of recruitment. Do not accept the first person who comes by. They may not have the qualifications you are seeking.
28. Ask grocers to stuff flyers about your program into grocery bags.
29. Explain large volunteer jobs by breaking the tasks involved into smaller components.

30. Be careful about recruiting people to titles without explaining the actual job functions and responsibilities.
31. Diagram where people will fit into the overall pattern of work.
32. ALWAYS offer a job description — even if it's a simple, one-sentence sketch of the work to be performed.
33. Don't recruit until you know what you are doing and what the volunteers are going to be doing.
34. Appeal to your current volunteers to recruit their friends.
35. Ask the local chamber of commerce to disseminate material to newcomers about your organization and its needs.

5. TO WHOM?	To whom does the volunteer report? With whom will s/he need to liaise?			Does the volunteer need to deal with administration? Does the volunteer need to be easy going, reliable, responsible? What decisions & responsibility will s/he have to take on?
6. WHAT REMUNERATION?	Reimbursement and out-of-pocket expenses: Travel Telephone Stationery Meals, etc			Does the volunteer need to deal extensively with money or administration?
QUESTION	CONSIDERATIONS (re: job spec)	NOTES FOR VOLUNTEER SPECIFICATION		CONSIDERATIONS (re: vol spec)

<p>7. REWARDS?</p>	<p>What can we offer the volunteer re: opportunities for:</p> <p>Initiative Independence Teamwork New skills Social life/company Challenge Routine Being valued/needed Confidence building?</p>	<p>This might suit a volunteer looking for:</p>	<p>Does the job require particular strengths or qualities to reap some of these rewards?</p> <p>What's in it for the volunteer?</p> <ul style="list-style-type: none"> - new friends - leisure interests - being useful - overcoming loneliness - responsibility/having a say
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Young volunteers as vehicles of change

22 February 2007

by Deepanjali Kakati

New Delhi, India: A sharp breeze cuts through the swaying grass but fails to dampen the enthusiasm of a bunch of students from New Delhi's Sanskriti School as they take off their shoes and wade into the Yamuna River on a cold December morning. They have come to chart the course of the river and understand how its relatively clean water turns totally murky as soon as it enters the city.

Vimlendu Jha, who designed this course on environment education for three schools in New Delhi, rolls out the shocking facts -- more than three billion liters of chemical waste and untreated sewage get dumped each day into the Yamuna, the source of 70 percent of the city's drinking water. The responsibility for cleaning it up, he says, lies not only with the government but also with common people like you and me.

The awareness trip is part of Bridge the Gap, an environment education course running in Vasant Valley, Shri Ram and Sanskriti schools in New Delhi. Bridge the Gap tries to help students understand their ecological environment and develop a sense of responsibility for it. "We work with rich schools from where we earn our resources and spend it in poor schools where we do it for free," says Jha, explaining the cross-subsidizing format.

After graduation from New Delhi's St. Stephen's College in 2000, Jha postponed further studies in order to launch the [We for Yamuna campaign](#). Disgusted with the condition of the river, he started the movement with 10 people to create awareness about how the Yamuna was being polluted and what needed to be done to clean it up. Within a few months, they were able to mobilize more than 500 volunteers.

The organization has now grown into a full-fledged NGO called Swechha-We for Change Foundation, which is active in the fields of environmental conservation, empowerment and social consciousness. Swechha has engaged with more than 5,000 young volunteers in the past six years. "One form of volunteering is when we work for you or for your cause. The other form is when volunteers are given a message and they take it forward on their own. It's a very interesting model where the target of change becomes the vehicle of change," says Jha.

Among the many organizations promoting social change through youth volunteerism is the New Delhi-based Pravah. Started in 1992 by a group of young professionals, it works with students as well as teachers to build social responsibility. Its programs enable young people to understand and debate social issues.

Pravah's SMILE program (Students Mobilisation Initiative for Learning through Exposure) helps people aged 17 to 25 volunteer with urban and rural NGOs, address social issues through youth clubs and influence public opinion through campaigns. The program is operational in 15 colleges in New Delhi and 22 other cities in India.

Whether it is street plays to raise awareness about civic responsibilities or initiating dialogues on sexual harassment in public transport, the youngsters spread the message with creativity and enthusiasm. Each volunteer is expected to put in at least 80 hours of work in New Delhi and spend four to six weeks outside the capital.

Swechha's programs are driven forward by enthusiastic youngsters, too. "Young people just need the right platform and somebody needs to channel their energy," says Jha, who is 27. "One very important thing we do in most of our volunteering programs is that we try to make people realize their self-worth-who am I, how am I different, what is my potential and where do I place myself in society."

Self-development is a key element of volunteerism and participants are often driven by the desire to bring about positive changes in their surroundings. In the process, they learn to work in groups and to

communicate. While many do it just to help the less fortunate or spread a social message, volunteering has also become a good way for students to build up their resumes, learn new skills or make contacts that can help them in their careers.

Sushant Arora, a SMILE volunteer, was part of the team that made the short film *It Matters* for the 2003 campaign Operation Ballot Box, to encourage young people to vote. "The film stands out as one experience that not only allows me to boast about having made a film in the very first year of my graduation studies, but also gives me an edge over others in terms of the knowledge I gained in the process," says Arora.

Swechha's programs also tap youthful energy in different ways. Last year the Monsoon Wooding program brought together more than 200 young volunteers who distributed saplings throughout New Delhi and encouraged people through street plays to rejuvenate the city's green cover. The program includes an informal school, called the Pagdandi School, run by university student volunteers who teach children in slums and promote awareness about sanitation and health. Swechha's music band, Jigri, gives voice to its message of social responsibility.

Jha also takes school students on four-day exposure trips to rural areas to make them aware of the symbiotic relationship between urban and rural India. One such trip to Mussoorie in September taught Ameesh Bhatnagar of Shri Ram School the basics of rural life. Staying with the villagers and helping out with their daily chores made him "appreciate the privileges I was accustomed to and how urban society is dependent on village resources," he says.

"Mahatma Gandhi talked about how there's enough for everybody's need but not enough for somebody's greed. For us, success means as much as you can consume and waste. But is that ideal for our planet, is that ideal for our social institutions? That's what our programs talk about," says Jha.

Pravah's rural exposure trips for urban schoolchildren help them break stereotypes and understand concepts like sustainable development and equitable distribution of resources. At times, these camps also turn into revelatory experiences for the volunteers looking after the students.

Neha Buch, a volunteer at one such camp in Wardha, Maharashtra, remembers a quiet girl from New Delhi's Sanskriti School who mostly kept to herself. On the last day, Buch saw the girl making a temporary road in the village. To her surprise, she saw this girl carrying a basket of cow dung, laying it on the path, leveling it with her hands and then jumping up and down to press the dung into place. Buch still hasn't forgotten the look of pure joy on the girl's face. "That was the first time I felt at peace....The reason why I was doing what I was doing sank in. I know each person has a true potential. They just need a chance to realize it," she says.

Pravah's SMILE program is divided into three stages that encourage the volunteers to learn from each other's experiences. As a first step, they meet and bond with their fellow volunteers. In the next stage, they are taken out of New Delhi for three to six weeks where they get a chance to connect with other communities and learn about their social realities. The concluding stage is one of reflection, where the young participants share their experiences.

An extension of Pravah's involvement with youth is the Bridging Universities to Societies initiative with Ashoka Innovators for the Public, based in Arlington, Virginia, in the United States. The initiative promotes entrepreneurship among youth and students in India.

On a visit to the United States under the State Department's International Visitor Leadership Program in 2005, Jha learned how voluntary organizations in America engage with young people on issues of ecology. "I

learnt a lot, traveling to different places, understanding different cultures, understanding different ways of looking at things. The IVLP program was quite an eye-opener," he says.

The journey indeed is most often one of self-discovery and realization. Journalist Newly Paul from New Delhi, who went on a Pravah awareness trip to Shahbad village in Rajasthan as a college student, says, "All

these years I had read of poverty, drought and illiteracy as chapters in a book. But this exposure has changed my views completely. Each of these words is now alive for me-associated with those hopeful faces that I saw in the village."

Sweta Roy Kashyap, research fellow with the Indian Agricultural Research Institute in New Delhi, took up voluntary work in Bihar's Munger district with the Self Employed Women's Association, looking for "real satisfaction and an opportunity to work directly with people." Though she complains about the entry of people without the necessary level of commitment into this sector, Kashyap says that her experience helped her "grow and evolve as a person."

Volunteering as a youngster, in fact, encourages people to dedicate their time and energy for others later on. Rashmi Sarmah, a Guwahati-based journalist, fondly recalls the time she spent working with sick animals as a volunteer with the Society for the Prevention of Cruelty to Animals (SPCA) in Baroda, Gujarat, during her college years. When she landed in the United States after college and wanted to take a break from her job at a news channel, she chose to volunteer at the Signal Mountain Animal Shelter and an assisted living facility for the elderly called Manor House in Chattanooga, Tennessee.

"My experience at the SPCA shelter encouraged me to go ahead with something similar there," she says. Spending time with the elderly people also helped her feel less homesick. "The most rewarding moments were when they would eagerly want to listen to stories from India and also tell me about their childhood days."

From : <http://www.worldvolunteerweb.org/browse/sectors/gender/doc/young-volunteers-as-vehicles.html>

SAMIA AL HASANI at VISION SAVER Case Study 2

It was a month on from that day when Samia had the conversation with Fathia about difficulties with volunteers. Today they were going to spend the day meeting a number of people who had expressed an interest in volunteering with Vision Saver. Hopefully all their efforts to publicise the services of the organization and try to recruit new volunteers will pay off, and they can find at least two more people to strengthen the day clinics.

As Samia arrived at the Centre, she realized that they still hadn't made a start on the new programme of expansion of their services outside of the capital. They still hadn't identified who could work on that project. It was easy in Muscat because the volunteer optometrists could come into the Centre when they finished their work at the hospitals and clinics. Now they were still unsure where to expand – to the west or to Salalah. It may depend on whether they were able to find people interested in collaborating with them. A start would need to be made soon. Maybe they could find someone today who would be interested in helping them to develop their ideas.

Before getting an opportunity to meet with Fathia and plan the day, she saw the new Health Educator sitting at the table by the kitchen. Issa had just started last week, after he had been recommended by Mohamed. Samia hoped that he would turn out ok as that project was a very important one. If they did well, maybe the international donors would support them with more grants. She went up to Issa for a quick conversation: "Hello Issa, how are you settling in? Have you had a chance yet to decide on your first steps with the new project?" Issa greeted her and explained that he had only been in the Centre a few times since starting, but had managed to read the project proposal and develop some ideas. He was going to meet with Mohamed the next day to discuss those ideas.

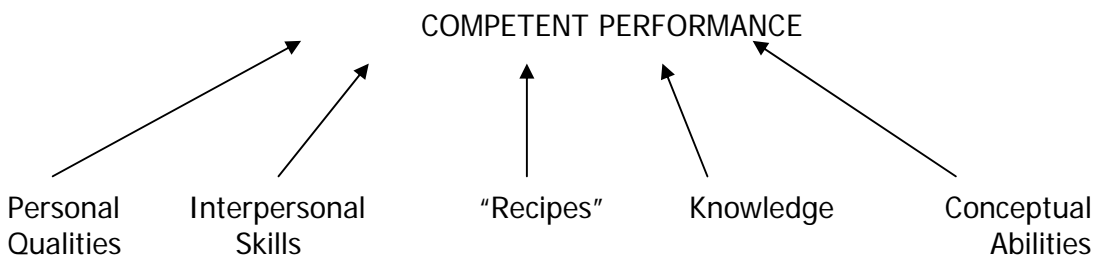
Samia said goodbye to Issa and went on her way to look for Fathia. She knew that Vision Saver had to get more people engaged with its work, and was pleased that these initiatives to recruit new staff and volunteers were happening. But somehow it all felt like it was a bit rushed and she wasn't sure that everything had been done in the best way or according to the employment laws. She noted to herself that she needed to talk to the Board about this at the next meeting.

Questions for group work

- **What do you think Samia should say to the Board at the next meeting?**
- **Describe the best way to run the day of meeting and selecting new volunteers for the clinics – what should happen and when? Who should be involved?**

COMPETENCIES

In carrying out their role and responsibilities competently, a person will usually be calling on several rather different attributes and abilities.



Personal Qualities: this covers attributes like a reasonable amount of self-confidence, energy and stamina; appropriate values and attitudes; self-awareness; and 'results' orientation.

Interpersonal Skills: this refers to everything associated with 'being good with people' – sensitivity, listening, ability to assert oneself and express oneself clearly, awareness of your impact on others etc.

'Recipes': this covers procedures, approaches, routines or techniques that can be used in different situations. They may be very specific, or quite loose, and may relate to a narrow or broad range of settings. But familiarity with, and having a 'way of handling', a wide variety of fairly standard situations is fundamental to all types of professional competence.

Knowledge: this may be 'specific' (e.g. about their subject or technical area) or general (the context for their work).

Conceptual Abilities: these include being able to 'stand back' and generate an overview, or a new perspective, being able to relate general principles and ideas to specific situations, being able to think creatively or analytically etc.

VOLUNTEERING AS AN EXCHANGE NOT A GIFT

“The ‘gift element’ to volunteering is important and no-one would deny the values that it represents. There are, however, implications in seeing volunteering *solely* in this way. It implies that you cannot turn a volunteer down; it does not give recipients much of a say in the relationship (they become indebted); and it ignores the fact that management and resources are still needed to support people who give their time for free. Thinking of volunteering as an *exchange* not a gift is often more appropriate. It does not take away the giving element but it makes the relationship more equal: the volunteers offers the agency what it needs, in return for receiving something form the agency. It helps to be clear about the latter as this can also be the key to motivating and retaining volunteers.”

The Top 25 Methods for Retaining Volunteers

1. Convince the entire paid staff to follow rules 2 through 25 because one person can't do it alone. Volunteer programs work only with a commitment that starts at the very top of the organization and continues all the way down through each successive level of management and staff.
2. Balance the needs of the organization with the needs of your volunteers. Remember that it has to be a mutually satisfying relationship for both parties.
3. Consider your volunteers as unpaid staff and include them whenever possible in office parties, meals and other similar activities.
4. Every once in a while, work alongside your volunteers. It promotes a sense of teamwork and reinforces the idea that you wouldn't ask them to do anything you wouldn't do yourself.
5. Set limitations with the paid staff as to which tasks volunteers will be asked to perform. Your volunteers are too valuable to be given the tasks that nobody else wants to do.
6. Make the volunteer experience at your organization fun. No matter what work the volunteers are doing, they should have a good time doing it.
7. Smile. No matter how much you want to grab the computer terminal and throw it across the room, don't let it show. Never let them see you suffering from stress.
8. Be flexible as an individual. Be willing to listen to volunteer concerns and suggestions.
9. Be flexible as an organization. Do not have policies so strict that volunteers feel uncomfortable in your environment.
10. Always emphasize your organization's mission statement. People no longer volunteer for organizations, they volunteer for causes.
11. Resist the urge to "play favourites" among volunteers. In other words, be consistent with your policies.
12. Practice the fine art of informal evaluations. It is amazing how much feedback you can get by just chatting with your volunteers.
13. Create a volunteer advisory committee. (Note: The key word is "advisory.") It will help empower volunteers, giving them a stronger connection to your organization and its mission and a reason to stay involved.
14. Use the media to promote your active volunteers. The media love stories about volunteers. Plus, no matter what they say, people just love to see their names in print.
15. Do not call on the same volunteers over and over again. It's too easy to become dependent on the "yes" people and burn them out. Plus, you miss out on developing a whole new pool of talent.

16. Acknowledge that the organization is not your volunteer's number-one priority in life.
17. Promote volunteers to new positions that require new skills, additional training and added commitment. Just because Dan is great at stuffing envelopes doesn't mean he is going to be happy doing it for the next ten years.
18. Once a year, ask the volunteers to give an anonymous evaluation of your organization, paid staff and the programs it offers (including the volunteer program).
19. For absolutely no reason at all, send your volunteer a note just to say "Hi."
20. Take the time to train your volunteers so they know what's necessary to do the job.
21. Vary your recognition program. The same old banquet with the same rewards every year gets boring. When volunteers stop attending because they've already re-papered their house in certificates of appreciation, you know it's time to move on to something new.
22. Don't be afraid to say "thank you" too much. Volunteers don't quit because they feel over-appreciated. Overworked, yes! Over-appreciated, no!
23. If your organization does not already have one, hire a professional volunteer program administrator.
24. Place volunteers in the right spot from the beginning. If you place a volunteer in a position that maximizes his or her potential for success, logic says he or she will succeed. Successful people tend to be happy people, and happy people tend to stay.
25. Each of us has his or her own unique motivators. If you really want volunteers to stay, learn what motivates them and then put that information into practice.

From: 'Volunteer Management' published by the National Minority Aids Council, USA.

Checklist for Managing Performance Well

- Is the organisation clear about what each worker, whether paid or voluntary, is meant to be doing, when they are supposed to be doing it, and what standards are applied to the work?
- Is everyone clear who is responsible for managing whom, and who is accountable for whom?
- Are problems with workers' performance identified, acknowledged and discussed with a view to resolving them, rather than being ignored or treated in an unhelpful fault-finding way?
- Is everyone allowed to learn from their mistakes
- Are there regular opportunities for all staff (including the Director) and long-term volunteers to meet with a manager or another person within the organisation to talk about achievements, problems and plans?
- Is there a clear procedure for appraisals, and it is consistently used throughout the organisation?
- Are the organisation's disciplinary procedures clear, fair and workable?

THE 1-1 SESSION

A critical moment in the managing of an individual is the one-to-one session between the two people. This session may be part of a regular support and supervision cycle; it may be the annual performance appraisal meeting; it may be a special meeting requested by either person to discuss a specific issue or incident.

It is in this session that the skills of a supervisor in relation to managing individuals are most intensively put to the test. There are some points which will help contribute to a positive session:

- *Good Preparation:* Before the session takes place the following are important:
 - both people should know the purpose of the meeting, and should prepare appropriately.
 - The supervisor will need to have ensured that adequate time is set aside for the meeting and that an appropriate location is assured.
 - She or he will need to set an agenda, but leave it open for review at the beginning of the meeting. The staff member/volunteer should prepare their points for inclusion in the agenda.
 - Relevant documentation or notes of previous agreements, meetings etc. should be reviewed by the supervisor, and if appropriate, copies should be made available to the staff member/volunteer before the session.
 - The supervisor should make it clear to the individual if they are expected to produce a proposal, document or develop ideas for discussion at the meeting, and a deadline should be agreed upon.
- *The Physical Environment:* this refers to the location and to any distractions :
 - an ideal location would be one that is not overlooked by others and is relatively free from outside noise.
 - the arrangement of the furniture should help contribute to a feeling of co-operation, facilitating a rapport between the two individuals.
 - Telephones should be diverted and visitors turned away.
 - Avoid looking at your watch or a clock on the wall as far as possible – this could give the impression that you are in a hurry or not interested.

- *The 'right' atmosphere:*
 - consider the welfare of the individual – are you aware of anything that may distract them from giving you their full participation? If so, this may need to be addressed before the session begins.
 - use appropriate language – avoid 'management-speak'.
 - Make it clear at the beginning that at the end of the session there will be a conclusion by the supervisor of what was agreed, and action points. There should be an opportunity after that for the individual to add anything or clarify anything.

Questioning Techniques

There are three types of questions which can be used in a 1-1 session, and they would tend to be used in a sequence:

1. Wide Open Questions starting with :

Explain.....

Tell me.....

Describe....

What....

They invite the person to give a long response covering many topics. For example, "Tell me about your work on that project proposal."

However, this could be *too* broad and so it is often necessary to be clear about the parameters. For example, "Tell me about your work on that project proposal – how is progress towards completing it?"

2. Specific Open Questions start with :

What....

Which

Who...

When...

How...

Why....

Where...

And invite a specific response about one subject area. For example, "What did you say in response?" or "Why did you approach it that way rather than another way?"

3. Closed Questions

These only invite a "yes" or "no" reply and so do not actually give you much information at all. The rule is that closed questions should only be asked to confirm or clarify the person's understanding of an issue e.g. "So you are saying that you didn't know what was expected of you?"

Unhelpful or Inappropriate Questions:

These can prevent proper reflection and self-examination:

- Leading questions are those that put words into the person's mouth e.g. "Wouldn't you say that you are not very good at time management?"
- Multiple questions are confusing e.g. "What paperwork do you fill out, what do you have to check, how long does it take you?"
- Hypothetical questions are those not based on fact e.g. "What would you have done if Katrin had refused?" or are those that are not based on fact but give the impression that they are, e.g. "I've spoken to Natalia you know. What would you say if I told you that she has given a different story?"

Listening Skills

During communication you will play the role of both speaker and listener. Listening is an *active* skill which contributes positively to communication. A good listener works to help the other person by establishing and maintaining a feeling that both are on the same 'wavelength'. The danger for listeners is that our own thoughts, feelings, questions and preoccupations will interfere.

Some points for consideration are :

- Matching the other person's body language (posture, gestures)
- Giving clear signals that you are paying attention (eye contact, nods, grunts)
- Matching the tone, pitch and speed of voice
- Using reflective responses.

Reflecting Back:

A reflective response uses the listener's own words to mirror back what they have heard. The focus is on the crucial parts of what the speaker is saying. The intention is to establish that you understand what your partner is thinking/feeling/meaning. Use statements rather than questions:

" You feel....." "you think..."

" Let me see if I have understood. Your position is..."

If you are confused (e.g. the speaker's non-verbal signals mismatch their words) you can mention this:

"I feel uncertain about what your position is on this matter. You are saying....but I sense that you may not be completely sure/happy/certain."

Mismatching

Responses which interrupt the flow of communication, or turn it to a different wavelength, can take the following forms:

- Critical – judgmental, blaming, warning, ridiculing
- Supportive/sympathetic – reassuring, consoling, giving misleading praise, in effect hindering attempts to confront the problem
- Interpretive – based on hunches, analysing and diagnosing the speaker's meaning, feelings etc.
- Logical/analytical – probing, questioning, interrogating which can be too pushy or cold
- Persuading – advising, giving suggestions/solutions, taking over.

There may be an appropriate time to use some of these responses, but it is important to be aware of how they can negatively impact on the session.

FEEDBACK

There are three types of feedback:

1. *Positive feedback*: praises strengths and achievements. It is the easiest form of feedback to give, but people often forget to give it.
2. *Critical feedback*: involves commenting on problems and areas of improvement – more difficult to give, but important and useful if given skilfully.
3. *Developmental feedback*: is positive or critical feedback followed by coaching on future performance.

If you wish to encourage people to maintain or develop their performance your feedback should be :

- **Ongoing**: a regular part of your relationship so that it becomes more natural and avoids surprises.
- **Specific**: when giving positive feedback or critical feedback, give detailed examples of what happened and what impact it had.

- **2-way:** always leave an opportunity for your feedback to be challenged and discussed, either immediately or soon after. You may be wrong or you may have been misunderstood.
- **Immediate:** praising or constructively criticising now, not at a future date.
- **Based on issues:** criticism should be directed at aspect of performance not at the individual as a person.
- **Helpful:** concentrating on behaviour that can be improved or changed and discussing alternative suggestions.
- **Non-judgemental:** describing unhelpful or unproductive behaviour rather than judging it.
- **Forward looking:** feedback should not dwell on the negative aspects of past performance, but should instead look to the future and help develop solutions to problems.
- **Not only related to problems:** don't forget to include unexpected praise and regular support for good performance.

Source: adapted from 'Mentoring for Management Handbook', Westminster College, 1998.

ACTIVE LISTENING SKILLS EXERCISE

Objective: The objective of this exercise is to allow participants to practice their active listening skills.

Method: Groups of 3 people. Each in turn plays the role of the manager, with one person playing the role of the staff member or volunteer and the third person being the Observer (and timekeeper)

Initially 2 minutes is given for preparation, then each group has 33 minutes total – that is, 11 minutes per turn.

Individual preparation in plenary (2 mins) :

- each person thinks of themselves as a staff member/volunteer in a 1-1 session with their manager.
- Identify a situation which you wish to discuss with the manager and get their feedback and ideas. It might be a situation of conflict with another member; difficulty with meeting a deadline; wanting help with the next steps on a project etc.
- Write down some points for a 2 minute initial explanation to the manager.

Group work (11 minutes – repeated 3 times)

The **staff member** explains the situation (2 minutes).

The **manager** waits till she or he is finished and then uses a combination of question types to gain further information and test out their understanding of the situation. (5 minutes)

The **observer** keeps the time, and also notes down any points about the way the manager is using the listening skills.

When the 7 minutes are finished, the feedback starts:

The **staff member/volunteer** says what he or she felt about the manager's listening during the session (1 minute)

The **manager** says what he or she felt or what was easy/difficult (2 minutes)

The **observer** feeds back to the manager the points he or she noted (1 min).

MANAGING TEAMS

What is a team?

A team can be defined as a group of individuals with shared values, complementary competences and specific roles and responsibilities, who are committed to a common purpose, set of objectives and approach for which they hold themselves mutually accountable.

We can look at each component separately:

- *A group of individuals* : it is important to recognise the characteristics and needs of the individual members as well as the group dynamics that are in operation when the individuals are together.
- *With shared values*: the core beliefs and values that shape the organisation and its mission must be shared by the individual members of the team for it to function effectively.
- *Complementary competences*: teams need to be made up of individuals with professional and interpersonal skills, personal qualities, knowledge, 'recipes' or experience that complement each other.
- *Specific roles and responsibilities*: individual team members must be clear of what is expected of them and what they will be responsible for within the team.
- *Common purpose and objectives*: team members need to be clear on both the short-term objectives they are working to achieve and how those fit within a longer-term framework.
- *Common approach*: time is needed for the team members to develop an effective way of working together as well as ensuring that individual tasks are carried out in a manner which is compatible with the team as a whole.
- *Mutually accountable*: the team members hold each other collectively accountable for achieving the objectives and thus contributing towards the overall purpose. This entails commitment and trust.

Teams are to be found at all levels within an organisation, and are tied together by their different tasks and responsibilities.

THE CHARACTERISTICS OF THE TEAM PROCESS

Much of the thinking about how teams initially form and consolidate themselves has been influenced by social psychology writings on group behaviour. It is recognised that much of what is known about the dynamics of a group of individuals is relevant to our thinking about teams within organisations.

The four stages of group development:

Forming

- Group is not yet a group
- Individuals want to establish personal identity within the group and make an impression
- Participation is limited as individuals get familiar with the setting, the leader and each other
- Individuals begin to focus on task at hand and discuss its purpose
- The group is essentially evolving ground rules on which future decisions and actions will be based

Storming

- Characterised by intra-group conflict and lack of unity
- Preliminary ground rules on purpose, leadership and behaviour are damaged
- Individuals can become hostile toward each other, and express their individuality by pursuing or revealing personal agendas
- Friction increases, rules are broken, arguments can happen
- If successfully handled, this stage leads to new and more realistic setting of objectives, procedures and norms

Norming

- Characterised by overcoming tensions and by developing group cohesion in which norms and practices are established
- Group members accept the group and accept each other's idiosyncrasies
- Group allegiance develops and group strives to maintain it
- Development of group spirit, harmony becomes important

Performing

- Characterised by full maturity and maximum productivity
- Can only be reached by successfully completing previous three stages
- Members take on roles to fulfil the group activities since they have now learnt to relate to one another
- Roles become flexible and functional
- Group energy channelled into identical tasks
- New insights and solutions begin to emerge

Source: Charles Handy (1988) *Understanding Voluntary Organizations*, UK , Penguin Books

CONFLICT AND TEAM BUILDING

Common types of conflict

- *Clique versus Clique*

People may form strong associations in clearly defined sub-groups, which try to exclude others

- **Individual versus Individual**

One individual may object to the ideas and opinions of another, and confront that person directly or indirectly

- *Clique versus Individual*

One individual gets singled out by a sub-group which may try to make that person's life difficult, undermining his or her position

- *Clique versus Leader*

A sub-group may take on an intense disliking to you and may go to great lengths to prove you wrong, draw you into an argument or make you lose face in some way

- *Individual versus Leader*

An individual may take an intense disliking to you and may go to great lengths to prove you wrong, draw you into an argument or make you lose face in some way

Dealing with difficult individuals

- As soon problems arise, take the opportunity to talk to the person individually. Try to understand what is bothering them. Sometimes disruptive people just want more individual attention. Try to diffuse the situation before the person becomes a ringleader for wider opposition.
- If this does not work, and there is someone in the group who has a personal relationship with the individual and can act as an intermediary, ask that person to discuss the disruptive behaviour sympathetically with the person in question.
- Give the person a particular responsibility in the group that will focus their energies, such as taking responsibility for a particular activity or project.
- Carry out an exercise that allows complaints to be voiced and discussed anonymously (for example '**Problem Hat**'). The issues can be aired through this medium.
- Only deal with difficult individuals publicly in exceptional cases. You can ask the person in question to make a comment in plenary and ask the group to resolve it together. But remember that this approach is very threatening and could be counter-productive.

BELBIN QUESTIONNAIRE

Team roles questionnaire

Task:

For each section distribute a total of 10 points among the sentences according to how you would describe your behaviour. Within each section you may allocate the 10 points in any way, providing the score for (a) to (h) adds up to 10.

You may transfer your score directly on to the score sheet provided.

Section 1: What I believe I can contribute to a team:

- (a) I think I can quickly see and take advantage of opportunities
- (b) I can work well with a wide range of people
- (c) Producing ideas is one of my natural assets
- (d) My ability rests in being able to draw people out whenever I detect they have something of value to contribute to group objectives
- (e) My capacity to follow through has much to do with my personal effectiveness
- (f) I am ready to face temporary unpopularity if it leads to worthwhile results in the end
- (g) I am quick to sense what is likely to work in a situation with which I am familiar
- (h) I can offer a reasoned case for alternative courses of action without introducing bias or prejudice

Section 2: If I have a possible shortcoming in teamwork, it could be that:

- (a) I am not at ease unless meetings are well structured and controlled and generally well conducted
- (b) I am inclined to be too generous towards others who have a valid viewpoint that has not been given a proper airing
- (c) I have a tendency to talk a lot once the group gets on to new ideas
- (d) My objective outlook makes it difficult for me to join in readily and enthusiastically with colleagues
- (e) I am sometimes seen as forceful and authoritarian if there is a need to get something done
- (f) I find it difficult to lead from the front, Perhaps because I am over responsive to group atmosphere

- (g) I am apt to get too caught up in ideas that occur to me and so lose track of what is happening
- (h) My colleagues tend to see me as worrying unnecessarily over detail and the possibility that things may go wrong

Section 3: When involved in a project with other people:

- (a) I have an aptitude for influencing people without pressuring them
- (b) My general vigilance prevents careless mistakes and omissions being made
- (c) I am ready to press for action to make sure that the meeting doesn't waste time or lose sight of the main objective
- (d) I can be counted upon to contribute something original
- (e) I am always ready to back a good suggestion in the common interest
- (f) I am keen to look for the latest in new ideas and developments
- (g) I believe my capacity for cool judgement is appreciated by others
- (h) I can be relied upon to see all essential work is organized

Section 4: My characteristic approach to group work is:

- (a) I have a quiet interest in getting to know colleagues better
- (b) I am not reluctant to challenge the views of others or to hold a minority view myself
- (c) I can usually find a line of argument to refute unsound propositions
- (d) I think I have a talent for making things work once a plan is put into operation
- (e) I have a tendency to avoid the obvious and to come out with the unexpected
- (f) I bring a touch of perfectionism to any team job I undertake
- (g) I am ready to make use of contacts outside the group itself
- (h) While I am interested in all views, I have no hesitation in making up my mind once a decision has to be made

Section 5: I gain satisfaction in a job because:

- (a) I enjoy analysing situations and weighing up all the possible choices

- | | |
|--|---|
| <ul style="list-style-type: none"> (b) I am interested in finding practical solutions to problems (c) I like to feel I am fostering good working relationships (d) I can have a strong influence on decisions (e) I can meet people who may have something new to offer (f) I can get people to agree on a necessary course of action (g) I feel in my element where I can give a task my full attention (h) I like to find a field that stretches my imagination | <ul style="list-style-type: none"> (f) I am sometimes poor at explaining and clarifying complex points that occur to me (g) I am conscious of demanding from others the things I cannot do myself (h) I hesitate to get my points across when I run up against real opposition |
|--|---|

Section 6: If I am suddenly given a difficult task with limited resources and unfamiliar people:

- (a) I would feel like retiring to a corner to devise a way out of the impasse before developing a line
- (b) I would be ready to work with the person who showed the most positive approach, however difficult he or she might be
- (c) I would find some way of reducing the size of the task by establishing what different individuals might best contribute
- (d) My natural sense of urgency would help to ensure that we did not fall behind schedule
- (e) I believe I would keep cool and maintain my capacity to think straight
- (f) I would retain a steadiness of purpose in spite of the pressures
- (g) I would be prepared to take a positive lead if I felt the group was making no progress
- (h) I would open up discussions with a view to stimulating new thoughts and getting something moving

Section 7: With reference to the problems to which I am subject in working groups:

- (a) I am apt to show my impatience with those who are obstructing progress
- (b) Others might criticise me for being too analytical and insufficiently intuitive
- (c) My desire to ensure that work is properly done can hold up proceedings
- (d) I tend to get bored rather easily and rely on one or two stimulating members to spark me off
- (e) I find it difficult to get started unless the goals are clear

Team Roles Questionnaire: Scoring Sheet

Task

- Transfer scores from each section on to first grid.
e.g. If in Section 1 you allocated 6 points to (a) then you write 6 under 'a' opposite 1.

Grid 1 Section	a	b	c	d	e	f	g	H
1								
2								
3								
4								
5								
6								
7								
Totals								

- Then transfer scores from grid 1 on to grid 2.
Your score of under 'a' in grid 1 is entered in box 'a' of grid 2.

Grid 2	CH	SH	PL	RI	CW	TW	ME	CF
1	d=	f=	c=	a=	g=	b=	h=	e=
2	b=	e=	g=	c=	a=	f=	d=	h=
3	a=	c=	d=	f=	h=	e=	g=	b=
4	h=	b=	e=	g=	d=	a=	c=	f=
5	f=	d=	h=	e=	b=	c=	a=	g=
6	c=	g=	a=	h=	f=	b=	e=	d=
7	g=	a=	f=	d=	e=	h=	b=	c=
Totals								

- Total Scores – Your highest score indicates your primary role

Key:

CH – Chairperson
 TW – Teamworker
 PL – Plant
 ME – Monitor Evaluator
 RI – Resource Investigator
 CW – Company Worker
 SH – Shaper
 CF – Completer/Finisher

BELBIN ROLES:

Chairperson or Co-ordinator

Distinctive contributions to the team

- Establishes and maintains a sense of purpose, of progress and involvement by all members of the team
- Brings 'maturity', confidence and trust
- Bonds and energises the team at Stage 1 (when it is forming)

Characteristic behaviours

- Clarifies goals and objectives
- Sets priorities
- Promotes decision-making
- Focuses people on what they do best
- Brings out the best in others
- Assertive but not domineering
- Good communicator, asks questions, challenges assumptions, listens, clarifies, summarises.
- Motivates the team.

Forgivable faults

- Intelligence but not brilliant or outstandingly creative

Teamworker or The 'Nice One'

Distinctive contribution to the team

- Promotes unity and harmony in the team
- Brings friendliness, sensitivity & caring to team
- Makes everyone feel an important and valued member at Stage 1, when they are feeling uncertain and apprehensive about their involvement.

Characteristic behaviours

- Listening to others and building on their ideas
- Smoothing over friction between team members
- Bringing people into discussion
- Counselling team members on their concerns
- Organizing social events

Forgivable faults

- Indecisive in 'crunch' situations
- Avoids confrontation
- Has little sense of urgency

Plant or The 'Ideas Person'

Distinctive contribution to the team

- Contributes original and creative ideas and solves difficult problems
- Brings breadth of vision and stimulating presence to the team
- Is responsible for some of the friction in Stage 2

Characteristic behaviours

- Good at ideas, poor at follow through
- Concerned with fundamentals, bored with detail
- Often radical and unorthodox in approach to problems
- Gets on best with the Chairperson; tends to ignore/dismiss other team members

Forgivable faults

- Wants to spend all the team's time on his/her latest ideas
- Poor at taking criticism of own ideas – gets prickly and often sulks
- Careless with detail
- Not a good communicator with, or manager of, ordinary people

Monitor Evaluator or Critic

Distinctive contribution to the team

- Prevents the team from committing itself to misguided projects or faulty decisions
- Brings a dispassionate analytical logic to situations
- Critical attitude can fuel the infighting in Stage 2

Characteristic behaviours

- Assimilates and evaluates large quantities of complex information
- Mulls things over before deciding
- Objective approach to problems
- Readily finds faults in the behaviour of others
- Not ambitious but competitive, especially with Plant and Chairperson

Forgivable faults

- Lacks warmth, imagination and spontaneity
- Unexciting
- Lacks drive and the ability to inspire others
- Can lower morale

Resource Investigator or Mr/Ms Fixit

Distinctive contribution to the team

- Keeps the team in touch with the 'outside world' through an extensive network of personal contacts and a lively interest in anything that is happening anywhere
- Brings a sense of 'fun' as well as numerous workable ideas
- Helps stimulate activity and encourage innovation in Stage 3

Characteristic behaviours

- Always 'knows' someone somewhere who can help out
- Rarely in the office and if is, probably on the phone
- Positive and enthusiastic, but drops things quickly
- Relaxed, sociable, gregarious
- Active under pressure and a good improviser
- Undertakes the role of salesperson, diplomat and liaison officer for the team

Forgivable faults

- Quickly loses interest
- Easily bored, demoralised and ineffective
- Can spend time on irrelevancies to the team

Company Worker or Implementor

Distinctive contribution to the team

- A practical organizer who turns ideas into manageable tasks
- Brings self-discipline, reliability and efficiency to the team
- Sets the pace for getting on with the job by establishing/adopting systems and procedures at Stage 3

Characteristic behaviours

- Methodical and systematic, logical and orderly
- Reliable, responsible and hard-working
- Doesn't like speculation or 'airyfairy' ideas
- Always knows what's going on

Forgivable faults

- Somewhat inflexible
- Slow to respond to new possibilities
- May be thrown by sudden changes
- Status conscious – can lead to competitiveness

Shaper or 'Action Person'

Distinctive contribution to the team

- Unites the group's efforts and pushes them forward to decisions and action
- Brings a dynamism and sense of purpose to the team
- Being performance oriented, is more active at Stage 4

Characteristic behaviours

- Driving
- Competitive
- Quick to challenge and respond to challenges
- Often rows, but they are quickly over and quickly forgotten – does not hold grudges
- Exudes self-confidence which often belies self-doubt
- Only reassured by results

Forgivable faults

- Prone to provocation and short-lived bursts of temper
- Can be arrogant and abrasive
- Impulsive, impatient and easily frustrated
- Most prone to paranoia

Completer/Finisher or 'The Worrier'

Distinctive contribution to the team

- Progress chases, concentrates on, and keeps others to, schedules and targets
- Brings a conscientious approach to quality and standards of performance
- Ensures that final (Stage 5) outputs of the team are unspoil by carelessness, sloppiness or error

Characteristic behaviours

- Searches for errors, omissions and oversights
- Maintains permanent sense of urgency
- Compulsive about order and deadlines
- Needs to check every detail, personally
- Impatient with more 'casual' members of the team

Forgivable faults

- Inclined to worry unduly
- Reluctant to delegate

"PROBLEM HAT"

A group exercise focused on discussing team issues

Objectives:

- ❖ To give individuals the opportunity to discuss immediate problems they face anonymously and constructively
- ❖ To emphasise equality in power and authority within the group
- ❖ To encourage participants to share problems and actively seek experiences and suggestions from each other
- ❖ To highlight that everyone has relevant and valuable experiences

Materials:

A hat
Slips of paper
Pens

Procedure:

1. Ask everyone to sit in a circle. Everyone, including the facilitator, should write on a slip of paper a particular problem they are facing and would like to resolve:

"I have difficulty with....."

Ask them not to mention names but to describe the problem in general terms.

Give them 5 minutes to think and write.

2. Ask them to fold the paper and put it in the hat. When all the slips are in, the hat needs to be passed around, and each person take one slip of paper. If it is your own slip, you need to exchange it for another.
3. A few minutes to reflect on the problem. Then anyone can start by reading out the problem, and giving their own suggestion of how to deal with it. Other people can also give their opinions.

COMMENTS TO BE ON THE PROBLEM AND NOT ON THE SUGGESTIONS

4. Continue around the circle until all the slips are read out .

DO NOT ALLOW MORE THAN 5 MINUTES PER PROBLEM

Comments:

This is a simple and powerful way to deal with immediate problems that the group is facing. It can be used when tensions are running high as it helps to speak about the issues publicly without being personal. This creates the opportunity for those who might be responsible to reflect on their behaviour and to change it.

Source: adapted from Brandes and Phillips (1990)

COMMUNICATIONS EXERCISE:

FOLDING PAPER GAME

1. Ask for four volunteers. Ask them to stand in front of the group. Explain that they have to agree to do two things: close their eyes and do what you ask them. Give each of them a piece of paper. Ask the rest of the participants to watch but not to comment.
2. Instruct the four volunteers to fold their paper in half and then tear off the bottom right hand corner. Tell them to fold it in half again and then tear off the upper right hand corner. Tell them to fold the paper in half again and to tear off the lower left hand corner.
3. Instruct them to open their eyes and display the unfolded papers to the audience. The papers are most likely to be different!
4. Thank the volunteers and then ask all the participants the following questions:

*So what happened that they are different results?
What does this tell us about communication?*

5. Summarise with key points:
 - often when leading teams, the communications are not effective...we can work to make them better
 - communication involves everyone – the person communicating the message AND the people receiving it. Individuals hear the message and interpret it in different ways.
 - So you need to be clear about the purpose and detailed in the instructions
 - Need to judge the appropriate amount of information to convey

MANAGING INTERACTIONS

1. TIME FOR SPEAKING

Two key behaviours that underpin the distribution of time for speaking are interruptions and invitations.

Interruptions can happen too frequently and can be to do with a dominant individual; a competitive relationship or a chaotic group. However, in some situations there are too few interruptions – perhaps because people are not skilled at interrupting, or because the group lacks energy or engagement.

There are skills involved in interrupting:

- Know that you are doing it
- Look at the person who is speaking and make eye contact if possible
- If this is not enough, make some kind of gesture indicating 'stop'
- Tell people what you're going to do before doing it: 'I'm sorry to interrupt, but I want to tell you....'

An invitation is a technique to use to influence the involvement of others. It can ask for the thoughts of individuals and raise awareness of the distribution of speaking time. Using invitations can create and protect the contributions of others ('Do you have something you want to add at this stage, Samia?'). Signal that you want to create a more open climate, put appropriate pressure on someone to contribute ('What do you think, Salem?) or break up a closed dynamic between two or three people and open up discussion.

2. Information

Look at how a group manages the exchange of information.

How well is the group managing this at the level of the procedures it uses? Is the meeting organised so that people who have information to convey are given the opportunity to do so?

How well is the exchange of information being managed at the behavioural level? Are people given space? Are they listened to? Do people ask questions?

What is the balance of telling versus asking? Are you someone who does a lot of telling and not much asking? Are you someone who mainly tells and does some asking? Are you someone who asks a lot? The balance of telling and asking affects meetings in relation to:

- Involvement: with participation encouraged via invitation and dominance broken down by the asking of questions
- Decision-making: for example, by gathering information, evaluating options and testing out possibilities.

Use questions to gather and process information so that decisions can be made; to challenge people to think, think harder and rethink; and to control interactions – we shape what others and think via questions.

Most people become more effective communicators if they ask more questions. Asking a question focuses on the other person and thus the questioner becomes more aware of that person's needs, and is more likely to be aware of the process of the interaction. Asking questions can help a group to use all its resources; a questioning approach can also generate commitment.

When you ask questions, you signal that you:

- Want to involve others – perhaps quiet people
- Are interested in what they have to say
- Want ideas or opinions from specific people
- Want ideas from the group as a whole
- Respect their opinions and ideas
- Are open-minded and prepared to move position
- Are willing to learn from others.

3. Ideas

We can tell a lot about how well a group is working together by looking at how interested people are in each other's ideas. Do people seek them from each other and explore? Do people concentrate on putting forward their own ideas?

Ideas are important because they generate energy and create ownership and commitment when participants' ideas are responded to. If, in a group situation, you want to create commitment, it helps to seek proposals – bearing in mind that people have to be able to respond. If people cannot come up with ideas, then, as group leader, you have to propose.

Ideas need development: this means expanding on an idea, progressing it, adding to it or modifying it, yet keeping some essential core. There are three common reasons why the development of ideas doesn't happen:

- The requirement of the meeting is to list options only
- The dynamic may discourage it – it may be competitive/withdrawn
- The skill may not yet be there.

The development or building of ideas is important and affects a group's :

- Climate
- Teamwork
- Ownership and commitment
- Quality of decisions

How can you do more to develop ideas?

- Listen to proposals in order to understand them
- Evaluate them and your reactions to them
- Identify ways in which the idea could be improved
- Formulate specific ideas for developing the original idea
- Articulate the development in the group

4. Reactions

We are often not aware of our reacting behaviour. In terms of reacting behaviour in groups we can look for:

- The overall level of reaction: are people signalling their responses to each other?
- The balance of positive/negative reaction
- The nature of the reactions: is it rational or emotional?

Levels of support in a group situation can be affected by how much, and in what way, people agree or disagree in the discussion. These two elements will affect the process of the group interaction, mostly in a rational manner. It is also important to develop awareness of what the *emotional* responses are in the group. There can be a choice in terms of your own behaviour:

- You can *enact* feelings, to express them directly. This can be powerful but is therefore risky
- You can *describe* feelings, to talk about how you, or others, are feeling. This can help create an open climate and can shift the level of the discussion. It can provide an alternative to disagreement and can be used to give feedback.

5. Clarity

In supervising groups we need to work to ensure clarity, which means paying attention to :

- The structure of the meeting and discussion
- The true meaning of what people say
- The outcomes of discussions and the shared understandings of these.

Here are some examples.

Managing structure by giving *directions*:

- 'Let's start by looking at our workloads'
- 'Can we go round the group to hear from each of you about that?'
- 'Why don't we move on to some ideas about lightening the load?'
- 'Let's spend some time brainstorming ideas for making this more manageable.'

Getting at the true meaning of what people say by *testing understanding*:

- 'Do you mean that you don't think that any of those will help, or that what Mohamed was saying isn't going to work?'

Summarising to help achieve better outcomes and shared understandings:

- 'What we've got so far is that everyone is feeling overloaded with work, but we know that there isn't a way to reduce that in the short term. We've looked at some ideas for reducing the pressure, which I've listed. Some of you can see possibilities in the ideas, but Abdul thinks that none of them will make any real difference.'

Can you identify where your skills are strongly developed and where they are under-developed?

What can you do to develop your skills in any under-developed areas?

'The Good Management Guide for the Voluntary Sector' – John Harris. NCVO Publications, London, 2002.

Team Building

This generally refers to a broad range of planned activities that help teams improve the way they accomplish tasks, and help team members enhance their interpersonal and problem solving skills. The kinds of activities may include away-days (team meetings held out of the office to discuss 'bigger picture' issues); going back to the organisation's vision and mission; training in interpersonal skills and problem solving etc.

Informal activities also contribute to the team building, such as meals out together, celebrating team members' birthdays, travelling together etc.

Apart from this activities-based approach to team building, it is also important to consider how the style used by the manager/leader may encourage team development and performance. It was seen earlier how we can consider 4 styles that a manager/leader may use when working with people : supportive, coaching, delegating and directing.

These styles may be used according to different stages of the team's development or according to the particular phase of the task at hand. So, it is more likely that the manager/leader will use a more directive style in the early stages - clarifying the objectives, laying out the expectations – moving into the coaching and delegating styles as the team develops.

TEAM BUILDING CHECKLIST EXERCISE:

Problem identification: To what extent is there evidence of the following problems in your team?

	LOW EVIDENCE		SOME EVIDENCE	HIGH EVIDENCE	
1. loss of team output	1	2	3	4	5
2. grievances or complaints within the team	1	2	3	4	5
3. conflict or hostility between team members	1	2	3	4	5
4. confusion about assignments or unclear relationships between people	1	2	3	4	5
5. lack of clear goals, or low commitment to goals	1	2	3	4	5
6. apathy, or general lack of interest or involvement of staff	1	2	3	4	5
7. lack of innovation, risk taking, imagination or taking initiative	1	2	3	4	5
8. ineffective team meetings	1	2	3	4	5
9. problems of working with the team leader or line manager	1	2	3	4	5
10. poor communications: people afraid to speak up, not listening to each other or not talking together	1	2	3	4	5
11. lack of trust between team leader and members, or between members	1	2	3	4	5
12. decisions are made that people do not understand or agree with	1	2	3	4	5
13. good work is not recognised or rewarded	1	2	3	4	5
14. lack of encouragement for working together in a better team environment	1	2	3	4	5

Scoring: add the scores for the fourteen items. If your score is between 14 and 28, there is little evidence that there is a need for team building. If your score is between 29 and 42, there is some evidence, but no immediate pressure for team building, unless two or three items are very high. If your score is between 43 and 56, you should seriously think about planning a team building program. If your score is over 56, team building should be top priority for your team.

LEARNING STYLES QUESTIONNAIRE

The questionnaire is designed to find out your preferred learning style(s). Over the years you have probably developed learning 'habits' that help you benefit more from some experiences than from others. Since you are probably unaware of this, this questionnaire will help you pinpoint your learning preferences so that you are in a better position to select learning experiences that suite your style.

There is no time to this questionnaire. It will probably take you 10-15 minutes. The accuracy of the results depends on how honest you can be. There are no right or wrong answers. If you agree more than you disagree with a statement, put a tick by it (✓). If you disagree more than you agree, put a cross by it (x). Be sure to mark each item with either a tick or cross.

1. I have strong beliefs about what is right and wrong, good and bad.
2. I often 'throw caution to the winds'.
3. I tend to solve problems using a step-by-step approach, avoiding any 'flights-of-fancy'.
4. I believe that formal procedures and policies cramp people's style.
5. I have a reputation for having a no-nonsense, 'call a spade a spade' style.
6. I often find that actions based on 'gut feel' are as sound as those based on careful thought and analysis.
7. I like to do the sort of work where I have time to 'leave no stone unturned'.
8. I regularly question people about the basis of their assumptions.
9. What matters most is whether something works in practice.
10. I actively seek out new experiences.
11. When I hear about a new idea or approach I immediately start working out how to apply it in practice.
12. I am keen on self discipline such as watching my diet, taking regular exercise, sticking to a fixed routine, etc.
13. I take pride in doing a thorough job.
14. I get on best with logical, analytical people and less well with spontaneous, 'irrational' people.
15. I take care over the interpretation of data available to me and avoid jumping to conclusions.
16. I like to reach a decision carefully after weighting up many alternatives.
17. I'm attracted more to novel, unusual ideas than to practical ones.
18. I don't like 'loose-ends' and prefer to fit things into a coherent pattern.
19. I accept and stick to laid down procedures and policies so long as I regard them as an efficient way of getting the job done.

- 20. I like to relate my actions to a general principle.
- 21. In discussions I like to get straight to the point.
- 22. I tend to have distant, rather formal relationships with people at work.
- 23. I thrive on the challenge of tackling something new and different.
- 24. I enjoy fun-loving, spontaneous people.
- 25. I pay meticulous attention to detail before coming to a conclusion.
- 26. I find it difficult to come up with wild, off-the-top-of-the-head ideas.
- 27. I don't believe in wasting time by 'beating around the bush'.
- 28. I am careful not to jump to conclusions too quickly.
- 29. I prefer to have as many sources of information as possible - the more data to mull over the better.
- 30. Flippant people who don't take things seriously enough usually irritate me.
- 31. I listen to other people's point of view before putting my own forward.
- 32. I tend to be open about how I'm feeling.
- 33. In discussions I enjoy watching the manoeuvrings of the other participants.
- 34. I prefer to respond to events on a spontaneous, flexible basis rather than plan things out in advance.
- 35. I tend to be attracted to techniques such as network analysis, flow charts, branching programmes, contingency planning, etc.
- 36. It worries me if I have to rush out a piece of work to meet a tight deadline.
- 37. I tend to judge people's ideas on their practical merits.
- 38. Quiet, thoughtful people tend to make me feel uneasy.
- 39. I often get irritated by people who want to rush headlong into things.
- 40. It is more important to enjoy the present moment than to think about the past or future.
- 41. I think that decisions based on a thorough analysis of all the information are sounder than those based on intuition.
- 42. I tend to be a perfectionist.
- 43. In discussions I usually pitch in with lots of off-the-top-of-the-head ideas.
- 44. In meetings I put forward practical realistic ideas.
- 45. More often than not, rules are there to be broken.
- 46. I prefer to stand back from a situation and consider all the perspectives.
- 47. I can often see inconsistencies and weaknesses in other people's arguments.
- 48. On balance I talk more than I listen.
- 49. I can often see better, more practical ways to get things done.
- 50. I think written reports should be short, punchy and to the point.
- 51. I believe that rational, logical thinking should win the day.



- 52. I tend to discuss specific things with people rather than engaging in 'small talk'.
- 53. I like people who have both feet firmly on the ground.
- 54. In discussions I get impatient with irrelevancies and 'red herrings'.
- 55. If I have a report to write I tend to produce lots of drafts before settling on the final version.
- 56. I am keen to try things out to see if they work in practice.
- 57. I am keen to reach answers via a logical approach.
- 58. I enjoy being the one that talks a lot.
- 59. In discussions I often find I am the realist, keeping people to the point and avoiding 'cloud nine' speculations.
- 60. I like to ponder many alternatives before making up my mind.
- 61. In discussions with people I often find I am the most dispassionate and objective.
- 62. In discussions I'm more likely to adopt a 'low profile' than to take the lead and do most of the talking.
- 63. I like to be able to relate current actions to a longer term bigger picture.
- 64. When things go wrong I am happy to shrug it off and 'put it down to experience'.
- 65. I tend to reject wild, off-the-top-off-the-head ideas as being impractical.
- 66. It's best to 'look before you leap'.
- 67. On balance I do the listening rather than the talking.
- 68. I tend to be tough on people who find it difficult to adopt a logical approach.
- 69. Most times I believe the end justifies the means.
- 70. I don't mind hurting people's feelings so long as the job gets done.
- 71. I find the formality of having specific objectives and plans stifling.
- 72. I'm usually the 'life and soul' of the party.
- 73. I do whatever is expedient to get the job done.
- 74. I quickly get bored with methodical, detailed work.
- 75. I am keen on exploring the basic assumptions, principles and theories underpinning things and events.
- 76. I'm always interested to find out what other people think.
- 77. I like meetings to be run on methodical lines, sticking to laid down agenda, etc.
- 78. I steer clear of subjective or ambiguous topics.
- 79. I enjoy the drama and excitement of a crisis situation.
- 80. People often find me insensitive to their feelings.

LEARNING STYLES QUESTIONNAIRE - SCORING

You score one point for each item you ticked (✓). There are no points for items you crossed (x).

Simply indicate on the lists below which items were ticked.

2	7	1	5
4	13	3	9
6	15	8	11
10	16	12	19
17	25	14	21
23	28	18	27
24	29	20	35
32	31	22	37
34	33	26	44
38	36	30	49
40	39	42	50
43	41	47	53
45	46	51	54
48	52	57	56
58	55	61	59
64	60	63	65
71	62	68	69
72	66	75	70
74	67	77	73
79	76	78	80

Totals

Activist	Reflector	Theorist	Pragmatist
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LEARNING STYLES - GENERAL DESCRIPTIONS

ACTIVISTS

Activists involve themselves fully and without bias in new experiences, they enjoy the here and now and are happy to be dominated by immediate experiences. They are open-minded, not sceptical, and this tends to make them enthusiastic about anything new. Their philosophy is: "I'll try anything once". They dash in where angels fear to tread. They tend to throw caution to the wind. Their days are filled with activity. They revel in short term crisis fire fighting. They tackle problems by brainstorming. As soon as the excitement from one activity has died down they are busy looking for the next. They tend to thrive on the challenge of new experiences but are bored with implementation and longer term consolidation. They are gregarious people constantly involving themselves with others but, in doing so, they hog the limelight. They are the life and soul of the party and seek to centre all activities around themselves.

REFLECTORS

Reflectors like to stand back to ponder experiences and observe them from many different perspectives. They collect data, both first hand and from others, and prefer to chew it over thoroughly before coming to any conclusion. The thorough collection and analysis of data about experiences and events is what counts so they tend to postpone reaching definitive conclusions for as long as possible. Their philosophy is to be cautious, to leave no stone unturned. 'Look before you leap'; 'Sleep on it'. They are thoughtful people who like to consider all possible angles and implications before making a move. They prefer to take a back seat in meetings and discussions. They enjoy observing other people in action. They listen to others and get the drift of the discussion before making their own points. They tend to adopt a low profile and have a slightly distant, tolerant, unruffled air about them. When they act it is as part of a wide picture which includes the past as well as the present and others' observations as well as their own.

THEORISTS

Theorists adapt and integrate observations into complex but logically sound theories. They think problems through in a vertical, step by step logical way. They assimilate disparate facts into coherent theories. They tend to be perfectionists who won't rest easy until things are tidy and fit into their rational scheme. They like to analyse and synthesise. They are keen on basic assumptions, principles, theories models and systems thinking. Their philosophy prizes rationality and logic. 'If it's logical it's good'. Questions they frequently ask are: "Does it make sense?" "How does this fit with that?" "What are the basic assumptions?" They tend to be detached, analytical and dedicated to rational objectivity rather than anything subjective or ambiguous. Their approach to problems is consistently logical. This is their 'mental set' and they rigidly reject anything that doesn't fit with it. They prefer to maximise certainty and feel uncomfortable with subjective judgements, lateral thinking and anything flippant.

PRAGMATISTS

Pragmatists are keen on trying out ideas, theories and techniques to see if they work in practice. They positively search out new ideas and take the first opportunity to experiment with applications. They are the sort of people who return from management courses brimming with new ideas that they want to try out in practice. They like to get on with things and act quickly and confidently on ideas that attract them. They don't like 'beating around the bush' and tend to be impatient with ruminating and open-ended discussions. They are essentially practical, down to earth people who like making practical decisions and solving problems. They respond to problems and opportunities 'as a challenge'. Their philosophy is: 'There is always a better way' and if 'if it works it's good'.

STAFF AND VOLUNTEER DEVELOPMENT

This involves extending the skills, knowledge, confidence and experience of individuals within the organisation. Ideally, opportunities for development should be provided to every member of the organisation. The term 'development' is usually used in a wider context than either 'learning' or 'training' and covers both of these. It tends to refer to a longer process of learning, acquiring skills or knowledge that may include a number of elements such as training, coaching, formal and informal interventions, education or planned experience

How development needs arise in CSOs

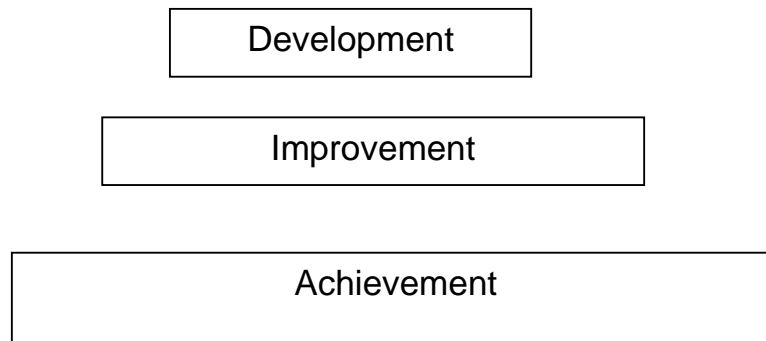
There are a variety of 'triggers' which generate the need for staff and volunteers to learn new skills, expand their knowledge base and build their confidence. These may include the following:

- ◇ *Needs arising through the requirement of project plans* - New project aims and activities are likely to generate learning needs if staff or volunteers are expected to undertake new responsibilities or work in new ways.
- ◇ *Needs arising through core competency requirements* - so that staff and volunteers are able to effectively follow the organisation's policies, procedures, systems and guidelines.
- ◇ *Needs arising from changes (in policy, legislation, the external working environment etc)* - changes can happen at a number of different levels, many of which may signal the need for training.
- ◇ *Individual professional development needs* - e.g. to keep up to date with new approaches to work, to maintain levels of knowledge and skill or to improve their future employability.
- ◇ *Needs related to resolving work problems* – e.g. poor written communication, low morale and lack of motivation, reports of dissatisfaction or complaints from colleagues or beneficiaries may signal possible development needs.
- ◇ *Needs related to unrealized potential* - some individuals may have underused abilities or ideas for developing the work which are being blocked. This may be due to lack of confidence, knowledge or the skill to present or convince others about the value of their suggestions. Any of these could signal a learning need.

Balancing the needs and wishes of the individual staff member or volunteer with the requirements and resources of the CSO can be a difficult issue. The guiding principle should be that the investment in learning is in order that the beneficiaries will receive a

better service, or the organization will be able to meet its goals more effectively. It is possible to consider three levels of priority for the use of resources to meet individual learning needs:

Hierarchy of learning needs



Achievement: ensuring that the staff member or volunteer can carry out his/her current responsibilities well and with confidence.

Improvement: enabling the staff member or volunteer to improve the ways in which current responsibilities are carried out – more efficiently, more quickly etc.

Development: enabling and encouraging the staff member or volunteer to take on new responsibilities and contribute to their own career development and the development of the organization.

It is important to identify and rank in order of priority an individual's main learning needs.

Achievement-related training (or other kinds of learning input) needs to receive top priority allocation of resources, as it is necessary to ensure that every individual can do their job properly. Whenever possible there should also be responses to elements of both of the other kinds of learning needs. These improve the individual's effectiveness and help to build commitment and morale.

How do individuals learn?

Adult learning has been described as a four-stage cyclical experience process which involves:

1. Having an experience
2. Reviewing the experience
3. Concluding from the experience
4. Planning the next steps

It is unusual to find individuals who give equal attention to all stages, and some may miss out some stages altogether. Which stages are emphasized over others will indicate the individual's 'preferred learning style'. It is argued that individuals can be helped to learn by knowing their learning style preferences. Personalised development programmes can be based on those preferences. But also the individual can be helped to develop their weaker styles so that they can aim to become better 'all round' learners.

Learning Methods

The choice of the best way of meeting an individual's learning and development needs may depend on:

- What the person needs to learn
- Their preferred learning style (e.g. learning better from trying things out first, or from understanding theory first?)
- The resources available
- The urgency of the need

Coaching

Coaching is a process by which a supervisor, through direct discussion and guided activity, helps an individual to learn to solve a problem, develop a skill or to carry out a task. It can be an extremely powerful way of helping an individual to learn.

Visits

Visits to other workplaces can be a very effective way of preparing for new developments in an individual's work. To get the most out of a visit, the individual should prepare for it carefully. Supervisors should always discuss proposed visits with the individual before and after it happens. This will encourage the person to reflect on what they learned and think about how they could introduce this new understanding into their practice.

Guided reading

Reading is often underestimated as a learning technique. It can be particularly useful in developing knowledge about a subject. Guided reading involves helping the individual to select relevant material, prepare for what they want to get out of their reading and review what they learned.

Supported delegation of tasks

Delegation is often discussed but seldom done well. It does not mean dumping unpleasant tasks on a team member and dressing them up as a learning opportunity! Delegation should be a planned, staged process of transferring responsibility for a task which enables the individual to meet their own learning needs. The process of delegation is time-consuming in the short term because it involves two people sharing responsibility for a task until the individual is both confident and competent to take it on alone. In the long term, delegation is a powerful learning method because it transfers the authority to make



decisions about an area of work as well as the skills or knowledge necessary to carry it out.

Training Courses

Training courses are often what first springs to mind when a learning need is identified. They can play a useful role in learning but have their drawbacks too. The main problem is one of transferring what is learned on a course back into the work setting. This can be helped by careful selection of the course in the first place. It can also help to have more than one person going on the same course, but this can be very expensive. In-house courses can be one solution since they are aimed at the needs of individual organizations. It is probably best to think of training courses only when other methods have already been considered.

Direct Supervision

Direct supervision involves the supervisor guiding the individual in doing a task which has been identified as a development need. This method is most effective when the individual wishes to develop their skills rather than learn new ones. It also requires that the supervisor is skilled in both the area of work and in giving feedback. Direct supervision lends itself to developing skills in group work and certain types of management skills such as chairing meetings.

Observation of performance/feedback

This is like direct supervision in reverse. Here, the individual is encouraged to observe another more experienced colleague and make observations about their performance. Through discussion, the individual can build the confidence to try the activity for him/herself. It is often used as an early stage of planned delegation and can be followed up by direct supervision on the same task.

Placements

These are temporary, planned transfer of an individual to a different workplace to develop specific skills or gain particular knowledge. Placements can be as brief as two days or much longer. Because the time involved can be considerable, it is vital that the individual and the organization offering the placement are well prepared.

Researching a topic

Finding out about a particular subject by researching can be a very useful learning method. This could involve reading, visiting other organizations or short placements. The process should include the production of a report or a presentation to colleagues as a way of focusing the learning and allowing others to benefit from the experience.

STAFF & VOLUNTEER DEVELOPMENT

ROLE PLAY INSTRUCTIONS – STAFF/VOLUNTEER

1. Form Pairs:

One person to play role of staff or volunteer
One person to play role of supervisor

2. The Situation:

You want to attend a two week training course on (decide what you want it to be on – something you are familiar with)

You need to get permission from your supervisor and you want the organisation to support you by paying for the course and giving you the time to attend.

You believe that the course will help you in your future career. It may not be immediately related to your current job description/set of responsibilities, but you believe that if you learn the new skills you will be able to contribute more to the organisation in the future.

Make your request and support your case to the supervisor.

3. Timing:

You have 2 minutes to explain your request.
The discussion with the supervisor will then last 8 minutes.

STAFF & VOLUNTEER DEVELOPMENT

ROLE PLAY INSTRUCTIONS – SUPERVISOR

4. Form Pairs:

One person to play role of staff or volunteer
One person to play role of supervisor

5. The Situation:

A staff member/volunteer comes to you with a request to attend a two week training course.

They need your approval and agreement that the organisation will support them by paying for the course and giving them the time to attend.

You know that the organisation only has a little money to support staff or volunteer development, and you need to be able to decide whether this request is a priority or not. You are not convinced that the individual is currently performing to his/her best and you will need convincing that this training course is appropriate.

Listen to the request and then ask questions in order to get information which will help you decide whether the organisation can support the individual to go to the course.

At the end, decide whether you agree to support them or not.

6. Timing:

You have 2 minutes to listen to the request.
The discussion with the staff person/volunteer will then last 8 minutes.

PLAN OF ACTION

Following my participation in the MANAGING STAFF AND VOLUNTEERS course, I have identified the following issues to be addressed on my return to my workplace:

My immediate plan of action will be to:

In the next six months I would like to:

Within one year I would like to have achieved the following:

Further Reading/ Resources

[in relation to the course topic, insert here]