



## HOME STUDY FOR TENANTS

A FREE SERVICE

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### Course Description

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#### EFFECTIVE ORGANISATION FOR TENANTS AND RESIDENTS ASSOCIATIONS PART ONE

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**Version:** For all tenants and residents representatives

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**AIM:** The aim of this course is to help you think about how to organise your local tenants and residents association effectively and to identify the roles of office bearers or committee members.

#### WHO THIS COURSE IS FOR:

This course is designed for tenants and residents who:

- ◆ Are in the process of setting up a tenants or residents association,
- ◆ Are relatively new committee members or office bearers in a local associations, or
- ◆ Are committee members or office bearers of a local association that could be operating more effectively.

[Note: if you are just setting up your local association at present, ask TIS for our guide to starting up. It takes you through the process step by step.]

#### WHAT YOU WILL LEARN IN THIS COURSE:

- ◆ The value of having a local tenants or residents association
- ◆ The purpose of minutes and agendas
- ◆ Why a constitution is needed
- ◆ What the main tasks of the different office bearers are
- ◆ How to be accountable for what you do

This is the first of two courses on the subject of Effective Organisation.

#### How to get Started:

Phone us or write to us at Tenants Information Service and you will be sent the free workbook straight away.

Suite 124-128, Baltic Chambers, 50 Wellington Street, Glasgow, G2 5HJ

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**HOME STUDY FOR TENANTS**  
**Effective Organisation for Tenants**  
**and Residents Associations**  
**Part One**

**Workbook**

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**HOW TO USE THIS WORKBOOK:**

Go through it at your own pace. Stop for a break whenever you want. When you start up again, look back at the section you had just completed.

As you go through the workbook, you are asked to carry out tasks.

Do not look ahead in the workbook for answers. These are given in the correct place in the workbook. You will come to them at the correct stage.

If you get stuck on something, try the following:

- ◆ Leave aside and try again later
- ◆ Turn back pages in the workbook looking for clues and ideas
- ◆ Phone TIS for help [freephone or reverse charges]
- ◆ DO NOT look ahead in the workbook for answers. It is important to do the tasks and reading in the order given.

## SECTION 1

### Aims and Formalities

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#### Activity 1

You are involved in a local association (or setting one up) because there are things you want to do together with others in your community. These are things it would be difficult or impossible to do alone.

List here some of the things your local association is there to do:

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#### Activity 2

Check through the items in this list. Put a tick beside any which your local association either has worked on, is working on or wants to work on:

- ◆ Reducing vandalism
- ◆ Dealing with anti-social behaviour
- ◆ Improving car parking provision
- ◆ Installing better play facilities for children
- ◆ Improving street lighting
- ◆ Improving traffic safety
- ◆ Environmental improvements
- ◆ Dealing with damp housing
- ◆ Getting houses modernised
- ◆ Getting new windows installed
- ◆ Running bingo sessions

- ◆ Laying on social events
- ◆ Setting up things for local youngsters to do

Are there other things you could add to this list?

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### Activity 3

In short, which of the following statements best describe what your local association is about? Tick one or more on the list.

- ◆ Improving community spirit
- ◆ Improving housing conditions
- ◆ Making our area a better place to live
- ◆ Stimulating the social life of the community

## SECTION 2

### Minutes and Agendas

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In your local tenants' association you will need to keep accurate records, known as **minutes**, of what is discussed and decided at your meetings. This is usually the job of the Secretary. The minutes normally follow the same order as the agenda, which is a plan of the items to be discussed at each meeting.

### Activity 4

List three reasons you can think of why it is important that your group keeps accurate minutes of its meetings.

1 \_\_\_\_\_

2 \_\_\_\_\_

3 \_\_\_\_\_

Minutes are required so that you can look back at them and check what was agreed at each of your meetings. They can serve as a guide to things, which need done between meetings and who will be doing them. You can also use them as a record of who attended each meeting. They may also be required by your landlord if you are requesting a start-up grant or continued funding.

### Activity 5

The following list is a list of things, which should be contained in minutes:

- ◆ Apologies
- ◆ People in Attendance
- ◆ Place where meeting took place
- ◆ Date on which meeting took place
- ◆ Record of previous minutes being agreed
- ◆ Details of correspondence received
- ◆ Note of forthcoming meetings or events
- ◆ Record of monthly financial reports and any financial decisions made at the meeting
- ◆ Record of key decisions made
- ◆ Record of people allocated specific tasks to do

Now list the three most important items, which you think, should always be recorded in minutes.

1 \_\_\_\_\_

2 \_\_\_\_\_

3 \_\_\_\_\_

### Activity 6

Read through the following passage:

#### The Beach and Dale committee minute

*A meeting of the Beach and Dale committee was held on Monday. I was there and so was Ellis and Tony, but the girl with the red hair didn't turn up. We talked about a lot of things especially about our planned clean up of the beach in June. Ellis said it should be in May but Mandy didn't think so.*

*We had a letter asking us for money to help a local project on recycling but it will be difficult to give them money as there's not much left in the bank. I'm going on holiday to Spain soon with my mum and my children. We will be away for the next three weeks, so I can't wait. We will be staying at the Amante hotel which has a big swimmingpool outside. I hope that someone else will be doing the minutes for our group till I come back all brown and tanned!*

*Someone volunteered at the meeting, but I can't remember who it was. Mike was at the meeting too so it might have been him. See you all at the meeting in four weeks.*

The Secretary  
BAD Committee meeting on Monday 12<sup>th</sup>.

### **Activity 7**

Now identify six things you think are wrong with this minute.

- 1 \_\_\_\_\_
- 2 \_\_\_\_\_
- 3 \_\_\_\_\_
- 4 \_\_\_\_\_
- 5 \_\_\_\_\_
- 6 \_\_\_\_\_

### **Activity 8**

Now make a list of some things you think could have improved the BAD Committee minute to make it a better record.

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**Tips for Minute Taking**

- ◆ Keep them short, clear and easy to understand
- ◆ Ensure all decisions are recorded clearly
- ◆ Include an action column stating who is responsible for carrying out decisions made
- ◆ Write up the minutes as soon as possible after your meetings, while your memory is still fresh about what happened at the meeting
- ◆ It's sometimes easier to share the task. Have a correspondence Secretary and a minute Secretary.
- ◆ Number each item in the minutes to match the number of the agenda items.

*Now might be a good time to take a break. When you start again review your answers in Activities 4 to 8 before moving on.*

### **Activity 9**

List here four items, which should always be included on an agenda. The agenda is the list of things which need to be covered in a meeting. It will help the meeting run more smoothly if you have an agenda to follow.

1 \_\_\_\_\_

2 \_\_\_\_\_

3 \_\_\_\_\_

4 \_\_\_\_\_

How did you get on? Some of the items which should always be included on an agenda are:

- ◆ Apologies
- ◆ Minutes of the Previous Meeting
- ◆ Matters arising from Minutes
- ◆ Correspondence
- ◆ Financial Report
- ◆ Any other Business
- ◆ Date/Time/Place of next meeting

Other items on the agenda will vary from month to month depending on the issues your group is working on. You may have had a meeting with the local Housing Manager that month or another tenants' group. You will need to

discuss meetings like these in advance and then report back on them once they have happened. Try not to have too many items on the agenda though!

### **Tips for Agenda-setting**

- ◆ If possible the agenda should be circulated in advance of the meeting, so people can come prepared knowing what items are to be discussed
- ◆ The Chairperson or Convenor should ask for any items of other business at the start of meeting so that they can be programmed into the meeting
- ◆ Don't allow the meeting to run on for hours just so that every agenda item can be covered - if you run out of time carry the most important remaining items over to the next meeting. Two hours is usually long enough for any meeting!

### **Activity 10**

Now have a go at drawing up the agenda for your next tenants' association meeting. Consider items which should always be on the agenda and those which may be relevant to your next meeting.

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*You have now completed Section 2 on Minutes and Agendas. It might be a good idea to take a break before moving onto the next section.*

## **SECTION 3**

### **Constitutions**

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All kinds of groups and organisations require constitutions and tenants' groups are no different. If you are a new group getting established you will need to draw up a constitution in order to receive funding from your landlord. Even if you are a well-established tenants' organisation it may be time to review your constitution and assess whether it is still the most suitable one for your group.

### **Activity 11**

If you are an established group try to remember what is contained within your existing constitution. Make a note of four things you think are in your constitution:

If you are in a newly established tenants' group try to list four things you think should be included in your constitution:

1 \_\_\_\_\_

2 \_\_\_\_\_

3 \_\_\_\_\_

4 \_\_\_\_\_

The constitution of a tenants' association provides the cornerstone of accountability. It sets out how the committee and office bearers are elected. The constitution also requires the committee to report to the membership on its activities, usually at an Annual General Meeting (AGM).

The constitution also lays down how certain important tasks are carried out, for example, how meetings are called and the notice people are given of meetings. The constitution should include rules about handling money properly.

The constitution therefore helps protect the membership from undemocratic practices on the part of the committee and office-bearers. Because the constitution has this role, it is only the membership as a whole which can change the constitution.

### **Activity 12**

In small groups work through these statements deciding whether they are true or false:

1. The constitution makes office bearers accountable to the membership.	TRUE	FALSE
2. It is optional whether an annual general meeting is held every year.	TRUE	FALSE
3. The constitution doesn't have to specify giving prior notice to members of annual general meetings.	TRUE	FALSE
4. The constitution provides rules for electing the committee.	TRUE	FALSE
5. Once elected, the committee can go on and on as long as it wants.	TRUE	FALSE
6. The chairperson can take decisions between committee meetings.	TRUE	FALSE
7. The committee should review the constitution and make any necessary changes annually.	TRUE	FALSE
8. The constitution identifies clearly who can be a member of the association.	TRUE	FALSE
9. The whole committee must turn up for a vote.	TRUE	FALSE
10. The committee is free to take any decisions it wants.	TRUE	FALSE
11. The committee can take on new members of its own choosing to fill vacancies arising.	TRUE	FALSE
12. Council officials have a right to attend committee meetings.	TRUE	FALSE
13. If the association intends to handle money, it must open a bank account.	TRUE	FALSE
14. A bank will want to see the constitution before allowing an association to open a bank account.	TRUE	FALSE

*Now might be a good time to take a break and consider what you have learned in the last couple of activities about constitutions.*

*If you wish to review your constitution or draw up a new constitution for the first time please refer to the TIS Basic Guide "Starting a Tenants and Residents Association" or the Home Study Pack "Constitutions - Content & Format".*

## **SECTION 4**

### **Roles of Office-bearers**

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In your tenants' organisation you should elect office-bearers each year at the AGM. The office bearers are responsible for over-seeing the running of

the organisation. They are given more responsibility than other committee members. Office-bearers are the Chairperson, sometimes called Convenor, the Secretary and the Treasurer. In some groups, you may decide it is fairer to split the role of the secretary and have a Minute Secretary as well. We will now look at the role of each office bearer in turn.

### **The Chairperson**

The chairperson or convenor is the person who makes sure things get done - not the person who does everything. The success of a meeting in any kind of organisation can depend upon how it is chaired. The two basic jobs of the chairperson are to guide the association to achieve its aims and to chair the meetings of the association

### **Activity 14**

Try to list as many duties of the chairperson as you can think of:

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How did you get on? Do you think the Chairperson of your organisation would identify the same things as you have? It would be interesting to find out! Later on you will find a list of all the duties and responsibilities of the chairperson.

### **The Secretary**

A good secretary must be reliable and efficient. He or she will need to pay strict attention to matters of detail and ensure prompt replies to correspondence. It is important that the secretary's name, address and telephone number are on all letters your organisation sends. The secretary's details should also be well publicised to landlords and other organisations that may wish to get in contact with yours.

### **Activity 15**

In this activity, instead of thinking about the duties of a secretary, you should try to identify what equipment a secretary requires to be able to perform their duties well.

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Now before you take a break we will look at the role of the other office-bearer, the Treasurer.

### **The Treasurer**

Every tenants' organisation should ensure a treasurer is appointed to handle the money coming into and going out of the organisation. Great care is needed with this - how well this is done reflects on everything else. Groups affected by the mis-management of money often disintegrate with a lot of bitterness all round. Handling money is not difficult but procedures are needed to ensure that the whole committee understands the money side of the organisation.

### **Activity 16**

Now try to think what the different roles of a treasurer might be. The treasurer has particular tasks to perform before a meeting, and at a meeting.

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What must a treasurer ensure is done in preparation for an AGM?

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*Now might be a good time to take a break before moving on to look at the roles of other committee members. Here are the answers to Activity 12.*

### **Activity 12 Answers**

- |          |                |           |
|----------|----------------|-----------|
| 1. True  | 2. False       | 3. False  |
| 4. True  | 5. False       | 6. True   |
| 7. True  | 8. True        | 9. False  |
| 10. True | 11. True/False | 12. False |
| 13. True | 14. True       |           |

**Further explanation of some of the answers:**

- 6. This should happen only if the matter is urgent. The Chair must report on the decision to the next available meeting.
- 9. The whole committee does not need to turn up for a vote but a quorum must be present. A quorum is the proportion of the committee, which is required to be present to pass decisions.
- 10. The decisions taken by the committee should be relevant to the association's aims.
- 11. This is true or false depending on the constitution of the association.
- 12. Council officials and councillors should only attend meetings "by invitation". They do not have a right to just turn up and attend meetings.

**SECTION 5**

**The Role of a Committee Member**

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If you are new to committees, they may feel strange at first but don't worry, you will find it straightforward to understand what is going on and what you need to do. Ordinary committee members have important duties to carry out. Whatever the type of organisation, certain skills are required of the committee members if they are to play an active and meaningful role at committee meetings.

**Activity 17**

In your groups identify what the attributes of a good committee member should be and what constitutes unreasonable behaviour at a committee meeting.

**Attributes of a good committee member**

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**Unreasonable behaviour at a committee meeting**

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*Now if you turn over the page you will find all the answers to Sections 4 and 5. These answers describe the roles and responsibilities of the office-bearers and committee as well as some of the equipment that is required by the office-bearers.*

## **Answers to Sections 4 and 5**

### **Section 4**

#### **The Roles of Office-bearers**

##### **The Chairperson**

- ◆ Help prepare agendas
- ◆ Guide conduct of meetings
- ◆ Build Unity of purpose
- ◆ Welcome members and introduce guests
- ◆ Know and understand the constitution
- ◆ Ensure sufficient consideration of issues
- ◆ Tries to promote consensus
- ◆ Prevents anyone taking over and dominating discussions
- ◆ Get through the agenda on time
- ◆ Sum up problems, points, decisions
- ◆ Ensure decisions are carried out
- ◆ Delegate tasks
- ◆ Represent group to the outside world

The chairperson should always have:

- ◆ A diary
- ◆ Appropriate paperwork for the meeting - agenda, minutes, reports
- ◆ Notepad and pen
- ◆ Folder to keep paperwork in order
- ◆ Watch or clock to ensure meetings keep to time
- ◆ Chairpersons hammer - to keep order!

##### **The Secretary**

- ◆ Prepare an agenda in consultation with the chairperson
- ◆ Arrange and book a suitable venue for the meeting and guest speaker if necessary
- ◆ Send notice of the meeting and agenda to all committee members so that they will receive them at least a week before the meeting is arranged. These should always be sent out even if they are held at the same time and place each week or month
- ◆ Keep a complete, approved and signed up to date set of minutes
- ◆ Attend to incoming and outgoing correspondence

- ◆ Make phonecalls and gather information
- ◆ Maintain minutes and records in an accurate filing system
- ◆ Keep diary of forthcoming events
- ◆ Keep record of everyone attending the meeting or collect their names in an attendance book
- ◆ Record apologies of absence
- ◆ Ensure a quorum is present before any business is done
- ◆ At meeting - read minutes of previous meeting (unless already sent out) and obtain the chairperson's signature for the official copy
- ◆ At meeting - read out all correspondence received and report any action taken since last meeting
- ◆ Ensure chairperson is supplied with all the necessary papers and information relevant to the meeting

The secretary should always have:

- ◆ A diary
- ◆ Necessary paperwork for the meeting - agenda, minutes, reports and spare copies for committee members who may have forgotten theirs
- ◆ Notebook and pen
- ◆ Folder to keep paperwork in order
- ◆ Headed notepaper with the organisation's logo
- ◆ Stamps and envelopes
- ◆ Computer or typewriter

### **The Treasurer**

- ◆ Operate a clear and accurate book-keeping system and be able to handle figures
- ◆ Be responsible for proper handling of the finance of the organisation, but not the actual raising of money
- ◆ Be one of three office bearers of the committee authorised to draw out money

Before the meeting:

- ◆ Prepare a financial report before each meeting
- ◆ Check members have paid their subscription (if applicable)
- ◆ Ensure all approved bills are paid

At the meeting:

- ◆ Present a report of money paid into the account
- ◆ Bring all account books to the meeting so that he or she can answer any questions
- ◆ Advise the group on the amount of money available for the groups work and highlight any danger of excess spending
- ◆ Collect any subscription (if appropriate)

At the Annual General Meeting:

- ◆ Prepare a financial statement for audit prior to the AGM
- ◆ Present the balance sheet and financial statement at the AGM after they have received audited accounts

The treasurer should always have:

- ◆ A diary
- ◆ A money box
- ◆ A cheque book
- ◆ An accounts book
- ◆ Folder for receipts
- ◆ Receipt book
- ◆ Bank book
- ◆ Petty cash book
- ◆ Note pad
- ◆ Paperwork for meetings

### **The Committee Members**

- ◆ Attend meetings punctually
- ◆ Arrive prepared with agenda and relevant papers
- ◆ Stick to the agenda
- ◆ Work as a team
- ◆ Support and encourage quieter members
- ◆ Discourage domination by one or few
- ◆ Take action on tasks identified from the previous minute
- ◆ Vote on issues
- ◆ Assist with projects, fund raising etc
- ◆ Aim towards constructive discussion and decisions
- ◆ Stick to the decisions of the group
- ◆ Encourage membership

- ◆ Feedback to the wider group membership
- ◆ Help with advertising, distributing pamphlets etc
- ◆ Elect office bearers
- ◆ Put forward ideas and make suggestions

A good committee member should always have:

- ◆ A diary
- ◆ Necessary paperwork for the meeting - agenda, minutes, reports
- ◆ Notepad and pen
- ◆ Folder to keep paperwork in order

**An ineffectual or "badly behaved" committee member is:**

- ◆ Irregular in attendance at meetings
- ◆ Ill-prepared - forgets papers and agendas
- ◆ Passive or apathetic - unprepared to take part in discussion and debate
- ◆ Ill-informed and frequently disinterested about the work of the committee - unwilling to do background work or speak on particular items on the agenda
- ◆ Over assertive - dogmatic! Putting people down during committee discussions
- ◆ Arrives at committee meetings with personal goals and a hidden agenda
- ◆ Disruptive and obstreperous with other members of the committee - attempts to take over the role of the chairperson or is dismissive of the chairperson
- ◆ Inattentive during most of the meeting - only interested in certain items on the agenda and in putting his or her point of view across, ignoring the views of others

## **SECTION 6**

### **Accountability**

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When a tenants' or residents' association sets up, it aims to represent a group of people. This could be all residents of their neighbourhood, or perhaps only the tenants in it. When a tenants' association claims to represent a group of people, it is accountable to them for its actions.

The committee of an association is accountable to the membership. Any office bearer or committee member carrying out a task is accountable to the committee while doing this. It was probably the committee which set

the task in the first place. Individual committee members, the committee, the membership, and the people you represent form a chain of accountability. Accountability is an essential part of democratic working.

**Activity 18**

In this activity, try to work out from the jumbled up list below who is accountable to whom?

- ◆ All local residents
- ◆ The association's committee
- ◆ The electorate
- ◆ The federation
- ◆ The council
- ◆ The association's chairperson
- ◆ The association's secretary
- ◆ The associations' treasurer
- ◆ The association's membership
- ◆ Funding bodies
- ◆ Councillors
- ◆ The local associations who join

Use the spaces overleaf to fill in your answers. See how many accountable relationships you can note down.

-----is accountable to -----  
-----for-----

-----is accountable to -----  
-----for-----

-----is accountable to -----  
-----for-----

-----is accountable to -----  
-----for-----

-----is accountable to -----  
-----for-----

-----is accountable to -----  
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-----is accountable to -----  
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-----is accountable to -----  
-----for-----

**Why do you need accountability in your tenants' organisations?**

Decisions taken by an association and the actions an association takes happen in pursuit of the association's aims. No actions should be taken which are not in keeping with the aims. Committee members who carry out the work of a tenants organisation do not do so for their own personal benefit. They may well benefit personally, but they do it primarily for the benefit of the membership.

Office bearers and committee members are given authority by the membership. Their responsibility in exercising this authority is to be accountable to the membership. Authority and accountability are two sides of the same coin.

**Activity 19**

In order to assess the accountability of your own organisation, you should consider each of these questions in turn and note down your answers.

- ◆ Why is your tenants' association needed?

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- ◆ What kind of things would you envisage doing together as an association?

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- ◆ From the answers given to the questions above try to summarise briefly a statement of aims

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### How Accountability Works

If you refer back to the section on constitutions in this workbook you will see that we looked at accountability then, in relation to constitutions.

Accountability also has to operate at the level of committee members and office bearers wanting to achieve things for their membership; and wanting to operate in a fair and democratic manner. The credibility of the committee and office bearers, in the eyes of the membership and those whom they seek to influence derives from how well they do this.

Your organisation may be part of an umbrella tenants' organisation like a federation. It is becoming very common now for many tenants' and residents' associations to combine together in pursuit of common goals. This may be seen to be a more effective way to influence landlord policies which apply to people throughout the landlord's area.

In federations, the members are mainly or exclusively the local associations. A federation must therefore operate in a way that is accountable to the local associations which form its membership. A federation will have no authority to instruct individual associations. Collective actions in a federation depend on a willingness to find enough common ground around which people want to work.

*Now would be a good time to take a break. Before you do however think about what you came up with as a statement of aims for your organisation. Are they very similar or very different to the aims you have at the moment? It would be interesting to find out the reasons why they are very different if that is the case.*

*Now move onto rounding off the course. You have almost completed this workbook.*

## Now, to Round Off the Course...

This part of the course gives you a chance to check your understanding of the main points presented. It takes the form of a TRUE/FALSE quiz. All you do is place a tick in the correct column to indicate whether you think each statement is TRUE or FALSE.

Statement	TRUE	FALSE
1. The aims of a tenants' and residents' organisation could include stimulating the social life of the community.		
2. Minutes of a meeting include a record of who attended each meeting.		
3. The agenda for a meeting should only include a financial report occasionally.		
4. If possible the agenda should be circulated in advance of a meeting.		
5. Not all tenants' and residents' groups require a constitution.		
6. The committee is elected according to the rules of the constitution.		
7. The chairperson is the person who does everything.		
8. The secretary is responsible for handling the money.		
9. The committee of an association is accountable to the membership.		
10. Authority and accountability are two sides of the same coin.		

## **What Next?**

Phone or write to TIS to ask for the Checkback Pack for this course. We'll send it to you straight away.

In it you will get:

- ◆ The answers to the TRUE/FALSE quiz
- ◆ A list of sources of further information on effective organisation

- ◆ Information about the second part of this effective organisation course  
*(You may of course ask us for the second part right away)*
- ◆ A list of other courses in TIS' **Home Study for Tenants** series
- ◆ A questionnaire to enable you to give us feedback on how well this course worked for you (or how badly)
- ◆ A course completion certificate

**For Now....**

**WELL DONE FOR COMPLETING THIS COURSE.** We hope you enjoyed learning this way and will ask for more **HOME STUDY** courses to be sent to you.

Tenants Information Service  
Freepost SCO 4863  
GLASGOW  
G2 6BR

0141 248 1242

e-mail : [info@tis.org.uk](mailto:info@tis.org.uk)