

What New Members Need to Know

History and Background of the Organisation

Find out how the organisation was established and in particular why it was established. Who was involved and what were the issues or priorities at the time? What has changed (if anything) to bring the organisation to where it is at present? Sometimes this information will already be available in written form - perhaps prepared for a previous funding application, or a previous Annual Report. This information, even photographs (many organisations keep scrapbooks), will help set the scene for new members.

Objects (purpose) of the Organisation

It is vital that you are fully familiar with the objects (aims and objectives) of your organisation. The aim will be a broad statement about why the organisation exists (an overall statement of intent). The objectives will be more specific statements about what the project hopes to achieve. Find out what the organisation aims to do - for whom, where and how? (This is sometimes known as the mission statement) What are the exact needs that your organisation is addressing and what services are provided to meet these needs? What does the organisation believe in? What is its value base? This information should be available in written form. It is useful at this stage to find out if your organisation is a charity and what this means.

Governing document of the Organisation

Get yourself a copy of the organisation's governing document (e.g. constitution). This will set out the organisation's objects and the powers it has to carry these out. The governing document is a set of rules which govern the organisation and establish the framework for the decision-making and management of the organisation. The governing document is useful for finding out procedures for general meetings, election of committee members, election of officers and how committee meetings are called. Below is a checklist of what to look for in your governing document.

- 1 **The Objects:** What you aim to do and who will benefit (the beneficiaries). It will also establish whether the organisation is charitable.
- 2 **Area of Benefit:** This describes the geographic area you will cover - local, regional, national or international.
- 3 **Powers:** What you are allowed to do to pursue your objects.
- 4 **Membership:** Who can be a member of the organisation. Subscriptions and how membership is organised.
- 5 **General Meetings of Members:** Rules for holding and running Annual General Meetings and Special or Extra-ordinary meetings.

6 **The Management Committee:** Rules for the appointment or election to the committee, and procedures for running the committee. Includes size and composition of committee, election of officers, and procedure for setting up sub-committees.

7 **Finance:** Rules for managing money including when the financial year will run from and how many signatories are required on cheques. Also should state whether the annual accounts should be audited or independently examined.

8 **Alterations to Constitution:** How to change the rules of your governing document at a General Meeting.

9 **Indemnity:** Provision to indemnify committee members of the organisation against liabilities incurred through doing their job properly. This does not protect against liabilities arising from breach of trust, fraud or wrongdoing and is usually limited to the assets of the organisation.

10 **Dissolution:** How to wind up the organisation and in particular what will be done with any funds remaining after liabilities have been met.

Structure of the Organisation (legal)

All organisations have a legal status i.e. how they are defined by law. Your legal status affects what both the committee and organisation are allowed to do. Find out what type of legal structure your organisation has. There are four common structures for voluntary organisations.

1 **Association:** An unincorporated association is a democratic, member organisation governed by a constitution. It is cheap to set up and run but has no legal identity and members can be made personally liable.

2 **Trust:** A trust is governed by a trust deed which appoints named individuals to manage the organisation. There is no member involvement or legal identity and trustees can be made personally liable.

3 **Company limited by guarantee:** A company is a flexible democratic structure governed by memorandum and articles of association. It has a legal identity and therefore can own property and take or defend legal action. Although more expensive and bureaucratic to run, it offers members limited liability i.e. protection from personal liability in certain circumstances.

4 **Industrial and Provident Society:** An industrial provident society is a society carrying on a business or trade for the benefit of the community or a co-operative society for the benefit of the community. Its governing document is known as rules. It has a legal identity, member involvement and limited liability but the rules can be inflexible and are expensive to register.

Structure of the Organisation (management and staff)

The simplest thing for you to do, to get a picture of the structure of the organisation in terms of management and staff, is to sit down with either the Chairperson of the Management Committee or the Director of the organisation and draw a chart/flow diagram of the staff structure within the organisation. This could be hierarchical with a Director at the top, then a number of tiers with different departments and managers within each of these, or it could be completely flat with no one manager in charge. Where and how does the Management Committee fit into this structure? Find out if the staff have team meetings and/or if management have separate meetings. Is there a system for reporting back to the Management Committee? The Management Committee is responsible for developing and maintaining a staff structure which enables the organisation to meet its objectives, so make sure you are clear about how it works.

Tour of Building and Any Outside Projects

It may sound obvious but a good induction involves becoming familiar with all aspects of the organisation's premises. Apart from giving new committee members an insight into the building they are managing, it is an ideal opportunity for members to see staff and volunteers at work, and get an idea of the kind of conditions (good or bad) that they may be working under. When doing this, induction should include *all* projects, bearing in mind that many may take place away from the main building. Only then can the Management Committee get a true picture of the organisation they are working for! Don't forget also, committee members must know where *their* meetings are held, where to park their car, hang coats, where toilets are, where the kitchen is and any health and safety rules that apply when they are in the building.

Introduction to Staff and Volunteers

When being shown around the building it is ideal that new committee members are introduced to staff and volunteers. Finding out a little about what staff and volunteers do and how their project fits into the wider picture is a useful exercise. You may not remember everyone's name but at least having met them will jog your memory if that person or project is referred to at a subsequent committee meeting. Having longer meetings with key members of staff would also be useful both in establishing relationships and obtaining vital information about the work of the organisation.

Roles of Staff and Job Descriptions

Once you have met staff and have learned a little about their roles, get copies or sample copies of the range of job descriptions and familiarise yourself with them for future reference and greater understanding of what personnel the organisation requires.

Contracts of Employment and Personnel Procedures

Familiarise yourself with contracts of employment of all staff and the sorts of agreements made with volunteers. Find out what personnel procedures are already in place. You are after all - the employer.

Annual Reports

Previous Annual Reports will probably be one of the most effective ways of finding out about many aspects of the organisation's work. It would be recommendable to read Annual Reports quite early on in the induction process, even before meeting staff as they will give information about each project or department, special events, funders, current accounts etc. Anything that is still not clear can be noted down and clarified when meeting either staff or committee members.

Funding Arrangements and Current Finances

It is vital that you know exactly *how* the organisation is funded. Who are the main funders? Who was approached for funding but declined? What amount of money has to be raised through the organisation's own fundraising efforts? Where there are several new members, e.g. after an AGM, some form of meeting, maybe even an informal get-together, with funders could be helpful. Familiarise yourself with the previous years' accounts and the current finances. If you are new to accounting, arrange a meeting with the Treasurer of the committee to talk you through the budgeting systems.

Policy Statements of the Organisation

Get yourself a copy of all policy statements that the organisation has written e.g. equal opportunities, health and safety, policy for involving volunteers.

Strategic/Development and Operational Plans

The organisation may already have a development plan drawn up for the next three years. It is important that the whole committee is aware and indeed involved in it.

Organisation's Networking Systems

It is useful to find out how the organisation links into other similar organisations, maybe even national bodies. Is the organisation affiliated to or represented on other agencies or groups? How does the organisation relate to other voluntary or statutory groups within the local community and environment in which it operates? Are they supportive of the services your organisation provides? This kind of information will assist you in building up a profile of the organisation you will be managing and in developing other contacts/links through the course of your work.

Voluntary and Statutory Sector Policies and Terms

If this is your first time on a voluntary management committee or indeed your first insight into the voluntary sector - be prepared to learn "the lingo". Find out immediately what any abbreviated terms stand for or what particular jargon means e.g. "Trust Status", "Purchaser/Provider split". Don't be afraid to stop someone who is speaking and ask them to clarify jargon or abbreviations! Find out if there is government policy and legislation which is impacting on your organisation, what it means and how the organisation is adapting to meet it e.g. Disability Discrimination Act, Equality legislation.

