



## 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 TWO

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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 how to encourage more people to join your local tenants and residents association.

#### **WHO THIS COURSE IS FOR:**

This course is designed for tenants and residents who:

- ◆ Are members of a newly established tenants or residents association,
- ◆ Are relatively new committee members or office bearers in a local association, 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:**

- ◆ How to encourage more people to take part
- ◆ How to run effective meetings
- ◆ How to make effective decisions
- ◆ How to handle money properly

This is the second 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.

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

**Workbook**

**AIM:** The aim of this course is to help you think about how to organise your local tenants and residents association effectively and how to encourage more people to join your local tenants and residents association.

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

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**WHAT YOU WILL LEARN IN THIS WORKBOOK:**

- ◆ How to encourage more people to take part
- ◆ How to run effective meetings
- ◆ How to make effective decisions
- ◆ How to handle money properly

**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 have 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

### How to Encourage More People to Take Part

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#### Activity 1

You are involved in a local association, which is trying to encourage more people in the area to become members. You are keen that as many people within the area find out what your association is trying to achieve so that they are willing to participate in the group.

List here four reasons, which you would tell, people to try and encourage them to join your local group:

1 \_\_\_\_\_

2 \_\_\_\_\_

3 \_\_\_\_\_

4 \_\_\_\_\_

It is not unusual for tenants and residents groups to want more people to become involved. Usually, this is because there are a few committed members who feel they are being left to do everything themselves. In order to overcome apathy, you should consider three key ideas when trying to encourage more people to take part in your local group.

#### Activity 2

Try to identify the following three key ideas by filling in the missing letters:

1     A \_ I \_ V \_ R \_ S \_ \_ T S

2     T \_ R \_ \_ E \_ P \_ E O \_

3     D \_ N ' \_ T \_ R \_ \_ E \_ P \_ E O \_ \_

How easy did you find that?

## Achieve Results

People like to be associated with something that is successful. If your group can achieve results for the area you represent, the status of your group will grow. As a result more people will want to be associated with it.

Of course achieving results is not easy.

Sometimes groups take on a bigger issue than they can cope with, and end up getting bogged down. Would it have been better being less ambitious and making the aim easier to achieve? People are rightly sceptical about influencing authority. **But it can be done.** It is really helpful, when a new issue comes up, to be able to recall past successes, however modest. It reinforces a positive feeling about the issue that you are about to take on.

Sometimes a group doesn't focus clearly enough on its aims. Think about:

- ◆ What in general is your group in business to do?
- ◆ What particular things are you trying to do at the moment?

Your answers to these questions should be quite clear, if you're not sure then it suggests that the group may just be drifting along without really achieving anything.

Sometimes you get caught up in things other people want your group to do. But does your group really want to get involved? The starting point for achieving results is to:

- ◆ Take on things which you think you can succeed with
- ◆ Define clearly what it is you're trying to do (the whole committee should be clear)
- ◆ Don't let others side track you

When your group does achieve results, make sure the people in your area know about it, and that your group gets the credit due. You could use a newsletter to inform the people in the area. If your AGM or another public meeting is taking place, make sure the group's achievements are mentioned.

Success breed success. A group that can feel the satisfaction of achievement will want to take on more. You will find it easier to draw more people in when they see a successful organisation at work. No one will be keen to join in if your group repeatedly fails.

### Activity 3

Before we look at the second and third key ideas, try to identify up to 10 reasons why you think people leave groups:

- 1 \_\_\_\_\_
- 2 \_\_\_\_\_
- 3 \_\_\_\_\_
- 4 \_\_\_\_\_
- 5 \_\_\_\_\_
- 6 \_\_\_\_\_
- 7 \_\_\_\_\_
- 8 \_\_\_\_\_
- 9 \_\_\_\_\_
- 10 \_\_\_\_\_

Now if you turn to page 6, you will find the answers but DON'T look on until you have completed the task.

The second key idea is Turn People On.

#### Turn People On

If people can get some satisfaction or even enjoyment from working in your group, they will want to keep doing it. They will also in turn attract more people.

When decisions are taken, the next step is to **share around the work**. So often groups take decisions, then assume the secretary or chair will do all the work. What should happen is a discussion of the tasks involved in carrying out the decision, and a sharing around of these tasks. No one need be left to do it all. Most people could be given fairly easy jobs.

Remember that some people may be keen on certain things but not others. For example, a person might be keen on helping with a bingo night but less keen on attending a meeting on housing repairs. Try to find a **niche** for different people's interests.

The groups that last a long time and have a healthy committee are the groups, which often include **social activities** in their work. It adds continuity to the group's profile in the area and can be great fun.

If a particularly important issue is on the go, use it to draw in more people. For example, if you had a public meeting about the issue you could ask for some volunteers to take on some simple tasks. Annual general meetings are another opportunity to draw in more people. The formal business of an AGM is dull to most people. But it's an occasion where you want a decent turn out so invite an interesting speaker, have a raffle or provide a buffet. The main thing is to add **something of interest** to the occasion.

The final key idea is Don't Turn People Off.

### Don't Turn People Off

There are many things which can put people off working in a group and therefore they can be driven away.

Imagine you are going along to a committee meeting for the first time. You don't know anyone. You don't know what the committee is doing. You don't know how the committee operates. You're shy about speaking up. The same old faces dominate the discussion and it's enough to put you off going back.

You need to find ways to make **new people feel welcomed and valued**. Take time to welcome new people, and make introductions. If you know in advance a new person is going to attend the meeting. An experienced committee member could perhaps arrange to call by and the two could come along to the meeting together.

Another fear some new recruits might have is believing they are **not as knowledgeable** as they should be. This lack of confidence may be misplaced, but can be felt strongly by newer people. You should show an interest and respect for the point of view of new people.

A common "turn off" at a committee meeting is to thrash a subject to death. When a well-rounded discussion of a topic has taken place, don't keep going over it, make your decision and get on. Another way to kill off interest in your group is to **overdo fundraising**. You don't want to give your community the idea that that is all you do.

Occasionally, the personalities of some committee members clash. While tact can keep this low key, sometimes the clash just cannot be resolved and someone has to go. **Personality clashes** allowed to go unchecked can too easily destroy the whole group.

Another type of personality that destroys groups is the ego tripper. The activity of the group is built around this person's craving for status and esteem. We all want recognition and acceptance, but the ego tripper goes too far. A variation on this is the person who is too fond of the sound of his or her own voice, and fails to recognise the value of the contribution of others.

It should be apparent to you from this section that there are lots of reasons why groups might fail to attract more active participants. Hopefully you can see that **apathy** is not a detailed enough explanation.

*Now might be a good time to take a break. Before you do, here are the answers to Activity 3.*

### **Activity 3 Answers**

#### **What causes people to leave groups?**

- 1 They no longer feel the group is working to its aims and objectives.
- 2 They are busy with other activities.
- 3 They do not feel part of the group.
- 4 They are never allowed to represent the group at other meetings or conferences.
- 5 They feel the group never takes up their suggestions.
- 6 They think one or two people dominate the group.
- 7 The issue has been resolved.
- 8 They are being asked to do too much.
- 9 They feel there is too much disharmony in the group and people are no longer pulling together.
- 10 They feel no one listens to them and they are often put down.

## SECTION 2

### How to Run Effective Meetings

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There are key ingredients to running meetings well. There are also things that need to be considered differently when you are holding a public meeting rather than just a normal monthly meeting of your tenants association.

#### Activity 4

What do you think is required to run an effective meeting? Try to list 5 things below:

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

One thing that is required to run effective meetings is discipline. **Discipline** can be achieved by:

- ◆ **Sticking to the issue in hand** - People often have things they want to say, but which do not directly affect the issue under consideration. **Don't fall into this trap.** Try to discipline yourself to make sure what you say is relevant. If you don't you may find the Chairperson brings you into line.
- ◆ **Don't get side tracked** - It is so easy to get side tracked. Just think of your average casual conversation. It moves from one thing to the next very much influenced by what one person says reminding another of something they want to say. Conversations start on one topic but usually finish on something completely different. And that's fine for conversations. Discussions at meetings **should not be like this.** Try to prevent it by reminding yourself of the reason for the topic being discussed.
- ◆ **Encourage Contributions** - Fairly formal approaches usually work best. On the other hand, new members shouldn't feel intimidated from contributing.

It is also important that in running effective meetings you aim for as much **clarity** as possible. In order to ensure you have maximum clarity, consider:

- ◆ **Have you got enough information?** Is there enough information upon which to arrive at a view or decision? Are your facts correct or is it hearsay? Do members present at the meeting **really understand** the issue at the stage a decision is being reached?
- ◆ **Has everyone understood the issues?** Part of the role of the chair is to judge when enough discussion has taken place to enable a good decision to be made. This means people **have understood** the issues and options. Not only should the committee's decision be clear but also the reason why that is the preferred option.

Finally, **democracy and fairness** are essential to run effective meetings. Democracy and fairness includes:

- ◆ **Allowing members to have their say** - all members of the associations should have a chance to state their view. The chair must see that no one (including him or her) dominates and that quieter people are encouraged.
- ◆ **The Chair having a key role** - the chair is central to a well-run meeting. If other office bearers and members understand this, it can assist in the effective running of meetings.
- ◆ **Differences of opinion** - where strong differences of opinion exist, they need careful handling. The chair must look for ways of reconciling differences and preserving unity. Never forget that what unites you is always much stronger than any one situation tending to cause divisions.
- ◆ **Democracy is not just about voting** - on most issues under consideration in committees, it's better to try to reach a consensus. A consensus means a position everyone finds reasonably acceptable, even if it's not what some people ideally wanted.
- ◆ **Action following a decision needs commitment** - this commitment should originate at the time the decision is being made. If it fails to originate at the time the decision is being made you may find it difficult to implement your decision.

## Activity 5

When you are planning to hold a public meeting on a particular issue, you want the meeting to be as effective as possible so that the people in your area will support your group in trying to influence that issue.

In the table there is a list of issues, which you will need to consider when organising a public meeting. You should try to list what needs to be considered about each issue and write your answers in the space under checklist. You will then be sent the answers to this activity when you send for the **Checkback Pack from TIS**.

Issue	Checklist
<b>Venue</b>	
<b>Catering for Particular Needs</b>	
<b>Timing</b>	
<b>Transport</b>	
<b>Attendance</b>	
<b>Chairing the meeting</b>	
<b>Agenda</b>	
<b>Providing Information</b>	

## Collecting up Opinions from the Meeting

### Activity 6

In the final activity in this section, you should consider the case study below and think about how the meeting in the case study was organised. Then prepare your own list of how you would have run the meeting differently.

#### **ABC Tenants' Association Meeting**

Davie, a committee member of the ABC Tenants' Association, was ill and had to miss the last committee meeting. He only found out that the next committee meeting had been brought forward a week when he bumped into the Secretary in the post office that day. She informed him that the changed date had been mentioned at the last meeting, and that in any case she did not have time to send everyone a letter. Also, that she had lost the minute of the last meeting.

Davie turned up for the meeting that evening at 7.30 p.m., but a few members turned up late and the meeting didn't start until 7.45 p.m.

First of all the Secretary read out every letter sent to the group.

The Chair had invited a representative from the local Federation to the meeting, but the group wasn't sure why he had been invited and had not prepared questions to raise. As a result, there was a general discussion about the Federation and what support it could offer the group. The representative from the Federation had to leave at 8.30 p.m. so their discussion was cut short.

The Chair then had two main items for the agenda which he concentrated on for the rest of the evening. There was a lot of discussion about the problem of the increased number of stray dogs in the area, and the rise in break-ins. No decisions were made as to how the tenants' association should tackle these problems.

At the end of the meeting the Secretary remembered that a tenants' group from Kirkcaldy had phoned and requested to meet with them. There was not enough time to discuss this as it was almost 10 p.m. and people had to get home so the Chair proposed that the Secretary arrange to meet with the Kirkcaldy folk. This was agreed by the group. The meeting closed at 10 p.m.

Once you have completed activity 6, it might be a good time to take a break before moving onto Section 3 -Effective Decision-Making.

**Section 3**  
**How to Make an Effective Decision**

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Effective decision-making in your tenants' organisation is very important if the group is going to achieve the goals you have set.

**Activity 7**

There are four main features of a good decision. Try to work out what they are from the clues below:

- ◆ C \_ \_ \_ R
- ◆ UN \_ \_ \_ \_ \_ OD
- ◆ S \_ \_ P \_ \_ T \_ D
- ◆ I \_ P \_ \_ M \_ \_ T \_ BL \_

Once you have worked them out, think about why these features are so important. Make a list of your reasons and then turn the page.

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Now, we'll look at these features in more detail. Good decisions are:

**Clear - Understood - Supported - Implementable**

You can remember this easily if you think of CUSI.

**Clear**

Often the decision made in the Committee arises from discussing options. It's a good idea for the Chair of the meeting to check at the end of a discussion -

"So what we've just agreed is ....."

**Understood**

The Committee should understand why the decision reached has been taken. This is true whether everyone agrees with it or not. Everyone at the meeting should be able to explain the decision and the reasons for it to someone not at the meeting. If you haven't understood a decision at a meeting, you should ask for it to be explained.

**Supported**

If your decision has been arrived at democratically, the Committee members will support it. Or will it? Once a decision is made, even Committee members, who disagreed with it, should go along with the majority view.

It is often worth going over the merits of different possible decisions until a consensus is reached on the best decision. This might not be what you ideally feel would be best, but at least Committee members would support it.

**Implementable**

A decision will normally require one or more people to do something to implement it. Are they willing to do it? Are they able to do it? Will doing it mean progress for the association?

**How to make a good decision**

At the best of times discussions in tenants' groups can wander off the point. It's not easy to stick to the point, but it is necessary if you want to arrive at clear decisions. Here is a checklist of steps to go through to help you reach the decisions systematically.

## Decision Making Checklist

<b>D - DEFINE</b>	Define the problem. Try to keep this clear and simple.
<b>E - EXPLORE</b>	Bring together the hard facts. If you're not too sure whether something is correct, don't bank on it being correct. Check it out.
<b>C - CLARIFY</b>	See that everyone in the group has the information and understands it.
<b>I - IDEAS</b>	Think as widely as possible about the different ways to crack the problem. To do this well, you must be quite clear what you want to achieve.
<b>D - DECIDE</b>	<p>Having generated alternative ways to proceed, you must select the one to go for. For each option you considered, you should think through what might result if you adopted it. Is it the result you want?</p> <p>You may decide to have a vote on alternatives. In small groups this is not usually the best way to proceed. Better to talk it through trying to reach a consensus about what to do.</p>
<b>E - ENACT</b>	Who will carry out the decision? DO IT! Has it produced the result you wanted? What is the next move going to be?

**Notice that these steps spell out D-E-C-I-D-E.** You should try to remember these steps when you are at your tenants' association meeting and you are trying to reach a decision on an issue.



## Section 4

### How to Handle Money Properly

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In Effective Organisation for Tenants and Residents Associations Part 1, you learnt about the different roles of the office-bearers in a tenants' organisation. The treasurer has the main responsibility for ensuring that any money the association has is handled in a proper manner.

The Chair and other committee members should make sure that the treasurer provides monthly reports to the committee so that if any problems do arise, the treasurer can be assisted to sort them out as soon as possible. If the treasurer has been newly elected he or she should be given support from the other office bearers to help them to overcome any fears they may have about being responsible for the money the association has.

**Some fears the Treasurer may have initially include:**

- ◆ Being responsible for the cash
- ◆ A lack of confidence in his or her own ability
- ◆ Being unsure of how the financial process works
- ◆ Understanding the financial jargon
- ◆ A lack of confidence to complete a full set of accounts

### Activity 9

As a quick reminder, list some of the duties of a treasurer:

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

There is a lot of financial jargon that the treasurer of your group will need to understand, but it is important that other group members understand it too. Here is a jargon buster you may find useful.

### **Financial Jargon Buster**

**Bank statement** - details all transactions

**Bank Interest** - received from bank only if your account is in credit

**Cheque Book** - received from bank/method of paying bills

**Income** - money being received

**Expenditure** - money being paid out

**Petty cash** - methods of keeping small amounts of cash

**Bank charges** - deducted from your account for processing transactions

**Credit** - money you are paying into your account

**Debit** - money you are paying out of your account

**Ledgers** - term used in accounting for filing information

**Budgets** - reports based on income and expenditure

**Balance** - money left in your account

**Reconciliation** - final report showing that your financial statement is the same as the bank statement

### **Activity 9 Answers**

#### **The Duties of the Treasurer**

- ◆ To keep accurate records
- ◆ To keep all receipts and invoices
- ◆ To maintain petty cash records
- ◆ To keep cheque book

- ◆ To collect all monies
- ◆ To regularly update the group
- ◆ To prepare budgets
- ◆ To prepare accounts for the auditor and the AGM

### Opening a Bank Account

In order to ensure that your tenants' association's money is being handled properly your group should open a bank account. This will require two people from the group to act as signatories for the account. This means that two signatures are required when money is being withdrawn from the account or cheques are being written. Here is a checklist of some of the things you should know when opening a bank account:

#### **Opening a Bank Account**

**Minimum balance** - some banks require that a minimum amount of money is always available in the account.

**Maximum limit** - some banks have a maximum limit, usually £500,000.

**Charges** - worth checking. Some banks will charge for transactions and others won't.

**Deduction of tax** - some voluntary organisations receive bank interest gross i.e. no deduction of tax.

**Constitution** - to open an account you will need a copy of your group's constitution.

**Overdraft** - banks will charge a fee if your account is overdrawn.

**Identification** - passport or driving licence may be required. If the person has two forms of identification, the account can be opened. If the person opening the account is a customer of the bank, no identification is required.

**Credit search** - most banks will do a credit search of the person opening the account.

## Activity 10

It is important that your tenants' organisation's accounts show a balance between income and expenditure at the end of the year or show a profit. If you are showing a loss at the end of the year then there must be some problems with how your organisation is handling money.

On the budget sheet below, work out if the budget will be balanced at the end of the year.

<b>Budget Projection for 2001/2001</b>	
<b>Income</b>	
Grant aid	£250.00
Membership	£24.00
Fundraising	£50.00
	Total _____
<b>Expenditure</b>	
Fundraising	£50.00
Committee Expenses	£14.00
Printing/Copy	£33.50
Postages	£72.00
Hall hire	£64.00
Training	£45.00
Miscellaneous	£19.10
Stationery	£26.40
	Total _____

After completing Section 4, you should have some idea of how to handle money properly in your tenants' association.

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.*

<b>Statement</b>	<b>TRUE</b>	<b>FALSE</b>
<i>1. When trying to encourage people to take part you should show you can achieve results.</i>		
<i>2. When decisions are taken the chair and secretary should do all the work.</i>		
<i>3. Apathy is the main reason people don't get involved.</i>		
<i>4. To run effective meetings you need clarity about what you are trying to achieve.</i>		
<i>5. A good decision does not need to be implementable.</i>		
<i>6. When making a decision all options should be explored.</i>		
<i>7. A ledger is someone who files financial information.</i>		
<i>8. The secretary is responsible for keeping accurate financial records.</i>		
<i>9. When you open a bank account you will be asked for your group's constitution.</i>		
<i>10. Some banks require that a maximum limit is available in the account.</i>		

### **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*
- ◆ *The points which should be considered in the checklist for organising a public meeting*

- ◆ *A list of sources of further information on effective organisation*
- ◆ *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.***

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