

Running Good Groups

Introduction



Booklet

1

Running Good Groups Tool Kit

About this Toolkit



This toolkit teaches groups the things they need to do to make sure that their group runs well. The word to describe the things you do to make a group run well is: *Governance*.

The reason it is important that your group runs well or has good governance is because it helps all of the members of the group to:



- Understand what is happening in the group
- Understand how decisions are made and how to make good decisions



- Know who can join the group



- Know what is happening with the group's money

- Have their say



- Keep good records
- Understand what their jobs are in the group

Running Good Groups Tool Kit

Running Good Groups

It is important that groups are run well. Things you can do to run a good group or have good governance include:

- Writing down a description of your group, including: goals, who can join, the activities your group does, and why you do them. This is called a *Mission Statement*.
- Running good meetings with agendas, notes etc.
- Treating people with respect
- Supporting all members to have their say
- Keeping records of your money including how much you have, where it is spent and who looks after it
- Having rules to follow
- Knowing your legal responsibilities
- Working together to make a plan for the work the group does
- Helping new members to learn about the group



Running Good Groups Tool Kit



What Will this Toolkit Teach Us?

This tool kit includes information about running good groups or governance including how to:



- Write a mission statement



- Run good meetings



- Include all group members



- Look after money



- Write rules or a code of conduct for the group



- Make good decisions



- Write a plan for the group



It might all sound too hard but.....

You can do it to!!!!!!!



Running Good Groups Tool Kit



What is in this Toolkit?

Booklet 1	Introduction to Kit
Booklet 2	Governance Checklist
Booklet 3	Writing a Mission Statement
Booklet 4	Writing a Code of Conduct
Booklet 5	Good Planning
Booklet 6	Looking After Your Money
Booklet 7	Complaints
Tip Sheet	Having Fun
Samples	Self Advocacy Sydney Complaint Form
Blank Forms	Mission Statement Form Finance Forms x 3 Action List Table
Checklists	Good Groups Checklist Finances Checklist New Groups Meeting Checklist

Running Good Groups

Checklist



Booklet

2

About this Checklist



Good governance is the things groups do to make sure they run well.

If you have good governance it can help the group to make sure everyone has a say in the way the group runs and the decisions the group makes.

This checklist helps you think about the different things you can do to make sure you have good governance.



Checklist

Tick for Yes



You have written down the purpose of your group or your *Mission Statement*

☐

You have rules for the group (*Code of Conduct*)

☐

You decided how the group makes decisions

☐

Everyone in the group is supported to have their say

☐

You have a plan or goals for the work the group is doing

☐

You have rules about how you look after the group's money

☐

You hold regular meetings

☐

You have an agenda and minutes at your meetings

☐

You have reports about the work people are doing

☐

You have a plan for fixing problems, and a Complaints Policy

☐

You have a plan for working well together

☐



To learn how to write a Mission Statement go to:
Booklet No.3



To learn how to write rules or a Code of Conduct for your group go to: **Booklet No. 4**



To learn ways to make good decisions go to:
Booklet No. 5



To learn how to support everyone to have their say go to: **Booklet No. 6**



To learn how to do good planning go to: **Booklet No. 6**



To learn how to look after your money go to:
Booklet No. 7



To learn about meetings, agendas, minutes and reports go to: **Meetings Kit**



To learn how to fix problems and to make a Complaints Policy go to: **Booklet No. 7**



To learn how to work well together and work as a team go to the: **Having Fun Together Tip Sheet.**

Running Good Groups

Mission Statement



Booklet

3

Mission Statement



What is a Mission Statement?



Some groups write a Mission Statement about their group. When groups make a Mission Statement they write down:

- Who the group is
- Why the group was set up
- What the group wants to do and why you do it



Why Do We Need a Mission Statement?



Having a Mission Statement is important because it:

- Explains why you wanted to start your group
- Helps other people to learn who your group is, what you do and why you do it
- Helps new members to learn about your group
- Helps you pick the activities the group does

Mission Statement



What Should be in a Mission Statement?

A Mission Statement should be short and to the point. Here are some examples of what you can write in your Mission Statement:

- Why your group was set up and why it is important

Example: *The Hell Raisers Self Advocacy group was set up because we do not believe that people with a disability are getting their rights.*

It is important that people with disabilities get their human rights so that they can have the same rights, choices, and opportunities as anyone else in the community.



- Who can be members of your group

Example: *People with an intellectual disability*

- The main things or goals your group wants to do

Example:

1. *Support people with disabilities get their human rights*
2. *Work towards a better world for people with a disability*
3. *Educate the community*
4. *Support each other*



Mission Statement



What Should be in a Mission Statement?

- The work or activities our group will do to get their goals

Example:

1. We will meet regularly and share ideas
2. We will lobby the government
3. We will run training
4. We will give talks



reinforce
self advocacy
OWNERSHIP OF OUR OWN LIVES

Have a look at the Mission Statement of Reinforce, a self advocacy group in Melbourne.

Reinforce is a self advocacy organization run by and for people with an intellectual disability.

Reinforce believes that the rights of people with an intellectual disability should be upheld in the same way as anyone else in the community.

Reinforce is here to assist, support and encourage independence for people with an intellectual disability.

Reinforce provides training, resources, lobbies and advises government, undertakes community education, holds forums, and promotes socialising and networking.

Reinforce supports people with intellectual disabilities to speak up about what they want and get their human rights. Reinforce is run almost entirely by volunteers.



Mission Statement

Use this form to help write your Mission Statement

Why was your group set up?

Why is your group important?

Mission Statement

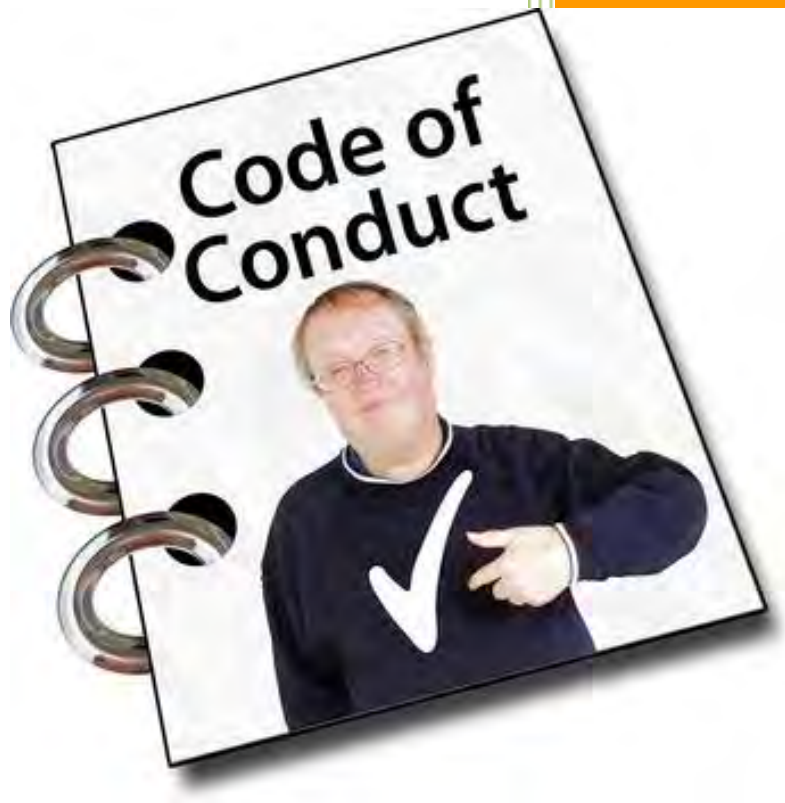
Who can be members of your group?

What are the main goals of your group?

What work will you do to reach these goals?

Running Good Groups

**Code of
Conduct**



Booklet



What is a Code of Conduct?

A Code of Conduct is a set of rules or guidelines that make sure groups run in a way that:

- Protects people's rights
- Supports people to respect each other
- Supports everyone to get a fair say
- Explains how the group is run



Sometimes groups write lists of rules that are very strict or negative and only talk about the things people cannot do. Groups with rules like this do not run very well.

A Code of Conduct is about writing good rules or guidelines that support people to be valued, respected and to have their say in their groups.





Why Have a Code of Conduct?

A Code of Conduct helps groups to make sure that:

- Members know their rights in the group
- All people are treated with respect
- Members are supported to have their say and have their ideas listened to
- Everyone gets information in ways they can understand
- No-one is bullied, abused or treated badly
- Meetings run well
- People are not discriminated against





What should be in a Code of Conduct?

Here are some things that different groups put in their Code of Conduct:



- We will treat all members with equal respect.

Respect means being polite, treating people as an equal and valuing their ideas and decisions.

- We will not discriminate against men and women, people from different backgrounds, people with or without disabilities, people of different ages, sexuality etc.



- We will run meetings in a way that supports everyone to have their say and be heard.



- We will respect the opinions and ideas of all group members.
- We will help people to get information in ways they can understand.
- We understand that everyone is different.

Code of Conduct



What should be in a Code of Conduct? cont.



- People cannot not be bullied, threatened or treated badly in our group.

Bullying means fighting, talking about someone behind their back, calling people names, swearing at people, threatening people, saying mean things on the Internet etc.



- We understand that some people might do things differently from other people and that is OK!



- We will treat all people the same way that we want to be treated.
- Members have the right to be heard if they are not happy. They also have the right to make a complaint.
- We will give people time to understand and support people to understand.



Making a Code of Conduct

Below are the steps you can take to make your own Code of Conduct:



1. It is important that all your members have a say and are involved in writing your Code of Conduct.

2. Look at the list on pages 3 and 4 and talk about:



- which ones you think your group should do
- what other things your group can do to run well
- which ones you think your group does not need in a Code of Conduct
- how you will make sure these things happen

3. Each member writes down or talks about how they want to be treated as a member of the group. This can include the things the group does to:



- make you feel good about yourself
- support you to have your say
- make you feel an equal and important member of the group
- treat you with respect
- listen to what you have to say



Code of Conduct



Making a Code of Conduct cont.

4. Each member writes or talks about how they do **not** want to be treated by the group. This can include:

- getting picked on
- getting bullied
- nobody listening to you
- nobody using any of your ideas
- people not taking the time to explain things to you



5. All the members talk about the things they think helps the group to run well.



6. All the members talk about all the things that happen that stop the group from running well.

7. Look at all the things you have talked about and written down. Now decide which things you would like in your Code of Conduct.

8. Once you have written down the things you would like in your group Code of Conduct, give people a chance to say if they are happy with what is in it.



Running Good Groups

Planning



Booklet



What is Planning?

Planning is what you do to decide the activities or projects your group is going to do and how you are going to do them.

In Booklet 3 you learnt how to write a Mission Statement. Your Mission Statement should include a list of goals for your group e.g.

The Hell Raisers Self Advocacy Group will:

1. *Support people with disabilities get their rights.*
2. *Support people with disabilities to get good services.*
3. *Educate the community about the rights and needs of people with a disability.*

Groups then decide the projects or activities they will do to help achieve their goals in the Mission Statement. including:

- What you want to do
- Why you want to do it
- How you are going to do it
- Who is going to do it
- When you are going to do it

This is called: Planning.



It is a good idea to write a plan for your group every 6 or 12 months. Everyone in your group should be able to have a say in the group's plan. Some groups schedule a special day just to make a plan of all the things they want to do in the next six months or a year.



Making a Plan

Step 1. Look at the goals written in your Mission Statement. Get everyone to brainstorm or write down an activity or project idea that can be done to help you all achieve the group's goals.

Examples: **Goal:** *Support people with disabilities to get their rights*

Activity: Run a Rights Information Day

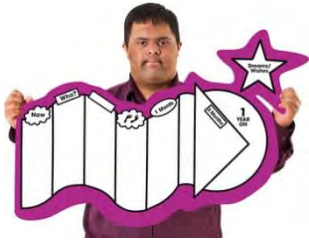
Goal: *Support people to get good services*

Activity: Make an information kit about the types of services and supports that you can contact

Goal: *Educate the community*

Activity: Learn how to do public speaking and then go out into the community to give talks





Making a Plan cont.

Step 2. You now decide how you are going to make your activity happen. This includes making a list of all the things you need to do to make your activity happen.

Example:

Planning a Know Your Rights Information Day



Why: We will use the information day to raise awareness of the rights and needs of people with a disability. We will invite people with disabilities, politicians and decision makers to come along.



How: We will write a list of jobs for people to do for the information day.



Funds: We have a budget of \$500.



When: We will take six months to plan the information day.



Making a Plan *cont.*

Step 3. The next step is to write an Action List. Below is an example of how you can use the list to help with your planning.

<h3>Action List</h3> <p>Project: Rights Information Day</p>			
Activity	What has to happen	Who	Done?
Where: In the local community centre	Ask the co-ordinator of the local community centre if we can use a big room and find out how much it costs	Brenda	
Money: We have \$500	We need to work out how much it will cost to run. This is called a budget.	Megan	
Helpers: Members of our group, our support worker and SARU	We need to email these people and ask if they can help us.	Phil	
Who: We want to invite people with disabilities, workers, politicians etc.	We need to make a list of names and get contact details for these people and send them an invitation.	Jim	
Jobs:	<ol style="list-style-type: none"> 1. Make an Agenda for the day 2. Pick the Guest Speakers 3. Pick a Date 4. Make and mail invitations 5. Organise food 6. Make an equipment list. For example microphones data projectors etc. 7. Decide which self advocates will speak 8. Pick the MC 9. Keep track of our spending 	Cynthia Committee Committee Jim Godfrey Rose Committee Committee Megan	

There is a blank Action List form for you to use in this kit

Action List

Project Name:

Activity	What has to happen	Who	Done?
Where:			
Money:			
Helpers:			
Who else?:			
Jobs List:			

Planning Hot Tips



1. Make sure everyone has a chance to have a say.

2. Respect everyone's ideas and suggestions.



3. Put planning updates on your Meeting Agendas.

4. Write down when you want each of the different activities to be completed. This is called a timeline.



5. Make sure people are supported to do their activities and have help if they need it.



6. Have fun together.



7. Keep a record of all the good things that happened and the problems and how you solved them.



8. Have a special meeting once you have finished your plan to thank everyone and talk about the good things that happened, and to celebrate your success!!!!!!

Running Good Groups

Money



Booklet

6



Looking After Your Money

Looking after your group's money well is an important part of good governance. Even if your group only has a small amount of money it is important to have rules about how the money is looked after because:

- You will know where the money is spent.
- You will know how much money the group has.
- All of your committee is legally responsible for your money.
- You know what the money is spent on.
- It stops people spending money on things that are not approved by the group.
- It makes it hard for anyone to steal your money.



How to Look After Your Money



1. Set up a bank account for your money even if you do not have much money. A bank account helps you to keep track of how your money is spent and how much you have left. All the money you get should go into the bank.
2. Make it a policy of your group that the committee has to approve all of the things that the money will be spent on and you must get and file receipts for everything you buy.



How to Look After Your Money cont

3. Try to pay everything with a cheque and make it a policy that two people have to sign the cheque. This means that you have a good record of where the money has gone and that no one person can get money from the bank.
4. The group should pick one person to give the report on the money to the group. This person is sometimes called the Treasurer. The Treasurer is one of the two people who signs the cheques. The Treasurer also gives a financial or money report to the group. Remember!!!!!!! All of the members of your group are responsible for your money NOT just the Treasurer.
5. The Treasurers Report should tell the group the following:

How much we have in the bank \$_____

How much money we got this month \$_____

How much money we spent this month \$_____

List of things we spent money on this month:

1. \$_____

2. \$_____

3. \$_____

There is a blank Treasurers Report Form included in this Tool Kit

Treasurer's Report Form

How much we have in the bank \$_____

How much money we got this month \$_____

How much money we spent this month \$_____

List of things we spent money on this month:

1. \$_____

2. \$_____

3. \$_____

4. \$_____

5. \$_____

6. \$_____

7. \$_____



How to Look After Your Money cont

6. Set up a good way to keep records of your money including:



Date	Description	Ref	Income	Expense	Balance
1 Apr	Balance b/f				200.00
4 Apr	Patrons and party	101	15.00		185.00
10 Apr	Bank Mtd 100000	301	54.00		239.00
18 Apr	Bank Mtd 100000	302	30.00		269.00
18 Apr	Greenes	101		10.00	259.00
21 Apr	Postages and stamps	102		20.00	239.00
24 Apr	Web site fees	103		40.00	199.00
27 Apr	Cham and desk Chg 001	104		125.00	74.00
29 Apr	Bank Mtd 100000	301	30.00		104.00
30 Apr	Bank Fees	105		2.00	102.00
30 Apr	Bank Mtd 100000	304	54.00		156.00
	Balance c/f				156.00
	Cash Book Balance		155.00		
	Agst Unreconciled cheques		10.00		
	Reconciled		200.00		
	Less: Deposits not yet shown			44.00	
31 Apr	Bank Statement Balance		126.00		

- Bank statements
- A cash book or computer form where you record any money you have received and all the money you have spent.
- A way to record and keep your receipts. Here is an example:

Payment Form



What did we buy? _____

Why did we buy it? _____

Cost: \$ _____

Receipt () Yes attached
() No Why not _____

There is a blank Payment Form included in this Tool Kit

Payment Form

What:

Cost: \$ _____

Why Spent:

Receipt () Yes attached

() No

Why not? _____

How to Look After Your Money cont.

7. Make a budget. A budget is a list of things the group thinks they will need to spend the money on each year. It is the job of the group to make sure you stick to the budget so the group does not run out of money. You should keep a budget form and check it at each meeting. A budget form looks like this:

What things we will spend money on in the next 12 months	How much we think we will spend	How much we have spent so far	How much is left
Wages			
Stationary			
Travel			
Food and Drinks			
Room Hire			
Printing			
Training			
Equipment			
Other			
Other			



How to Look After Your Money cont.

8. At the end of each year you should write an “Annual Financial Report.” The report should say:

- How much money you **got** in the last 12 months
- How much money you **spent** in the last 12 months
- **What** you spent money on in the last 12 months
- How much money you still **have** in your bank



Looking after your money check list

We have set up a bank account

☐

All our money goes into a bank

☐

We have chosen two people who sign the cheques

☐

The committee decides what the money is spent on

☐

We have made a budget

☐

We have a place to keep our receipts

☐

We have a form for writing down what we spend our money on

☐

We have a form for writing down money we get

☐

We have a report from the Treasurer each month

☐

We write an Annual Money report once a year

☐

There is a blank Money Checklist in this kit

Running Good Groups

Complaints



Booklet

7



What is a Complaint?

A complaint is when you tell someone about a problem or a concern you have with something or someone.

At different times people can get upset with something that is happening in the group. The reasons you might be upset about something happening in your group include:

- You are been treated unfairly or badly by another member or members of the group.
- You think that you or someone else has been treated unfairly at your group meeting or by your committee
- Something is happening in the group you are not happy about
- You have been treated unfairly by the people supporting your group such as your support worker, or volunteers

All groups should have a way that people can make a complaint if they think they are being treated badly or unfairly in the group. This is called a having a Complaints Procedure.





Why Have a Complaints Procedure?

It is a good idea for all groups to have a way for their members to make a complaint because:

- It makes sure all members get a fair go in the group.
- It protects the rights of the group members and the people working with or supporting the group.
- It is a good way to fix problems before they get too big.
- It helps groups to run well and to treat members with respect.
- Members of the group know that their complaint will be listened to.
- If problems do not get fixed, they might get really big and cause tension in the group.





Do We Need a Complaints Procedure?

Every group needs to have a way to make a complaint and every member of the group should know how to complain. Your group might not need to write a complaints procedure if:

- Your group is supported by a service that has a complaints procedure you can use.
- You already have a complaints procedure.



It is a good idea to ask the people supporting your group if there is already a complaints procedure your group can use or if they think your group needs to write your own complaints procedure.





What should be in your Complaints Procedure?

If you are going to write a complaints procedure some of the things that should be in it include:



- What is a complaint – write down in plain English what a complaint is.
- Your rights when you make a complaint – explain that members have the right to:
 - Make a complaint
 - Have their complaint treated seriously.
 - Not be punished or get in trouble for making a complaint.
 - Have their complaint kept private or confidential.



- Who can make a complaint e.g. members of the group
- Who you can make a complaint against e.g. other members of the group, the committee, the people working to support the group etc.



How to make a complaint – this includes the steps

- people follow when making a complaint.
- Whose job it is to sort out the complaint e.g. a complaints officer who is as a member of the group, the president or chairperson of the group, a volunteer, the person working to support the group.





What Steps should be in your Complaints Procedure?

Your Complaints Procedure should include the steps people follow to make a complaint. Here is an example of the steps that one Self Advocacy group uses:



Step 1: Talk to the person who has upset you, if you are able to.

Step 2: If you do not want to do this or if this doesn't work talk to the committee or to the person supporting the group. It might be a good idea to take a friend with you. You can ask that the notes of this meeting be written.



Step 3: If this still doesn't work, you can fill in the complaints form.

Step 4: Give the form to the person whose job it is to help your complaint.



Step 5: The complaints person works with you to decide the steps that can be done to fix your complaint.

This might include:

- Talking to the person who upset you
- Organising the people involved to meet and talk together
- Changing the way things are done
- Talking at a group meeting to work out a way to solve the problem
- Learning who else you can make a complaint to if the complaint is not fixed





What Steps should be in your Complaints Procedure? cont.

Step 6: The person who made the complaint is told what happened with the complaint and how it has been fixed, or the person is given advice about who else they can complain to if their problem is not fixed.

Once you have made your complaints procedure make sure every member gets a copy.

Good Luck!!!!!!!!!!

Examples of complaints forms and procedures are included in this toolkit.



COMPLAINTS RECORD FORM

DATE OF COMPLAINT: _____

COMPLAINT RECEIVED BY: _____

COMPLAINT MADE VIA: TELEPHONE / LETTER (attached) / IN PERSON / OTHER

SUBJECT OF COMPLAINT: _____

(Further details of complaint attached if needed)

INFORMATION TO BE GIVEN TO COMPLAINANT:

- Reassure complainant that all complaints are treated confidentially.
- They will suffer no loss of service because they have made a complaint.
- Explain the complaints procedure.
- Remind the complainant that they have the right to choose an advocate/support person. Explain that SAS is happy to get complaints as they can help to improve the service.

NAME OF COMPLAINANT: _____

ADDRESS: _____

PHONE NUMBER: _____

SUPPORT PERSON : _____

ACTION TO BE TAKEN: _____

Signed

(Complainant)

Date

(Executive Officer or President)

Date

OUTCOME of INVESTIGATION

COMPLAINANT'S RESPONSE: _____

Having Fun – Tip Sheet



Having Fun Together

It is really important for groups to take time out to have fun together. Groups that run well do not just spend time working on the issues and projects but they take time to do things together that are fun.



Taking time to have fun together can sometimes be a way to stop problems coming up between members of the group and it helps you to unwind, relax and enjoy each other's company.

Here are some ideas for things groups can do to have fun together:



- Go out to dinner together
- Hold a movie night
- Do some team-building games
- Take time before meetings to chat and learn what people have been doing.
- Hold a games day or night
- Plan a social activity with other groups
- Hold a B-B-Q



SARU

Self Advocacy Resource Unit

Resourcing Self Advocacy groups across Victoria
for people with intellectual disability, acquired brain injury and complex communication requirements

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