

1 DIRECTION



Plans provide your organisation with direction. They are your roadmap and travel plan. They will highlight your destination, your mode of transport, the route you will take, how you are going to deal with hazards, who you will have on your trip and who you have to involve or take along for the ride.

You can go on a journey without a roadmap or a plan, it will probably be a fun adventure, but it will also be risky and stressful. You will likely take some wrong turns, spend more money, miss important opportunities and maybe even leave some people behind. You may not even end up where you intended to end up, or where others expected you to be. You may not know when you actually reach your destination. In organisations you are entrusted to use your resources wisely to achieve the purpose intended by the founding document. You cannot go off on your own adventure, without the accountability and discipline required from a good plan.

There are different types of plans, with the strategic plan generally the key plan. All other plans deliver to the core goals in the strategic plan. It depends on the size of your group or the complexity of the project you are undertaking, as to how many plans you may need.

Steps for developing a strategic plan

- 1. Know your purpose:** Your purpose is why you exist. It should be held within your founding document (trust deed or constitution). It is important that you have a clear view of your purpose.
- 2. Create your vision/view of the future:** Your vision is your chance to describe what you / your community will look like or be like in the future. A vision should be aspirational (in other words something motivational to aspire to), it should also be related to your purpose and be realistic.
- 3. Analyse the environment in which you operate:** There are many ways you can do this, two common methods are:
 - a. SWOT** (Strengths, Weaknesses, Opportunities and Threats); and
 - b. PEST Analysis** (Political, Economic, Social and Technological).
- 4. Analyse the distance (gap) between your future and where you are now:** There are many ways you can assess the gap. A simple approach is to give yourself a score out of 10 (10 being fully achieved).
- 5. Develop strategies to close the gap:** Consider the results of your analysis of the environment you are operating in.
- 6. Identify barriers and risks to the successful implementation of your strategy**
- 7. Develop an action plan for implementation:**
 - a. Time frames** (so you know when you intend to have achieved things).

b. Milestones (things that will tell you that you are making progress).

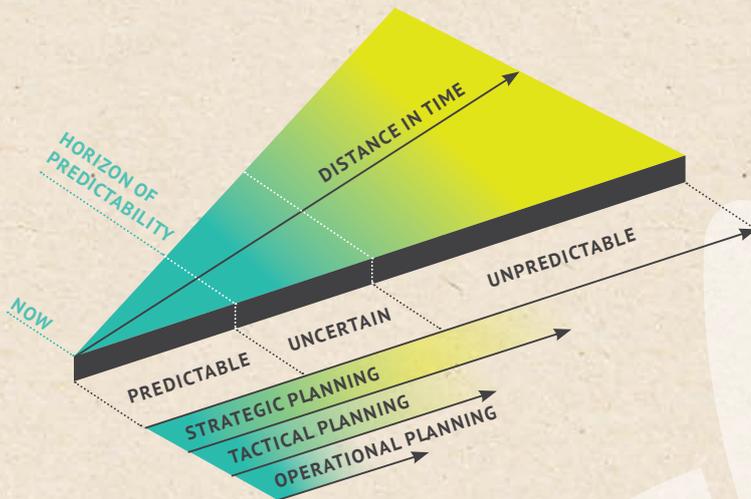
c. Review steps (to check if you are making progress as fast as you intended and in the right direction).

d. Responsibilities (making sure you know who will be undertaking your planned activities).

e. All plans should be SMART = Specific, Measurable, Achievable, Realistic and with a Timeframe.

8. Create a calendar of planned activities to monitor progress.

For plans to continue to remain relevant and provide value to an organisation they need to be regularly reviewed and modified. See on the right a simple model of planning cycle.



The planning horizon is how far ahead in terms of time an organisation should plan for, depending on the goal. This is also related to the level of complexity and risk.

There are cases where you can clearly see into the future and can set a course that will work for you for the next twenty years (i.e. large scale assets). There are also cases where the future is so uncertain that anything past the next six months is murky at best.

To determine your planning horizon, you need to have some sense of how clearly you can see the future environment in which your organisation will be operating, related to your goal(s).

It is a good idea to set out a calendar of planning activities

MONTHLY	Monitor progress towards achieving your plan. Review milestones and KPI (Key Performance Indicators).
ANNUALLY	Review plan, amend actions as required to ensure it is still relevant. Acknowledge goals achieved and those not yet met. Set KPI for the year and review the annual plan/calendar.
3 YEARLY	Complete review of strategy and direction.

In Summary

Good planning:

- Fits the organisations need.
- Is realistic. It can be implemented.
- Is specific. You can track results against plan.
- Clearly defines responsibilities for implementation.
- Clearly identifies assumptions.
- Is communicated to staff and volunteers.
- Gets people committed.
- Is kept alive by follow up and planning process.

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2 FINANCIAL MANAGEMENT



**Money is the lifeblood of all organisations.
Without it we cannot do what we set out to do.**

Good financial management has four main features

1. Plan what you need.
2. Control with systems and processes.
3. Monitor to keep a close watch.
4. Oversight to build accountability and manage risk.

Plan what you need

Forward plan and develop a budget for the year. Base your budget on:

1. Typical spending in recent years.
2. Planned activities.
3. Estimated or known increases.

Things to think about. Understand where your sources of income will come from. Be careful and honest. Ideally you will have more than one revenue stream:

- Contracts
- Funding grants
- Membership
- Sponsorship
- Fundraising
- Business Activities
- Donations.

Understand your operating costs i.e. what you need to pay to operate:

- Administration/Finance
- Wages/Salaries
- Insurance
- Power/Telephone/Water
- Building rent/Maintenance
- Marketing and Promotion
- Information Communication Technology
- Staff Development
- Printing/Stationary.

Understand what new developments you need i.e. capital costs

- Building projects
- Equipment purchases
- Vehicle purchase
- Resource Development
- Website Development.

Good questions to ask

- Have you got enough money to cover your expected expenses?
- Have you enough surplus to build up reserves for the replacement of equipment, maintenance of premises and unexpected expenses?
- Have you identified risks and how you can manage them?
- How much of your revenue is reliant on successful funding applications?
- Has your organisation run at a loss or a profit?
- Have you enough money in reserve to cover continued loss until you can create a profit?

Control with operational systems and processes

Financial controls are important to both safeguard spending and to understand your finances. Think about investing in a good accounting software package and allocate resources to keep records up to date.

Your system needs to:

- Keep a transparent record of all monies received and payments made
- Manage bank accounts
- Manage cash flow / liabilities & funding allocations
- Provide an accurate trail of transactions
- Provide reports of revenue and spending against budget
- Be simple and straightforward
- Have sufficient controls in place to ensure money is accounted for correctly and in a timely manner.

Monitor to keep a close watch

Once you have control of what your money is doing, you need to closely monitor how it is being spent against your plan. The purpose of monitoring financial performance is to manage risk for the organisation. All systems should work together to paint a picture of the financial health and ongoing sustainability. The level of monitoring will depend on the complexity of the organisation and how regularly money comes in and goes out.

Oversight to build accountability and manage risk

Money is a precious resource that needs to be overseen and accounted for adequately. With regards to finance, oversight is a role of governance. The board does not need to see all the detail, but should be sufficiently confident that whoever is delegated the responsibility is doing so in a responsible manner.

At monthly meetings the board needs to:

- Review profit and loss statements, with:
 - Month and year to date figures
 - Comparison and variation from budget.
- Approve accounts for payment. Note that these may have already been authorized and paid, however the board must view the accounts for payment and approve them
- Monitor other key indicators, such as cash flow, bank balance and liabilities
- Address areas of risk as highlighted by management and/or finance committee
- It is good practice to appoint a treasurer and/or finance committee
- Be aware of the new financial reporting requirements. To find out more go to the Charities Services website.

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Charities Services www.charities.govt.nz
External Reporting Board XRB www.xrb.govt.nz
IRD www.ird.govt.nz



Good governance is the foundation for any successful organisation.

Role of Governance

The primary role of a Governance Body, of any organisation, is to manage strategy and risk. The systems and processes in place to support the Governance Body in this role will vary from organisation to organisation.

Common elements are:

- Providing vision, direction and focus for activities of the organisation
- Monitoring performance and activities against strategic goals
- Monitoring performance against budget
- Identifying shortfalls or areas of weakness or risk and taking actions to address
- Identifying and allocating resources to meet goals and deliver planned activities
- Provide strategies for sustainability.

Who Governs?

Governing bodies are identified by many names, Board/Directors, Trust/Trustees and Committees. Regardless of title and other activities that the group may carry out, sufficient time and resources must be allocated to the governance role. In not-for-profits, members of these entities will often be involved in management and/or volunteer activities as well. It is important to understand which hat you are wearing when decisions are made.

Board Composition

Board composition and number is determined by your founding document (Deed). The process for selection needs to be understood and followed.

Where possible, look for a range of skills and a diversity of backgrounds and views to ensure the delivery of an organisation's purpose. In an election process, the existing board should proactively encourage people who have the desired skills to stand for election.

Ideal numbers for a board:

There needs to be sufficient people to ensure work can be allocated fairly and to avoid overloading people, but not so large that decision-making becomes cumbersome.



If your board consists of elected representatives, there must be clear guidelines for accountability and responsibility, communication and confidentiality.

An elected representative's first loyalty must be to the board. The role as a representative is to bring that perspective to all discussions.

Governance

Strategy
Direction
Risk management
Decision-making (high level)
Providing resources
Stakeholder relationships.

VS

Management

Implementing strategy
Directing staff
Reporting progress against plans
Developing and maintaining policy and procedure
Day to day decision-making
Managing resources (people, money, time)
Stakeholder management.

Board Meetings

There is no hard and fast rule about meeting frequency. Boards need to meet regularly to ensure they can carry out their role. Frequency will depend on complexity of the business activities, level of management support, geographic spread and commitments of members and requirements covered in the founding document. It is important that there is a culture of full attendance at board meetings. Absence must be by apology and for a good reason.

Meeting Requirements

Good meetings are meetings that have a purpose, run to time and deliver good decisions and actions. To achieve this there are basic elements that are present:

- Agenda
- Minutes with recorded actions
- Written reports – available before the meeting.
To include any recommendations for action
(taken as read before the meeting)
- Resolutions for key aspects
- Oversight of finances
- Oversight of performance against strategic/annual plan
- Decisions and actions
- Timekeeping.

Board meetings need to make good decisions. It is important to consider what is needed to make good decisions (information and data), with a balance between timely decision making and responsible, well considered decisions.

To make a decision ask the following questions:

1. Does it fit our plan?
2. Does it fit our budget?
3. What are the risks and can we manage them?
4. How will we monitor the effectiveness of this spend?

Governance vs Management

The line between governance and management is not always clear. Many factors influence how well your organisation will be able to divide management and governance functions.

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Administration covers all the systems and processes that work within your organisation to ensure things run smoothly. They ensure you meet all your reporting requirements and legal obligations.

Systems that are well thought out, documented and regularly reviewed, provide the following benefits:

Tasks are completed correctly and in a consistent way (the same each time):

- Records are maintained and accurate.
- Reporting to funders, the board and government agencies is on time and accurate.
- Training new staff is a straightforward process.
- Time is saved.

It is a good idea to document the systems for all aspects of your organisation. For example; Governance, Finance, People, Communication, Health and Safety and activities specific to your organisation.

Documented systems do not need to be complicated, or cover every minute detail. They can be documented by using text, diagrams or pictures. It is important that the systems are accurate and kept up to date, with regular (annual) reviews to determine effectiveness and accuracy to reflect any changes since the last review.

It is important that your systems reflect your organisation. You can use "borrowed" systems as a starting point, but must ensure they are customised to your organisation. They must have meaning for the staff to use them.

What should we document?

Document all the processes that are required by legislation, occur regularly and your organisation requires to be done a particular way.

How do we get started?

The documentation of all your processes and systems will take time. It is recommended that you plan and prioritise the steps you will take. Sometimes the hardest part is taking the first step and it can feel like a very daunting task.

To get started you can:

1. **List the basic processes involved in delivery of your core service/product.** For example:
 - a. Customer phone call to make an appointment.
 - b. Client meeting occurs.
 - c. Billing process (to client or to agency).
 - d. Payment received.
2. **List all the systems and standards which contribute to each.** For example customer phone call:
 - a. Customer database.
 - b. Customer service standards.
 - c. Telephone systems.
 - d. Booking system.
 - e. Follow up/client feedback.
3. **Consider all legal/compliance obligations:**
 - a. Client confidentiality/privacy.
 - b. Trust deed or Society rules.
 - c. Relevant legislation.
 - d. Contractual requirements.

Determine a format for your documented system in terms of page layout and table of contents. Don't worry if this is not clear, as you begin to write things down it will fall into place. You may need to adjust your format and table of contents as you become more aware about what you need to include in the documented system.

Keeping things up to date

In addition to documenting your systems for administering all the functions of your organisation, you need to be diligent in keeping things up to date. A back log of administration functions causes bottle necks, results in incomplete information and late reporting and you may not be aware of problems until it is too late. To stay up to date there are a few things you need to do:

- Have a good filing system for both paper and electronic files
- Keep filing up to date
- Complete paperwork as activities are completed
- Maintain databases up to date on a timely basis
- Follow a system to manage your time (to-do lists, Outlook Task Manager, CRM systems or similar)
- Have a calendar of key reporting dates, compliance dates etc. and plan in advance to complete the task on time.

Technology

Technology can help you to maintain your administration functions. ICT systems that function well and are up to date are an important productivity tool. There are many cloud based systems that offer cost effective, reliable solutions for many organisational activities. For Not-For-Profits, these services can be very cheap or free if you register with Techsoup. It is worth seeking good advice from information communication technology specialists about what will work best for your organisation.

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NZ Association

Resource Centre Trust

www.associations.org.nz

Techsoup

www.techsoup.net.nz



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Good communication is vital to the success of any organisation.

Within an organisation, communication needs to be a deliberate process that is appropriate to both the audience and the message. If we are not deliberate and planned about our organisational communication strategy and style, then people may interpret the message from what they observe. This may not be the message you want people to take away about you. It is important that organisational communication is planned, to ensure that perception actually is reality.

Key points about communication

- All communication should be: honest, straightforward and timely.
- Good communication is a powerful tool to help an organisation achieve their purpose.
- Good communication is not just talking and listening.
- In an organisation, a number of systems and processes contribute to the achievement of good communication.
- We communicate something to other people all the time, even when we think we are not, for example our body language.

Components of communication

1. **Message** – As part of an organised process, it is important to think about the message you are communicating and the purpose for that message.
2. **Media** – There are many means by which you communicate to others; having a conversation, sending an email, issuing a press release, holding a meeting, giving a presentation, maintaining an up to date website, written procedures; to name a few.
3. **Audience** – Different individuals and groups will have different communication needs. Thinking about the audience and how they are most likely to receive the message you intended, is an important part of a communication plan.
4. **Communicator** – Some people are natural communicators and others will need to work at it. Regardless of your skill level, it is important that everyone understands their role and makes the effort to communicate.



Internal Communication

Internal communication includes all the processes within an organisation that create the flow of information necessary for the efficient operation of the organisation.

It is a management function to ensure that the formal communication processes within the organisation are designed to allow for that flow of information.

It is a governance function to ensure communication from the governing body to the management is operating effectively.

In some not-for-profit organisations the governance function may need to assume a level of management responsibility in order to bridge the gap, if there is not a management team in place.

Communication with volunteers is also a key part of the internal communication process and can involve:

- Emails or texts
- Meetings
- One-on-one discussions or casual conversations
- Newsletters
- Websites and social media
- Presentations
- Procedure manuals
- Acknowledgements.

Effective communication will be a combination of the above. Written communication will need to be backed up with good conversations.

Remember all communication should be two-way to assist clear understanding. It involves talking, listening, asking and answering questions and feedback.

External communication

External communication covers how an organisation communicates with stakeholders outside of the organisation. Stakeholders are diverse and each stakeholder group will require a specific communication strategy.

To determine who your stakeholders are, list them:

1. **People/groups** who interact with your organisation (clients, public, funders, government departments)
2. **Community influencers** who provide support and/or influence public perception (politicians, councillors, media, businesses, peak bodies, lobby groups)

External communication can involve:

- Personal contact via emails, meeting, phone calls
- Newsletters and E-newsletters
- Regular networking events
- Presentations or reports
- Media releases/statements
- Website and social media.

It is a good idea to develop a communication plan that covers what you are going to do and when you are going to do it. The planned activities for communication contribute to the perception others will have of you. It is important that it is planned and consistent.

Feedback

Communicating to others is not a perfect process. A lot of “noise” can interfere with the message. It is therefore very important that part of your communication process includes checking for understanding.

When communicating one-on-one, it is relatively easy to seek feedback by asking questions to ensure your message is understood. When dealing with stakeholder groups you can ask questions in group situations, or by conducting a survey.

Never forget that one of the most important parts of communication is listening.

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6 EVALUATION



Effective organisations are constantly and consistently evaluating their effectiveness on many levels.

A review and evaluation of how things are going is important to an organisation for:

- Continuous improvement
- Meeting changing expectations
- Accountability to funders and contracts
- Ensuring you are making a difference.

Evaluation occurs on many levels and should be viewed as a normal part of any activity.

Individual and team

Encourage every member of the team to evaluate their effectiveness in their role. Encourage conversations at meetings that openly discuss, without blame, how projects and activities went and if they could be improved.

Encourage a culture of helping colleagues to improve their effectiveness and working together to develop solutions.

Regular performance reviews are part of self-evaluation and are a valuable tool in managing people and encouraging personal development.

Governance teams can review their effectiveness by assessing meeting effectiveness, decision-making, individual contributions to the activities of the organisation and the organisation's results.

Programme evaluation

Your organisation may be required to measure the effectiveness and impact of your activities to meet contractual obligations, but regardless of contractual obligations every initiative should be evaluated regularly to ensure it remains effective and relevant.

To effectively evaluate a programme or a project, you first need to understand what was intended. Therefore, it is important that you have clarity about the purpose of the programme, that there are sufficient measures in place and that key performance indicators (KPI's) are relevant and can be measured.

Ideally, you will evaluate effectiveness on a regular, or continuous basis, by monitoring your KPI's and creating a management report for the governance board that clearly shows achievement (or not) of critical KPI's. This report should include a few key measures that can be easily quantified and reported to alert the organisation to potential challenges.



Regular surveys of clients and/or other stakeholders is an effective way of monitoring trends and impact of a programme or activities. Designing a survey is a specialist role and it is a good idea to seek help to ensure your survey generates useful information.

You can provide more depth to an electronic survey by conducting focus groups either before or after conducting your survey. Focus groups can be costly and time consuming, but do provide more depth and understanding to support a survey.

At its simplest level a survey will help you to find out:

- Have we done what we said we were going to do?
- Has our activity made the difference we expected it to?
- Do our clients/ stakeholders agree with us?

Evaluation is a management tool that provides an organisation with valuable information to improve processes. Any initiative that you undertake has used valuable resources of time, money and equipment.

The PDCA (Plan, Do, Check, Act) cycle of continuous improvement demonstrates how to ensure you are learning from mistakes, getting the results you expected and using those resources wisely.

Results Based Accountability or RBA is one evaluation system which is currently used by a number of government agencies. Resources and information can be found on RBA at the Family and Community Services website – www.familyservices.govt.nz



Organisational evaluation

This process is carried out annually to determine if the systems you have in place are effective, the infrastructure is sufficient to do what you want to do and if there are any changes you need to be aware of. This review fits well with the strategic planning and budgeting cycle as information from one will inform the other.

To carry out an evaluation of your organisation there are a number of questions you can ask:

- Have we met all our contractual obligations?
- Where are our problem areas/challenges?
 - KPI's not met
 - Capability
 - Non-conformances
 - Customer complaints
 - Incidents.
- What changes are we facing?
 - Contractual
 - Legislative/regulatory
 - Social/demographics
 - Funding.
- What have we done well?
- What feedback have we had from staff, from clients?
- What are other organisations in our field doing, saying?

Information from this review can then be added to your strategic planning information (SWOT analysis) to create a plan of action for the coming year (or more).

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| What works | www.whatworks.org.nz |
| CommunityNet Aotearoa | www.community.net.nz |
| Sport NZ | www.sportnz.org.nz |
| MSD Organisational Capability self-assessment tool | www.msd.govt.nz |
| Family & Community Services | www.familyservices.govt.nz |

7 LEADERSHIP



All organisations need leadership to stay on track, strive for a better way, and to tackle adversity. Leadership is the collective responsibility of those responsible for governance and management of an organisation.

Good leaders generate results from a team by providing consistent direction and guidance.

Leadership is not about charisma, having the best public presence, or taking control in every situation. It is about people stepping up, making decisions, deciding on a course of action, and taking people with them. Every person in a governance team can show leadership.

“Management is about doing things right. Leadership is about doing the right things” - Peter Drucker

The process

The governance and management teams of any organisation provide leadership by developing a vision for the future and communicating that vision. The leadership team will also lead processes to articulate the values of the organisation and will demonstrate those values to others.

The process of leadership is a combination of all the organisational processes which provide clarity and direction. What sets good leadership apart is the ability to communicate a consistent message to keep people on track at all times. Consistency is important when things are not going well. Reminding the team about the purpose and the plan will help you to overcome the challenges that you may have to face. Inconsistency creates confusion and perceptions of “shifting goal posts”, which can result in loss of focus and lack of progress.

Some organisations will have a strong figurehead, usually the chairman or CEO, who is the visible leader. This person will be the one who frequently leads public events, makes media statements and runs meetings. However, leadership is a group responsibility.

Everyone in the leadership team (governance and management) must actively participate in the processes that lead their organisation.

To participate in those processes the leadership team should ensure they:

- Are fully prepared for meetings in order to make timely and robust decisions
- Attend functions as appropriate to talk to staff and stakeholders about the organisation
- Demonstrate integrity and adherence to the organisational values in all their communication and actions.

Attributes

Are people born with leadership traits or can they learn them? Think about the good leaders you know. Many will seem to be natural leaders, with charisma and people skills that make it appear easy. Others will be reluctant leaders, uncomfortable with the public aspects of leadership.

The reality is that you can learn the skills and attributes required of good leadership. Leadership is about stepping up and providing consistent direction to your organisation. It is common in not-for-profits for people to rise to a leadership role because they have a passion for the purpose of their chosen organisation. A good leader is able to demonstrate that passion and harness it for the collective good.

People skills can be learned. Don't worry if you are not a natural people person. People will respond if you are honest and genuine in your interactions with them. A good leader cares about others and shows a genuine interest in people.

Good judgement and decision making comes with knowledge, and knowledge comes with information and work. If you are in a leadership role, it is your responsibility to learn about the organisation, its purpose and the environment you operate in. This is to ensure you can show good judgement and guide the organisation through the next phase of development.

In many not-for-profit organisations there is a need to influence others in order to achieve your goals. You may need to influence funders, sponsors, government agencies, or clients. Community leaders develop circles of influence and relationships that help them to advocate for their organisation or cause. The ability of your organisation to influence others will be a combination of your individual networks and the processes you use to communicate.

The good leaders that you know will have worked hard to develop the attributes needed to become respected leaders, irrespective of their natural talents.

Outcome of good leadership

It is worth investing time and effort in developing the leadership capabilities of any organisation. The result will be an organisation that runs smoothly and can weather any storms.

- 1. A strong team** is the result of leadership that provides consistency of purpose. A team with a clear sense of direction is able to get on with the job. A team that has been well led will not let personality differences get in the way. They will understand their individual and collective responsibilities and will want to strive to achieve organisational goals.
- 2. A clear purpose** is the result of leadership that focuses on the organisational vision and brings people back on task when they lose their way. In not-for-profits (as for many organisations) it is easy to be side tracked by financial constraints, individual needs, funding requirements, and other external challenges, and move away from the core purpose of your organisation. Good leadership will help everyone to focus on why you are there and how best to achieve your purpose in a sustainable way.
- 3. Timely decision-making** is the result of leadership which is prepared to make a decision based on good information in a planned and considered way. Timely decisions occur in organisations that have a good plan and where the risks of the decision are understood. Plans and risk analysis provide confidence to the leadership team which enables them to be decisive.
- 4. Resilient organisations** are those that can weather the storms. Organisations face adversity in many ways – a drop in funding, change in government policy, economic conditions, staffing challenges and so on. Effective leadership will help the organisation manage their way through these challenges.

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Knowhow Non Profit

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He aha te mea nui o te ao?
What is the most important thing in the world?
He tangata, he tangata, he tangata.
It is people, it is people, it is people. (Maori proverb)

Any organisation relies on people to ensure things get done as planned and to the standard required. There can often be a mix of paid staff and volunteers with many organisations relying on both to function. There are many similarities in managing paid and unpaid staff, but there are also many important differences.

Good people practice, is a combination of:

1. **Policy** – What you will do.
2. **Processes** – The systems to meet your policy.
3. **Practices** – How you implement the processes, how you interact everyday (Leadership).

The combination of policy, process and practice will result in a unique culture for your organisation. Every organisation will have a culture - creating a good culture is not an accident, it is the result of careful alignment of values with organisational practice.

1. Policy

Included in your organisational policies should be a minimum of the following people-related policies:

1. **Recruitment and Induction.**
2. **Learning and personal development.**
3. **Health and safety.**
4. **Communication.**

Staff and volunteers need to know how you view these aspects of the employment relationship. It is important that your policy reflects what you are actually going to do, and not a generic “feel good” policy that you then ignore. Think about what you stand for as an organisation, how you want your staff and volunteers to feel about working for you, and what you want to be held accountable for.

2. Processes

Processes and systems are important in an organisation as they provide consistency and clarity about how things are done. Processes will also ensure that you comply with legislation.

You must have an employment agreement for paid employees which complies with legislation. It is a good idea to seek advice about your employment agreements, and to review them regularly to ensure they are current with legislation. The New Zealand at Work website does have an employment agreement builder that will help with mandatory clauses, however, your agreement must also accurately reflect your workplace and your practices. Expert advice from an employment lawyer or HR advisor will help you to get it right.

You should document systems to cover:

- Recruitment processes, including orientation
- All types of leave
- Training and development
- Performance review
- Processes that occur on resignation
- Processes related to conduct (privacy, confidentiality, social media, computer use, dress code).

3. Practices

How you do things in your organisation is the critical aspect of developing a good culture. The practices are how you interact with your staff, your clients, and your stakeholders every day. They are the visible demonstration of your values and therefore your culture. When assessing the practices of your organisation it is truly the little things that count.

Staff and volunteers notice how you talk to each other, how you talk to them. They know when their opinions are valued, and when they are not. They understand integrity, trust, openness and honesty when they see it (or when they don't). Every action of the leadership team will be open for interpretation. What you do and how you do it is important.

When determining how you do things consider the following:

- Values
- Communication
- Valuing the staff and volunteers
- Leadership accessibility
- Decision-making.

Culture

Every organisation has a culture. Strong cultures are very powerful in determining how an organisation proceeds. Not all strong cultures are "good" cultures. A culture is developed from values, the policy and structures that are in place, the systems that control how work occurs, the stories that are told, the rituals that are observed and the values that are visibly demonstrated. Developing the culture that works best for an organisation is a long process.

Managing volunteers

To develop a team of loyal volunteers it is important that they are valued and treated in the same way you treat your staff.

It is a good idea to have:

- A job description with expectations for attendance and performance
- Orientation process covering Health and Safety
- Regular communication, including opportunity to get feedback from volunteers
- Oversight and supervision of their activities
- Recognition and reward for work well done
- Training opportunities as appropriate
- Clear pathway, for them to talk to someone if required.

MORE INFO



CommunityNet Aotearoa www.community.net.nz

New Zealand at work www.employment.govt.nz

Volunteering NZ www.volunteeringnz.org.nz



Successful organisations build strong relationships and partnerships, particularly in the community sector where resources can be scarce.

Why are strong relationships important?

1. **Sharing knowledge** – Community organisations do not usually have large management teams, with wide ranging experience and knowledge. Sharing knowledge with others is one way of making best use of the resources you have.
2. **Fundraising** – Maintaining good relationships with funders, donors and sponsors will help you to better plan and manage your fundraising activities. They will understand your organisation and you will better understand their priorities and constraints.
3. **Complementary services and referrals** – If you work in the same sector, or for the same people, it is important to understand services that others provide. You can then confidently refer your clients to additional services and also ensure you do not waste resources competing with existing services.
4. **Peer support** – Having someone you can talk to about challenges you might be facing, or about ideas you have for your organisation is invaluable. Knowing you have someone at the end of the phone can help when things get tough.
5. **Sharing resources** – Developing partnerships or collaborating on projects is a good way to share resources to offer your client base enhanced services.
6. **Challenges** – When you have challenges people are more likely to help if you have a strong relationship.

Who should I develop relationships with?

Strategic relationships are those that help you to pursue your organisation strategy. Be clear on what you want to achieve and decide who the people and organisations are who can help you. Decide at which level the relationship should take place. Is it an operational relationship – manager to manager, staff member to staff member; or is it at a governance level – board to board, chair to chair?

How can I develop relationships?

Find out who the key people are and make contact with them. There are many ways you can initiate a working relationship; the easiest is to ask people if you can meet to discuss how you might work together in the future.



For the relationship to develop both parties need to benefit from the time and resources that are put into the relationship. What can you bring to the table?

Relationships develop based on:

- Trust
- Mutual respect
- Shared values
- Honesty
- Open communication.

Work on the basis of win/win. Any partnership or collaboration needs to meet the goals of both organisations. Do not begin a working relationship with a hidden agenda, be open and up front about how you think you and your organisation can benefit from the ongoing partnership or collaboration.

Collaboration

Organisations that work in the same sector can leverage their resources and experiences to achieve a common goal. Collaboration on a project by project basis is an effective way to work together. There are many benefits, but there are also challenges.

Benefits:

- Wider pool of knowledge. People from each organisation will bring their skills and expertise
- More cost effective implementation E.g. shared marketing
- Clients/customers will experience well-integrated service
- Not reinventing the wheel
- Larger network and reach
- Organisations maintain their own identity.

Pitfalls:

- Different goals from each organisation may not be understood or apparent until the project is underway
- Imbalance in what each party brings to the project (knowledge, funds, infrastructure) may cause issues as the project progresses
- Decision-making could become cumbersome if boards of each party need to be involved.

How to collaborate successfully:

- Define the scope of the project very clearly, make sure all parties are in agreement
- Identify what each party wants to gain, how will they each define success
- Agree on the budget
- Define processes for managing the project:
 1. Meetings
 2. Time commitment
 3. Approval processes
 4. Managing changes in personnel.
- Involve all parties in celebrating success
- Keep communication flowing between organisations and within each organisation.

MORE INFO



CommunityNet Aotearoa

www.community.net.nz



The Wheelhouse
Empowering Taranaki Community Groups

www.wheelhouse.org.nz