Essential Skills for Environmental Activism

Papers from the first National Environment Movement Training Programme - Adelaide, 1996

National Environment Movement Training Support Group

November 1997

First National Environment Movement Training Programme

THE BACKGROUND

The first National Environment Movement Training Programme came about as a result of broad agreement among many people within the environment movement of the need for an improvement in skill levels among workers within the environment movement.

A significant number of people had come to recognise that staff, Board members and volunteers were being placed in the impossible position of being asked to perform important and difficult and onerous work without being provided with proper training, resources or adequate organisational support.

As a result the 1995 conference of Environment Centres and Conservation Councils had agreed that the 1996 conference should focus on training. At the same time, as part of its community sector support programmes, Cycad Consulting and Publishing was independently attempting to develop a proposal to develop and fund national training programmes for the environment movement.

The first national training programme was subsequently developed as a cooperative initiative of the steering committee the Environment Centres and Conservation Councils annual conference and Cycad Consulting and Publishing.

An evaluation of the training indicates that all participants in the training found the training programme extremely productive and want ongoing skill-training programmes to be developed for the environment movement.

As a result of the week of training a variety of initiatives have been developed which include the establishment of a number of working groups to develop proposals across the environment movement for the development of ongoing national training programmes, for improving the work of boards of management and for coordinating Information Technology and information systems management within the environment sector.

These conference papers include:

- Summaries of the presentations by the trainers
- A summary of the training evaluation
- Appendices

For further information on any of the topic areas please contact the person listed as the Presenter or the person who is listed as having prepared the document.

Further training: As a result of the success of the first national training sessions, proposals are now being developed to establish permanent training programmes within the environment sector. For further information on the Adelaide conference and on proposals for further training, contact:

Acknowledgments and contact information:
This report was edited and laid out by Chris Harris and Garth Luke

Cartoons by Phil Somerville from “In the Tiger’s Mouth – An Empowerment Guide for Social Action” by Katrina Shields, 1991. Used by permission from the publishers, Millennium Books, Sydney

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1. ORGANISATIONAL CHANGE AND GROWTH - PLENARY

The Need for change
Initiating change
Managing Change

Presenter: 98-
Chris Harris

Key Issue

CHANGE IS NOT SOMETHING THAT JUST HAPPENS, WHETHER TO US OR TO OTHERS - IT OCCURS BECAUSE OF EXTERNAL OR INTERNAL FORCES AND IS USUALLY INITIATED, ORGANISED AND PLANNED

In some cases the change experienced is initiated by someone for negative reasons, not to improve the effectiveness of an organisation but for reasons of personal politics, power, or to force individuals with whom they disagree to leave the organisation.
Many people in thinking about, examining, discussing and experiencing change tend to assume that change happens. In most cases it doesn't - it is made to happen, someone, somewhere, is initiating change and (possibly) managing it.

Key issue

CHANGE IS CONSTANT AND IT IS OFTEN NECESSARY. IT IS DESIRABLE FOR US AND OUR ORGANISATIONS TO CHANGE TO COPE WITH CIRCUMSTANCES WHICH ALTER AS A RESULT OF CHANGES ELSEWHERE

In the case of the community sector and more specifically the environment movement we often experience change initiated from elsewhere (Government, industry), or from within (increased budgets, more staff, extra information) but we don't manage it.
In many cases we don't even recognise the need for change (especially managed change) to cope with these external or internal events.

Key issue

From these key issues a third issue arises:

IS OUR ORGANISATION STRUCTURED TO COPE WITH CHANGE OR DOES IT NEED TO CHANGE ITSELF INTO TO BE ABLE TO DEAL WITH CHANGE AND GROWTH?

Those issues for me justify the importance of needing, initiating and managing change and bring one to the processes for dealing with those issues.

1.1 WHY DO WE NEED CHANGE

Because of organisational growth

Most of the current medium and large organisations within the environment sector experienced their most rapid growth and change up to and in the early and mid-1980's, often experiencing annual growth rates or ten, twenty or thirty per cent. Few however managed or planned this growth.

Because of external forces

Social and business conditions have changed. Business and Government has internationalised. Privatisation has taken hold and a small Government is theoretically at large. The internet has arrived. No part of Australia is immune from the same environmental problems and every environment centre and conservation councils faces these problems. Yet the environment movement continues to be fragmented, with little cross organisational cooperation, limited innovation and only incremental steps to initiate and manage change.

1.2 HOW DO WE INITIATE CHANGE

From above
From below
collectively
As individuals

The manner in which change is initiated is very important to its success. The most successful change programmes are usually ones which involve a broad range of people working towards the same end. This may involve an individual with an idea who co-opts other ordinary staff members and who persuade those in management positions. Or it may be initiated by managers who obtain support from others on staff.

In considering change it is important to consider informal power structures and whose support may be needed to effect change.

1.3 HOW DO WE MANAGE CHANGE?

1.3.1 Ad hoc

When organisations grow and change in an ad hoc manner, nothing is planned to cope with this change. Demands on the organisation and staff grow, the number of staff grows, as do the variety of personalities (and their motivations for working for the organisation. The needs of those staff increase.

The culture of the organisation may change quite dramatically as a result of these changes, alienating some of the older staff members.

Management committees or boards may have million or multi-million dollar budgets and staff of twenty or thirty for whom they are responsible but may have no personnel management or financial management skills and may, indeed, in many cases simply by on the board for prestige.

Staff and committees may be dealing with technical, financial, political or social situations for which they have never been trained or of which they have no experience.
Organisations have experienced repetitive financial and management crises. Staff have experienced burnout. Staff turnover has been rapid in some cases up to forty or fifty per cent annually.

Occasionally when crises develop within organisations efforts are made to initiate change, but often these tend to be superficial, dealing largely with the symptoms of change rather than the causes and avoiding the need for major cultural and systematic changes within the organisation.

As soon as the immediate crisis has passed board and management revert to their former practices. In most cases where changes have been proposed and agreed to they are not implemented, either because of lack of will, lack of systems or a perceived lack of resources.

1.3.2 Systematically

The alternative is to recognise that external forces, the growth in demands on ones organisation or the actual growth in size require continuous change and processes to cope with and manage that change.
The failure to do this within environment and other community sector organisations, is the reason that some organisations which in the 1980s were at the cutting edge in community campaigning, in use of technology, in the use of the media, or in advertising and promotional campaigns.

Generally within the environment sector there has been minimal growth in the larger organisations. Indeed many organisations have shrunk, largely because of the failure to properly manage change.
In dealing with and planning for change however we need to recognise that their are a variety of attitudes to change and a variety of types of change which we need to manage - the reason that this is important is that many organisations and individuals try and deal with one type of problem by changing unrelated things.

1.4 WHAT DO WE MEAN BY CHANGE?

There are a variety of types of change that occur or are initiated from both within and outside the organisation

- Change from within the organisation
- External changes (society/industrial/political/technology)
- Cultural/social changes (external/internal)
- Style (personnel)
- Structural changes
- Technological changes (without systems)
- Financial changes
- Systematic changes (including technology)
- Legal changes (incorporation)

Each one of these changes requires a different approach. A common mistake is to deal with problems that are largely ones of culture and style by addressing issues to do with structure, resources or systems.

Thus issues of low morale and high staff turnover which are caused by poor leadership or lack of care and concern for staff are often addressed by a re-structure or a change to organisational systems neither of which address the causes of the problems.

One of the unavoidable reasons for change within an organisation is growth in size. Beyond a certain point organisations stop functioning effectively unless they initiate, plan and implement changes to cope with growth.

In the rest of this paper I am going to deal only with a few of these issues as many of the issues relating to external forces such as external social and political change are within the ambit of campaign strategy and implementation. I want to focus briefly on organisational change to cope with and manage growth.
Organisational growth or development can take place for a number of different reasons and in a number of phases. These are outlined below:

1.5 THE CHRONOLOGY OF CHANGE

1.5.1 Establishment phase (Voluntary/no office/1-2 people)

1. Most organisations within the community sector start as small, often voluntary organisations of one or two people, with limited resources of any type. In many cases they operate out a persons house, have no infrastructure.

2. Initially the organisations are operated by one or two people who know each other well, understand the other persons mode of operation, have a good understanding of the goals which they are aiming to achieve (at least in the short to medium term) and are able to share most of the information coming into the organisation.

1.5.2 Informal phase (few rules, no committee)

3. These organisations are often informal. They may not be incorporated, may have few rules or structure, and no management committee.

1.5.3 Change phase (usually unplanned)

4. The organisations tend to change in an ad hoc way. Because the organisations may be volunteer driven it is impossible to select who participates or what skills they have. The modus operandum and goals of new entrants may be different to the original founders but this is often not explicit.

1.5.4 Initial formalisation

(small organisation, incorporation, membership, little discussion)

5. At some point many organisations start to formalise; they will incorporate, establish a management committee, set rules.
6. These steps are often taken without any discussion of what type of organisation participants are seeking, without any understanding of whether there are shared goals, without formalising structures, decision making processes, roles.
7. Organisations will often establish fundraising and membership programmes of sorts and start being much more public and pro-active

1.5.5 Growth phase

(rapid growth, office, staff)

8. At this stage organisations will often pass the 'critical mass' and start growing rapidly. The organisation may open an office and start employing staff.
9. As the number of people involved or employed on a full time basis passes four or five and the information flow increases, the opportunity for continuous and shared interaction and for common sharing of all information decreases.

1.5.6 Secondary formalisation (more than 3-5 staff)

10. At this stage organisations have passed the informal/establishment or small organisation stage and are becoming a mid-size organisation (from five to six people or more), largely determined by the inability of all staff to communicate informally. There are sufficient staff to require meetings and formal mechanisms to communicate internally.
11. This is the point at which organisations should start to plan and organise for change and growth.

1.5.7 Medium size organisation (more than 3-5 staff)

This is the point at which informal structures based on daily informal interaction cease to operate properly; internal communication systems have to be put in place, regular formal meetings start occurring, organised information systems should be required.
It is also a key point at which many organisations fail to implement necessary change.
In initiating and planning for change, however, their are a number of key areas which govern an organisation which must be addressed. These are the CULTURE of the organisation, the STRUCTURE of the organisation and the SYSTEMS of the organisation.

1.6 INITIATING PLANNING AND ORGANISING CHANGE

WHAT NEEDS TO BE DEALT WITH?

1. Cultural and Philosophical issues

Philosophy (what the organisation is about/hopes to achieve - master planning)
Culture/style/type (Democratic, hierarchical, consensus, grass-roots, direct action)

Philosophy: What are the <u>goals of the organisation</u> (these may be different from the formal goals in the rules and may have changed since the organisation was founded)
Culture: What is the <u>culture of the organisation</u> this involves things like staff and volunteer involvement, consultation on policies and other decisi**ons, decision making processes.**

(By <u>culture</u> I mean: the overall way in which the organisation organises its internal relationships; whether it is democratic, hierarchical, consensus orientated. Whether it aims to be grass roots orientated, direct action etc.)

2. Structural issues

Structure: centralised, decentralised, staff/committee driven, branches, federated, national

By structure I mean such things as whether it is centralised or decentralised, whether it is staff driven or committee driven, whether it has a branch structure, whether it is a federation of separate but equal state offices or a national structure with subordinate state branches. How finances are controlled. Issues to be considered include:

The role of branches

The role of the Board or management committee

Whether the organisation is centralised or decentralised

3. Systems (information/personnel systems, infrastructure, finance management)

By systems I mean how information is organised and shared, how finances are managed (as opposed to controlled), personnel systems, how infrastructure is organised and managed. Issues to be considered include:

- The establishment of personnel policies, including wages and conditions, sexual harassment policies, job descriptions, performance evaluation, working conditions etc.
- How is information to be managed and distributed
- The use of technology and equipment
- Fundraising and financial management
- Performance evaluation

It is also important to consider the relationship between these areas, eg between cultural and structural issues and structural and systems issues and how one may influence the other.

We tend to make assumptions that certain types of organisations will behave and operate in certain ways but this is not always so, for example:

- Consensus can be organised and efficient
- Hierarchical can be disorganised & inefficient
- Systematic & technologically advanced can also be radical

These assumptions tend to be based on our knowledge (or lack thereof) about existing examples within community groups, assumptions which can be false. Thus supposed consensus organisations (eg TWS) are often seen as being radical, relatively decentralised and non-hierarchical and non-systematic in their organisation, whereas they can be centralist, elitist and conservative.

Apart from the fact that assumptions about existing organisation may be false, one can in fact have highly authoritarian organisations that are highly anarchic and disorganised internally, while one can have decentralised and consensus organisations that have efficient and effective systems.

Similarly there is no relationship between effective systems and administration and conservatism in organisations. There tends to be a luddites assumption in some parts of the social change movement that technology, systems and effective administration is somehow the realm of business and government, is therefore conservative, and should be avoided. Such an assumption apart from being un-environmental and wasteful, is irresponsible and damaging to the environment movement as I hope to show.

1.7 TEN KEY RULES FOR MANAGING CHANGE

Change - integrated and ongoing (Change is constant, is initiated from within and planned for).

Recognising that there will always be a need for change and incorporating an ongoing mechanism for examining what changes are needed and how to manage them. Even if the culture of the organisation is fine and the structure is OK, there will be a range of both internal and external forces that will require a constant review of operations and organisational systems.

2. Change must be in the context of the organisations culture (change will fail unless those identifying and recommending change understand the organisation - changes must be 'owned').

That the use of external consultants to identify problems and recommend changes will often be wholly unsuccessful, unless those people understand the culture and dynamics of the organisation, and unless the process and outcomes are owned and implemented by the staff, volunteers and management committee as whole.

3. Responsibility for managing change must be clearly identified

There needs to be a clear distinction in addressing issues between those matters which are properly the responsibility of management and those that are the responsibility of the Board. The tendency for management committees and boards is to avoid responsibility and to abdicate their power and roles to permanent staff, who may in some cases be the cause of the need for change.

4. Don' t address cultural issues via structural/systematic change or vice versa.

There is often a tendency to try and address deep seated cultural problems (lack of care about staff, poor working conditions, lack of leadership) by superficial changes to systems and structure; changes which are almost bound to perpetuate the problems rather than solving them.

5. For change to work it usually needs to be inclusive (though not always)

Major organisational change usually needs to be inclusive of all staff, volunteers and committee members; changes driven from above or below are less likely take root.

6. Implementation of decisions about change is critical

Implementation of change is critical to success. No process of decision making should occur without an identification of resources, timetables and responsibility for implementation <u>and</u> a regular process of review of progress, involving all the original participants.

7. Monitoring and evaluating decisions taken and their implementation should be a continual process

In order to successfully implement change it is usually necessary to continually monitor and evaluate the decisions and their implementation. Poor decisions can be reviewed, as can timeframes and allocations of resources.

8. Providing skills and resources for change is essential

People are often asked to undertake changes requiring new skills without the skills and/or resources being provided. This will often exacerbate the problems rather than solving them.

9. Expert advice should be sought where appropriate

Expert advice about the technical and systematic aspects of change will reduce mistakes - many organisations opt for false economies by trying to implement change without proper <u>technical advice.</u>

10. Proper cost/benefit will reveal the real (often lower) costs of change.

<u>There is often a tendency to think change cannot be afforded. Real cost benefit analyses will often show that what appear to be costly changes will often quickly save money.</u>

2. DESIGN AND MANAGEMENT OF INFORMATION SYSTEMS

Presenter: Chris Harris

KEY ISSUE
The principal function of all environment groups and many other community groups is information handling and enhancement. This is true for most areas of work both internally and internally.

ENVIRONMENT GROUPS ARE PRINCIPALLY INFORMATION ENHANCERS

Environment Groups:

Take information from a variety of external sources, refine it and re-issue to the public and media
Internally individuals receive information and distribute to other staff to enhance their knowledge
Publicly groups and individuals propagate information via the news media, via newsletters , via the internet and directly to politicians and at public meetings

KEY ISSUE:
Information gathering, storage, management and distribution should be a priority for environment groups

KEY ISSUE:
Failure at information management should be seen as a critical organisational failure

2.1 GOALS FOR INFORMATION MANAGEMENT:

TO GATHER INFORMATION SYSTEMATICALLY

Many organisations fail to recognise their function as an information enhancer and therefor do not systematically gather information

TO REPRODUCE THAT INFORMATION IN A FORM THAT IS UNIFORM AND UNDERSTANDABLE

An examination of the information which organisations produce shows that it is of extremely variable quality, is not standardised and is often not easily understood by a lay person.

TO SORT AND STORE INFORMATION SYSTEMATICALLY

This is one of the most frequent failures of organisations. Very few organisations move, at the appropriate time to a centralised information system (filing system and library), that all staff and public can easily access and which provides information equally to all.

TO MAKE THAT INFORMATION EASILY ACCESSIBLE

Many organisations have a treasure house of information in their offices but most simply sits in filing cabinets or rarely used bookcases and is not made available to staff, public or media

TO REDISTRIBUTE THAT INFORMATION EFFECTIVELY

Requires a pro-active effort to make place information in the public arena

TO ENHANCE THE EFFICIENCY OF STAFF

Large amounts of staff time are wasted in both unnecessary personal filing and time consuming searches for information in badly managed (or unmanaged) information systems.

TO CARRY OUT THESE TASKS IN A COST EFFICIENT MANNER AND TIME EFFICIENT MANNER

Enormous amounts of money are wasted by poor information management and failure to invest in technology that could save staff time and resources.

TO PROVIDE PERSONAL EQUIPMENT (EG COMPUTERS) THAT ALLOWS STAFF TO ACCESS INFORMATION AND PERFORM EFFECTIVELY

The amount of time which is wasted as a result of failing to invest in modern, adequate equipment can be huge. Usually this is as a result of a failure to plan and budget for the provision of adequate equipment and a failure to properly assess the costs benefits of providing decent equipment.

TO PROVIDE PROPER TRAINING IN THE USE OF SYSTEMS

Many organisations provide equipment for which they never provide training. Apart from being frustrating to staff, this is a significant waste of valuable resources

2.2 PLANNING INFORMATION SYSTEMS

SHOULD COMMENCE EITHER PRIOR TO OR AT LATEST WHEN ORGANISATION REACHES FOUR TO FIVE PEOPLE

Usually organisations can cope with a fairly ad hoc system until they have three people working in it. After this such systems become highly inefficient and wasteful

SHOULD CAREFULLY IDENTIFY TYPES OF INFORMATION TO BE GATHERED AND CATEGORIES FOR STORAGE

This should be based on an assessment of goals and on likely requests for information from the public and elsewhere.

SHOULD BE STRUCTURED TO ALLOW PROGRESSIVE UPGRADING AND GROWTH

It is pointless planning and investing in an information system which is going to need completely overhauling in a matter of one to two years. Systems should be capable of coping with information needs for 5-10 years

SHOULD BE MANAGEABLE WITHIN EXISTING STAFF AND FINANCIAL RESOURCES

For small and medium size organisations systems which do not require specialist staff or skills are preferable - but which are labour efficient. These should be capable of being progressively upgraded

2.3 PRINCIPLES FOR TYPES OF SYSTEMS

2.3.1 Databases

Should be used to store the key information which the organisation utilises on a day to day basis. Accessing such information by key words is the simplest and easiest way to ensure that staff and public (where appropriate) can simply and easily find the information which they require. Development of a list of key types of information used by the organisation on a day to day basis (volunteers, media, politicians, companies, environment groups etc) are best stored in this way and available on line. Database software should be user friendly and should ideally be compatible with the membership database

2.3.2 Libraries

The key issues with libraries are making them accessible and relevant. It is noticeable how many libraries are not properly used because people either cannot easily access them, don't know what's in them, or don't know how to find the things even when they know they exist. They key to solving this is an online indexing system, cross-referenced with the filing system, with an easy search mechanism.

Simple programmes such as Papyrus can be used for these types of functions.

2.3.3 Filing Systems

The standard filing system in most organisations is a decentralised system where everyone keeps their own files in the way which they choose. The pitfalls and costs of this are addressed more fully in the paper “Of filing systems and libraries” but in general such systems are:

- Incredibly wasteful of physical resources
- Time inefficient
- Financially costly
- Inefficient in handling of information
- Poor at creating decentralised organisations with equal access to information
- Good at handicapping the campaign efficiency of organisations

2.3.4 Email Systems

A networked internal email/printing system should be an essential prerequisite of any efficient organisation of more than two to three people. For a number of reasons:
Networked printing is quicker and more cost effective than any other system
In larger organisations the ability to communicate and leave message by email is often the most effective way to communicate with other staff
Use of email is up ten to twenty times cheaper than sending the same information by fax and takes much less time. It can be done from the persons desk and with modern mail programmes formatted documents can be attached

2.3.5 Building And Workspace Design, Ergonomic Systems

The issue of workspace and working conditions is often one that is ignored by community groups. The actual nature of the building is one that can be difficult to address given the limited resources, however several other issues can be addressed which can make the working environment easier. These include:

- The provision of adequate lighting
- The provision of proper ergonomic furniture and proper training in its use
- Proper workspace designs so that equipment and resources are within easy reach

3. CAMPAIGNING

3.1 CAMPAIGN PLANNING

Karen Alexander

This brief paper does not detail how to decide the priority of a particular nor the process of strategy planning. It is simply checklist of the sorts of things you would bring to a meeting which was going to address strategy, after you have decided a particular campaign is a priority.

CHECKLIST FOR PLANNING MEETING

1. Background information on issue and its context

What do we know about the issue and the possible on-ground solutions and the reliability of this information.
- What don't we know.
- What do experts think and what research/literature is there.
- Legislative background and opportunities.
- Any previous history on this issue from our group or other groups, within the bureaucracy or industry.
- Stakeholders - who are they?
- What other environment groups are doing
- What actions/policies do the other stakeholders have
- Decision makers: who precisely can make the **final** decisions to achieve your goal(s)?

2. Who are the possible decision-makers on the way?

Who or what influences these decision-makers (eg World Vision has an Advisory Board made up of business men, they could use them to influence Howard rather than a letter writing campaign reflecting voter interest) Do you know for sure who or what influences them? Be creative here but also try to be as specific as possible eg Public opinion is all very well, but WHO within The Public and why?

(Examples of influence: business community - but which bits, the voters - but which ones. Any information about the attitudes to the issue from any of the stakeholders.)

3. Timetable of:

- Known related events, possible decision-making dates;
- Draft ideas for dates for Strategic Plan.

4. Strategic planning:

Maybe draft Strategy Plan OR at least a proposal for a process to get a Strategy Plan including looking at the role of media, public awareness, long term objectives, short term aims, action plans to achieve them.

Image of campaign - direct action or the more established routes etc. Resources needed: eg training, equipment for those involved, what are the funding options, support base.

5. Check your assumptions
Our assumptions: what are our own biases eg do we really KNOW what some of the other stakeholders think or just what we read in the newspapers?

6. Who to get involved
Careful selection of those interested in issue within organisation PLUS people with any other skills/knowledge which have identified (unless get this ahead of time).
Draft agenda (preferably circulated for input), briefing notes, including jargon. Proposals re ongoing nature of group: whether it would be that group or something else, its nature - formal/informal, if there is to be a follow-up meeting, how results of meeting communicated to attendees.

3.2 CAMPAIGN IMPLEMENTATION

Presenter: Bob Burton

The following paper uses an imaginary case study as an example the of key facets which make up a process of considering and implementing a campaign.

The basics of the scenario:

A mining company has applied for an exploration licence over an area that adjoins the Lakes National Park in central west NSW. The Lakes National Park is noted for its migratory bird life and scenery. While the exploration licence is outside the park it overlaps with a proposed extension to the park designed to include the entire catchment of the Boondocks River. The area is little known by most conservationists, let alone the public.

The local Aboriginal community, however, know the area well. The Boondocks Aboriginal Corporation, have lodged a Mabo claim over the National Park and the surrounding area, including the area covered by the proposed exploration licence.

The exploration licence is for gold and the company is hopeful of finding a major deposit especially given that the area was mined for gold 80 years ago.

The mining company, Everyday Resources Inc, is a major Australian mining company with projects in Australia, including one 40 km away at Boondocks East. It also has a number of operating mine sites overseas. Everyday Resources Inc has hired a big Sydney PR firm, Bill & Hole, to run its campaign for its exploration activities and possible mine.

The proposed mine is opposed by the Boondocks Environment Centre that works on a range of issues including soil erosion, forestry and a local council recycling program. It has never been involved in mining campaigns before.

The BEC receives 80% of its income from the Federal Government's Grants to Voluntary Conservation Organisations scheme which enables it to employ one part time coordinator. The dozen regular volunteers are fully occupied keeping the centre running and working on existing priorities. BEC is a reasonably conventional organisation with a membership elected Executive and a commitment to non-violence.

Virtually no-one else in the environment movement has much to do with BEC, though a few read their occasional newsletter. Sometimes the BEC manages to get someone to the annual conference of the NSW Conservation Council.

DIRECT ACTION!, a radical direct action group that thinks Earth First! are a bunch of wimps, is looking around for a new protest.

The local council is largely comprised of conservative farmers as well as a real estate salesman from Boondocks. The one progressive councillor, a sociology lecturer from the Boondocks University, is isolated on the council, apart from which no-one can understand what he is talking about.

There is also a pro-development grass roots group, Boondockers for Balanced Development, who are looking for a new issue to revive their flagging membership. They are pretty rabid and have been known to resort to harassment to get their way.

The State Labor Government is largely supportive of the mining industry but is dependent on the support of a Democrat and green inclined independents in the Upper House. The mining union is influential in the ALP Left and is not surprisingly, strongly pro-mining.

The local media is strongly pro-development while the state and national media know little about politics in the Boondocks area.

The cast is:
Boondocks Aboriginal Corporation
Boondocks Environment Centre
NSW Conservation Council
Mayor of the Boondocks Council
Everyday Resources Community Relations Manager
Boondockers for Balanced Development
Department of Environment
Chief Adviser to the Premier: The Editor of the Boondocks Bugle
Mr and Mrs Middle Australia
Direct Action

Your planning, should you choose to do it ....should reflect on what Napoleon, Cropper, Robertson and Forbes had to say. The script of the hypothetical will be based on Moyer's eight phases of a movement campaign.

Specifically you should think about the following:

- The lodging of the exploration licence;
- Research on your opposition;
- Legal actions
- Blockades;
- Police;
- Harassment;
- Building alliances; (not restricted to other members of the cast)
- Freedom of information requests
- Claims of monkey wrenching and "eco-terrorism".
- Scientific experts
- Burnout;
- Annual general meetings
- Media - local, state and national;
- A commission of inquiry;
- Decisions by the minister for environment and the premier;

4. ROLES OF BOARDS AND OFFICE BEARERS

How to have fun and an effective board

Presenter: Karen Alexander

A board which works well can set the scene for the organisation to solve many, many common problems for groups from forward planning to financial crises. I believe it is worth a lot of effort to get a board working well and that the effort will be well and truly repaid.

The solutions are not found in these few pages. It is essential that the reader either read the Hudson book (or some other reference which has been recommended) or delegate someone, preferably someone on your board with some influence, to read it. Or get in some outside professional help. A piecemeal effort will only be frustrating.

Reforming, or getting a board to work effectively, may take two years.

<u>Acknowledgment</u>
Most of what is here has been taken from an excellent reference: Michael Hudson:
"Managing Without Profit". Penguin. GET IT! I've used it because it made sense of my own experience, it clarified issues in an excellent way, seemed practical and applicable to environment organisations in this country no matter what size. Good reading.

4.1 STRONG BOARDS ARE ESSENTIAL

Board membership used to be an honour. Today it is a demanding task requiring specific competencies and skills.

Strong boards are needed:
- To provide the organisation with security and continuity
- To hold the chief executive 2 accountable
- To provide a long-term perspective
- To monitor overall performance.

4.2 THE ROLES OF AN EFFECTIVE BOARD AND EFFECTIVE BOARD MEMBER

- Governing the organisation.
- Provides accountability for the organisation
- Resolves tensions between different stakeholder groups
- Giving advice to management

Some boards, especially little committees of management of, for instance, an environment centre, may do far more than what is listed below. In fact, the board may be the same people as the people in the office, the volunteers, the unpaid staff etc.

If YOU are one of these then you have to be even more careful to be sure you put your board hat on when you are having your board or committee of management meeting and distinguishing this role from any of the others. Maybe you should have a board meeting on a separate night, or allocate the first hour of the monthly meeting, or maybe a well planned meeting longer meeting but only once a year. Whichever it is the following roles are just as important for a little group as a big group.

Some boards may be huge, up to 200 members. No matter what size your board, it needs to cover the following topics. The way the board does addresses the topics will vary: a large board will have to set up sub-committees and the board itself may only meet once a year. A small board doesn't have to do this and can meet more frequently.

The tasks of the Board will include:

1. Governing the organisation, and distinguishing this from management This would include the following tasks:

- Agree mission, objectives, approving the broad strategy for working towards these.
- but not necessarily about developing them.
- Monitoring the organisation's performance against the agreed plans, but not necessarily providing the data which does this.
- Anticipates decisions: is aware of changing external environment and ensure organisation is geared up to respond to new circumstances but not necessarily doing the research to do this.
- Establishing processes for determining the organisation's strategy and monitoring its overall performance
- Seeing significant changes in funding environments and responding.
- Seeing significant changes in the size and needs of the beneficiary group or campaign priorities.
- Seeing the need to change the overall structure of the organisation or the senior management structure.
- Anticipating the succession for the Chair and CEO.
- Ensuring the organisation is well managed but not about managing it.
- Establishing broad policies/philosophy for the way the organisation should work eg financial policy, personnel policy and policies on ethical issues.
- Giving guidance about or deciding the overall allocation of resources but is less concerned with the precise numbers. (But someone needs to be!!)
- About taking responsibility for the organisation's performance, but not about meddling with the detail of the performance measurement system.
- Provide insight, wisdom, good judgement.
- The board shapes decisions rather than taking them.
- And does this in ways which move beyond setting abstract policies which are of little practical use.

2. The Board provides accountability for the organisation. It should be:

Being responsible for all the organisation's work but not doing it.

- For appointing high calibre CEO and reviewing: the CEO's contract and personal performance and, when necessary, replacement of an under-performing executive.
- Setting up the necessary reporting procedures to ensure it can discharge those responsibilities:
- Establishing performance measures for the organisation as a whole, monitoring against these;
- Ensuring financial security and ensuring there are effective financial management systems;
- Morally accountable to all the different stakeholder groups eg members, funders, regulatory bodies, general public. It is legally accountable to some.

3. The Board resolves tensions between different stakeholder groups

- Organisations are coalitions of people with different interests, eg such as service users, funders, staff, members and volunteers. Boards should be able to resolve the competing demands.

  eg Members can make unreasonable demands on staff; lenders can place burdensome conditions on grants; staff may put their own interests first.

- Boards are morally accountable to all of these groups.
- Boards are legally accountable to some of these groups.

4. Boards are about giving advice to management

But not telling them how to carry out their job.

- Staff have been appointed either by the board (eg CEO) or by CEO/other staff to do their job. If there are serious questions about their performance then a board member should talk to the Chair/president, or maybe the CEO about it, who will then act, or not act, on it depending on whether they think it is a problem. It is NOT the board member's role to manage the staff, you have delegated this role to the CEO.

- IF the CEO is not performing then this is a role for the board but they need to consider: is the job description clear, has the CEO had a performance review, do the CEO need further training for the job, is this just a disagreement on the way things should be done, do you still essentially have faith in your CEO to do the job?

4.3 TYPICAL WORK PROGRAM FOR A BOARD

- Defining the ideal size and composition of the board.
- Structuring committees and working groups to anticipate the future needs of
- the organisation.
- Recruiting and inducting new members to meet present and future requirements.
- Ensuring board members are clear about the board's responsibilities and
- how they are discharged.
- Providing training and support to meet board members' needs.
- Determining its own agenda and priorities - board role, mission, objectives,
- major strategy, ethical issues, policy etc.
- Monitoring its own performance.

4.4 BOARD CHECK LIST:

- Is there a commonly understood role of the Board and its members? Has this been discussed/clarified with the current board and any new members? Is it clear to staff?
- Are they focusing their efforts sharply on those critical functions that no one else can discharge.
- Do they understand the difference between governance and management?
- Are they taking few decisions and understand their more sophisticated role?
- What is different as a result of the board's work? Has the board added value to the organisation?
- Or is it a significant drain on the staff who have to prepare for and attend meetings? Is the organisation getting value for money?
- Are they reviewing their role and performance at least annually?

4.5 BOARDS: FROM WHAT IS TO WHAT CAN BE

Each situation is different but the following are some ideas:

Attracting talented people:

- Talented board members are a scarce resource, so boards need to be energetic and systematic in searching for them.
- Procedures for recruiting and electing potential board members should be as rigorous as those for staff recruitment.
- The processes and priorities are different for elected, selected, appointed and self-perpetuating boards.
- Find a good Chair who understand the roles of boards or is at least committed to working it out with outside advice.
- Be very pro-active in seeking people who can fill the skills needed and understand the role of boards, meet them informally to explain what is expected. Preferably board members should do this.
- Clarify the role of the board - this will probably take some time and should be facilitated by an outsider who understands community organisations. Emphasise that the board member role is NOT the same as staff role, or, in campaigning organisations, it is NOT a campaigning role. Agree the balance of skills and representation required and prepare job descriptions.
- Expect people who stand for election to meet the criteria set out in the job description.
- Create a group of people who can work together as a team (could ask prospective members to attend as observers first for mutual assessment).
- For elected boards: details of expectations should be widely publicised, current skill gaps announced, existing members should seek out new people.
- Strengthen people's skills on appointment: induction, a mentor, attend training course, acclimatise themselves eg sit in on management meetings, read past papers, minutes, background.

- Develop and provide a ‘corporate’ history of the organisation, its ways of operating, achievements, problems, solutions which have been tried, personnel.
- Make appointments time-limited.

4.6 INCREASING BOARD EFFECTIVENESS.

- Boards are surrounded by forces that lure them into ineffectiveness and which need to be resisted.
- CEOs may need help to learn how to manage board matters professionally.
- Effectiveness is the chair’s responsibility, often discharged jointly with the CEO. Together they need to establish the right agendas, clarify the staff’s role, work on their relationship with each other, ensure that the board reviews its own performance.
- Ensure agendas, whether prepared by staff or a board member, reflect what should be on a board agenda and what shouldn’t - this reflects understanding or lack of it of board role. Get Chair and CEO to vet the items if necessary while role is clarified, or two people concerned about roles go through agenda ahead of time and recommend changes. The criteria include:
    - Is this something only the board can deal with,
    - Is it a fundamental issue for the organisation,
    - Does it have policy implications, or should the staff (or ‘me’ under another hat) deal with it as part of their job description anyway?

A typical agenda might include:

- Specific achievements related to the mission in the last period;
- Overall allocation of resources to different sections of the organisation;
- New policies for development, review, adoption;
- Review of CEO contract/performance;
- New and emerging issues which the staff and/or board might need to address;
- Accountability indicators eg finances, morale, forward planning and whatever else has been nominated ;
- New board members, chair succession;
- Improvement of board procedures and info systems, performance;
- Fun, social side, getting to know board members/staff, induction of new board members

EXERCISE:

After reading the following you could check your board agenda over the last year for the ‘board’ items. Are any of the above items not there? Maybe there are things which you recognise now shouldn’t be there at all.

- Resolve small number of critical issues rather than attempting to consider briefly a wide range of issues. Put these up front, do not leave till end just because they are big or time-consuming.
- Review the board performance annually at least: Against agreed list of responsibilities for governance for the work of the organisation, work of the board.
- Confirm members attendance.
- Identify areas for improvement.
- Agree package of actions needed to implement improvements and criteria for monitoring those.

TROUBLE SHOOTING

This list of topics came from a brainstorm of the workshops at the Adelaide training conference:

- Board members not accepting their roles.
- Does the board itself understand its role, can the Chair clarify, can the ‘role of the board’ be put on the agenda, can finance and time be allocated to this issue, can the person be removed.
- Pre-emptive - make sure advertising or board vacancies, new members being approached, are clear about the role with job description including evaluation.
- Wrong reasons for accepting role eg prestige.
- Lack of experience and/or training, not understanding of the roles.
- Staff understanding of role but board not accepting their direction.
- The board shouldn’t ‘take direction’ from the staff, however, the board should be listening to the staff especially via the CEO.

- Staff should be sure it's not their own management eg 'problems' with the CEO, rather than a board problem they are concerned about. Staff should be operating through their CEO/Co-ordinator.
- The CEO and Chair should discuss the issue in a frank and constructive manner as possible. Get an outside facilitator/mediator if necessary.
- Staff/CEO could request a hearing from the board and gently point out what they think the organisation needs from its staff AND the board for there to be an effective partnership, or staff could be very up-front in its proposals.
- Be as constructive as possible on the way the board may fulfil its roles better, what that means for the organisation's capacity to achieve its goals better, and the need and status of the job to be done by board members. Note areas where staff can contribute to the solution.
- If talking of general problems then have specific examples.
- Members could be alerted to dilemmas.
- Change the board members via the appropriate process.

Frustration with a board which is not activist oriented.

- Has this non-activist role of the board been a board decision, an historical accident, or just because of who happens to be on the board now?
- Is it time to review the role of the board with a view to clarifying the mission and/or the style of the organisation? When was this last reviewed ?
- Is it to do with different perceptions of the how the organisation may achieve its objectives or carry out its mission?
- Has an issue arisen, or a contributing factor which has brought about the apparent division, which the board should have or needs to address? eg loss of funding, a campaign issue which is related to the mission of the organisation but not centrally.
- Clarify for yourself if it is just you and whether you are in or out of step with the style of the organisation. Are there other board members which feel the same, do staff feel some division too?
- Talk to the Chair and ensure that you are taken seriously eg about your role on the board, the role of the board and the style. Stress that you want to have this discussed at a board meeting but in a constructive way. Do not assume he/she is unsympathetic. For women, watch out for patronising male dismissals even if done nicely.
- Put this issue on the agenda for discussion and, if possible, a process which would help clarify and resolve the issue, and preferably with the Chair's support and at least someone else's. Use previously agreed positions to raise your questions, a process for resolution.

How to get the board to do some forward thinking

- This is not an easy task and very easily listed as an agenda item and not achieved. But it is definitely the board's role to do this. It could be a staff job to prepare for this and to do the work necessary for the board to do their forward thinking.
- Get board to clarify their role and timetable for carrying out priorities.
- Staff could stress their strong need for forward thinking, the expertise of the
- board to address the issues raised and to set priorities. And that the
- organisation needs to do this.
- Forward thinking is as much a process as a decision. Get advice on that process.
- For complex organisations with a diverse agenda eg ACF, it may take 6 months every 3 years.

EXERCISE TO HELP CLARIFY ROLES

The ROLE SWAP GAME

This is a powerful exercise that board members and staff can undertake together to clarify roles. It takes less than an hour and be both illuminating and entertaining.

The board and senior management team meet together in one room. The board gathers at one end of the room and imagines that it is the staff. It has 20 minutes to address the question 'What do we expect of an effective board?'

The staff meet at the other end of the room and imagine that they are the board. They ask 'What do we expect of an effective senior management team?' The two groups then meet together and report on their deliberations for 20 minutes. The final 20 minutes should be spent on agreeing the changes that need to happen for each to meet the expectations of the other.

It is remarkable what high expectations can be established when one group stands in the shoes of the other.

This can also be done by one small group trying to come to grips with a problem which is related to board/staff roles. Brainstorm the above questions by pretending to be 'the staff', then 'the board'. Compare notes and see if any actions emerge.

Definitions

- The Board is used here as the generic term for that group of people legally responsible for the organisation. May be large, small, elected, self-appointed. May also be called Council (eg ACF), Committee of Management or just a bunch of bastards.

Chief executive, CEO, coordinator, unpaid but 'primary' person carrying out a lot of work of the organisation, or maybe a group of people collectively responsible to the board but they must still be accountable.

USEFUL REFERENCES

MANAGING ORGANISATIONS
Michael Hudson Managing Without Profit Penguin.
Excellent guide to all aspects of running not-for-profits.

THE F'FB NETWORK
The Fun and 'affective Board Network was set up following the Adelaide Training Conference for environment organisations. It will .... well, it is in the process of working out its role. Contact is the author.

5. FUNDRAISING - OVERVIEW - We can raise money

Bob Burton Fundraising we can do it:

There are a few histories of the environment movement, some of individual campaigns or organisations in Australia but none on environmental fundraising. Fundraising ain't sexy but any honest history would indicate that successful campaigns rely on successful fundraising.

I believe that one of the greatest areas for improvement in the environment movement is its fundraising. A good fundraiser can protect more of the environment than the best campaigner ever will.

Given that the least painful mistakes to learn from are someone else's I have compiled a rough history of environmental fundraising in the last 25 years.

5.1 HISTORICAL OVER-VIEW OF MOVEMENT FUNDRAISING.

5.1.1 Phase 1 the 1970's

- The movement was comprised of scientists/academics and student activists
- Small membership base primarily for newsletter distribution
- Pre-computer era

Fundraising consisted of:

- Out of pocket subsidisation from core group members:
- Phone, stamps, etc
- Crisis appeals
- Market stalls
- Small-medium scale benefits
- Some merchandising (primarily through stalls) of T-shirts, stickers
- Some bookshops
- Spontaneous donations for mass campaigns such as the Barrier Reef, Project Jonah, Movement Against Uranium Mining;
- Creation of GVCO under the Whitlam Government to support conservation councils and ACF;

The basic attitudes to fundraising were:

- Fundraising = administration = bureaucracy
- Aversion to asking for money breeds "money will come"
- Money is a corrupting influence and shouldn't be sought by anti-materialists
- Public are apathetic
- Argument about generalists versus specialists
- Crisis campaigning is averse to planning; fundraisers plan and are averse to crises;
- Lack of certainty about how long the organisation would be in existence for;
- Everything done in-house
- Fundraising primarily done by volunteers, or, if done by staff, it was one of many functions;
- Strong belief that information would change views; "the public is apathetic"; the media are censoring the debate;

5.1.2 Phase 2: The 1980's

Conservation Councils and small/medium groups remained the same;

National groups (TWS/ACF/WWF):

- Increased quality merchandising - calendars, diaries, t shirts, posters
- Strong promotion of membership
- Direct mail donations appeals
- Very high media visibility of campaigns
- Increase in retailing aimed at raising funds rather than distributing information;
- Increasing budgetary allocation to fundraising;

- Ethical investments raised from membership for publications and buildings;

Attitudes:

- Tension between generalists and specialists
- Tension between campaigners and fundraisers especially in terms of budget allocations;
- Short term focus of crisis campaigning limiting ability to invest
- High turnover of fundraisers
- Reliance on ideas and styles from US fundraising
- Argument over spending bequest capital vs spending interest
- Use of external market research/advertising/design skills;
- Competition between groups with few joint fundraising strategies and little openness
- Staff often internal appointments or problem of conservatism of external appointments
- Lack of training

5.1.3 Phase 3: 1986-1990

Conservation Councils and small/medium groups remained much the same - GVCO, some membership and donation income, some merchandising, some special events.

Other groups: benefits, stalls, merchandising, donations from core supporters.

National - TWS, ACF, GPA, WWF, RFB (NZ)

- Increased investment in staffing in membership and
- Fundraising especially membership promotion, raffles, direct mail;
- Small scale bequests
- GPI underwriting canvassing and direct mail
- Increased specialisation and budgeting/co-ordination
- Increased number of mail order catalogues and merchandising
- Surge in public support boosted unsolicited income
- Increased frequency of asks from multiple appeals and raffles
- Creating list fatigue?
- Increased investment in computerisation;
- Increased emphasis on list building
- Little emphasis on major donors
- Management skills lagged behind growth
- Debate over use of mainstream consultants - are they relevant and useful?
- Rapid rate of growth generated extreme stresses on management, staff and ability to plan;
- High turnover of fundraisers but some move between organisations;

Attitudes:

- Tension between campaigners and fundraisers especially in organisations with flat management structures; sometimes overt hostilities;
- Difficulty recruiting good experienced fundraisers or if successful difficulty retaining them due to stress, workload and internal conflict;
- Sluggishness in sorting out non-performing fundraisers
- Competition - little sharing of information
- Increasing management difficulties
- Stop start progress of some programs
- Recognition that the public are supportive but difficulty tapping it or mobilising it.

5.1.4 Phase 4: the 1990's

- Constant threat to GVCO

- Some medium sized groups seek to emulate fundraising strategy of major groups particularly focused on direct mail;
- Broad scale challenges to environmentalism from industry and elsewhere
- Mainstreaming of environmentalism results in increasing competition at retail and merchandise level and decrease in volume and returns
- Constant budget traumas of majors resulting in decreased morale of fundraising and increased turnover;
- Friction with campaign and management who often had unrealistic expectations of what was possible;
- Management skills overloaded with number of problems; few understood detail of fundraising;
- Decreased rates of renewal and recruitment;
- Variability in quality of retail management;
- Some new ventures;
- Some new conservation councils in regional areas increases competition for GVCO
- Difficulty of management responding to decline of traditional fundraising areas;
- Few new initiatives other than koalas, automatic deductions
- Some seek corporate sponsorship - partly as a panaceas for cash crises and partly as long term strategy;
- Some major initiatives falter - Walk for Wilderness;

What lessons?:

- There is a need to resolve the specialists vs generalists debate
- You don’t get what you don’t ask for
- Movement undecided whether people are motivated by despair or hope?
- Proper evaluation and recording of history is essential
- Recruiting good people and training is essential
- Fundraising and boards need to be priorities
- Fundraising and campaigners both need to understand the roles of the other
- Consultants should be used but with a clear understanding of their limitations
- Investing in the future makes good sense

What does the future hold?

Negatives:

- GVCO remains under threat
- There is likely to be an increasingly aggressive attack on fundraising - koalas, shops, support
- base via media, dirty tricks, conflict between groups or within, movement redundant
- Direct action is increasingly unproductive and cliched;
- Increasingly negative image large environment groups by membership

Positives:

- Building fundraising skills within the movement
- Establishing the social change fundraisers network:
  - Building skills through providing a casual forum to exchange ideas, learn from others experience, get moral support;
  - Nodes based in major centres with fundraisers from environment and other social change groups meet informally to discuss issues they consider important; (at present only exists in Melbourne)
- Build information exchange links between centres so that a national network emerges developing materials that can be widely accessed by people in centres where there are no other fundraisers from other groups;
- A national environment/social change fundraisers conference?
- Over time this should assist in raising skills levels of fundraising, improving morale, decreasing turnover of fundraisers and establishing a national pool of fundraising talent that can be called on for assistance for specific groups or crisis campaigns;

Questions that arise:

- Who to facilitate national linkages and materials?
- Explain why separate from but supplements TAFE;
- Building movement wide fundraising initiatives

  - Shared research on the environmentally supporting public;
  - Creation of new foundations - conservation alliance
  - Creation of new fundraising programs such as Earthshare
  - Joint promotion of bequests for the environment
  - Joint promotion of retail outlets/merchandising
  - Establishment of small grants programs within groups;
  - Promoting tithing as general concept;
  - Establishing a brokering house between major donors and campaign projects (a la the tides foundation in the us)
  - Evaluation of corporate sponsorship
  - Mapping of broad fundraising trends ie implications of reduction in state funding and increasing community fundraising
  - Investigating the effectiveness of fundraising via the internet
  - Investigating the history and possible expansion of trading

Establishing mutual understanding between fundraisers and others, especially campaigners and boards.

We need to build a better relationship between fundraisers and campaigners. The first step is understanding why it is that there is tension between two which I think comes from differing styles of personalities which operate in different roles.

How to destroy the morale of fundraisers

- Criticise the performance of the fundraisers when budget targets aren't met
- Remain silent when fundraisers meet or exceed budget targets are met
- Waste large amounts of money - especially on internal fighting
- Celebrate a campaign achievement - and forget to invite the fundraisers
- Develop campaign plans without any input from fundraisers
- Damage the image and credibility of the organisation
- Say fundraisers aren't campaigners
- Call them "bean counters" or some other derogatory name

The cliches and untruths about campaigner and fundraisers

CAMPAIGNERS	FUNDRAISERS
Believe in egalitarianism	Believe in the donor pyramid
Are crisis managers	Are planners
Often co-operate with organisations	Pressure to treat other other organisations as rivals competing for scarce $
Have support of Board most of whom are campaigners)	Feel Board doesn't understand fundraising
Are good at spending	Look to invest
Issue focus	People focus

6. FUNDRAISING FOR SMALL GROUPS

6.1 DEVELOPING A FUNDRAISING PLAN FROM SCRATCH

Presenter: Bob Burton

Key questions

- What fundraising do you currently do?
- What have you done in the past that:

a) Worked - why (did you evaluate it)?
b) Didn't work - why (did you evaluate it)?

- What do you need funds for?
- Why should I support you?
- What is distinctive about your group compared to others?
- How much do you need?
- When?
- Who does your fundraising? What skills do they have?
- What are the fundraising opportunities that you see?
- What are the constraints?
- Are there threats/points of vulnerability to your current
- funding base?

Some pointers:

- Do what you do well before starting new programs;
- Over time diversify your income streams to spread risk;
- build a plan appropriate to your strengths and weaknesses
- the easiest mistakes to learn from are someone else's

Building a fundraising culture in your organisation:

- the greatest limitation to your successful fundraising is not a lack of good ideas but sustainable human energy;
- recruit fundraisers, including volunteers, carefully and build on their skills;
- invest in training and evaluation of yours and other mistakes;
- build your human capital along with your fundraising program;
- celebrate your successes and learn from your mistakes;
- build support amongst other key sections of the organisation
- board, other staff, campaigners so that they understand what you are doing;

Who is there to:

- advise you on f/r from within your organisation?
- outside your organisation?

  (beware people who offer panaceas or seek to shape the organisation to fit their ideas rather than provide tools relevant to your situation).

Building the Social Change fundraising network and a source of learning.

6.2 UPGRADING SUPPORTERS AND DONORS

Presenter: Bob Burton

How can a small group substantially increase income from a small membership base and with limited staff?

Some key points:

- the donor pyramid
- you don't get what you don't ask for
- don't mine your supporters - build a relationship
- have a human face and a personal approach
- communicate well - understand your supporters
- local focus groups reach networks untapped by others and raises more dollars

Some elements:

- wish lists
- donation appeals
- membership renewals
- membership growth - member get member, stalls or other point of personal contact
- bequests

6.3 ORGANISING FUNDRAISING EVENTS

Presenter: Garth Luke

Don't jump into events

Fundraising events - participative occasions designed to encourage financial support - may not be the best way for your organisation to raise money. Asking your network for donations, or concentrating on government or private sponsorship may be (and are likely to be) much more cost effective.

Nonetheless an event may be appropriate if you use it to also do one or more of the following:

- raise awareness
- make a protest
- enlist new supporters
- make contact with a new group of people
- have fun.

However always be aware of the opportunity cost of running an event. Could you use the resources more effectively in some other way?

If you decide to take the plunge

- If you do decide to run a fundraising event try to make sure that it achieves at least three things:
  - raises sufficient money
  - conveys a message which is congruent with your organisation's philosophy
  - offers something for the spirit of all the people involved.

It is also very important that the event does not become too much of a drag on the organisation - it must be tailored to your organisation's interests and resources. It should also form part of a larger fundraising strategy which is diversified - you don't want everything depending on the success of one event.

Plan for success

Thorough planning is necessary if you want to pull off a successful event. The plan should include:

- clear objectives for the event
- an income and expenditure budget - income predictions should be based on a cautious assessment of the number of people likely to be involved and the average amount that they will contribute
- allocation of responsibilities
- identification of the target audience
- a detailed timetable which allows sufficient time for organisation and promotion.

Event organisation

- Closely monitor progress of event organisation, promotion and response rates - act quickly if things fall behind schedule.
- Make sure you have all relevant approvals.
- Keep things as simple as possible by reducing frills - it is usually easier to cut costs than raise money.
- Try to delegate as many tasks as possible - good if individual volunteers can take on discrete areas of responsibility eg newspaper promotion or entertainment at the event. This is easier to manage, increases accountability and is likely to be more satisfying for the volunteers.
- Ensure all event staff are well equipped to handle any likely issues on the day - role play if necessary. You don't get a second chance on the day.

Promotion

- Letting people know about the event and getting them to come along are central - the best organised event is a failure if no one joins in.
- The key to effective promotion is personal engagement. People are most likely to get involved if they are asked personally by a positive person. Letters and glossy brochures are not enough - you need to ask people to come along.
- For small scale events this entails personal contact. Use your networks of friends, volunteers etc and build from there. Share the responsibility eg ask each committee member to bring ten people.
- For large scale events which may rely on media publicity build relationships with media organisations and ask them for help. Also ask relevant celebrities for their support. Once again personal contact is very important.
- Local media are usually very willing to help if you contact them in plenty of time. You can help them by providing good stories, picture opportunities or by involving celebrities. There is a tendency for media to provide most publicity on the day of the event - this may too late for you and you should be clear about the best timing for you. Give aways are a cheap way to get some media coverage also eg free rainforest t-shirts to the first three people who ring in.
- Schools can be an important promotion avenue - this is especially useful if you have a supportive teacher contact.
- Banners and posters can also provide a relatively cheap form of promotion in a confined geographical area. These are especially useful in regional centres where there is one central meeting place for the community.

Sponsorship

- Sponsorship can be a very useful way to minimise costs, promote the event and lend validity to your cause.
- Try to have all material costs sponsored and also obtain media sponsorship. Before approaching a potential sponsor research their interests and likely ability to give. Then ask them for as much as you feel is reasonable. Be careful of offering too much in return as some sponsors try to get every bit of publicity they can. Be very clear about your obligations under any sponsorship agreement and ensure that these are followed. There is no quicker way of losing a sponsor than not keeping your end of the bargain.

On the day

- There are three main things to remember on the day:
- *What can go wrong will go wrong!* - prepare for every possibility you can think of and be on the lookout for those you can't.
- *Make the most of the occasion* - maximise the benefit of the day. Make sure people can hear and see what you have to say - make your presence real. If it's a fundraiser also use the occasion to inform people and ask them to send campaign letters, if it's a campaign event also ask people to give money. Try to get them to act there and then - not just think about doing it later.
- Don't forget to ask people for their names and addresses - one of the main benefits of events is to make contact with new people.
- *Have fun* - keep the energy going and share it with others.
- After the event

- Tie up all the loose ends straight after the event. It is important to do this before the energy is lost or it can drag on for ever. If it's a big event and you need a break try putting off holidaying until after you've finished all the post event organisation - you'll enjoy the break much more.
- Don't forget to immediately thank everyone involved. As well as specific thanks to volunteers and sponsors it is often a good idea to send a general letter of thanks to be published in the local paper.

Evaluation and documentation

- Feedback from participants and all those involved in running the event is very valuable. Participant feedback can be obtained with a sample survey on the day or just by asking people for comments during the event.
- Get feedback from helpers at a special feedback meeting or by using a standard evaluation sheet.
- The lessons learned should be summarised and documented to ensure that they are used in future planning. Keep more than one copy - you wouldn't believe how many organisations lose their evaluation summaries.

The evaluation should also test whether the event objectives were achieved and assess the cost-benefit of the event. An adequate assessment of costs is usually best attained by simply listing all the costs you can remember (very soon after the event) under each of your organisation's cost categories eg salaries, postage, copier, advertising, printing, hire of equipment, travel etc. Salaries are likely to be the largest cost and the hardest to work out.

Simply ask all those involved to estimate the time that they spent organising the event and multiply this by their salary rate. Include everyone who spent time on the event eg receptionist answering phone calls, coordinator supervising event staff etc.

Don't forget to also include an estimate of infrastructure costs such as rent, electricity etc - staff time is probably the best guide. Don't spend too much effort being too precise with amounts - there's no use trying to record the cost of every last letter that went out when salary estimates may be hundreds of dollars out.

Don't forget to define all numeric data and costs clearly so that useful comparisons can be made in future years.

Effective documentation of the event requires considerable detail. I find it best to break the documentation into sections covering background, objectives, budget, ideal timetable, allocation of responsibilities, location of resources and then each of the main organisation activities.

These can include sponsorship, promotion strategy (with separate sections for each method of promotion), printing details (including originals), on the day volunteers, evaluation and documentation, strategies for next time.

The documentation needs to not just talk about the approach but also the details such as how many chairs were needed, who provided them, at what cost and who picked them up. If each section is detailed and separate it is much easier to delegate the task to a volunteer next time.

If you don't record these details in an easily accessible format the event has to be reorganised almost from scratch each time - a major contribution to burnout of fundraisers.

The event smorgasbord

A number of event options with brief notes are listed below.

Auctions - can be big or small and often attached to a dinner or other event. Small groups can raise money quite well by asking people to donate things they have made or no longer need or to offer services eg 2 hrs of computer instruction or cleaning. Small, friendly groups can raise most by asking for all bids to be paid.

Button/badge Sales - many areas allow groups to sell badges on the street on specific days. The key to success is a few very gung-ho and positive sales people. Don't spend weeks recruiting school students when a few adult volunteers will achieve more.

Cinema - relatively successful and profitable but you need to have a good deal with your local cinema. Great if the film can educate people to.

Concerts - lots of organisation, costs and risks. Probably best if you can piggy back an existing event or if a group of performers offers to organise their own event and give you the income (or some of it). Try to use the opportunity to educate the audience at the same time.

Dances/parties -parties are likely to be more popular than dinners with most people - the Wilderness Society in NSW has years of bush dances to its credit.

Dinners - can be expensive and risky - likely to be successful if you have well healed committee members and supporters who like paying large amounts of money for poor food and a speaker.

Doorknocks - can be very cost effective, but don't take it on unless your members are comfortable with it. Positive collectors can usually raise about $80 in two hours of collecting. Could work very well for a local conservation group because of geographic linkage.

Morning Teas - currently used by cancer groups around Australia - sponsored by a tea and coffee company, organisation is minimal and taps a market of people at home during the week. Neat idea.

Raffles - Australians love gambling - keep the tickets cheap, obey the law, and have a few positive sales volunteers and you can't lose. Try to keep the prizes in keeping with your organisation.

Sponsored events - Walks, fasts etc - try to avoid events that depend on the weather and don't choose a day that clashes with other major activities. Probably the best option is to arrange sponsorship with an existing event eg MS and the big bike rides.

Stalls - can provide a regular and effective promotion of your organisation and can assist campaigning also. Need regular volunteers who are willing to do it or to focus on peak times eg pre-Christmas. A useful variation of this is to set up a shop just for a few weeks before Christmas. Ask real estate agents for a free space and perhaps combine with like minded groups. Shops such as this in rural areas can raise $15,000 in one month.
Some major community markets are willing to support a charity for the day. People are asked to donate as they enter the market area and/or stall holders give a percentage.

Weird and wonderful things eg plastic duck races, red nose days etc -see! anything works with enough promotion - just keep it simple and keep the costs down - that way you can't lose too much if it doesn't work. Hey you could even try asking people for the money directly.

Further reading

Arnett, M. 1985 *The Fundraising Ideas Book* (Shepp Books, Sydney) - a simple and easy to read overview with plenty of event ideas
Flanagan, J. 1982 *The Grass Roots Fundraising Book* (Contemporary Books, Chicago) - a more detailed, American version of the Arnett book - provides a more in depth theoretical base.

7. FUNDRAISING FOR LARGE GROUPS

7.1 ROLE OF PUBLIC IMAGE IN MEMBERSHIP & FUNDRAISING

Presenter: Geoffrey Hill

7.1.1 Presenting your image

Key Goal
TO PRESENT YOUR ORGANISATION AND YOUR CASE TO THE PUBLIC IN A WAY THAT MOTIVATES PEOPLE TO SUPPORT YOU.

You should aim for the following in your work:

PRO-ACTIVE COMMUNICATING:
What the public may see, read, or be told about your organisation ie print media, electronic media, canvass, public talks, information displays etc.

TIDY PROFESSIONAL LOOK

CLEAR STATEMENTS OF INTENT AND POSITION

FUNDRAISING AT TIMES OF MAXIMUM MEDIA COVERAGE
Fundraising can ride on the campaign trail!

RE-ACTIVE COMMUNICATING:
Your response when the public seeks information from you, by phone or in person.
It is essential that the point of first contact leaves and impression of competence and commitment. If your front office or phone is staffed by volunteers then it is essential that they are well informed or can defer to someone who is.

Don't let people down! If you say you are going to do something (eg get back to them with information) , do it or you will lose them! Offer people active options at first contact ie join us....write to....ring...., and you have a greater chance of involving them with your organisation.

FUNDRAISING IMPLICATIONS:
When working in the public arena always record names and addresses.
One of the best ways of collecting names is by recording name and address details of people who contact you for information and advice. Send membership/donation forms with information requests.

Key Goal
SETTING A STYLE FOR YOUR ORGANISATION

BEHAVIOURALLY:
- we do what we say we will do (credibility).

IMAGE THROUGH MEDIA:
- professional
- clear statements of intent and position (with relation to issues)

PRINT NEWSLETTERS AND BROCHURES
- logo on everything, with a short statement about what you do
- easy to read
- clear, logical arguments
- spacing, air, colour
- print face, type style, serif vs sans serif etc

- justification (eg left only for more personal communications; both sides for technical information)
- layout for scanning (eg shape, as people read; sub-heads every 3-5 paras to break up text and make it more readable)
- avoid large and overly technical language
- always include an action device and/or a return envelope

PRINT MEMBERSHIP FORMS

state your case clearly current campaign information new information

You should:
- ask for support, both campaign and financial
- make a positive statement that reiterates the reason for support
- include tick boxes eg ☐ yes, I want to help! ☐ Here is my donation.......
- print boxes or lines for credit card numbers, expiry date, signature;
- tick boxes for cheque/money order/credit card

7.1.2 Identifying your target audience

THE 3 GROUPS:people who know you and support you
people who don't know you and would support you if they did
people who wouldn't support you in any case

CONCENTRATE ON THE FIRST TWO! THEY ARE PEOPLE WHO SHARE YOUR VALUES.
THEY ARE PEOPLE FOR WHOM YOUR ISSUES HAVE PERSONAL RELEVANCE.

HOW DO YOU FIND THEM?

Profile your existing supporters: survey them by mail, phone or canvass, or focus groups. Thank them and explain what you are doing (ie looking for more people like them!). Ask them:
- Who are they?
- How did they find out about you?
- What inspired them to support you?

WHAT ARE THE DEMOGRAPHICS OF YOUR SPECIFIC CAMPAIGN AREA?

- People who live there, people who play there?
- Who is it personally relevant to?
- Who would care about the bigger picture?
- Check the bureau of statistics
- Look at like minded groups

WHEN ASKING FOR SUPPORT:

- What can they do to help: campaign, financial?
- How will it benefit them and future generations?
- Tell them what you have done in the past (your credentials)
- Tell them what you will do with their financial support

7.1.3 Copywriting for direct mail appeals

Direct mail: the most cost effective way to reach supporters or potential supporters.

It educates, campaigns and fundraises.
Timing is important. February? June? September? December....Xmas?

Key Elements you need to consider:
Outer envelope; letter: brochure?; response device; return envelope

Keep it
- Simple
- Short

Devices to attract attention
- question on outer envelope ?
- Interest: involvement: answer in first paragraph of body copy
- Desire : I want to be part of the solution
- Action: campaign and financial

Always give thanks for past support!

The text

- Length: 1-2 pages maximum (competition for attention). If 2 pages, bleed sentence over page.
- Readability: Use short sentences, paragraphs, avoid big words.
- Edit ruthlessly - omit unnecessary words.
- Break up text; use emphasis, bullet points, (eg list past successes and achievements or immediate concerns.)
- Urgency**:** create a sense of immediacy, urgency: eg this is happening **now!**
- Be aware of the scan reader - 80% of people! Summarise your essential arguments in bold at intervals throughout the copy.
- Ask several times. Ask early. Ask for the response now (please send your donation today). Ask in the PS - one of the three most read components of any letter. Who to, who from, PS.
- Share good news and bad, but if bad, always with a solution.
- Postcard with response device will usually be posted.
- Pre-paid return vs stamps.
- Code and address on response device.
- Get on other lists, see what they do.

7.1.4 Annual reports

- Mainly applicable for corporate, Government or high donors, but should always be available.
- Include mission and case statements
- Most people can't understand financials
- Use pie charts, graphs, to show where funds come from and how they are spent
- Use photos if you can afford them, and lots of campaign information
- Doesn't have to be glossy, complicated or expensive

7.1.5 Newsletters in fundraising

- Update information
- Keep people in touch
- Acknowledge support
- Report on successes
- Share forward planning
- Educate about issues, provide background
- Photos - people give to people
- Setting the scene for appeal mailings and activities ie this is coming up soon

7.1.6 Corporate giving

Pros:
- Low cost income
- Can be good for capital appeals ie their name on your building

Cons:
- Are they clean enough for you?
- Reliability
- Strings attached

7.1.7 Why fundraise?

..........TO CAMPAIGN

TO EDUCATE
TO BE INDEPENDENT
TO SURVIVE!

DEFINITIONS:
- Fundraising is a way of developing relationships with people who share your values!
- Fundraising is a way of giving people who share your values the opportunity to act on those values!
- Fundraising is grass roots activism.
- Fundraising is a pre-requisite for independent campaigning. Fundraising is asking for money.....don't be afraid to ask. Asking the right person, at the right time, for the right amount is the pinnacle. If you are proud to work for your organisation, then you must be proud to fundraise for it!

BEFORE YOU START

Prepare a mission /case statement.................outline your reason for being.

This is a statement of your organisation's essence...your reason for being ie to protect animals from cruelty...to protect the natural environment in South Australia, etc.

Case statement....expanded version....who, how, why, when..... To back up this statement is essential that you also expand it to include a document of preferably less than one page that defines:
- Who you are - legal structure etc
- What you do - campaign, lobby, educate etc
- How long you have been doing it
- When and why did you start
- What makes you unique
- What are your past, present and future objectives
- How successful have you been in meeting your objectives
- How has your organisation raised funds in the past
- How do you intend to raise funds in the future

THIS CASE STATEMENT IN VARIOUS FORMS WILL BE THE BASIS OF ALL YOUR FUNDRAISING ACTIVITIES.

7.1.8 Donor acquisition....methods

Mail
- Unaddressed (letterbox drop, insertion of a prospect piece into another piece of mail)
- Addressed (via list hire, list exchange, or to a potential donor identified by existing donors)

Telephone
- Cold calling from the phone book or to a list constructed from the electoral roll or other specifically selected list
- A combination of mail and phone. Only with addressed mail where a phone call is made to follow up a mailing piece.
- Merchandising Goods or lottery tickets. May utilise phone, mail or door to door selling.

Advertising

Either a paid advertisement or a prospect piece inserted into a commercial publication. (Free advertising can sometimes be obtained via bromides lodged with the publication which can be used as fillers. The material must contain some form of response mechanism.)

Petitions

Volunteers

Personal solicitation of a potential donor identified by a volunteer

Personal solicitation cold calling door to door

Special events

Unsolicited enquires or donations

Display brochures

008 or 005 phone numbers to be used with media (radio, TV, print)

RENEWALS:

Membership renewals can be based on anniversary or annual expiry dates..

- Anniversary renewals ie 12 months after they joined will give a more even cash flow over the course of twelve months .
- Annual renewals ie everyone expires on 31st Dec will give a large cash flow in the first 3 months.

CALENDAR PLANNING

Make up a calendar of interactions with donors/supporters for the course of each year eg quarterly newsletter/magazine mailings, quarterly appeal mailings and depending on your structure, maybe an attempt at a monthly giving upgrade and a renewal cycle.

Renewals are usually the most reliable income.

If you have a membership/annual supporter scheme this will likely give more consistent income as it can be followed up more effectively but a mix of members and donors can also be beneficial.

In a typical cycle you may have a great diversity of source code names including advertising, direct mail, canvass and telemarketing. They usually perform characteristically in the renewal cycle. ie mail acquisition responds best to mail renewal.

In the old GP plan the renewal cycle had precedence over the appeal cycle but after 6 months of not renewing we put them back in the appeal cycle. Use your most cost effective source first.

When renewing it's usual to have a minimum of your approaches, eg Mail/mail/mail/phone?

Upgrading and donor segmentation is usually based on source and giving levels

ie mail	D1	$0-19.99
	D2	$20-34.99
	D3	$35-49.99

By varying the response device suggested amounts accordingly you can gently upgrade average amounts and monitor net income within these segments.

Monthly giving - credit card or direct debit

This is perhaps the most significant upgrade you can achieve. It can be done via mail or phone. CAA Amnesty and GP make $ millions per annum from this programme.

DD is a high net programme. As it ensures longevity...normal attrition rate is up to 30% as people move or lose interest but with DD this will reduce to 10-15% as although people still change addresses they seldom change bank accounts.

Reverse inertia principle applies once people are signed up with this system.

SEGMENTATION OF YOUR DATABASE

- Active members are those who have given 0-18 months (last gift)
- Lapsed are those who have not given for 18-48 months

Core indicators are recency, frequency, amount, longevity

The following information must be retained on your database:

- Name and address
- Date and source and amount of first gift
- Date, source and amount of last gift
- Recency .... Date of last gift
- Frequency.....total number of gifts
- Amount.....amount of highest gift

CODES:

Code everything, in and out. You need to know where your money is coming from (eg and advert in a magazine - so each insert or advert or mailout should have a source code

First recorded activity is the source code. This never changes, so you always know how the member or donor was acquired.

- Return mail; not at this address. Names should be de-activated.
- Don't delete anything!
- Personalise - can't overestimate the importance of doing this promptly
- Thank you letter with receipt attached is the easiest and cheapest way to do this. Send as quickly as possible. This re-inforces the good feeling of giving.
- The sooner, the stronger.

Hardware: we are living in the right time. hardware is getting faster and cheaper.
Software: a variety of commercial software is available most at reasonable cost.

7.2 MERCHANDISING

Presenter: Anna Bounds

Workshop Aim:

- To provide an indication of the issues involved in fundraising for large groups through the use of enterprises and merchandising.

7.2.1 Objectives:

- Participants will increase awareness of the issues
- Participants will understand the importance of planning
- Participants will have worked through the issues in one product development exercise.

Brainstorm:

- Identify organisations that fundraise
- What enterprises, activities, types of merchandising are undertaken?
- Evaluate what works/doesn't work and why
- How do we measure what is working?
- Link to evaluation workshop/initial objectives
  Benchmarking
  Surveys
- What has changed in the '70s, '80s and '90s?
  Fringe, mainstream, "it's OK now" - no need for further activity

7.2.2 Issues for Discussion:

- How to establish merchandising

- What link, if any, should exist between the organisation's mission and the enterprise activity?

- What are the pitfalls of merchandising ?
  - trendy disasters
  - appeal
  - popularity

- Approaches to:
  - design
  - distribution
  - capital
  - administration - infrastructure
  - staff - needs - annual/seasonal

- Centralisation

Confronting issues

- Should an environment organisation be promoting consumerism?
- What's more important - money or the cause?
- Where have organisations sold out?
- Are any products ethical?
- Is Merchandising campaigning?
  - Wilderness not woodchips!
  - Wilderness no compromise!

Profit margins - Products have different margins, eg:

- calendars
- posters/cards
- clothing

7.2.3 Analysis

It is essential to properly analyse the product and the market:

- Promotion avenues
- Membership considerations

- Copyright
- Strategic Alliances
- Value of the name of the organisation
- Pilot testing
- Energy -vs- $'s outlay
- What are the products that make money?
- What might work well as a pre-Christmas item?

To answer these questions it is important to go through the steps of the planning process

A design proforma can be valuable AND market testing is a necessity

7.2.4 Planning:

Ask yourself the following questions:
- What is the market?
- What outlets will be used?
- How will the product be marketed - At a wholesale/retail/mail order level?
- Will the product have a multi-purpose of making money, promoting the cause and educating the public, or a single purpose?
- How much money is available for investment?
- What sort of return do you expect on the dollar?
- Can anything be obtained free through donation or at a reduced cost? (Ensure there are no strings attached).
- What quantity of the item will you produce?
- What is the break even point?
- When will you start making a profit?
- Is it realistic that the number of items will sell?
- When is the best time to market the product?

When considering your products it is useful to draw up a proforma so that you are sure you have taken into account all possible issues and variables that might be relevant, including*:*

- Item
- Quantity
- Clothing
- Colours
- Sizes
- Dimension
- Type Face
- Wording
- Measurements

Prepare a brief for designers and manufacturers:
- Ensure quotes are obtained in writing
- Ensure they match your specifications
- Is free promotion or advertising available?

NOTE: - Cards and stickers are good to begin with and joint products with other organisations means costs and worry are shared.

7.2.5 Case studies

1. Strategic Alliances

Every now and again, great opportunities present themselves.

In 1989, recycled paper was new and rustic brown paper stationery was expensive. Two innovative marketers with one of the leading environment organisations, saw the trend breaking and sourced a huge quantity of extremely cheap brown paper stock. They had the knowledge, the product concept, the materials and the market, but they didn't have the capital or the machinery needed for production.

Brainstorm options they could have taken to launch the product.

2. <u>Who is the Competition?</u>

One prominent environment organisation runs a chain of very successful shops, however, they also have a wholesale/mail order arm that both provides and competes with the stores.

The environment calendar is one of the key profit items for the stores, but it is also a big money spinner for the wholesaler, especially if the large department stores buy the calendar in bulk.

What are the possible consequences of large wholesale sales to department stores?

3. <u>Making a Profit - at any cost</u>

We are an environmentally friendly company that makes t-shirts for a wide range of highly successful companies - MGM, Coca Cola etc. and high profile events - Grand Prix, Bathurst. We'd like to make t-shirts for you in exchange for the right to use your name - the return will be enormous.

What do you think?

8. BUILDING LEARNING ORGANISATIONS - documentation, monitoring and evaluation.

Increasing effectiveness and reducing stress through documentation, monitoring and evaluation.

Presenter: Garth Luke

This paper is intended to allow readers to:
- Develop an understanding of the importance of DME in building an effective organisation;
- Identify the key DME methods and how to apply them;
- Consider some useful applications of DME in their organisation.

Training can't teach you everything you need to know

Staff and volunteer training by outside 'experts' and trainers can help to build more effective organisations but there are lots of things that you need to know that can't be provided by outsiders.

This is the specific knowledge base that an organisation builds up as it carries out its work. Each event, each activity provides important knowledge. This includes information about:
- Who is willing to support the organisation,
- How to effectively run a particular event,
- How best to explain key information to new volunteers,
- How to make the photocopier duplex without eating the paper,
- What members of parliament are supportive,
- What went wrong at the AGM last year etc.

An organisation that forgets these lessons is doomed to keep wasting time, frustrate staff and reinvent the wheel. An organisation that can learn and remember lessons, question its approach, develop more effective strategies and continue to build upon this knowledge is a learning organisation. Such an organisation makes much better use of the time of its staff and supporters, achieves more and reduces frustration for everyone.

Documentation, Monitoring and Evaluation (DME) is - the core of learning

A lot has been written about learning organisations, much in the general area of quality management. In this workshop I would like to focus on three key tasks to achieve greater organisational learning. These are:

Documentation, monitoring and evaluation.

DOCUMENTATION is the recording and sharing of useful information. It can involve evaluation reports, procedure manuals, notes stuck on walls and machines, audio and video tapes, even songs. Documentation seeks to share valuable knowledge to help people avoid pitfalls and utilise the most effective strategies. It contains the fruit of our and others' mistakes. Good documentation is accessible, relevant and utilised in planning.

MONITORING is the regular collection of information in order to test the progress of activities and make corrections as work progresses.

EVALUATION is the review of activities against certain goals, standards or values.

Many organisations state that they are committed to DME but in practice they often give them a very low priority - preferring instead to concentrate on planning and action. Unfortunately their plans are unlikely to be very effective because they are based largely on hunches.

Vision, leadership, team work, decision making, skilled staff, effective conflict resolution, thorough planning, good negotiation are all necessary for an effective and positive working environment - but they are not sufficient. The best run team also needs relevant information to carry out its role.

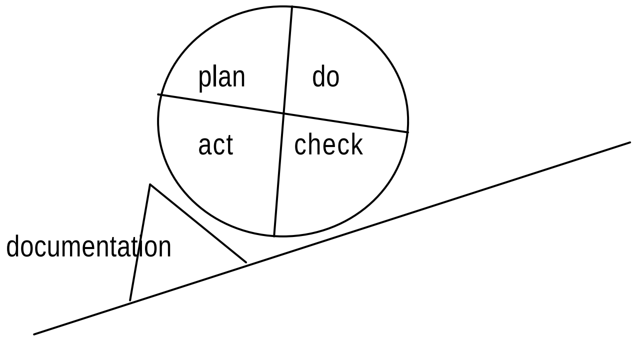
Documentation, monitoring and evaluation can provide this information. It is especially important for organisations trying to do complex jobs (eg creating social change) with few resources, high staff turnover and a heavy reliance on volunteers.

This workshop is not about starting DME in your organisation as all people and organisations do evaluate and document things each day. It is about doing it as effectively as possible and helping to build a culture in which its effective use is encouraged.

My own experience of community organisations and the results of many quality management studies indicate that 40% or more of the resources of community organisations are often used reinventing the wheel and correcting mistakes. Not only is this a terrible waste of limited resources but it also saps the morale of those involved and increases stress in the workplace. In this context one of the key issues to think about is:

Continuous improvement

A useful way of thinking about organisational learning is described by the *continuous improvement cycle* described in total quality management. This can be represented graphically as:



Documentation, learning & quality improvement

The four parts of the cycle are Plan ---> Do ---> Check ---> Act. Checking is achieved by monitoring and evaluation while the check represents documentation of the lessons learned.

Documentation stops the organisation slipping backwards as it learns to improve its performance.

While evaluation and documentation are generally seen as important there usually seems to be more interest in planning and doing - with the result that not enough effort and time goes into ensuring that lessons are learnt.

Often people put these things last and never get to them, or they think they know all they need to know or that they are not skilled enough to carry out evaluation.

In reality most organisations can become much more effective at learning just using their existing resources. While some techniques and situations require significant expertise very useful information can be obtained using fairly simple methods. This does however require a commitment by the people in an organisation.

Those organisations which are effective learners tend to allocate about 5% or more of their resources to monitoring and evaluation. Useful documentation and sharing of information can be achieved with a similar commitment of about 5% of resources.

In return people can expect significant improvements in effectiveness, reduction of stress, improved morale and large reductions in the amount of time and resources correcting problems. In other words improved documentation, monitoring and evaluation usually pays for itself several times over.

Too often organisations make decisions purely on hunches, reinvent the wheel, forget important lessons learned. It is often as if they have no memory and are destined to repeat the same mistakes and learning cycles over and over again. The key to reducing this wastage is for the organisation to learn how to do things better and to remember this.

How much time is wasted showing each new person how to use the photocopier, how many supporters are lost when their request for less mail is forgotten, how many times are the same mistakes made in organising an annual event, how much energy goes into inventing and reinventing procedures that are not written down clearly, how many times does one group try an approach which has failed in every other state?

Methods of monitoring

In some ways monitoring could be considered simply as a form of evaluation but there are advantages in seeing it as a separate function. Evaluation often conveys ideas of thorough investigation after the event with comparison against objectives or values. Monitoring on the other hand emphasises regular checking of an activity as it progresses.

In this way it assists project implementation and allows fine (and sometimes not so fine) tuning of a project as it proceeds. Used effectively it can prevent you making expensive mistakes where you end up saying 'Oh well, maybe we'll do it better next time'. It is also a useful part of staff supervision.

The sort of questions monitoring asks are:

- Have we done what we planned to do?
- Are we working to the planned timetable?
- Has it had the effect that we planned?
- Are there instances of success and failure in different areas?
- Does anyone need assistance in carrying out the tasks?

Information used for monitoring does not have to be numeric - it can be opinions or a simple set of Yes/No answers (eg Did you check the doors were locked before launching the space shuttle?). It can be recorded on paper or on computer or on a white board in the office. Examples of monitoring tools are:

- Performance indicators which summarise key measures;
- Checklists of activities and problems, regular personal and group reflection;
- Asking others to rate performance; financial and other targets.

It does need to be:

- Relevant - the information has to answer useful questions
- Accurate
- Timely - its not much good if the horse has already bolted
- Understandable
- Objective - at least not self interested
- As simple as possible - don't waste people's time collecting unnecessarily complex information
- Well defined - people need to have a shared understanding about what the information means - this is particularly important for historical comparisons
- Consistent - to allow comparisons over time and across areas
- Relatively easy to collect - don't want staff spending all their time collecting information rather than doing the task
- Used - there is no point in collecting information if it is not used
- Operationally focussed - the level of data collected and summarised should focus on the management unit
- Reaching the right person - this may be a manager or committee or it may be the worker carrying out the task.

It is also handy if it can meet a number of needs at once eg external reporting requirements as well as internal management needs.

Most of the above characteristics may seem self-evident but it is amazing just how often they are not achieved and how often people seem to collect information that is not used or useful. This just wastes trees and everyone's time.

When monitoring a program it is important to identify the minimum key information required to manage the activity.

One useful way to identify this is to write down the objectives of the project and then to sort them into a hierarchy of outcomes. For example a program to increase home composting may have the following hierarchy of objectives:

- Gather the appropriate information
- Develop TV, radio ads and newspaper articles on home composting
- Get agreement from media outlets to publicise the information
- Increase the public's knowledge of home composting
- Change public attitudes to home composting and the tipping of organic matter
- Increase the level of home composting
- Decrease the pollution caused by tipping organic matter.

Once such a hierarchy is established it helps in checking the logic of the project, issues that need to be addressed to achieve the goals, and suggests the key points that need to be monitored to adequately manage the project.

It is important that people can make use of the monitoring information. Simple, easy to understand presentation (graphics often help) should be presented to people at relevant times.
The best information is useless if it arrives too late.

One should not let a formal monitoring process replace more subjective and intuitive information. You should still keep your eyes and ears open and discuss how things are going. The formal monitoring adds to this information and helps to check its validity.

Some possible monitoring activities for a conservation group:

- Weekly meetings with staff and volunteers on each project
- Specific project indicators
- Regular comparisons with the budget
- Staff workloads
- Revue of press clippings
- Testing the effectiveness of mailings
- Indicators of response to clients/supporters - eg time to send receipts for donations
- Checking that decisions have been implemented
- Checking how staff and volunteers are feeling
- Auditing procedures
- Any other suggestions?

Methods of evaluation

Most of the rules that apply to monitoring information also apply to evaluation and many of the methods are shared. In practice the two overlap while probably the most important difference is that monitoring is seeking a fairly shallow picture of events to see if things are going according to plan.

Evaluation on the other hand looks more deeply to try to answer the question 'Why?' and to determine whether the plan itself should be changed. Evaluation looks at such things as effectiveness, efficiency, relevance and impact.

It is important that evaluation should not just focus on the formal objectives of the project. These are important but there may be other positive and negative effects not thought of. For this reason it is important to encourage other relevant information through observation, discussion and open ended prompts in interviews and surveys (eg questions like 'What did you want to get from the event?' or 'Do you have any other comments that you would like to make?')

It is also important to identify early on just what information you will need for an evaluation. It may be impossible or very expensive to collect relevant information after the completion of a project. If possible use existing data collection to reduce extra work for staff and always keep accurate and well defined historical data to allow comparisons over time.

With both monitoring and evaluation it is valuable to have as much participation by all the stakeholders as possible. There are usually four main parties - the evaluators, the evaluated, the clients of the program and those the evaluation is for. It is useful to try to maximise the overlap of these four groups. This helps to build skills in the organisation, ensures that the information collected is relevant and helps to build commitment to the process and results.

Techniques commonly used in evaluation include surveys, feedback sheets, focus groups, benchmarking, quality circles, observation, discussions with participants, numeric analysis, interregional and historical comparisons.

While there are risks in incorrect use of methods a simple formal evaluation can usually provide a valuable supplement to more subjective assessments. The main rules are to keep measurements simple, to compare like with like and not to jump to conclusions. Checking information by using more than one perspective or source of information is important.

The evaluation focus should not just be on work outputs (eg the number of appeal letters sent out) but on the outcomes (eg the number who responded to those letters by giving a donation). The focus on program outcomes should however not preclude checking the feelings, workloads and needs of staff and volunteers - unfortunately these are often overlooked in evaluations.

When writing up evaluation reports it is useful to have a consistent reporting style in the organisation with well defined information that is authored and dated for future reference. The writing should be sufficiently detailed to allow an intelligent outsider to understand just what is being discussed.

The job is not over once the report is written. If valuable information has been identified in the evaluation then it is important that it is used in future planning. This may require the ‘selling’ of the report and follow up to ensure that the results are taken into account.

Finally, when looking at any activity it is important to highlight the successes as well as the failures. While it is important to understand what can be improved it is also important for staff and volunteers to receive positive feedback.

Some possible evaluation activities for a conservation group

- Brainstorms and feedback after significant events and meetings - ask everyone involved to write down what went well and what could be improved
- Testing the effectiveness of mailings
- Quality circles to resolve continuing problems
- Six-monthly or yearly reviews of activities (perhaps linked to staff objectives or key result areas)
- Survey of staff and volunteer satisfaction
- Focus groups made up of supporters or the public to identify how issues are perceived
- Suggestions process
- Surveys of customer/member satisfaction
- Evaluation of relationship with other environmental organisations
- Assessment of effectiveness of newsletter - what are people saying, focus group, survey or responses to requests for action
- Campaign evaluations
- Fundraising evaluations - including cost benefit analysis
- Staff workload analysis
- Exit interviews
- Any other suggestions?

Documentation

Documentation can mean anything from a procedures manual, to a newsletter which shares fundraising and campaigning ideas, from a volunteer induction video or computer based training to a sign on the door which says ‘Please close after you’.

It's all about sharing information so that people don't have to relearn things from scratch. Documentation also helps to provide consistency

The key factor to think of when producing documentation is who the audience is. The material has to be used and understood by the target audience.

It is true that many organisations have too much paper floating around but good documentation can actually reduce the volume of paper. Effective procedure manuals usually reduce unnecessary communication because people know what they need to do. Well documented and implemented communications and decision making procedures also allow people to feel confident that they will get the information that they need and that they will be listened to.

Summarising learning and removing out of date material can also reduce the volume of paper considerably.

It is common for people to join long established organisations only to find that virtually no procedures are written down or that no one is quite sure where to find them. Its very hard to improve procedures if you don't know what they are.

Documentation does take time and patience but as with all appropriate systems it can save much more time than it takes. It also frees people up to do something new rather than answer the same old questions from new staff and volunteers. This helps both morale and effectiveness.

You don't need to go overboard though. The amount of detail required depends on the criticality of the tasks. Those building space shuttles need pretty detailed documentation, those describing how to run a market stall need less! A good rule of thumb is that most organisations should spend about 5% of time on documentation and filing.

Some possible documentation activities for a conservation group

- Long, medium and short term plans
- Procedure manuals and (more detailed) work instructions- these should be recorded in a central register, should be kept up to date and should give the reasons for procedures
- Monitoring and evaluation reports
- Training notes
- Signs on machines which explain tips for use
- Direction signs on walls
- Filing systems and box labelling - including lists of contents
- Detailed notes on organising repeat events - ideal timetable, budget, useful contacts, key tasks and volunteers
- Donor liaison notes - information about donor history, requests, preferences, contacts
- Committee role and responsibilities
- Committee policy decisions
- Fundraising contacts
- Consistent reporting (eg reporting by objectives)
- Job induction package
- Office procedures on prominent display in relevant areas
- Historical records for events and campaigns to compare effectiveness
- Consistent and comprehensive job descriptions
- Documented grievance procedures
- Documented recruitment and termination procedures
- Use of reporting to keep people focussed on their tasks
- Accurate donor and network records including requests and discussions with supporters
- Ideas newsletter between intra and interstate conservation groups
- A single and up-to-date client database
- Any other suggestions?

Who should be responsible for DME?

All staff should take some responsibility for ensuring that their work is documented and evaluated but key responsibility lies with the coordinators/managers of projects. Effective documentation, monitoring and evaluation are essential parts of successful management.

Organisations with ten or more staff should consider appointing one or more skilled people with specific responsibility for coordinating DME in the organisation. While DME responsibilities will still lie with general staff such positions help to ensure consistency in data collection and documentation, provide the time and skills for more complex evaluation and give energy and support to a DME program. These positions usually prove to be very cost effective.

Conclusion

Documentation, monitoring and evaluation can be very powerful tools in helping to build more effective organisations. The goal is to encourage a spirit of critical self inquiry and a willingness to record and apply the lessons learnt while still maintaining spontaneity in the organisation.

To achieve this it is important to realise that DME is an important part of the broad skills and strategies needed for effective management - but that it must be complemented by other ‘softer’ skills such as inspiration, negotiation, respect, listening, compassion, courage and humour.

Useful reading

D, Fry & L.King 1991 *A manual of standards for community health* (AGPS, Canberra) - this is a very detailed set of standards developed for community health centres, provides an interesting documentation and monitoring model
P. Hawe, D. Degeling, J. Hall 1992 *Evaluating Health Promotion* (Maclennan & Petty, Sydney) - good overview of planning and evaluation with very useful chapters on survey method and focus groups
Office of Public Management, NSW 1992 *Planning and monitoring your program* (NSW Government) - a good and easy to read summary of the outcomes hierarchy approach to planning, monitoring and evaluation.
VCOSS 1984 *Do it yourself Social Research* (VCOSS, Melbourne) - a useful guide for community groups
Yoland Wadsworth 1991 *Everyday Evaluation on the Run* (Action Research Issues Association, Melbourne) - provides an overview of the wide range of monitoring and evaluation methods, and provides a very good comparison of both objective based review and the open inquiry method
Gail Wilson 1989 *Self Evaluation Kit* (Victorian Association of Citizens Advice Bureaus, Melbourne)

9. PLENARY ON TRENDS IN ENVIRONMENTALISM

Presenter: Karen Alexander

Movement trends and challenges

This summary of the Adelaide conference workshop attempts to identify some of the major social, economic, political and other changes which have occurred in the recent past, are occurring or are likely to occur. By identifying these changes we can identify the challenges which the environment movement faces and which it needs to address to be relevant and effective.

- Threats to government funding base of established movement
- Greater diversity - more groups in total;
- Wider range of goals;
- Increased diversity of methods of achieving goals;
- Possible split between ‘on-ground’ versus political.
- Better trained
- Better managed.
- Still no community history (and this is the year 2020).

Australia: regional - issues

- Indigenous issues growing, backlash.
- Environment awareness and concern growing.
- Unemployment: Full-time: decreasing; part-time: increasing; work hours: increasing; hidden: increasing.
- Increasing sense of loss of community and hence increasing fear, feeling of vulnerability;
- Increasing loss of “social capital” (Eva Cox).
- Maybe increasing law and order push if crime perceived to increase.
- Underclass increasing.
- Crime could increase.
- Reduction in democratic processes and the resources/information access needed to enable them to work.
- Increasing reporting, indicators and accountability eg companies legislation, auditor-general.
- Australia - social - demographics
- Baby boomers moving into retirement, with money, with time, with good values.
- Generation X moving into decision-making. Very self-oriented, me is good.
- Women moving into more powerful positions (30% occupation of board seats, cabinet - apparently does change the culture) eg heads of companies, board members, etc.
- Increasing urbanisation to big city and regional centres - decline of rural villages.
- Increased homelessness.
- Standard of Living - if defined as GNP/capita - continuing to increase; if defined with broader indicators - will decrease probably.
- Increasing conservatism in the community as they feel more vulnerable??
- Aust - financial services/economics/ownership of resources
- Market oriented policies increasing. If it’s good for the market then do it.
- Increasing divide between rich and poor and concentration of resources into fewer hands;
- Increasing privatisation of information
- Privatisation of public assets/possibly core services
- Corporatisation/privatisation of, eg environment?
- Increased globalisation, vulnerability of Aust to outside influences eg WTO
- Massive increase in workers funds/super funds - could lead to greater accountability, ethical basis of investment.
- Venture capital/R and D

State of Environment - Aust/international

- Increased environment degradation and extreme events.

- Increased economic cost of environmental degradation to companies, government.
- International companies respond to environment constraints when it is good for business and because insurance demands it.
- Increasing food shortages.
- Continuous loss of biodiversity in Australia and world-wide - the 6^{th} major extinction in 3000 million years.
- Possible major environmental problems eg Gulf Stream turning upside down.
- Science, knowledge, technology
- Increased communication capacity within movement, third sector, internationally in developed nations: access to information, to network, to plan, to activate, to push for, to act. and ditto for opposing forces.
- Increased biotechnology with diverse array of implications: genetic escapes, massive job loss, misuse and some useful products probably.
- Work-leisure
- Decline in mass formal work
- Change in work ethic to include volunteer work as part of ‘work’
- Increase in amount of work which is part-time.
- Greater diversity/flexibility in work patterns
- Several professions in one lifetime.
- Shorter working life, early retirement
- Longer working week for some
- Shorter working week gradually taking over: increase in volunteerism
- Increased leisure for some: increase in volunteerism
- Less job security.
- Increased vulnerability of workers to employers/exploitation
- Greater flexibility for employees/employers.
- Greater opportunities for men to have flexible arrangements eg for child care.
- More menial service casual type jobs eg house cleaning, with less security, currently largely non-unionised and increasing links/co-operatives/unionising of these jobs.
- Health/education/schooling - personal, institutions
- Increasing time spent at school.
- Greater access by older people for retraining.
- Greater diversity of opportunities eg TAFE, Uni, informal, adult eds etc.
- Decrease in government funded research and pure research, increasing ties to business agenda and funding.
- More uncontrollable bacterial and viral and weirdo diseases - everywhere.
- Energy services
- Nuclear power staying flat but waste accumulating and more accidents with waste storage.
- Renewables increasing.
- Coal ??
- Oil ??
- Efficiencies increasing.
- Access to good quality fresh water and ground water reserves falling.
- Extreme difficulties of access in some areas eg Middle East, India, China, Australia.
- Impact on earth: population/resource use
- Increasing numbers in most areas except developed work where could start declining unless they have immigration programs.
- Increasing per capita net resource use everywhere and especially developed work though rate of increase greatest in developing world.
- Consumption per person increasing.
- Recycling per person increasing.
- Efficiency of production increasing.

Government

- Smaller
- Has less control because of outside influences and choosing not to control.
- Mantra of ‘balancing budgets’ until crises hit which affect business eg crime, too many poor/unemployed (no buying power).

- Environment as core service for government
- Push for green constitution
- Increasing role of newer parties - greens/dems, shooters, minorities - and decrease in older parties
- Change for better in voting system.
- Legislation, international treaties: Environmental ones continuing to increase, monitoring of enacting increasing.

Personal level

- Ageing in western world.
- Alliance with green economics and community groups/business.
- Social attitudes to environment - reduced expectations of environmental health.
- Youth - a move towards conservatism.
- Food will become a problem as green revolution runs out of steam and pop increases.
- Oil will run out in cheap form maybe 50 years leading to enormous change. Awareness of environmental issues is increasing in rural areas, but primarily focussed on production.
- Farmers who are willing to perform environmental works constrained by finances. Increasing flows of displaced persons worldwide leading to increasing environmental pressures.
- Increasing frequency of disasters, both natural and human caused.
- Technology: nanotechnology for cleaning up pollution/health.
- Instant personal communications to create different grouping of people.
- New sources of power - geothermal/gravity.
- Increasing improvements in materials - less needed, more recycled.
- Return to conservatism?
- Change in work ethic and definition of who we are as individuals in western world away from the identity as an 'occupation' eg from a 'profession' to something else which will include a voluntary/3rd sector 'occupation'.
- Change in expectations for men and women - less stereotypical.

Home/household

- Gradual increase in men doing more housework (has gone up by 15 minutes/week in last 20 years).
- Less time by either parent in total housework/child care if have jobs.
- More blended families.
- More single mothers and probably fathers.

Third sector (community/NGO sector)

- Growing faster than the public or private sector.
- Becoming better managed, resourced, trained.
- Becoming better connected between different sections of the sector: aid-environment-social justice-welfare-etc. within Australia/overseas.
- Will play role in redefining the individual in society which doesn't have mass formal work.
- Consumer movement increasing.
- Direct action movement increasing.

IDEAS FROM GROUP DISCUSSION

Technology Increasing control by those who have information, know how to organise it and disseminate it vs increasing use of info tech to protect and enhance culture.

Murdoch, Gates, global satellites, infotainment; Aboriginal use of video satellites because families talking en mass better than telephones.

Spirituality creating stronger connections with inner self. Finding strength and peace with full capabilities and better realisation of how much each individual can achieve ie moving away, a bit, from 'technology fixes'. Growth, spread of 'spiritual' groups: meditation, yoga, etc.

Wildlife utilisation: Increasing pressure, economic motivation driving Recent SA legislation facilitating commercial use if conservation problems not clearly demonstrated; networks and Government initiatives national and international.

Toxic chemical effects on health: Increasing illness; chronic exposure to thousands of toxic petrochemical vapours common in home, office, rural areas. Poorly publicised research showing links.

Increasing gap between rich and poor. Increasing internationally.

Civic engagement. Movement from passive to active democracy Phenomenal growth of NGOs, organising of 'third sector'. Urban populations. More removed from consequences of behaviour on the environment therefore more difficult to motivate people to effective action. Statistics on urbanisation.

Increasing ethnic community, with lower environmental awareness.

More organised industry/anti-progressive campaigns.

Decreasing ability - time, education - to contribute to real democracy.

Economic rationalism. Neo-liberalism and the New World Order what effect on indigenous communities and environment.

Increasing public apathy but people still claiming a concern for the environment.

Decline and fall of the middle class.

Growing contempt for politicians and political processes.

Green movement getting more sophisticated and strategic, but same also happening with industry.

10. PERSONNEL ISSUES

Presenter: Anna Bounds

STAFF RECRUITMENT : A Training Outline

Aim:

This section of the training papers summarises many of the key issues which need to be taken into account in carrying out recruitment. It emphasises the importance of careful recruitment to ensure that it is cost effective, time effective and places the right person in the position.

Objectives:

1. Participants will be able to identify the elements of a recruitment process,
2. Participants will be able to write an advertisement, duty statement and selection criteria,
3. Participants will be able to prepare for interviews and to take the role of Presiding Officer or Chairperson.

Warmup:

- Turn to the person next to you and tell them how many interviews you have experienced in your working career.
- Identify two positive points/two negative points about any job interview you have experienced.
- List on the whiteboard

Questions for Discussion:

- What methods do we use to achieve successful recruitment?
  - Advertising - Newspapers : ⇒ National
    ⇒ Local
    ⇒ Web Membership
  - Word of mouth
  - Poaching
  - Redeployment

- Is formal recruitment necessary?
-

10.1 THE PROCESS OF RECRUITMENT

- **Advertising**: Where? When? for What?

- at a minimum, advertisements should include:

- Title of Position
- Location
- Name of organisation/logo
- Purpose of position
- Key responsibilities
- Selection criteria - qualifications, skills, abilities, attributes
- Contact person - number
- Application requirements
- Closing date
- Salary and benefits (optional) - DISCUSS

Making Connections: How do we achieve an effective advertisement?
By preparing a relevant duty statement.

A Duty Statement should include -

- Role or purpose of position,
- Main duties/responsibilities,
- Attributes required/person specification/selection criteria,

We also need to ask ourselves:

- Are responsibilities in keeping with salary? (Refer to awards, enterprise agreements to ensure consistency across the organisation).

- Are the expectations of the organisation realistic?

10.2 CASE STUDY

Position: Campaign Manager

Role: To co-ordinate a cost effective national campaign strategy.

Responsibilities:
- Ensure that all state campaigners are aware of the strategy and their respective roles
- Promote the strategy to the membership
- Ensure that campaigning is kept within budget allocation

- What does this really mean vis-a-vis duties?
- What sort of person does the organisation want?
  - - Qualifications) In each of these categories
  - - Experience) Identify those that are
  - - Skills/abilities) both essential and
  - - Attributes) desirable
- Is ranking of criteria relevant?
- When might the ranking differ?
- Should the composition of the team have an impact on the selection process?

<u>Short Listing:</u>

Q. What is it?
A. Assessing applicants against the criteria.

Shortlisting can be done on your own or in a group.

If done individually, the results can be collated by one person;
If done as a group, the results can be discussed and a group decision reach.

- Applicant meets all essential criteria (A)
- Applicant meets most of the criteria (B)
- Applicant does not meet the criteria (C)

<u>Planning the Interview:</u>

Using the selection criteria - let's brainstorm a list of possible questions -

Discuss : ~relaxing questions
~challenging
~confrontational
~open/closed

~exercises in analysis/report writing/proofing/typing

Is the selection panel looking for particular elements in any of the answers?

Notes should be kept about each candidate and at the end of the interview, candidates should be evaluated against the criteria.

Conducting the Interview:

- The interview environment should be comfortable without interruptions.
- Candidates should be introduced to the panel.
- The interview should open with a question which puts the applicant at ease.
- Questions should be open and relate clearly to the selection criteria.
- In closing, the following details should be confirmed :
    - Preferred starting date
    - Referees
    - Salary details
    - Date when decision will be made
- Follow up :
    - Unsuccessful applicants should be contacted promptly.
    - Internal applicants should be given careful feedback and debriefing.

The letter of offer to the successful applicant should be carefully worded.

10.3 SUMMARY OF KEY ISSUES IN RECRUITMENT AND INTERVIEWING

- Interview Experiences
    - Nervousness - increased by people on selection committee
    - Nepotism
    - Ascription of values
    - Human bias/validity of intuition in process
- Interviewing for your own job?
- Relevance and clarity of questions
- Role of conservation/movement involvement as part of selection criteria
- Clarifying intuition
- Debriefing unsuccessfuls
- Shortlisting - choosing people to interview
- Roles and responsibilities of panel
- Lack of feedback (area needs improvement for the image of the movement
- Make time for it (Internal applicants need special care)
- Duty Statements/Position Descriptions
- Description of the organisation - culture question
- Role of the position - broad statement
- Duties - what can be delegated could be indicated.
- Selection Criteria
- Value of transferable skills
- Eligibility lists
- Shortlist Grid
- Temporary Appointments/Casuals
- Responsible for)

- Oversee) Valuable words
- Ensure)

- Culture - "in club"
- Induction - clarity/training
- Volunteers
- Dismissal
- Pre-selection
- Role of Committee
- Follow up to recruitment exercise
- Specialist knowledge
- Advertising networks - cost/equity
- Job application - lists as a resource
- Performance appraisal- mediation
  - conflict resolution
  - personality
- Merit
- Weightings
- Matching People to the job
- Value of the package
- Tenure -vs- Contract - VNPA
- Project Officers - Generic skills could be developed

11. MEDIA STRATEGIES

Presenter: Elisabeth Mealey

11.1 TEN THOUGHTS ON DEVELOPING A MEDIA CAMPAIGN

1. Why do you want to go to the media with this issue? Have you done everything else you need to before you take it into the public arena? Is the media your first option? If so, maybe you should think hard about all the other avenues you need to pursue first:

- Political
- Educational
- Community
- Others?

Is your media strategy closely linked to the rest of the campaign?

If not, FORGET THE MEDIA STRATEGY!

2. What are the key points you want the media (and the public) to understand about your issue? If it's a new issue, perhaps you'll need to do some media briefings before you take it further.

List your TOP THREE messages, then refine them to ONE MAJOR POINT

3. Who are you targeting? Everyone in Australia? everyone in the world? Start again.

- The Minister? Better.
- The Department? Now you're talking.
- The mayor/local council

What's the best way to get the 'target's' attention?

- A one-off media expose?
- A concerted media campaign?
- Public pressure?
- All of the above?

4. What outcome(s) are you looking for?

- A one-hit, one-day wonder?
- A week-long, hard-hitting, to-and-fro beat-up?
- A targeted attack in one key media outlet?
- A letter in the letters page?
- A meaty discussion on talk-back radio?
- An all-encompassing TV documentary with no-holds barred?
- An international embarrassment released overseas?
- All of the above?

BE CLEAR ABOUT WHAT COVERAGE YOU WANT AND WHERE BEFORE YOU START.....

5. How are you going to get that ideal coverage?

- A press conference releasing something HOT and NEW?
- A tightly written, targeted press release which makes the journos want more?
- An exclusive story released to a trust-worthy journalist with 'pull' ?
- A briefing session with an editor/chief of staff/columnist/environment correspondent/TV producer or researcher?

- A letter to the editor which makes everyone sit up and take note.

6. **Have you prepared all your materials**, tailored to the style of release you've decided on?

- A new report (thoroughly researched and checked) which tells the media something they don't already know;
- A tightly-written, one-page media release which sets 'the line' for all speakers;
- A backgrounder with all the other important issues covered briefly;
- Any video footage or photographs which can be made available;
- For an on-going campaign: a graphic/logo; media kit; poster; stickers
- A web page?

7. Practising the line: Now that you've decided all of the above, practise THE LINE over and over again until you've covered every potential TOUGH QUESTION. Set up a mock interview/ press conference - and challenge your speakers with EVEN TOUGHER QUESTIONS.

8. Practise makes perfect: If it's TV news you're going for, try to set up a practise run using a video camera. Don't throw your trainee campaigner into the TV deep end without several practise runs!! Does your issue have a visual element for TV - if so, EXPLOIT IT.

NB: TV NEWS GRABS ARE AS SHORT AS 5-10 SECONDS! CAN YOU GET YOUR MESSAGE ACROSS THAT FAST? IF NOT, REFINE IT!!
(Watch a few talking heads who've mastered the art: Peter Costello, Jennie George; Jim Downey, etc)

9. Think hard about **TIMING**.

The media loves a story that's connected to a particular event eg an anniversary; an international convention meeting; environment day; a minister's departure for an important meeting overseas, etc. You could take the running if you get in just ahead of that event.

The old method of releasing things on Sundays for Monday's media still works - AS LONG AS IT'S NEWSWORTHY.

Fridays are to be avoided since most Saturday papers have early deadlines and the journalists are off to the pub by lunch time!

If something BIG happens the day before your release (eg Port Arthur massacre), consider changing the release date. Even with the best strategy in the world, you're not going to be able to compete with a mad, media frenzy.

10. Always be on the look-out for opportunities to RESPOND.

Responsive media work has an undeservedly bad rep. What's wrong with phoning John Laws with some well-aimed invective or offering yourself or your campaigner to 'AM' when there's a story breaking with relevance to your campaign? Or if it's more local, get into the local letters page or on local radio.

11.2 TIPS FOR EXTRAORDINARY MEDIA WORK

Ideas, ideas. Keep them coming. The media get bored quickly and are always under pressure to find new ways with old material. Your organisation's creative talents could be harnessed to deliver the goods.

Get personal. Journalists operate on a system of 'contacts'. That's where 75 per cent of their stories come from. Get to know your local media personnel on a personal basis and suggest lunch, or a coffee or a drink to discuss ideas.

Maintain an up-to-date list of **media contacts** and their areas of interest and their deadlines. After hours contact numbers can be useful for BIG stories.

Be sensitive to media **deadlines**. Don't call a radio producer five minutes before the news is going to air and don't call a daily newspaper reporter just before their copy is due. That's a great way to make a media enemy.

Don't bombard reporters with pointless press releases. The most effective organisations only put out releases when it's something BIG. Reporters are **blitzed by press releases** every day and get to know which ones to discard just by looking at the letterhead.

Make sure you **follow-up** your (once in a while, newsworthy) press release with a quick call to check that the reporter received it and understands it.

If you think you've run a media campaign by putting out a press release, you need to go back to activist school.

The **non-mainstream media** should not be ignored as they are often the source of ideas for the mainstream. They are also important as they reach particular target groups which you may want to reach too. Keep in mind:

- The gay press
- Ethnic media
- Community TV and radio
- Party political media
- Free, local 'what's on'-type press, etc

These media often welcome feature articles, columns, guest appearances, public service announcements - some of which you could churn out while on the bus or at the beach or at the laundromat, etc.

Keep abreast of the **new media technology**. Be aware that much of the debate about environment issues is going on in cyberspace these days and many reporters are connected to the Net. Find an enthusiastic member of staff to keep an eye on the relevant bulletin boards and Web pages and think about having your own Web page designed. But don't do it unless you're going to get into the Net boots and all.

11.3 DEALING WITH A CRISIS

Just as you start to get complacent with your media performance and how positive the coverage has been, there is bound to be A MAJOR SET-BACK.

Why is it so?

1. Murphy's law

2. The media loves to find dirt on people and organisations that the public was just learning to like and respect: eg Princess Di; Carmen Lawrence; Greenpeace.....

3. There are lobby groups out there (with lots of money from industry) who are paying PR companies to:

- Destroy the environment movement's credibility;
- Find dirt on green organisations and their leaders;
- Dig out overseas 'experts' and pay them to tour the world spreading doubt about your campaign;

4. Campaigners are human beings too. Sometimes they make mistakes and you can be pretty certain that the media will find out about them!

How to respond

- Don't panic. This happens to everyone! Look at Esso and BHP!!
- Keep doing what you do best - ie campaign and make it as media-friendly as possible.
- If anything, do more media work than you were doing before the crisis. Show them that you're above all that!

- If the attacks are to the heart of your organisation and are sustained, produce a statement which responds and rejects the criticisms POINT BY POINT or explains the mistake. Remember, you don't have anything to hide!! Appoint one spokesperson - preferably the BOSS - to handle all of the media to ensure consistency.
- Make sure you keep all staff updated on the situation and brief them on how you are responding. If the media can't get a response from the top, they'll find ways to get to staff - especially former staff and especially former, aggrieved staff.
- Roll with it. If nothing else, you can be assured that the media frenzy will die off within a week or so. Then you can get back to REAL work and campaigning. Meanwhile, ensure that you remain as open and honest with the media as you can.
- **GOLDEN RULE:** Never mislead a journalist. Always be truthful and up-front. If there is a legitimate problem or a campaigner has made a mistake, be open about it. Journos love nothing more than a COVER-UP!!

12. MEDIA - SO YOU WANT TO GET IN THE NEWS?

Presenter: Hendrik Gout (Hendrik Gout & Associates)

1. Introduction.

Many people approaching the media for the first time have only the vaguest idea of why they're doing it. In some cases, they believe that getting access to the media is the only way they have of getting others to hear, see, and believe what they have to say. Calling a press conference and getting the media to run their story seems the easiest solution. Peer pressure demands it, corporate, departmental, and government policies dictate it, and very little seems to discourage it.

But today's seminar will deal with much more. Not just *how* to get on the media, but *when* to get on the media, and how to *avoid* getting on the media. Each of these three is as important as the others.

2. First steps.

First things first. Before we even think of approaching any news organisation, it is vitally important to always keep in mind what we are trying to get across. For example, imagine you're listening to the early morning radio news, and there's a story highly critical of yourself, your organisation, or your issue.

The first reaction is to get on the news and put your side of the story. It's the wrong reaction. The best alternative, every time, is to carefully consider the effect on listeners.

Sometimes, being criticised or attacked can serve a valuable purpose in the longer term. It may lock an opponent into an ill-considered opinion. It may draw your own colleagues closer together. It may reflect badly on your critics.

The first thing to do is to reassess the changed circumstances, and formulate the best possible response. Your goal is not to win an argument on any particular day but to capture long-term long-term advantage, to use the media as one tool in effectively doing your job. Before we start: maxim... what do we want to achieve?

3. Your objective.

This leads us, naturally, to your objective. Far too many media workshops concentrate on the this-is-how-to-dress formula for success in getting the message across. But this is often counter-productive. It builds an expectation that good media performances will usually be the best tool. It is naturally an important one, but it is, in fact, a tool of last resort. Far more objectives come into play, and holding your objectives high will show you every time.

For example, imagine you are a Prime Minister of State Premier and have been accused by the Opposition Leader of not spending enough on roads.

Your objective is clear: convince people that you do spend enough to keep our roads safe, uncongested, and flood-free. You could, of course, do everything else that we'll work through today flawlessly: work out is it's a busy news day, call a media conference at the site of an almost-completed road project, issue a press statement listing table and figures of road expenditure under your own and the Opposition Leader's terms of office, pledge your commitment to good financial management, accuse the Opposition Leader of hypocrisy, and have yourself photographed with road construction workers in their hard hats.

Effective, but there may be a better solution. Remember the objective? It may be that the public, the readers and the viewers, won't believe you any more than they believed the Opposition Leader (who, had he done his job, would have had himself photographed in peak hour traffic at an appalling bottleneck).

So we come back, as always, to the objective. How would it be if the NRMA or RACQ chairman rebutted the Opposition Leader? What if provincial or Shire council chairmen/mayors held press conferences, applauding your spending on roads on remote areas of the country of the State?

Finding a more credible spokesperson than yourself (yes, it is sometimes possible!) is always worth exploring. The objective, after all, is to win the argument, not to get on TV, and sometimes that takes thinking more than anything else.

Throughout this seminar, we will refer back to the objective time and time again.

4. Your message.

So you've decided that getting yourself in the news is, in this case, the best alternative. Now comes the next step. This requires a certain mental discipline. We have to decide, simply, what the one basic message is that we're trying to get across.

To use the Minister/Roads analogy, this would be: Yes, we do spend enough on roads. Everything else, all the other information we disseminate, will be used to fortify our arguments, but all the charts we use, all the experts we throw up, all the tables of figures and photo opportunities, are just ways and means of making that message more convincing.

But the point must always be held foremost: we spend enough on roads. No matter what situation we are in, every time we want access to the media, our message can be expressed in a few words. Right through the entire process of seeking access, talking to reporters, following through, everything we will cover today, it pays always to keep the essential message foremost in our minds.

Now we to convey it. At this stage, other forces come into play. What represents the best way of illustrating our event, for television, for newspapers? Many people find watching television critically a valuable learning tool. See what the experts do.

After all, if you're watching something on TV, obviously they - the people who the story is about - have succeeded. What venue did they choose? If the story is unfavourable, is it because they chose the wrong location or the wrong time? From now on, you'll have to watch the news with a new eye... not just hearing what's being said, but evaluating always their approach.

But one thing will have happened regarding the story you're reading about in the paper, or are listening to on the news. Inevitably, they will have succeeded in making their story interesting.

According to research, people watch television news for five principal reasons, and in order of ranking they are:

- to be entertained;
- as a talking point among friends or strangers;
- to give the impression to others that one is well informed, and to avoid embarrassment be being caught at a disadvantage;
- as a measure of our security (this is one reason why 'disaster' stories are always popular television fare);
- to increase our personal understanding - to find out.

So, we have to find ways of making your message entertaining, we have to find ways of making it a talking point, we have to motivate the audience's fears and self-interests.

In many cases, creating a favourable news opportunity varies from story to story. At the workshop we have gone through circumstances applicable to your own line work. Is it conceptual? Can it be illustrated? Is there any other supportive location, character, or "stunt" we can use? Does it require a press kit? Photos, transparencies, or tape? Have we thought of the differing needs of the various types of media?

5. Your strike

So, having done our homework, we are now going to tell the press that we have something to say. The next step is to alert the media. Choosing the time of day, using devices to attract the media to our function, and seeding information among journalists is of prime importance.

Depending on the event, and the lead time involved, the media will have to be told as early as possible... but not so far in advance that it will be forgotten when the big day comes. In other words, for a normal launch, policy speech, etc. where no major location difficulties are likely to be encountered, a week is time enough. The best thing now is to issue a very short media alert, informing chiefs of staffs of the time, day, and location. This is a media advisory.

Then, the day before the function, another media release can be issued, with more information, and offering as much bait as possible. The trick now is to make journalists want to come. If any beverages are being offered, now is the time to tell them. If it involves something out of the ordinary - a boat trip when announcing maritime policy or a chance to film a usually-restricted work site, a chance to drive the car at a car launch - tell them in the invitation. If this invitation isn't successful, then all our other steps which follow are less effective.

6. Your move.

Right, you've got them there, now what are you going to say?

But some basic rues are universal, have someone check that the venue is set up... is the conference door unlocked, have the press releases been done, checked, and if you're handling someone else, are they going to make it on time or have flights been delayed. These elementary considerations are overlooked even by professionals, and few things irritate journalists more than functions which aren't properly organised. Now is the time to do the un-creative stuff....check the mechanicals.

When journalists arrive, see there is someone to welcome them, direct them, distribute press releases, let them know what's going to happen.

Then, the interview/function begins.... will you enjoy the torture? Yes!

Remember the following, and it's hard to go wrong:

- Do not lie. Ever. There can be many reasons to be an obscurant - commercially sensitive information, you are not able or willing to break a confidence, or (and let's face it, these things happen) some information in your possession is damaging to your argument, then swing around to more comfortable ground. But if you can't tell the full truth, then say you can't... and if you can't say that you can't, then fudge! But do not lie.

- Answer directly, remembering all the time your message. If you get a vicious interviewer with a hostile agenda, be ever more courteous, ever more direct.

- Do not get angry with the interviewer. Get angry with the stupidity of your opponent, with the unfairness of the way the world works, with injustice and inequity, with your own or other's lack of caviar and champagne, but do not get angry with the interviewer.

- Do not be afraid to show some emotion, but remember that television highlights emotion.
- Remember the KISS principle - keep it simple, stupid. Make your answers easy to understand.

7. Your follow-through

Interview over, now you assess. Did it go well or badly? You watch the news. How was their treatment. Was is fair....in your opinion. If so, you might consider contacting the reporter tomorrow under the pretext of giving them another snippet, but basically to thank them without appearing over grateful. If you feel offended by their story, ring them and explain your position. In almost every circumstance, never abuse the reporter. Do not accuse him/her of bias, do not raise your voice. Do not argue. Explain, explain, explain.

And, are there any follow-up opportunities? Did you meet someone with a special interest in your subject? If so, make sure that reporter stays in your contact book. Remember that news is, for reporters, a day by day affair. For us, it's a long campaign.

8. Bad news management

Forget the adage. The truth is, good news is no news! No matter how professional we are, there will be times when we wish we weren't in the news. Media management is also very much about avoiding bushfires and contain damaging stories.

We can do that several ways. Firstly, a keen sense of judgment, and a knowledge of our own areas expertise, to plan ahead and foresee problems before they arise. Governments do this all the time. In the days before the Government is to announce balance of payment figures, for example, select journalists are backgrounded, and often Governments or companies foster the impression that something far worse is on the way.

When the announcement comes, it seems nowhere as bad. Some of the processes involved follow-through also apply to containment of bad news. Speaking with reporters, choosing the time announcement so that it has minimum impact (on already busy news day, for example, of at an inconvenient time). In any event, contain bad news is at least as important as disseminating good news. Both are essential, each requires different skills.

9. How your knowledge of the media will enhance your own effectiveness.

Public relations is crucial to any organisation. Increasingly, Government and their departments, lobby groups, and business is finding public relations sections to be vital to the smooth running of their operations, and essential in getting their job done.

As someone with a knowledge of the media, your own position within your organisation is strengthened immeasurably. It increases your effectiveness within the structure. You will more easily be able to change the world! Enjoy! And your work has become more challenging, rewarding, and satisfying.

And that, after all, is why we're here today.

13. FINANCIAL MANAGEMENT

Presenter: Lou de Leeuw (FCA)

The session was run on the basis of the needs of the group that attended and the Agenda reflects the requests of the group. The following is a very brief summary of the issues that a finance manager or treasurer needs to be considering in managing financial issues.

Issues to be considered and understood:

Asset, Liability, Debtors, Creditors, Income, Expense, Receipts and Payments.

The difference between accrual and cash accounting.

The impact of Government reporting requirements for accrual accounting.

Financial Statements ,their uses and abuses.

Staff members and board members should read and discuss the statements that they were presented with by their organisation, Finance Managers or Treasurers. With their new found knowledge they could ask questions and hone their skills.

Income and Expenditure as opposed to Receipts and Payments should be understood

The importance of regular accounting and statements should be well understood. They are a management tool not just to prepare for an AGM.

Record keeping systems are critical . With access to computers so computerised accounting systems are available to most organisations. In particular, MYOB, Microsoft Money and Best Books.

Choosing an accountant to assist the organisation and the role of auditors should be understood.

The impact of staff on taxation, superannuation Guarantee and Workcover was the final item on the agenda.

14. THE COMMONWEALTH, THE STATES, TREATIES AND THE ENVIRONMENT

Presenter: James Blindell

Thanks to Lisa Ogle of the EDO (NSW) for her assistance.
Reference Book: Environmental Law in Australia, GM Bates, Butterworths

OUTLINE
1. Introduction
2. Overview of the Constitution and Commonwealth & State powers re: environmental protection
3. Discussion of hypothetical - Commonwealth protection of the environment
4. International Agreements - how they protect the Australian environment
5. Discussion of Ah Hin Teoh Case

14.1 INTRODUCTION

There are two types of law - common law and statute law:

Common law: developed through the English courts with principles being developed as a result of litigation. It dealt with the protection of private property and the individual. The industrial revolution/technology left the common law behind in terms of the impact on public resources and public assets (the environment).

Statute law: Government intervention became necessary to regulate industry, regulate development, protect resources - pollution control and environmental protection.
Governments passed statutes.

The Commonwealth Constitution, contained within the Constitution Act 1900, empowers Commonwealth Government to make laws.

14.2 THE COMMONWEALTH CONSTITUTION

1. Australia was a “fresh canvas”, unoccupied land (until Mabo).

2. The Constitution does not mention the “environment” because the Constitution was an economic document focused on the financial arrangements to make the profitability of the federation of the colonies greater than the sum of their individual efforts. Its other focus was to ensure that the vested power interests in each colony retained power.

3. In addition, in 1901 the colonies did not have the health and pollution problems that England was experiencing. Private property was protected (section 51(xxxi)), the public good was not.

4. The Constitution gives the Commonwealth power to legislate on certain topics set out in the Constitution (unlike in Canada).

5. Topics not listed in the Constitution can be legislated for by the States provided the legislation is not “inconsistent” with Commonwealth legislation (section 109).

6. The Constitution can be changed (section 128). The proposed change must be agreed to by a majority of electors in a majority of States and by a majority of all electors.
   Only eight of 44 proposed changes have been approved.

7. The High Court may be moving towards the view that provided Commonwealth legislation can be interpreted as falling under a “head of power” in the Commonwealth Constitution, there is no topic upon which the Commonwealth cannot legislate - and therefore further diminish the importance of the States. However the

Commonwealth legislation is still subject to the express and implied restrictions on Commonwealth power in the Constitution.

Commonwealth Constitution "heads of power" used to pass environmental legislation
Section 51 (attached):

(i) trade and commerce with other countries and among the States;
(ii) taxation; but so as not to discriminate between States or parts of States;
(xx) foreign corporations, and trading or financial corporations formed within the limits of the Commonwealth;
(xxvi) the people of any race for whom it is deemed necessary to make special laws;
(xxix) external affairs
(xxxix) matters incidental to the execution of any power vested by this Constitution in the Parliament...or in any government of the Commonwealth...or any department or officer of the Commonwealth;

Other financial powers (attached):

sections 81 to 83 spending;
section 96 special purpose grants and loans;

There are express restrictions on Commonwealth power in the Constitution
Section 90 imposition of uniform customs and excise duties
Section 92 trade within the Commonwealth cannot be the subject of customs duties

Commonwealth - State co-operative arrangements

To avoid direct conflict with the States, the Commonwealth has developed a policy of "co-operative federalism". Recent High Court decisions expanding Commonwealth powers to include environmental. protection have encouraged the States to participate.

Under this policy the National Environment Protection Council ("NEPC") has been established under the National Environment Protection Council Act 1994.

NEPC, in consultation with the States, develops national guidelines and standards for air, water, soil and noise pollution. It attempts to deal with business "forum shopping" for the weakest environmental standards.

In 1992 the Inter Governmental Agreement on the Environment (IGAE) was signed by the Commonwealth, all State and Territory Governments (WA subsequently withdrew) and the Australian Local Government Association. It recognises that the States have primary responsibility for managing the environment and that the Commonwealth and States should co-operate on environmental management issues. The Principles of Environmental Policy within the IGAE recognise ESD, the precautionary principle.

DEST both administers Commonwealth environmental legislation and co-ordinates and directs the consultation with the States.

Consultation between the Commonwealth and the States occurs at a number of levels:

- Ministerial through the Australian and NZ. Environment and Conservation Council
- (ANZECC);
- Specialist ministerial councils, for example - the Great Barrier Reef;
- Non-ministerial authorities - National Health and Medical Research Council (NHMRC),
- River Murray Commission, Consultative Committee on Nuclear Codes, National
- Occupational Health and Safety Council, EPA (Australian Heritage Commission,

- Australian Nature Conservation Agency, Great Barrier Reef Marine Park Authority,
- Office of the Supervising Scientist for the Alligators Rivers Region).

Co-operative policies take time to implement and only require one or two States to refuse to co-operate and the process is further delayed. This begs the question as to whether local-operation is the best solution in environmental terms to global problems when the Commonwealth has the power to impose uniform legislation?

Integrated Environmental Management?
The Federal/State divisions and the administrative divisions within States ensure that integrated management is almost an impossibility eg - local government, pollution control, heritage protection, coastline management, planning control, wildlife management, Aboriginal Affairs.

An example of successful IEM in Australia is the Great Barrier Reef Marine Park Authority.

14.3 INTERNATIONAL AGREEMENTS (TREATIES & CONVENTIONS)

Are usually enforceable at international law.

A bilateral agreement is an agreement between two nations, multilateral agreement is between more than two nations.

A "protocol" is a type of international agreement designed to supplement an existing agreement.

Depending upon the terms of the agreement, once a nation signs an agreement or ratifies an agreement it becomes a party to the agreement. In most agreements ratification is required which means the signatory must issue a declaration stating that it considers itself bound by the agreement.

In Australia recommendations prepared by the Department of Foreign Affairs (in consultation with other relevant Departments) are submitted to the Federal Executive Council through the Minister of Foreign Affairs.

The Federal Executive Council consists of the Federal Cabinet. It advises the Governor-General who has the power to enter international agreements. The Governor-General usually acts upon the advice of the Federal Executive Council.

The Federal Parliament has no formal role in the making of international agreements. However, the text is usually tabled before Parliament.

Enforcement and implementation in Australia

Under international law a party to an international agreement is required to perform its treaty obligations in good faith. Only another party to the agreement can enforce the agreement.

Unless the agreement has been enacted into Australian law, an Australian citizen has no rights to enforce Australia's obligations under an agreement. It is under the External Affairs power (section 51(xxix)) of the Constitution that Parliament can pass laws to meet its international agreement obligations.

There is no obligation upon the Federal Government to pass such laws. An international agreement does not impact upon the domestic law of Australia without domestic legislation (except for peace treaties) - Tasmanian Wilderness Society (1982) 153 CLR 270.

Is there an argument for self-executing treaties which would save time and ensure that international posturing as a good world citizen is converted into domestic compliance with international agreements? (see Ah Hin Teoh hand out).

Minister for immigration v Ah Hin Teoh (1995) 128 alr 353

Facts
Respondent's application for residence status was rejected because he was serving drug jail sentence.

Respondent appealed arguing that the officer, acting as the Minister should, in exercising her discretion, have given consideration to the best interests of his children, as required under the UN convention on the Rights of the Child. That Convention had been ratified by Australia but had not been implemented by domestic legislation.

Majority:

1. Ratification of a convention can give rise to a legitimate expectation that the decision maker will exercise its discretion in conformity with the terms of the Convention.
2. Ratification is a positive statement by the Government to the world and Australians that the Government and its agencies will act in accordance with the Convention.
3. That positive statement is an adequate foundation for a legitimate expectation, without statutory or executive indications to the contrary, that admin. decision makers will act in conformity with the convention and treat the interests of the children as "a primary consideration".

Minority:

1. Ratification is only a statement to the international not the national community.
2. Would make decision makers work impossible because would need to be aware of 900 treaties that Aust. is a party to.

The Commonwealth Government has indicated that it intends to legislate to indicate that the entering into of an international treaty is not a reason for raising any expectation that government decision makers will act in accordance with the treaty if it has not been enacted into Aust. law

14.4 TRADE & COMMERCE WITH OTHER COUNTRIES & AMONG THE STATES SECTION 51(I)

Scope of the power

1. Is construed broadly - Australian National Airlines Commission (1976) 138 CLR

2. Trade and Commerce has ordinary meaning includes all the commercial arrangements of which transportation is the direct and necessary result, the mutual communing, the negotiations, verbal and written, the bargain, the transport and delivery - W & A McArthur Ltd (1920) 28 CLR 530

3. Laws authorising the Commonwealth to undertake commercial activities (eg airline) is a law wrt Trade and Commerce Australian National Airways (1945) 71 CLR 29

4. Trade and Commerce includes not only sale and disposition of goods but also the transport of goods and people (eg rail, air etc transport) - Australian National Airways (1945) 71 CLR 29

5. Mere intra-state preparation for interstate trade in goods is not part of interstate trade - Beal (1966) 114 CLR 238

6. The Commonwealth can legislate for matters that are incidental or ancillary to interstate Trade and Commerce - Grannall (1955) 93 CLR 55. For example, regulations that control abattoirs that export meat because it affects export trade - Noarlunga Meats (1954) 92 CLR 565, to regulate trade may be able to regulate activities in the factory, field or mine. "All acts or processes which can be identified as being done or carried out for export".

7. It does not matter that the purpose of the legislation may be both regulation of interstate Trade and Commerce and protection of the environment, it is still valid - Murphyores (1975-76) 136 CLR 1

8. But must still retain (artificial) distinction between inter and intrastate Trade and Commerce Wragg (1953) 88 CLR 353

9. For a law to be "incidental " to the power it must have sufficient connection eg regulations that deal with the stimulation/authorisation of intrastate air travel (profit margins commerce) do not have sufficient connection but regulations that deal with intrastate air safety do - Airlines of NSW (1965) 113 CLR 54 and AN Airlines Commission (1976) 138 CLR 492

10. BUT Murphy J dissent: States not given exclusive power over intrastate T &C, Commonwealth can enter this area provided the law is relevant to (wrt) interstate Trade and Commerce, laws dealing with efficient competitive and profitable conduct of interstate Trade and Commerce are within power.

14.5 FOREIGN CORPORATIONS AND TRADING OR FINANCIAL CORPORATIONS FORMED WITHIN THE LIMITS OF THE COMMONWEALTH

SECTION 51(xx) SCOPE OF THE POWER

Tasmanian Dams Case - (1983) 158 CLR 1 afforded the Commonwealth very wide power. Laws covering all internal and external relations of all or any of the above corporations, any aspect of the affairs of such corporations, is not restricted to their trading activities.

Re Dingjan (1995) 128 ALR 81 - restriction

1. To be valid under 51(xx), the law must have an effect on corporations that it does not have on the rest of the population, it must discriminate between corporations and other people. Must look at the way the law operates upon corporations, it is not enough that the law impacts on all people including corporations.

2. In reality and substance, there must be a substantial connection - the law must operate on the rights, duties, powers or privileges of corporations.

3. It is not enough just to mention corporations, the conduct it regulates must effect the corporations or their officers, employees or share holders.

14.6 EXTERNAL AFFAIRS POWER - SECTION 51(XXIX)

SCOPE OF THE POWER

This is a very broad power and includes power to enter treaties and conventions - Burgess (1936) 55 CLR 608, Koowarta (1982) 153 CLR 168

1. Implied restrictions on the power because of Federal nature of the Constitution.

2. If a topic is of international concern then it is within the EA power

3. Mere fact that the treaty is "genuine" is enough to bring any subject matter within the External Affairs power because it is then a matter of international concern. (Tasmanian Dams Case (1983) 158 CLR 1, Richardson (1987) 164 CLR 161)

4. The fact that the Government has entered into a treaty/convention is sufficient to show that the subject matter is of international concern

5. can legislate with resect to all aspects of Australia's participation in international affairs

6. The law must carry into effect or comply with provision of a treaty

7. BUT the law must be reasonably capable of being viewed as appropriate or adapted ie reasonable proportionality between the law and the purpose of discharging the obligation - eg slaughter all sheep in Australia to meet treaty obligation that Australia safeguard against a sheep disease found overseas but not in Australia

8. May be enough that a law is wrt External Affairs if it ensures compliance with an international recommendation or international objective or with the spirit of a treaty without an exact written obligation under an international agreement ie (international concern is enough) Polyukhovich (1991) 172 501

Questions arise such as does the External Affairs power cover acts, matters or things outside Australia or must there be some nexus between Australia and those acts?

14.7 THE PEOPLE OF ANY RACE FOR WHOM IT IS DEEMED NECESSARY TO MAKE SPECIAL LAWS - SECTION 51(XXVI)

SCOPE OF THE POWER

Tasmanian Dams Case - (1983) 158 CLR 1

1. "race" has wide non-technical meaning includes biological element, physical similarities, a common history, a common religion or spiritual beliefs, a common culture - a sense of identity

2. "Australian Aboriginal" a person of aboriginal descent, albite mixed, who identifies himself as such AND who is recognised by the Aboriginal community as Aboriginal.

3. "special laws" can benefit interests of a particular race and benefit whole of mankind. Koowarta (1982) 153 CLR 168. It is a discriminatory power that can be used to pass benevolent or repressive laws.

The laws can cover any area of human activity including protection of cultural and spiritual heritage. WA v Commonwealth (1995) 128 ALR 1.

A law may be "special" even when it confers a benefit generally, provided the benefit is of special significance or importance to the people of a particular race.

14.8 FINANCIAL POWERS

Taxation; but so as not to discriminate between States or parts of States - section 51(ii)

"Taxation" includes:
income tax,
customs and excise,
tax concessions

"Excise" includes all taxes upon or in respect of a step in the production, manufacture, sale or distribution of goods - Hermatite Petroleum (1983) 151 CLR 599.

Section 90 - Commonwealth has exclusive power to raise duties of customs and excise

States can impose "royalties" - which set the amount to be paid by considering the value of the privilege conferred by the licence or royalty - Harper 63 ALJR 687

Section 81 to 83 and section 96 - Commonwealth has power to spent revenue raised for purposes that are incidental to the powers the Commonwealth has under the Constitution - Davis (1988) 63 ALJR 35

Commonwealth can grant financial assistance to any State on such terms and conditions as the Parliament thinks fit - section 96

Therefore Commonwealth has wide spending discretion to encourage conservation and protection.

Section 92 - Trade commerce and intercourse between the States must be absolutely free.

Must distinguish between regulation (OK) and restriction/prohibition (not OK). Laws cannot discriminate against one State.

14.9 IMPLIED POWERS AND PROHIBITIONS IN THE CONSTITUTION

Nationhood power
Federal nature of the Constitution

14.10 TEOH CASE

"Ratification is not to be dismissed as a merely platitudinous or ineffective act"
Ratification on its own, "in the absence of statutory or executive indications to the contrary" is adequate foundation for a legitimate expectation that decision makers will act in conformity with the Convention.

10 May 1995 - Evans and Lavarch, following High Court ruling, made an executive statement that the entering into of a convention does not raise any expectation that decision makers will act in conformity with that convention, if it has not been enacted into legislation.

The Administrative Decisions (Effect of International Instruments) Bill 1995. - not yet passed into law provides clear statutory indication that conventions must be passed into domestic law to have domestic effect and decision makers need only comply with Australian legislation

BUT note High Court comment "is not platitude or ineffectual act" - so avenue for argument - What's the point of conventions that are not passed into domestic law? Especially in an era when environment protection is national and international issue - exert pressure on Government to live up to its commitments.

Also High Court indicated that the provisions of a convention that Australia is a party to may be used as a legitimate guide to the development of the common law, but when not incorporated into domestic legislation - use this approach carefully.

15. QUALITY MANAGEMENT OF VOLUNTEER WORKERS

Presenter: Roger Horton, July 1996
from C. Regan et al, 1996, 'Embracing The Challenge: Quality Management Of Volunteer Workers'

Quality management of volunteer workers means:

"creating a cooperative environment and ensuring that people are free to act intelligently, imaginatively and sensitively. Flexibility and spontaneity are features of volunteering which need to be preserved. However, appropriate structures and procedures are necessary for the smooth running of any operation."
Noble (1991, p.71)

15.1 BASICS OF QUALITY PERSONNEL MANAGEMENT

Effective Personnel Management has five main functions and activities:

- Planning for human resource needs;
- Recruiting people for the organisation;
- Appraising and compensating employee behaviour;
- Improving employees' and the work environment;
- Establishing and maintaining effective working relationships.

The major components of these functions and activities are:

- Planning For Human Resource Needs
- Planning and forecasting the organisations short-term and long-term human resource requirements;
- Analysing the jobs in the organisation to determine the skills, knowledge and abilities that are needed, and designing jobs to accommodate the
- needs of both the individual and the organisation.
- Recruiting People For the Organisation
- Recruiting job applicants;
- Selecting from the job applicants those most appropriate for the available jobs.
- Appraising and Rewarding Worker Behaviour
- Appraising and evaluating worker behaviour;
- Rewarding and motivating worker behaviour.
- Improving The Worker's and The Work Environment
- Determining, designing and maintaining equipment to increase worker ability and worker performance.
- Improving the physical work environment to maximise worker safety and health.
  Improving the work environment, especially in regard to the quality of work life and productivity improvement programs.
- Establishing and Maintaining Effective Working Relationships
- Recognising and respecting worker rights. - Understanding the reasons and methods used by workers in organising [ie. work practices].
- Bargaining and settling grievances with workers (and any organisations representing them)."

15.2 WHY IS IT IMPORTANT TO MANAGE VOLUNTEER WORKERS WELL

- Helps to ensure that the aims of the organisation are fulfilled.
- Increases the effectiveness of the organisation and the efficiency of the worker.
- Improves the work atmosphere of the organisation.
- Provides an example of good leadership and follows through on the philosophy of the organisation.
- Allows for the maximum use of the skills, knowledge, experience and resources of the organisation.
- Reduces possibility of discrimination and poor work practices.
- GOOD PUBLIC RELATIONS!

15.3 MAJOR DIFFERENCES IN THE WORK SITUATIONS OF VOLUNTEER WORKERS AND PAID WORKERS

- Most paid workers receive monetary rewards without having control over their work hours and the type of work undertaken.
- Volunteer workers can dictate their preferred hours and tasks, but receive no monetary rewards or leave entitlements (all basic to undertaking volunteer work). Consequently, commitments other than their chosen volunteer work have greater impact on volunteer workers than is so for paid workers, for whom the influence of monetary rewards creates set boundaries within which they must function.
- Organisations must plan for the rights of volunteer workers to not work or to change their tasks.

15.4 FUNDAMENTALS OF VOLUNTEER WORKER MANAGEMENT

The following Minimum Standards should be used as a basis for agreed contracts and conditions for volunteer workers.

VOLUNTEER WORKER AND ORGANISATION RIGHTS AND RESPONSIBILITIES.

- Overall the volunteer worker should have a good knowledge of the organisation, what it is trying to do, and be prepared to <u>meet minimum standards</u> as set by the organisation.
- Neither Volunteer Worker Rights and Responsibilities, nor Organisational Rights and Responsibilities should be viewed in isolation from each other. Both sets of Rights and Responsibilities should be read and acted upon as a whole.

Volunteer Worker Rights

1. The right to be treated as a co-worker (not just free help, nor as a prima donna).

2. The right to know as much as possible about the organisation - its policies, its people, and its work.

3. The right to a suitable assignment - with consideration for personal preference, temperament, skills, abilities, education and employment background.

4. The right to a written Job Description and written Contract of Employment Conditions.

5. The right to refuse to do a task requested of them.

6. The right to determine the number of hours that they will volunteer and when these hours will be worked.

7. The right to <u>not</u> have to or be expected to contribute anything (eg money, resources, etc...), other than their time, experience and skills in undertaking a job.

8. The right to relevant training for the job, which is thoughtfully planned and effectively presented.

9. The right to continuing education on the job, as a follow-up to initial training, which provides information about new developments and other relevant matters.

10. The right to sound guidance and direction by someone who is experienced and well informed and who has the time to invest in giving guidance.

11. The right to a safe place to work which is an orderly designated place, conducive to work, and worthy of the job to be done; and a right to safe conditions and practices of work.

12. The right to promotion and a variety of experiences through advancement to a greater responsibility, or by transfer from one activity to another.

13. The right to be heard and listened to - have a part in planning, to feel free to make suggestions, to be shown respect for an honest opinion, to have these acted upon when agreed to as valid statements, and to receive information back as to the outcomes of these suggestions.

14. The right to a fair and equitable Disputes Procedure if there is a problem with the standard of the work that the volunteer worker is doing.

15. The right to be free of discrimination or harassment because of racial background, religious belief, sex, sexual preference, marital, age or disability status and political background.

16. The right to knowledge of existing or impending industrial disputes, presented in a balanced manner, to enable the volunteer workers to make informed choices of action.

17. The right to a fair and equitable Termination Procedure (which includes reasons for dismissal and an appeals process).

Organisation Rights

1. The right to employ or not employ any volunteer worker based on the needs of the organisation.

2. The right to expect the volunteer worker to meet minimum standards as defined by that organisation.

3. The right to expect the highest level of dedication, commitment and effort that the volunteer worker can give, even on a short-term basis or casual basis.

4. The right to expect conscientious acceptance of responsibilities as to promptness, reliability and good performance from the volunteer worker.

5. The right to expect enthusiasm and belief from the volunteer worker in the work that the organisation is doing.

6. The right to make a decision as to where the volunteer worker would best fit within the organisation, after negotiations with the volunteer worker.

7. The right to express constructive criticism to the volunteer worker in a diplomatic way, and suggest changes.

8. The right to expect loyalty to the agency and only constructive criticism from the volunteer worker.

9. The right to expect from the volunteer worker, clear and open communication at all times.

10. The right to expect appropriate behaviour from the volunteer worker at all times.

11. The right to expect an effective and appropriate work productivity from volunteer workers in leadership positions.

12. The right to expect that volunteer workers will not discuss any client's circumstances and details outside of the organisation.

13. The right to expect the volunteer worker to bring any concerns about clients and their circumstances to the organisation for discussion.

14. The right to tell a volunteer worker that their services are no longer required, and the reasons for this decision.

Volunteer Worker Responsibilities

1. Be sure - examine your feelings and be sure that you really want to help other people.

2. Be convinced - don't offer your services unless you believe in the value of what you are doing

3. Be clear - about what you are prepared to do and what you will not do. Make sure the organisation knows this before you start work or, if you have a change of mind, as soon as possible - it will reduce misunderstandings in the future

4. Accept the rules - don't criticise what you don't understand, there may be a good reason. However, feel free to ask, "Why?"

5. Be loyal - offer suggestions, but don't "knock".

6. Be willing to learn - training is essential to any job well done.

7. Keep on learning - know all you can about your organisation and your job.

8. Welcome supervision - you will do a better job and enjoy it more if you are doing what is expected.

9. Speak up - ask about things you don't understand. Doubts can turn you into a worker with problems.

10. Be dependable - do what you have agreed to do. Don't make promises you can't keep as it causes problems for everyone.

11. Be a team player - respect the function and roles of the paid staff and of the organisation.

12. Acknowledge the Organisation Rights - the organisation has a responsibility to its aims first and foremost, and has the right to make decisions based on this responsibility.

Organisation Responsibilities

1. Have a policy and philosophy on the status of volunteer workers within the organisation and how they will relate to paid staff and other people.

2. Have an employment policy with regards to volunteer workers covering such matters as:

- Job Descriptions;
- Job Contracts;
- Contracts of Employment Conditions;
- Boundaries of levels of legal, professional liability and expertise of each job;
- Quality and choice of jobs; and
- Use of organisational resources.

3. Properly meet and fulfil the Volunteer Worker Rights, and ensure that no volunteer worker is exploited. (Note: The Volunteer Centre of NSW advises people against regularly doing more than 16 hours of volunteer work a week in the same position. They state that "after 16 hours, we start to look into the question of exploitation, because after two days' work, the job should probably be a paid one",)

4. Provide ongoing training to all volunteer workers employed on a long-term basis (ie. those who work more than 3 months).

5. Ensure that the organisation and its paid staff address any concerns raised by volunteer workers, make decisions regarding those concerns, and report this back to the volunteer workers.

6. Ensure that no volunteer worker is discriminated against or harassed.

7. Ensure that volunteer workers work in conditions which comply with Occupational Health and Safety standards for the job they are performing; and that volunteer workers receive ongoing Occupational, Health and Safety training so as to ensure their ongoing personal safety.

8. Ensure that volunteer workers are not employed in situations where an industrial dispute is in progress. Nor should volunteer workers be co-opted to be involved in such disputes.

9. As well, there will be additional specific rights and responsibilities as determined by individual organisations.

TRAINING

Initial Training Program

All volunteer workers are required to attend an initial training course which is appropriate to their future job status and the position they are to undertake, prior to working for the organisation.

<u>Topics That Should Be Covered Are:</u>

- Organisational Aims and Directions;
- Personal Attitudes and Values;
- Volunteer Worker and Organisation Rights and Responsibilities;
- Communication; and
- Different Types of Work Options for Volunteer Workers.

Orientation to a Specific Task

All volunteer workers should be given an orientation to the task involved, equipment used and safety requirements.

Ongoing Training

All long-term volunteer workers should be given the opportunity to attend training that is appropriate to the work currently undertaken or to be undertaken in the future. <u>Note</u>: Funding of costs of ongoing training for volunteer workers should at least be based on the levels of training costs required under the Training Guarantee Levy Scheme for a paid worker in a similar position.

EMPLOYMENT CONDITIONS

These are important so as to ensure that there is an agreed basis for employment between the volunteer worker and the organisation so as to reduce any misunderstandings or difficulties in the future. Job Descriptions and Contracts of Employment Conditions must be developed and agreed upon before recruiting or employing volunteer workers.

Job Description

This should cover:

- Clear description of actual tasks (perhaps in priority order
- Skills, knowledge and experience needed.
- The volunteer worker's responsibilities to management.
- Methods of communication with supervisors and/or management.
- Hours of work.
- Safety and/or emergency procedures.

Perhaps all jobs to be done by volunteer workers could be broken down into a series of tasks rather than a prepared job description which is a compilation of those tasks. Volunteer workers could compile their own job description by choosing the preferred amount and type of tasks and possibly therefore enhancing their ability to carry out the work. The tasks could be set out on cards and volunteer workers could be encouraged to share the less popular activities.

Contract of Employment Conditions

This should cover:

- Job Title
- Terms of Engagement and Hours of Work,
- Job Description (to be included).
- Designated work space/area.
- Meal breaks.
- Time-in-lieu arrangements.
- Public holidays.
- Annual Leave - notice of intention, and arrangements.
- Other leave (absences) entitlements and arrangements.
- Reimbursements/allowances and expenses:
  - travel car (as per tax rate rebates) and other; ·
  - phone calls (as per current Telstra rates); .
  - meal allowances?; ·
  - child care costs? (as per current Family Day Care rates);
  - respite care costs? (as per current Home Care costs); and
  - out-of-pocket expenses.
- Leave entitlements;
- Training and on-going support:
- Initial training program;
- Orientation to specific service; and
- On-going training.
- Support, appraisal and supervision arrangements (see elsewhere in minimum standard for details).
- Staff conflict procedure.
- Disputes procedure - as per paid employees?
- Disciplinary procedure - as per paid employees?
- Termination procedure - as per paid employees?
- Appeals procedure - as per paid employees?
- Resignation procedure - as per paid employees?
- Occupational health and safety procedures.
- Insurances, insurance arrangements and procedures:
- Public liability;
- Volunteer worker, personal;
- Volunteer worker, vehicle (including loss of excess and loss of third party);
- Civil liabilities (as per professional liability for paid workers); and
- Access to rehabilitation programs.
- Anti-discrimination and anti-harassment principles.

RECOGNITION/REWARDS (INSTEAD OF MONEY)

Recognition needs to be tangible and consistent to ensure that volunteer workers are not ignored or forgotten by the organisation.

Examples of appropriate recognition and/or rewards are:

- Annual Certificates of Service;
- Regular morning teas, lunches, afternoon teas, (dependant on service and volunteer worker arrangements). Other appropriate measures.
- Yearly 'Thank You' parties.
- Certificate for any training undertaken listing topics included.
- Reference for any work undertaken, etc...

Also there needs to be regular consultations of one (1) hour with volunteer workers, on issues that affect them and the organisation, at least every three (3) months. (This could be linked with regular Supervision sessions. See below for details).

EVALUATION AND SUPERVISION

Evaluation and supervision must be done to ensure quality of the work undertaken.

Evaluation
Volunteer workers should be able to participate in and have access to the annual organisation review. As for paid staff, each volunteer worker's position should be evaluated each year. (The evaluation need only be documented by date and by subsequent changes in job role).

Upon leaving, each volunteer worker will have an 'Exit Interview' which shall, at least, encompass the topics of:

- Good points of the job and the organisation;
- Areas of improvement that could occur; and
- Issues of their jobs, the organisation, the service or the group, as seen from the perspective of the volunteer worker.

Supervision
Volunteer workers should expect regular supervision and support every three (3) months. The organisation will provide a designated supervisor who is readily accessible. The terms of the supervision should be agreed upon between the organisation and the volunteer worker when the volunteer worker commences work.

RECRUITMENT

See your state's Volunteer Centre material for details of ideas.

The organisation should apply the same standards for the recruitment of volunteer workers as it does to paid workers. However, the unique situation of volunteer workers will need to be taken into account when recruiting.

General Principles To Be Followed When Recruiting Volunteer Workers

- Organisations need to target their recruitment strategies to the types of volunteer workers that are required.
- Organisations need to have set Job Descriptions for volunteer workers finalised prior to advertising.
- Advertising should be undertaken in a way that is appropriate to the volunteer workers.
- Adequate resources should be allotted to the advertising, recruitment and training of volunteer workers - how else can the organisation really ensure that is getting a suitable worker?
- At the time of recruitment, volunteer workers have the right to choose the type of work they would prefer.
- Special Needs Groups:
  - People of Non-English speaking backgrounds;
  - People with disabilities; and:
  - People with dependants and primary care givers, (eg parents, carers) should all have their specific needs taken into account when they offer to volunteer. Disregarding their specific needs limits their opportunities to volunteer.
- Organisations need to be innovative and strategic about the way they attract volunteer workers.

15.5 CONCLUSION

This framework will provide a minimum base which environmental organisations can utilise to embrace the challenge of effectively managing their volunteer workers, It will assist organisations to create a culture of quality Personnel Management based upon respect, concern and awareness of the rights and preferences of individual workers, while allowing them to act intelligently, imaginatively and sensitively. Ultimately, and most importantly, it will help increase the quality of service provision to clients.

Effective Personnel Management is

"the recognition of the importance of an organisation's work force as vital human resources contributing to the goals of the organisation and the utilisation of several functions and activities to ensure that they are used effectively and fairly

for the benefit of the individual, the organisation and society ......Effective personnel management is based upon respect, concern and awareness for the rights and preferences of individuals. "

Schuller, Dowling and Smart (1988, p.9)

15.6 USEFUL READING

C. Regan, et al 1996: *Embracing The Challenge* available from Western Sydney Community Forum Tel.: (02) 687.1456. Provides working policies and documents for managing volunteer workers

M. Curtis & J. Noble 1991: *Volunteer Management - A Resource Manual* available from the Volunteer Centre Of South Australia.

Various Publications provided by the state Volunteer Centres.

NOTE: VOLUNTEER CENTRES ARE GREAT RESOURCES ON A VARIETY OF TOPICS REGARDING VOLUNTEER WORKERS.

16. SUSTAINABLE ACTIVISM:

SURVIVAL SKILLS FOR ENVIRONMENTAL WORK
Presenter: Katrina Shields

16.1 MOTIVATION & DESPAIR

Why provide training or support in this area?

* Feelings of discouragement, exhaustion and even bitterness are not uncommon among activists who have worked for more than a few years.

* Turnover is high, with subsequent loss of skilled people.

* Many groups do not attract enough new members or work as effectively as they could, and the causes can be linked with not dealing effectively with these issues.

* Research by Mary Gnomes on peace activists in the USA found the major cause of dropping out and discouragement was not campaign losses or lack of results, but unresolved and unsatisfactory relationships with other activists.[1]

* Bill Moyer highlights that many activists adhere to a belief that they are powerless and that the movement is failing. They are often hostile to the notion that the movement is progressing along the normal road of movement success and that they could afford to celebrate their successes.[2]

* Groups are often led by highly task/action-oriented personalities who may remain highly motivated, but who do not acknowledge the needs of others for training and support, or for validation, and who do not give attention to individual needs and group process until it is too late.

Training In 5 Areas That Can Assist Environmental Workers In Maintaining Motivation

- Helping activists individually and collectively deal with feelings such as loss, grief, frustration, anger and despair
- Assisting the establishing of support / affinity groups
- Assisting activists to develop a wider perspective on the change process
- Developing or maintaining group morale / motivation.
- Training in processes and techniques to motivate and enrol non-active people

1. Helping activists individually and collectively deal with feelings such as loss, grief, frustration, anger and despair.

We are continually bombarded by signs and information telling us that the world is in trouble. Feelings of pain or distress caused by this are natural and healthy, if acknowledged, expressed and used as a motivating force for acting positively for change.

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1. Gnomes, Mary 1992 "The Rewards and Stresses of Social Change: A qualitative study of peace activists" in Journal of Humanistic Psychology Vol 32 No. 4.

2. Moyer, Bill "Playing to Win MAPs for Social Movements" World Rainforest Report Sept 1994 & March 1995.

What is not healthy is the denial, the psychic numbing that prevents many people from really taking in what is happening around us, and which also saps energy and blocks the ability to take action for change, sending people scurrying into escapist activities.

Or, unacknowledged, unexpressed feelings of pain for the world can cause people to take action in an unhealthy way - acting for change from a sense of desperation and/or driven-ness, so that their actions are more frantic than effective. This is a sure recipe for eventual burn-out. Cynicism, can be seen as a form of congealed disappointment, feelings that have not had an opportunity to be expressed and to shift.

Actions which rely on anger as their only fuel can result in behaviour which is counter-productive, lacking well-thought-out long term strategies and appropriate responses.

When we can express our feelings of pain for the world - whether they manifest as anger, fear, sadness, hopelessness, frustration, numbness, etc. - in a safe way and in the company of others, it helps to release the mind, to clear the energy, and to overcome the fear that these feelings will destroy us. It helps us to re-connect with others, with the vast web of life, and with the resources we have for creating change. It reassures us that we are not in this alone - we have support for the journey.

This work can be done at a very simple level of being willing to listen to and support colleagues feelings, or to allow time in meetings and workshops to acknowledge this dimension, through to specially designed workshops. These workshops could be from a few hours to a few days in length and can assist with a deep transformation in motivation. This field is known as Despair to Empowerment work.

Some of the exercises we use in this work are designed to:

- Hear each others' stories of despair and of hope and to gain support
- Allow full expression of the feelings of despair and other feelings in a ritualised way
- Reclaim our sense of power
- Create visions of positive futures
- Develop skills and strategies for action

Enhance our sense of inter-connectedness - with each other and with the web of life

The methods used engage all of our senses and ways of knowing and include creative play, painting, dancing, creating rituals, storytelling, meditations, guided visualisations, games, trust-building , writing and goal-setting exercises.

Some useful short exercises :
<u>Open Sentences</u>
This exercise can be done in pairs or small groups, each person taking a turn to respond to the following opening line(s):
"Times I have felt really despairing are........"   OR
"Times in my activist life when I have been at my lowest ebb are......."
"What contributed to this was........"
"What got me out of it was............"
This could form the basis of a discussion and sharing of participants feelings in this area.

<u>Making a Difference Stories</u>
"Relax, close your eyes and remember a time when you felt that some action you took made a difference that was positive. What happened? Who was involved? What was the setting? Remember as vividly as possible the qualities of mind and feelings you had at the time."
Either write this down for yourself or share your stories in a small group or in pairs.

There are many exercises and processes for working in this dimension, resources can be found in Macy (1983), Shields (1991) and Seed et al (1988).

2. Assisting the establishing of support / affinity groups

It is never an easy road for people committed to fundamental change. For many of us this work represents a lifelong commitment. How do we sustain ourselves through the inevitable hard times? How can we hold on to our faith and resolution? Where do we recharge and renew our commitment? How do we find resources? Who can help us to stay on track?

One way to nourish this is to form a support or affinity group. This could consist of three to seven members who make a commitment to meet regularly and to be in contact with each other as needed. Many people have managed to continue environmental work without a structured support group. However, few people who devote their lives to such work do it without some regular source of reflection, challenge, and affirmation - necessary for sustained and effective efforts for change. Too often we are confronted with feelings of isolation - even from those with whom we work closely.

Support groups are one way to give regular attention to each person's social change work - to reflect on directions, goals, effectiveness, rough places and growing points, to challenge each other - taking into account all dimensions of our lives. There are three basic elements to the support: emotional support, support for action, and educational support.

Emotional support can be: giving encouragement, affirming and validating thinking and achievements, allowing space for expressions of feelings, checking on physical health and discouraging over-work. Support can be loving challenges based on seeing a person and their life clearly and then thinking carefully about that person.

Support for action can be: helping to clarify goals, set directions and take actions. It can also help solve problems in specific difficult situations, to look at longer-range strategy questions. It can focus on areas of skill and leadership development for each individual. The group can also decide to undertake action projects together.

Educational support can encourage learning as a primary focus by attending workshops or seminars together, or reading and discussing books or journal articles, or asking members of the group to share special knowledge or expertise.

<u>Making support groups work</u>

- Have clear agreements - what you want to do together, how often, how long, to meet, being respectful of each other etc.
- Confidentiality is very necessary for building trust. Make a clear commitment that sensitive personal matters raised in the group will not get discussed outside the group.
- Start and finish on time - we're all busy people!
- Equal time for each person to speak and have the focus of attention (this may be varied in special circumstances).
- Keep to the stated purpose - keep the focus on the person whose turn it is - resist getting sidetracked.
- Practice good listening - this is the key element.
- Ask pertinent, strategic questions to encourage clarity on each person's objectives and how to reach them.
- Encourage skills development and study.
- Encourage self-care - physical and emotional.

- Allow silence - encourage the focus person to pause occasionally, to go within, to reflect without interruption.
- Provide challenge and feedback - gently, skilfully and honestly. And practice receiving feedback. Encourage boldness.
- Draw out deeper feelings - this takes time and skills.
- Deal with conflicts as they arise.
- No recruiting - support time is about support for you, not for recruiting the other members for your cause, unless they offer. This sort of group is different in nature from a working party.

Encouragement could be given from environment groups for the formation of support groups from within the same organisation or with members from other groups doing similar work. Workshops and discussions designed to give some ideas and experience of how they can best operate can be helpful in getting them off to a good start. Resources for establishing and maintaining support groups can be found in Green & Woodrow (1993) and Shields (1991) and Coover et al (1977).

3. Assisting activists to develop a wider perspective on the change process.

* By exploring "change models" as a group, patterns from other social movements may provide a bigger perspective, than the one of apparent lurching from crisis to crisis.

* More realistic expectations and effective strategies may emerge.

* Models can assist the reframing of "losses" as inevitable and potentially galvanising trigger events to move to a new phase of the environment movement.

* With a wider perspective, inexperienced activists are less likely to be discouraged or give up because of a campaign setback.

* Models that take in the longer term perspective can help shift motivation from a short term (this campaign) basis to a long term, principled life-long, sustainable commitment to fundamental change.

* Models which validate a variety of roles and strategies within the same movement can help to minimise projection and negativity towards others who are in fact working for the same change, albeit differently; for example, Rebels vs Reformers

Some models we have found useful for working with groups in this way are:

* Bill Moyer's <u>Movement Action Plan</u>, with its "Eight Stages of Social Movements" and the "Four Roles of Activism".(Moyer 1990)

* Everett Rogers' <u>Innovation Diffusion Theory</u> that explains the way that new ideas and new consciousness spreads in societies and the roles of innovators, change agents, early adopters , etc.([1]

* Coping with change models drawn from a diverse variety of sources such as theories of organisational change and management and the grief work of Elizabeth Kubler-Ross.

* Non-Violent Social Barometer model can be a tool for strategy building and analysis. (Shields 1991 p. 54)

* Tools such as Structural Analysis and Lewin's Force Field Analysis (Coover et al 1977) can assist in developing a wider perspective on the problem and forming appropriate strategy.

[1]Atkisson. Alan "Innovation diffusion game" IN CONTEXT Magazine No 28

Workshops from 1 hour to several days can be designed using these models as tools for learning and exploration.

4. Developing or maintaining group morale / motivation

Developing a good Task / Maintenance balance

Groups can become overly focused on the task at hand - especially when the task is preventing environmental destruction - at the expense of the maintenance of individual and group well-being. This means paying attention to how things are done not only what gets done particularly in terms of attending to group process that maintains interpersonal relationships and work satisfaction. Attention to group maintenance whether it be in meetings or daily activities can help to sustain your group for effective work in the long haul.

Building Team Relationships

Good teamwork can be one of your most effective tools for making a difference. Understanding and valuing the individual needs, skills, talents, resources and styles of working and communicating which each person brings to your team can help each person to do their best work. Your team can then synergise these energies for maximum effectiveness. There are many options for training and support for team building.

Resolving Conflicts and Improving Communication

Nothing saps the energy like unresolved conflict, or confuses an issue like misunderstanding and mis-communication. Good techniques for communication - both oral and written - and for resolving inevitable conflicts, will help your group to function effectively. Groups that see conflict as an opportunity for development rather than as something to be avoided, are more likely to flourish. Basic training in conflict resolution skills can be a good in investment maintaining the group. Taking time to resolve conflict, if necessary with a neutral third party mediator or facilitator can prevent serous damage to group morale.

Celebrating Successes & Achievements

Too often our successes and achievements are overlooked in the rush on to the next thing. In the world of environmental activism, where there are many setbacks, it is vital that the group does take time to celebrate, to validate achievements and provide impetus to carry on.

All of the training areas above have links with effective planning & evaluation, stress management and burnout prevention, time management, etc.

Exercises

1. See rating scale "**How well does your group empower its members?**" this could be used as a focus activity for the group to evaluate peoples satisfaction in a number of key areas.

2. Topics for a group brainstorm and/or discussion:

> *"What do you find motivating?*
> *"What, in our organisation, saps motivation?*

3. **Group Feedback Exercise**: the purpose of this exercise is to give a simple format to evaluate and share personal experiences of being part of a group. It also helps build understanding and support within a group. Take it in turns, with no interruptions or discussion:

> *"What is good about being part of this group for me......"*
> *"What is hard about being part of this group for me....."*
> *"What I would like help with is....."*(

For ideas on exercises that could be used to develop in these areas see Coover et al (1977), Shields (1991) and Jelfs (1982)

5. Processes and techniques to motivate and enrol non-active people

The fields of psychology, sales/marketing, health promotion and fundraising have developed a fairly sophisticated understanding of what motivates people that is applicable to environmental groups wanting involve new people. It can be very useful for groups to access knowledge and resources from these areas and translate them to the community based environmental activist setting.

This area of training involves methods and strategies to:

- Provide more than just information on the problems but to also provide well designed and appropriate conduits to action. (Culturally and sub culturally appropriate, suggesting action that is not too much ,not too little, motivating without pressure etc).
- Building rapport and communication with people from sectors of society your group members may not generally mix with.
- To assist new people to change their self image and perceive themselves as environmentalists.
- Providing welcoming and supportive orientation and follow through for new volunteers or donors.
- Providing training, clear expectations and support in overcoming obstacles to further action.

Resources for training in Flood & Laurence (1987), Covey (1989), Pegg (1993) and Shields (1991). See also resources for fundraising etc.

SUGGESTED READINGS AND RESOURCES

Andrews, J. (1994) Political Dreaming - Men, Politics and the Personal Pluto Press, Australia .
Coover et al (1977) (Reprinted many times since then) Resource Manual for a Living Revolution. New Society Publishers USA

Covey, S (1989) The 7 Habits of Highly Effective People, The Business Library, Information Australia, Melbourne

Flood, M & Laurence, A (1987) The Community Action Book NSW Council of Social Services

Green, T & Woodrow, P (1993) Insight & Action - How to Discover & Support a Life of Integrity and Commitment to Change, New Society Publishers, Philadelphia

Jelfs, M. (1982) Manual for Action Action Resources Group London.

Macy, Joanna (1983) Despair & Personal Power in the Nuclear Age, New Society Publishers, Philadelphia

Macy, Joanna (1991) World as Lover, World as Self, Parallax Press, Berkeley, California

Moyer, Bill: The Movement Action Plan & The Practical Strategist. Social Movements Empowerment Project, San Francisco

Peavey, F (1986) Heart Politics, New Society Publishers, Philadelphia

Peavey, F (1991) By Life's Grace: Musings on the Essence of Social Change, New Society Publishers, Philadelphia

Pegg, M (1993) The Positive Planet - People Who Work to Build a Better World, Enhance, UK

Seed, J; Macy, J; Fleming, P; Naess, A (1988) Thinking Like a Mountain - Towards a Council of All Beings New Society Publishers USA.

Shields, Katrina (1991) In the Tiger's Mouth: An Empowerment Guide for Social Action, Millennium Books, Newtown, NSW (& New Society Publishers USA 1993).

16.2 STRESS MANAGEMENT & BURNOUT PREVENTION

Presenter: Katrina Shields

Why is training / workshopping On this topic needed?

High stress levels and burnout are very common among environmental activists - both paid and voluntary workers. High stress levels are, obviously, bad for individuals, for those close to them, and for the organisations in which they work. Turnover can become high, with loss of skilled and experienced people. Stressed people are not effective and can often create conflict and contribute to low morale. They also often act in ways which make it unattractive for new members to join the organisation. Cynicism, negativity and rigid thinking are side effects of chronic stress. Serious anguish and long term physical, emotional and motivational effects that are suffered privately are not unusual amongst activists who have worked for several years.

Taking care of the part of the environment over which we have the most control - that is, ourselves, is a vital part of effective activism. Putting some attention into stress management and physical, emotional and spiritual renewal is, to use Covey's analogy, "taking time to sharpen the saw".

Symptoms of long term stress and burnout

Physical
- Chronic tiredness - sleep does not refresh
- Decreased immunity - susceptible to colds, flu, allergies
- Aches and pains in joints, muscles, stomach or back
- Sleep affected - hard to get to sleep or wake early
- Weight loss / weight gain
- Decreased interest in sex

Behavioural
- Withdrawal and isolating oneself from friends and colleagues
- Rejecting help
- Lack of effectiveness
- Paranoid reaction, overly suspicious of others
- Not turning up to work / keeping commitments/decreased responsibility / professionalism

Mental / Emotional
- Depression
- Rigid thinking, lack of problem solving ability
- Resentfulness
- Negative mind set and irritability
- Crying or getting angry easily and inappropriately
- Forgetfulness
- Anxiety

Spiritual
- Cynicism about previously valued things
- Devoid of joy and unable to laugh
- Sense of futility and loss of meaning
- Inner sense of emptiness - nothing left to 'give'

Which of these symptoms if they occurred in your life would you certainly pay attention to and motivate you to change the stressful pattern that caused it?

Burnout Rating Scale

Think over the past 3 months and score the following questions according to how often you have experienced these symptoms.

Score:	0 = Never	3 = Sometimes
	1 = Very rarely	4 = Often
	2 = Rarely	5 = Very often

Adding up your total score will give you some indications whether you are likely to burn out or not.

1. Do you feel fatigued in a way that rest or sleep does not relieve?
2. Do you feel more cynical, pessimistic or disillusioned about things you used to feel positive about?
3. Do you feel a sadness or emptiness inside?
4. Do you have physical symptoms of stress, eg insomnia, stomach pains, headaches, migraines?
5. Is your memory unreliable?
6. Are you irritable or emotional with a short fuse?
7. Have you been more susceptible to illness lately, eg colds, 'flu, food allergies, hay fever?
8. Do you feel like isolating yourself from colleagues, friends or family?
9. Is it hard to enjoy yourself, have fun, relax and experience joy in your life?
10. Do you feel that you are accomplishing less in your work?

Scoring:

0 - 15 You are doing well.
16 - 25 Some attention needed, you may be a candidate.
26 - 35 You are on the road to burnout. Make changes now.
36 - 50 You need to take action immediately - your health and well-being are threatened.[2]

Contributing Factors To Stress.

There are many potential contributing factors to stress. They can be grouped in four ways: the nature of our work; personal or individual factors; organisational factors - the nature of our organisation (which the whole group and particularly the management is responsible for) ; and larger socio-political factors over which we have little control

Nature of our work

Much environmental work involves the following:

- Prolonged attention on disturbing and negative information and future projections
- Crisis work with a short term focus
- Apparent lack of results - sometimes unrealistic expectations due to lack of understanding of the long-term nature of social movements
- Working against resistance
- Lack of resources

Personal factors

These interact with stressors related to personal relationships, identity, state of health:

[2]Based on a scale developed by Freudenberger & Richelson cited in Jaffe & Scott 1984 :15

- Motives / sense of identity (who we are) / personal values are equated with what we get done (or are seen to be doing)
- Accumulation, of emotions that are not dealt with for instance: grief, disappointment, conflict, uncertainty, frustration and obsession
- Denial of basic needs, for example the needs for adequate nutrition, exercise, sleep, time-out, recreation, creativity, intimacy, spirituality, or privacy
- Lack of personal planning / time management skills
- Inability to set boundaries and limits - staying focussed and effective (see page on effective stress managers / passive victims of stress

Organisational factors

- A group culture or ethos (often set by role models) of working too hard, competitiveness, overly-task focused, with a low process orientation
- Lack of clear and achievable goal setting, prioritising or realistic expectations
- Lack of review, evaluation, feedback or celebration
- Low team morale or support for individuals
- Unresolved conflicts or unawareness of oppressive attitudes or practices
- Chaotic, noisy, cramped or unaesthetic work environments
- Insufficient induction to jobs/roles and/or lack of training

Sociopolitical factors

- Patriarchal values such as: an attitude that workers are expendable, focussing on feelings or relationships is a waste of time, productivity is everything etc.
- Lack of resources for environmental work
- Early stages of a campaign or setbacks, etc
- Larger political climate

Qualities of Effective and Ineffective Stress Managers

Active Stress Manager	Passive Victim of Stress	Self Assessment
Puts energy into areas that can be managed	Leaves many things to chance or fate	
Anticipates and plans for the future	Does not think ahead. Does not set clear priorities	
Reservoir of time, energy for the unexpected, unplanned and crisis events	Faces deadlines by cramming at the last minute	

Accurate perception of both threats and support from the environment	Sees environment as threatening
Takes time to evaluate alternative strategies	Lets problems accumulate
Adapts a strategy to reduce stress directly	Compulsive, stereo-typed responses to all threatening stressful situations. Increases level of stress with his or her reaction
Takes care of self and body. Avoids over-loading capacity by pacing & relaxing	Lack of pacing, self care or diversion
Seeks help and support as much as possible	Works alone, does not call on resources
Manages time by focussing on priorities	Takes on tasks that cannot be completed or are overwhelming

Personal Strategies for Managing Stress

Alter / Remove Stressors

- Learn to recognise / anticipate your potential stressor
- Remove yourself from stress inducing situations if feasible
- Take action to manage your environment
- Take organisational / political / social action
- Build up conflict resolution / communication skills
- Life planning, eg set priorities
- Manage your time

Reduce Individual Vulnerability & Build Resistance

Develop self exploration / self awareness to rework attitudes, beliefs and self talk

- Talk, investigate check out perceptions
- Increase self confidence and assertiveness skills
- Improve social supports
- Balance work and leisure
- Get enough sleep
- Improve health status through nutrition and exercise
- Decrease use of alcohol, drugs, caffeine and nicotine

Reduce Impact of Stress Reactions

- Recognise symptoms - link to causes
- Modify negative self talk and self criticism
- Learn and use calming techniques and stress releasers eg:

  Relaxation training

  Meditation

Massage
Exercise

- Give priority to self renewal activities
- Be willing to seek professional help and other support
- Increase the amount of fun!

Preventing Stress & Burnout as part of Organisational Culture
Some Recommendations

1. Create a group culture / ethos that supports self-care, balance and sustainable work loads and patterns.

2. Take a long-term perspective of planning and working for the long haul, to keep experienced / skilled group members for as long as possible.

3. Balance task focus with process and relationship / maintenance focus - in meetings, in daily work, in planning, and in evaluation.

4. Provide workshops / training in stress management and burnout prevention - can be as part of conferences, gatherings or ongoing training / orientation.

5. Use regular planning and evaluation as a tool to reduce stress.

6. Build stress level checks into reviews and evaluations - how stressed do people feel? What is contributing? What do we need to do about these?

7. Put stress prevention strategies on the agenda for meetings.

8. Allow people to express feelings of distress, grief and loss and frustration - regard them as normal and healthy responses to unhealthy situations and state of the world.

9. Provide individual or group debriefing after critical incidents or high stress campaigns. Keep an eye open for vulnerable individuals and see intervention as valid.

10. Create support structures, eg supervision, mentoring, support / affinity groups, larger group workshops.

11. Put value on socialising, fun, humour, relaxation time as a group.

SUSTAINABLE ACTIVISM Goals and Resources Worksheet

1. Goals and Priorities In order to be effective in my work, sustain myself and enjoy a balanced life what I will change is:

2. Action Plans Exactly what I have to do or find out (who, where, when etc.) to put these into action is:

3. Support The people I need support or cooperation from, or to communicate with to assist my action plans are:

4. The ways I might **sabotage** my changes are:

5. What I will do about my goals in the next **48 hours** is:

6. What I will do in the next **2 weeks** is:

7. What I will do in the **next 3 months** is:

8. I will **reward myself** for achieving my goals by:

Suggested Readings
On Stress Management And Burnout Prevention

Shields, Katrina (1991) In the Tiger's Mouth: An Empowerment Guide For Social Action, Millenium Books, Newtown, NSW

Oriented to social change activists, and contains worksheets and exercises that can be done individually or used to create workshops for groups. Deals with personal and organisational aspects of burnout prevention and recovering from burnout. Also other aspects of working well together.

Green, T & Woodrow, P (1993) Insight & Action - How to Discover & Support a Life of Integrity and Commitment to Change, New Society Publishers, Philadelphia

Good ideas for creating support groups; how to create a "Clearness Process" for personal decision-making. And other useful tools.

Covey, S (1989) The 7 Habits of Highly Effective People, The Business Library, Information Australia, Melbourne

Covey, S & Merrill, A (1994) First Things First Simon & Schuster NY

Both the above provide good strategies for prioritising and working more effectively in all aspects of your life.

Ryan, R & Travis, J (1981) Wellness Workbook - Creating Vibrant Health, Alternatives to Illness and Burnout, Ten Speed Press, Berkeley Ca.

Encouraging self-responsibility for long-term wellbeing.

Jaffe, D & Scott, C (1984) From Burnout to Balance - a Workbook for Peak Performance and Self-Renewal, McGraw Hill, New York

A lot of good self-assessment tools and strategies, oriented to the business world.

17. TIME MANAGEMENT STRATEGIES

Presenter: Bobbi Allen

We cannot really manage time, only ourselves

SELF ORGANISATION

Diary system
A diary should include a place for planning as well as appointments and phone numbers. Try organising work into projects, including goals, time lines, resources, obstacles, 'how to' steps, daily to do lists, etc. Stay focused on the objective of your activity rather than on the amount of activity. Find ways to do as little as possible to achieve your objective.

Set priorities
Determine how urgent and how important an activity is. Allocate an 'A' for the must do's - most essential and most desired; a 'B' for need to do, but later; and a 'C' for things that could be put off indefinitely - try selective neglect!

Be efficient in your paper handling
Set aside an administrative time to handle correspondence, memos, phone messages etc. at the one time. File or transfer 'to do's' into a diary and re-cycle unnecessary paper. Don't handle paper more than once.

Try and do one thing at a time, and keep track of how long it takes
Instead of swapping activities, losing track and getting stressed, work on one thing at a time. When that is finished start another activity from the list. Notice how you currently spend your time - how long are things actually taking you? Identify time wasters and work out some solutions.

Make time for administration
Some work requires concentration and should not be interrupted. Find and allow administration time so non important things don't become urgent. (Close the door, go elsewhere, let people know what you are doing, and why.)

Be aware of your self-talk
What are you telling yourself about time? Do you need to change it into something that will make you feel in control, rather than feeling pressured?

Set Limits
Learn to say "No!" Limit setting is essential to effective work and self-management. Say "No" both to requests from others, and to the inner voice that drives you too hard and makes you take on too much. Re-schedule "interruptions" to a more convenient time. Stand up when someone "drops in".

DELEGATION AS A TIME MANAGEMENT TOOL

DELEGATION.....
doesn't mean abdicating your responsibilities!

It means achieving results by empowering and motivating others to carry out tasks, for which you are ultimately accountable, to a standard which you make clear.

This may mean that initially you have to put in a bit <u>more</u> time to give someone clear instructions, or to set up a system so that the task can be done by someone else - but it may save you time in the longer term.

Good delegation can be a way of empowering new staff and / or volunteers. Don't forget to give feedback - specific praise for what's done well and specific directions about what needs to be done differently.

Note how often the words "<u>clear</u>" and "<u>specific</u>" occur when we talk about delegation!

CAN YOU DELEGATE MORE?

For a specific task, ask yourself?

1. Is there someone who can do the task better than you can? Are you really benefiting from the expertise of your colleagues, staff, volunteers?
2. Is there someone who, while doing the task slightly differently to you, or in slightly more time, can still do the task adequately?
3. If you can't do the task until tomorrow, is there someone who can do it today?
4. Is there someone who would benefit from doing the task, in terms of their personal development?

Answering **YES** to any of the above indicates opportunities for delegation

HOW DO YOU SPEND YOUR TIME?

Think back to your last working day.

List the day's activities and note, in 15-minute blocks, how much time you spent doing them.

ACTIVITIES	TIME SPENT (each 15 mins)

Doing the right thing

List your organisation's goals (or your section's goals) and <u>your</u> main areas of responsibility.

ORGANISAT ION / SECTION GOALS	AREAS OF RESPONSIBILITY

TIME WASTERS

Individually, complete the following questionnaire, ticking the box that most closely applies to you.

	Item	Strongly Agree	Slightly Agree	Slightly Disagree	Strongly Disagree
1.	Other people always seem to come to me for advice				
2.	My work tends to pile up.				
3.	I never seem to have time to myself.				
4.	I spend too much time in meetings.				
5.	I always seem to be trying to do too many things at the same time.				
6.	I tend to put off unpleasant jobs.				
7.	I tend to lose or mislay papers, memos, etc.				
8.	I never have time to think				
9.	The telephone never seems to stop ringing.				
10,	I'm always writing letters, memos and reports.				

	Item	Strongly Agree	Slightly Agree	Slightly Disagree	Strongly Disagree
12.	I have to start and stop jobs frequently				
13.	I find it difficult to say 'No' to other people's requests				
14.	I have too much paperwork to deal with.				
15.	I'm always interrupted by other people.				
16.	My work space is disorganised.				
17.	Planning more work is difficult, others decide what I should do.				

TIME MANAGEMENT WORKSHEET

MY TIME WASTERS **SOLUTIONS**

Before Work:

Morning Session:

Lunchtime:

Afternoon Session:

After Work / Evening:

Weekends:

TIME AND LIFE MANAGEMENT
Covey's Quadrant II Approach

What is one thing you could do (that you aren't doing now) that if you did it on a regular basis, would make a tremendous positive difference in your personal life?
....
....

What in your work life would have similar results?
....
....

The day to day choices of what we put effort into, and what we don't get around to, shapes our lives and the influence we have on our world as much as anything else. We are always saying No to something, if we aren't saying No to the things which are not important to us **we end up saying No to the things which are important to us.**

We spend out time in either of 4 ways:

URGENT / IMPORTANT
Quadrant I

Crises
Time-bound projects

IMPORTANT /NOT URGENT
Quadrant II

Preventing problems, resolving conflict, relationship building, self-renewal / stress management planning

URGENT / NOT IMPORTANT
Quadrant III

Some phone calls
Some interruptions, some visitors
Some projects which are not important to us

NOT IMPORTANT / NOT URGENT
Quadrant IV

Pleasant time wasters that don't renew us
Some TV watching, fiddling, worrying

Don't assume because it is urgent that it is always important.

Note: Preventing problems, long range planning, preventative maintenance, relationship building, "Sharpening the Saw", taking time to delegate or train others, developing skills which will make you more efficient are all Quadrant II activities.

To get time for Quadrant II (important, not urgent) we have to be able to say No to some apparently urgent things. The essence of time management is to execute and organise around balanced priorities. This means creating a balance between the different roles we have in our personal, work and community lives.

We usually fail to do this in one of 3 ways:

1. Inability to **prioritise**.
2. Inability or desire to **organise** around these priorities.
3. The **lack of discipline to execute** around them, to stay with priorities and organisation.

Four Key Activities in Quadrant II Organising

1. **Identifying Roles** (in the personal, community, work areas of your life eg Parent, Manager of outreach project, Office Coordinator, etc.
2. **Selecting Goals** - select 2 - 3 important goals for the week for each of the roles. Some of them need to be Q II goal.
3. **Scheduling** - for the week ahead, don't rely on forming daily "To Do" lists in the morning. Incorporate appointments and commitments including those with yourself. Review commitments already made in the light of the current importance; you may want to cancel or reschedule some. Longer range planning over several weeks or months is useful.
4. **Daily Adapting** You may give tasks a priority rating, eg A B C or Top Drawer, Middle or Bottom Drawer or number them. This gives you a guide as the day unfolds and things do not flow as expected. Put first things first.

The key is to schedule your priorities rather than prioritise your schedule.
The primary focus of this time management tool is on people and results, not time per se.

Reference: The 7 Habit of Highly Effective People, Stephen Covey, The Business Library, 1990

SUGGESTIONS FOR TIME PLANNING / MANAGEMENT

Apart from forming your **weekly** activity plan, the following habits tend to be practiced by people who manage their time effectively. Remember the notion of effectiveness is based on **making time for the things which truly matter,** not just being able to cram in a lot of things into your day.

1. Plan time to prepare.

Many activities become urgent, stressful and less enjoyable as a result of lack of forward planning and pacing. Scan ahead.

2. Give yourself "time estimate" feedback.

To accurately estimate how long something **actually** takes has a big impact on our ability to plan and achieve. To improve this ability to give yourself feedback: jot down your estimate of how long an activity will take as you plan it, then after the fact go back and note **how long it actually took**. Over time you are then likely to get more realistic.

3. Use time zones.

Time zones are large, interchangeable blocks of time set aside for specific important activities. It is not an appointment or unmovable fixed commitment but acts as a focus for activities of a similar nature or related to a particular area, eg unstructured family time, reading time on work related matters, time to meet with colleagues. It also helps others to know when you might be available for particular purposes.

4. Keep “perhaps” lists.
If you have an insight or an idea about something related to one of your roles or goals that you want to keep track of, a perhaps list is the place to note them. You may not want to commit yourself to them yet or make a definite time to do them by. When you set your weekly or long range goals you can review these lists and select any you wish now to do.

5. Focus on daily priorities.
On your daily schedule you will have appointments or time bound activities noted; as well you can create a list of other activities that need to be done today or could be done today. Each day these can be briefly reviewed and a sense of their relative importance decided - you may mark them A B C priority or number them with 1 being the most important. This means as the day unfolds with its unexpected changes and interruptions you can keep refocussing on what is most important for me to accomplish today, then keep following them in that order.

Reference: “Connections - Quadrant II Time Management”, R & R Merrill, Publishers Press, USA, 1989

STAYING ON TARGET
BOBBI ALLEN
When you feel a sense of frustration and your mind starts to run around in circles as you search for answers, stop for a minute and ask yourself just what circles you’re running around in.

Circle of Concern
This is the large circle that encompasses everything that reaches your awareness and about which you have some feeling. This may include a goal you want to set for improvement in a particular role, your son’s plans for the weekend, offensive magazines on display at the newsagent, the Prime Minister’s foreign policy or why your co-worker spends so much time drinking coffee. Although these things may be valid concerns, you may or may not be able to really affect them. Your ability to do so is determined by whether or not they also fall into a smaller circle within your Circle of Concern, called the:

Circle of Influence
Your Circle of Influence defines the area of concern in which you can actually make a difference. While you may not be able to influence Australian foreign policy - at least in the short term - you can do what is necessary to set and achieve a meaningful goal in your life. In addition, you may have a good relationship with your son and be able to influence his weekend plans. But you may not have any immediate contacts that could help you to do something about those offensive magazines. On the other hand, if you think it’s really important that your co-worker spends less time drinking coffee, and if you have a good relationship with her, you may be able to do something about that - but is that really how you want to spend your time? You should be spending most of your time in your:

Centre of Focus
It is here that the things you are concerned about, that are within your ability to influence, **and that are in harmony with your deepest values and your most important goals** are found. This is the centre of your target of personal effectiveness, the “bull’s eye” of the effective management of your time and resources. Every time you hit the centre of that target, you maximise your time, talent and energy investment. Every time your aim is off and you land in some other circle, your personal effectiveness score takes a dive. Interestingly, as you concentrate your life within your Centre of Focus, your Circle of Influence automatically increases. You find in your growing personal strength the ability to affect more people and circumstances in positive ways. If you focus on your highest values and noblest purposes, you tend to see the world as an opportunity for noble accomplishment.

[Adapted from Merrill, A R & Merrill, R R (1987) Connections: Quadrant 2 Time Management, Publishers Press, Salt Lake City, Utah]

18. MEETING SKILLS

Presenter: Jayne Weepers

18.1 WHY FOCUS ON MEETING SKILLS?

I think meeting skills are crucial for the environment movement given the decision-making processes we generally use, the enormity of the issues we are grappling with, the inevitable short timelines, and the great range and diversity of people involved in many of our meeting forums.

Most organisations or groups use some form of participatory decision-making. We need to recognise that this form of decision-making is highly specialised and requires a lot of managing. Every person involved needs to be trained to use the decision-making process.

In the environment movement very few decisions are ever made by one person alone. As soon as you have more than one person making a decision then you have a meeting. Therefore, many of us spend a majority of our activist time in meetings. It makes sense then to learn how to use meeting processes to our best advantage.

Improving your meeting skills leads to :
* better decisions
* less time wasted
* less frustration and misunderstanding
* a better maintained and healthy group
* more time to do your job

It can be difficult to be both involved in the substance of a meeting and the process of a meeting. Obviously both are integral to a successful meeting, and neither should dominate the other. Without good process and good process-oriented people, meetings often flounder in detail and proceed with little sense of direction or outcome. This usually leads to intense frustration and boredom, or anger.

On the other side of the coin, the process needs to be adjusted to the needs of the meeting. There is also nothing as frustrating as an over-processed meeting where nothing actually gets achieved because the process became the end rather than the means.

18.2 WHAT MAKES A GOOD MEETING?

This applies to meetings which are participatory and require decisions of some kind. Public meetings or other meetings primarily for information sharing require different preparation.

The essential ingredients of a good meeting are :

1. A clear decision making process
2. A carefully crafted but flexible agenda, including shared goals and process tools
3. A skilled facilitator who wrote or understands the agenda
4. Other process-oriented people in the group

Without these four ingredients any meeting will have a more difficult time than is necessary.

18.3 DECISION MAKING PROCESS

Most groups you will encounter are using formal or informal versions of consensus decision making. Without going into detail, here are the basics of consensus. Regardless of the decision making process, you will find that good meeting skills will help in any situation.

What is consensus decision making?

Consensus decision making is building united judgement; the decision everyone accepts that reflects the best thinking of the group. It is firmly based on group trust.

Why use this form of decision making?

- decisions are made without voting. There is no 'losing' and 'winning' side. It achieves a stronger decision than voting; people will share and own the outcome.
- it allows the airing of many viewpoints and synthesising these, rather than choosing one idea over another.
- it aims at persuasion not coercion
- it provides an opportunity for everyone to participate, the meeting process is inclusive not exclusive
- a better decision is made by working thoroughly through the issues
- it affirms the group's ability to think as a group rather than considering proposals from individuals and then compromising
- consensus encourages openness and honesty

Consensus does not require that every member agree with the proposal unanimously. Keeping the best interests of the group in mind, some people may agree to disagree. In this way the group is able to move forward. The integrity of the group is more important than any one issue the group may face.

Consensus Rights and Responsibilities

Rights.

As a participant in the consensus decision making process, you should :

- have a clear understanding of the decision making process and agenda
- be able to contribute and air your views
- feel listened to and respected
- be able to access necessary information (in or out of the meeting time)
- be able to block consensus
- Someone may feel very strongly or morally obliged to block consensus. In this instance the group will be unable to move forward. The group must hear this person, they may be right. Blocking of consensus must be taken very seriously by the individual and the group.

Responsibilities

As a participant in the consensus decision making process, you have a responsibility to :

- listen to and respect others
- work constructively towards solutions
- come prepared and briefed
- understand that you may need to compromise
- understand that an inclusive meeting does not mean that every person needs to participate in all decisions. Delegated decision making is often used in consensus, and requires group trust and respect.
- understand the process, identify process problems and work to change them.
- abide by meeting rules and understandings
- watch and learn process skills

The consensus process

Put most simply the consensus process works like this :

- an issue is brought to the group and worked into a proposal
- clarification is sought on the proposal
- the proposal is discussed and concerns raised
- differences and disagreements as well as similarities are drawn out and encouraged
- the proposal may be modified or adapted
- the group discusses a new proposal based on ideas raised in discussion
- the group reaches a decision that is acceptable to all in spite of reservations or differences.

The Safe Meeting Environment

People need to feel they are in a safe meeting environment in order to make good decision. This is most important if the meeting is discussing difficult issues. Attributes of a safe meeting environment include :

- Confidentiality
- Affirmation
- Trust
- Respect
- Friendliness and openness
- No personal criticism
- Active listening
- Active participation
- Everyone able to see everyone's face
- No interruption

By forming meeting agreements about behaviour at the beginning of the meeting it gives participants and the facilitator guidelines about what is acceptable to the group. The facilitator should enforce the guidelines gently at first, and more strictly as the meeting proceeds.

18.4 FACILITATION SKILLS

What is this mysterious thing called facilitation?
It really isn't that hard. A facilitator helps members of a meeting decide what it is that they wish to accomplish and then helps them carry this out.

A good facilitator should :

- have a meeting process ready to propose to the group, or have been thoroughly briefed by an agenda group if the agenda process was being prepared by others
- ensure everyone agrees and understand the meeting goals and agenda
- allow the agenda and processes to evolve
- make the group aware that they are in charge, that it is their business being conducted and that each person has a contribution to make.
- not be shy about guiding the meeting, people will expect it not resent it.
- not let people off the hook. As the facilitator there is only so much you can do. It is also up to the participants to make the meeting a success
- know exactly who the participants are and have done some research about their likely positions and views.
- have determined issues of great concern, undercurrents or personal interactions that will affect the meeting, and have some skills and strategies for handling difficult situations
- identify as quickly as possible the process-oriented people in the meeting, and use their skills and support
- test for consensus and push forward towards decisions
- be constantly clarifying what the session is trying to achieve. If you are having an opened ended discussion on a topic and are not hoping to reach any decision - then define it as that. Otherwise participants will feel frustrated and also feel that the session has failed, when in fact it may have achieved exactly what was intended.
- be careful not to impose her/his own meeting rules and standards.
- always take a speakers list. Read out the list so that people know they are on it and how long they have to wait. This saves a lot of frustration and anxiety that they have been ignored.
- gently enforce the meeting guidelines as defined by the meeting
- encourage people to present their viewpoints
- make observations about group dynamics and help keep the meeting balanced

An effective facilitator will have :

- little emotional investment in the meeting

- an understanding of the goal of the meeting
- an ability to encourage others to participate
- an ability to encourage the group to take responsibility
- a commitment to demystifying the role of the facilitator
- energy and attention to the job at hand
- a commitment to keeping the group to time limits

The qualities of a good facilitator include :

- NEUTRALITY. Though they may contribute to discussions and make suggestions, they should not manipulate the meeting to bring about a particular outcome.
- GOOD LISTENING SKILLS. Including reflective listening and strategic questioning
- RESPECT for the participants and confidence that consensus can be reached and good solutions found.
- INTEREST in what people have to offer
- ASSERTIVENESS that is not overbearing - to know when to intervene decisively and give some direction to the meeting.
- CLEAR THINKING AND OBSERVATION of the whole group. This requires a split attention to the content of the discussion and the process. (Constant evaluation is required of the progress of the meeting compared to aims of the session.)
- FORWARD THINKING. Always be thinking through the next step in the process. If the process becomes unclear it may be easier to have a break and sort it out than to stumble slowly without a clear process.
- UNDERSTANDING of what needs to be achieved.

TESTING FOR AGREEMENT

With large groups or groups where there is a fair amount of conflict, it is particularly crucial that the process of testing for agreement is done clearly and formally. If you let this slip it will definitely come back to haunt you.

- test as soon as a decision seems to be emerging. Periodic testing will clarify disagreement.
- Always restate the proposal. Don't just ask, “do we all agree with that?"
- Ensure everyone understands the proposal
- Insist on a response from the group. Do not take silence as consent. Individuals need to be conscious of what they are doing.
- It may help to put the question in the negative, " does anyone disagree with ... ?"
- Ask the minute taker to read out the decision.

Dealing with Disagreement- PROCESS

- Don't get flustered
- Have a sense of the numbers of participants that disagree. Some proposals do not reflect the areas of agreement that were coming out of discussion. Abandon those proposals immediately and go back to general discussion before trying to put another proposal.
- If a small number of people disagree with the proposal, then ask them to restate their specific concerns, sometimes people are misunderstood.
- Allow discussion and see if it is possible to retest the proposal, or amend it to everyone's satisfaction.

If the disagreement is becoming more intense rather than moving towards a constructive solution, here are some options :

- Agree to disagree. You only have this option if the issue is not urgent or genuinely doesn't require whole group agreement.
- Send a small group away from the larger forum to deal with the disagreement and present a proposal back to plenary later
- Give the group a break to refresh. Check the process as a fresh approach may resolve the problem.
- If only one or two people are blocking ask them to stand aside to allow the group to move forward. (Perhaps do so quietly aside from the large group) Suggest that their views be clearly expressed in the minutes.

Dealing with Disagreement - STYLE

Meetings progress beautifully and you may be cruising along as a facilitator until you reach a point of disagreement. My hints for facilitator's style are :

- remain very calm
- use small strategies like asking the group to be absolutely silent for two minutes to think through the issue
- give the group and yourself a break if it is getting too demanding
- be absolutely strict. This is the time to enforce meeting rules, such as no personal criticism, no interrupting, be constructive etc.
- if the main opponents are getting genuinely angry and no end is in sight, do not let them impose this on the whole group. Use the process options suggested above.
- feel justified in being strict by remembering that a participatory and good meeting does not feature three people battling it out and boring everyone else to tears!
- be reassuring. Disagreements are a normal part of meetings.
- be positive, remind participants of what has been achieved during the meeting, or that you think they are dealing with the disagreement well.

18.5 APPROACHING AN AGENDA

A good agenda is the key to a successful meeting. Formulating an agenda before the meeting starts is crucial, even if it changes significantly throughout the meeting.

In formulating the agenda you are defining overall goals plus session objectives, thinking through processes to get there and checking time constraints.

Here is a short list of some process tools which can be used in your agenda to assist the group to function better. Learning which tool to use and when is something you will learn with time and experience. Watch other facilitators and copy their techniques.

Process tools :

- Open discussions (to air all views and develop proposals)
- Divide into small groups (vastly increases participation, people get to know each other better, can more easily work through contentious issues)
- Brainstorming (creative ideas, no need to justify, stimulates discussion)
- Role plays (exploration of taking on other people's roles. Watch out role plays need to be used sparingly they can drive people mad)
- Fishbowl process. (Very handy for contentious issues that everyone wants to participate in. Have a chosen and trusted small group (the 'fish') making the decision, with a larger circle of people watching, (the 'bowl'). The 'bowl' people are given regular opportunities to input to the 'fish', but are not a part of the decision-making process.)
- Delegated decision-making. Sometimes very contentious issues can become impossible to solve in the large group. The large group can choose a small group of trusted representatives and send them off to make the decision. It needs to be clear that this decision is then binding on the large group.

For every meeting session ask these questions :

- WHAT do we have to achieve
- WHEN do we have to have it done?
- HOW are we going to do it?

A good agenda is not :

- a list of topics that need discussion
- something that you impose on the group and stick to rigorously

Sample Agenda of Day 1 of a two day planning meeting.

9.00	group introductions, maybe a warm-up game or exercise
9.20	check the roles of facilitator, minute-taker, and timekeeper are allocated
9.30	facilitator to check people understand the decision-making process being used, and ask meeting to create guidelines for a 'safe' meeting environment.
9.45	agenda review - Review aims of the meeting if it is the first day, plus aims of the day.
10.15	SESSION 1. Group discussion in plenary (no decisions required) - one comment from everyone around the circle about how they feel about the issue - brainstorm strengths and weaknesses - time for general discussion and observations
11.15	TEA BREAK/EXERCISE
11.45	SESSION 2 Divide into small groups. Groups to work towards proposals re solutions for the weaknesses and building on the strengths. Small groups to allocate a reporter and come back to plenary with clear proposals.
12.50	Quick plenary to regroup. Check that groups have progressed and are ready to report back after lunch.
1.00	LUNCH Agenda setting group meets
2.00	SESSION 3 Small group report back and question time. Devise a process for dealing with small group proposals. The most obvious being to get plenary to identify common themes and work on those first. Presumably this is a key decision-making phase.
3.30	TEA/EXERCISE
4.00	SESSION 4 Dealing with the issues of difference. This section needs to be kept positive and solutions-oriented. Have a process ready. Maybe back to small groups after some plenary discussion or a fishbowl process. Groups to work towards proposals.
5.00	SESSION 5 Plenary for : - evaluation of the day - housekeeping/cleaning up - clarify arrangements for the next day