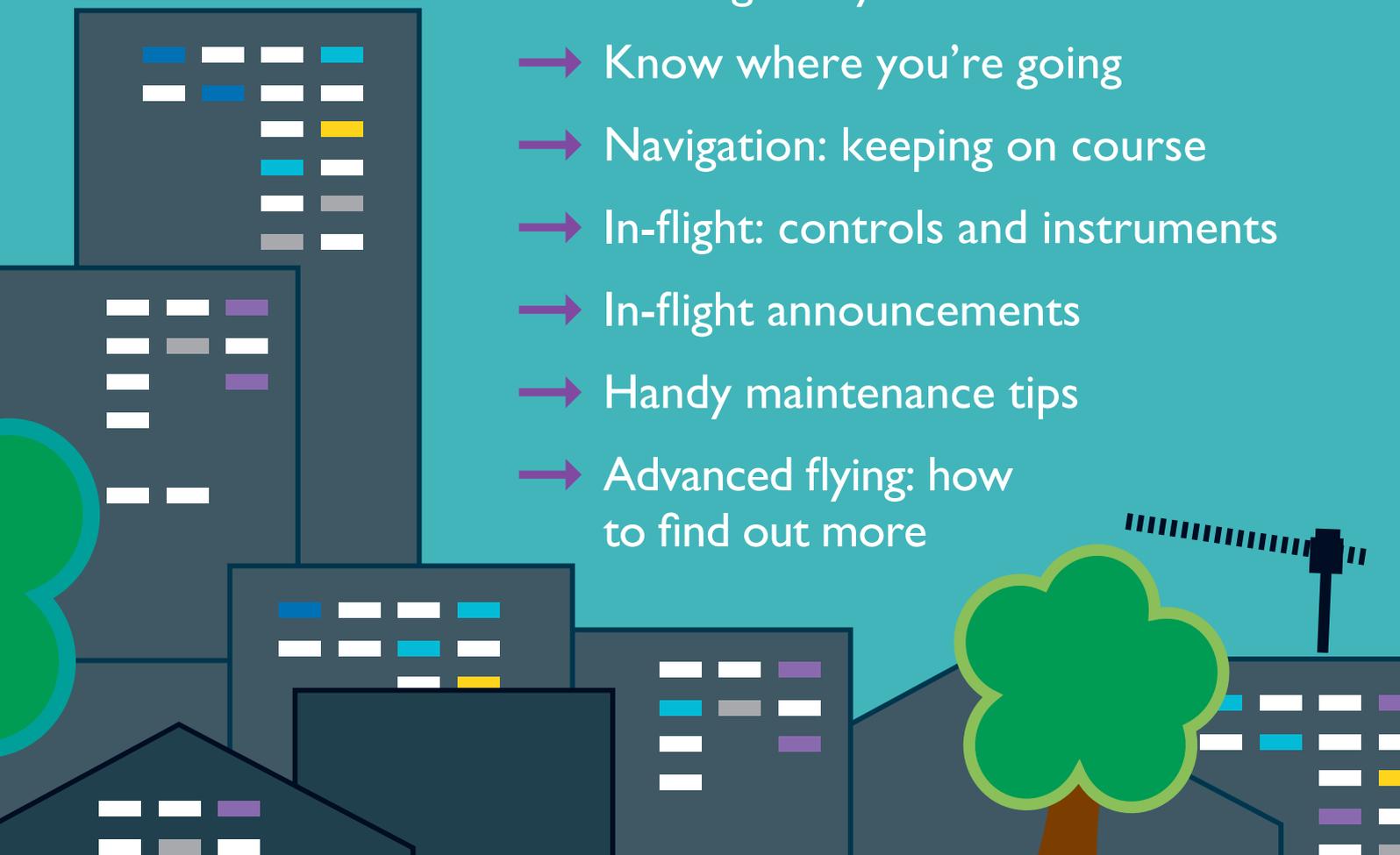# Learning to fly

Piloting your local voluntary or community organisation

→ Flight manuals

→ Air traffic control

→ Getting ready for takeoff

→ Know where you're going

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→ In-flight: controls and instruments

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Learning to fly

Maybe you've just set up a local organisation to make a difference to your community. Maybe you're involved in one that's been running for some time, and have just joined the Committee or become one of the Trustees.

Does it sometimes feel like one of those dreams? Where you're flying a plane, but you don't really know how? Which of those dials says what? And how do you make it go up or down?

Running a local group can be just as complicated as flying a plane. There are rules, regulations and procedures, people to keep happy, and plenty of things that can go wrong. It can all seem very complicated, when all you wanted to do was help the local community.

The good news it doesn't have to be that difficult. First of all, you're not a solo pilot, but part of the Committee team. There are clear guidelines on the best ways for a Committee to run a local organisation. And there are plenty of organisations out there whose job is to help you.

Read this leaflet to start getting your organisation ready for take-off.

The National Hub of Expertise in Governance, June 2005

Sort out who does what

Be in charge: Like a plane, your group must have a pilot with ultimate responsibility for the organisation, and for the people it aims to serve. This usually means the Management Committee, or in some cases, the Trustees who oversee the Committee. This team must set the strategy, direct the work of the organisation and make the key decisions. It also needs to make sure the organisation is well-run, has enough money, and is doing what it was set up to do. If you are involved in the organisation's day-to-day work, you need to keep this separate from your work as a Committee member.
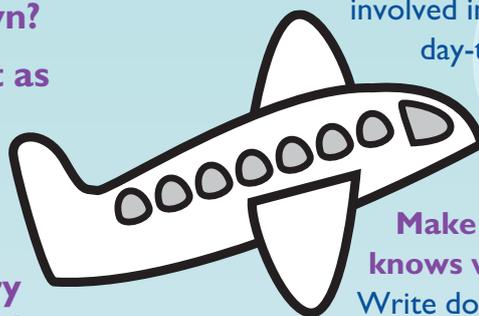
Make sure everyone knows what they have to do: Write down what everyone is supposed to do – staff, volunteers, advisers, and Committee members. These can be role or job descriptions, or just letters setting out the key points.

Delegate: Delegate the jobs the Committee can't do to other people, making sure that everyone knows exactly what they can and cannot do. You might need to take on staff, volunteers, consultants or advisers to make sure everything gets done. If you have a senior staff member, she or he should be the bridge between the Committee and the staff and volunteers. Get reports back from people working on behalf of the Committee.
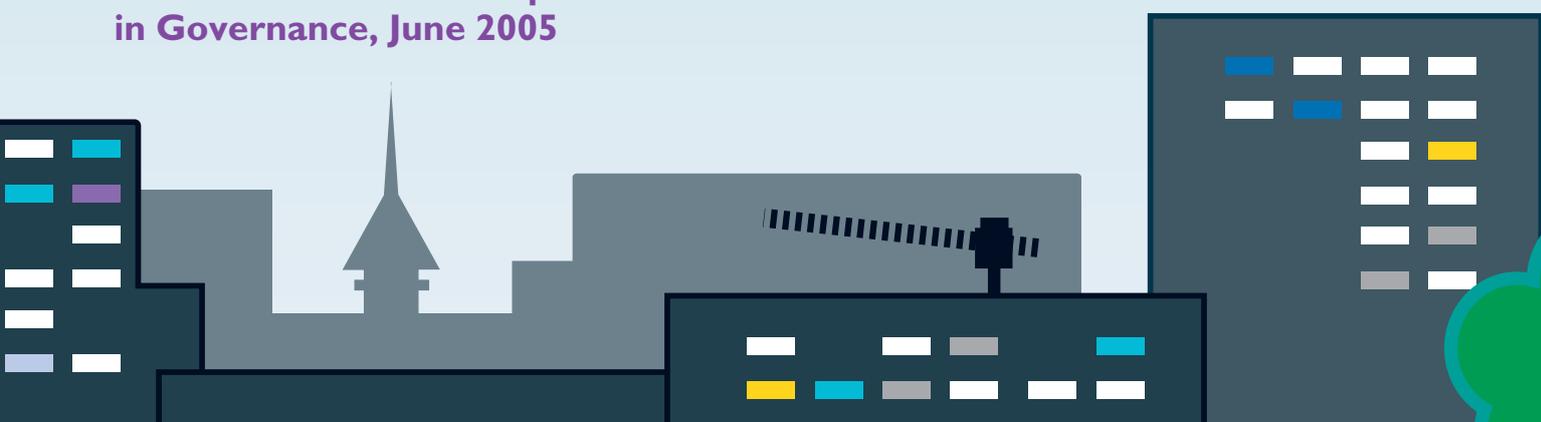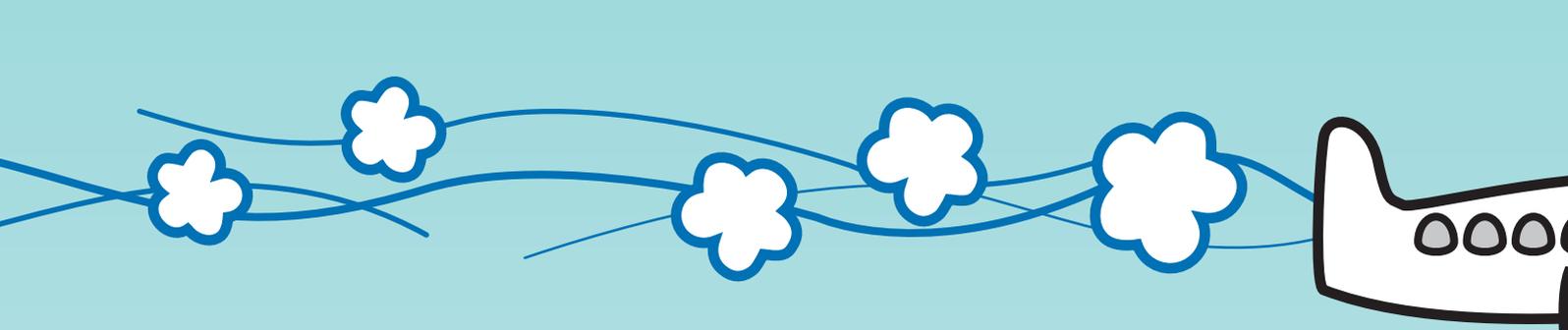
Read the flight manuals

Follow your own rules: If you have a legal governing document, make sure all the Committee members have a copy and understand it. Make sure that your meetings and the rest of the Committee's work follow it, for instance when it comes to electing new members. Always remember what the organisation was set up to do.

Get ready for takeoff

Get the 'house-keeping' right: Keep written records of meetings, and decisions taken on important issues. Set budgets for all areas of work and keep detailed financial records of all costs and income. Have policies and plans to guide everyone's involvement. If you employ staff, make sure they have proper contracts of employment.

Get the finances right: Set annual budgets, keep clear records, and publish annual accounts. Set rules for who can spend money and how much. Be especially careful when handling cash, when investing or borrowing, and with donations. Never commit the organisation to spending money it doesn't have.

Plan for problems: Set up fair ways of dealing with complaints and disputes. Make sure everyone knows about the procedures and how to use them.

Prepare for risks: Every organisation is sometimes at risk. Risk may affect property, assets, income, staff, volunteers, service users or the organisation's reputation. Get information about likely risks, and do what you can to avoid them or reduce their impact. If you can, take out insurance against major risks.

Seek professional or specialist advice when needed: Make sure you get independent advice about risks, important decisions and other major issues. Even the most qualified Committee may need financial, legal or technical advice to help them make good decisions.

Obey air traffic control

Check which laws and regulations apply to your organisation: This could be quite a long list, and you may need to get outside advice. Depending on what kind of governing document your organisation has, you might need to comply with the law on charities, companies or Industrial and Provident Societies. And depending on whether the organisation employs staff, and what kind of work it does, you may need to know about some or all of: employment law, health and safety, data protection, anti-discrimination, child protection, protection of vulnerable adults and more besides.

Know where you're going – keep on course

Know where you're going: Always remember what the organisation was set up to do, and what it's trying to achieve. Make sure the strategy supports the overall objectives.

Be organised: Be sure that all the Committee members understand their job, and that Committee meetings are well-run. The Committee needs to make sure that between
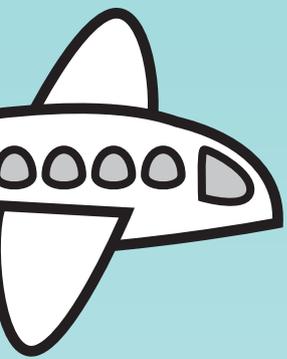
all its members, it has a good balance of skills, knowledge and experience. If Committee members need support or training, this should be arranged for them.

Keep it clean: Set up ways for Committee members to declare conflicts of interest, and for conflicts to be recorded and dealt with openly. Have a way for Committee members to claim fair travel and out-of-pocket expenses. Don't pay Committee members unless it's allowed by the law, the organisation's governing document and (for charities) the Charity Commission.

Equality: The Committee should make sure that the organisation's work is open and fair to all sections of the community. This includes thinking about: services provided; membership of the Committee; employment of staff; and accessibility of communications and meetings.

In-flight: controls and instruments

Control: The Committee is responsible for making sure that the organisation does all that it needs to comply with the law, with its own rules, and with any other regulations. Make sure that your Committee gets the information it needs to be sure this is happening.

Monitor progress: Get regular reports on how the organisation is doing against its plans. Set performance targets, and check they are being delivered. Set a timetable for projects. If things are not going to plan, find out why, and take action to sort out any problems.

Keep an eye on the finances: Get regular financial reports (quarterly or monthly), and make sure that you understand and deal with any major variations from the budget. Make sure the organisation has enough cash to pay its staff salaries and all other bills.

Make the meetings work: Keep meetings short and focused. Make sure you have enough information, but not too much. Meet as often as you need. The Chair should make sure that everyone has their say, and that no one dominates the meeting.

In-flight announcements

Consult and inform: Identify everyone with an interest in your work – people who use or benefit from it, staff, volunteers, donors, members of the organisation and partners. Set up ways to consult them, keep them informed and involve them appropriately. Use plain language and provide translations or other versions if necessary and wherever possible. Most organisations have to produce an annual report and accounts; consider if you also need more regular ways of communicating, such as newsletters, a website or public meetings.
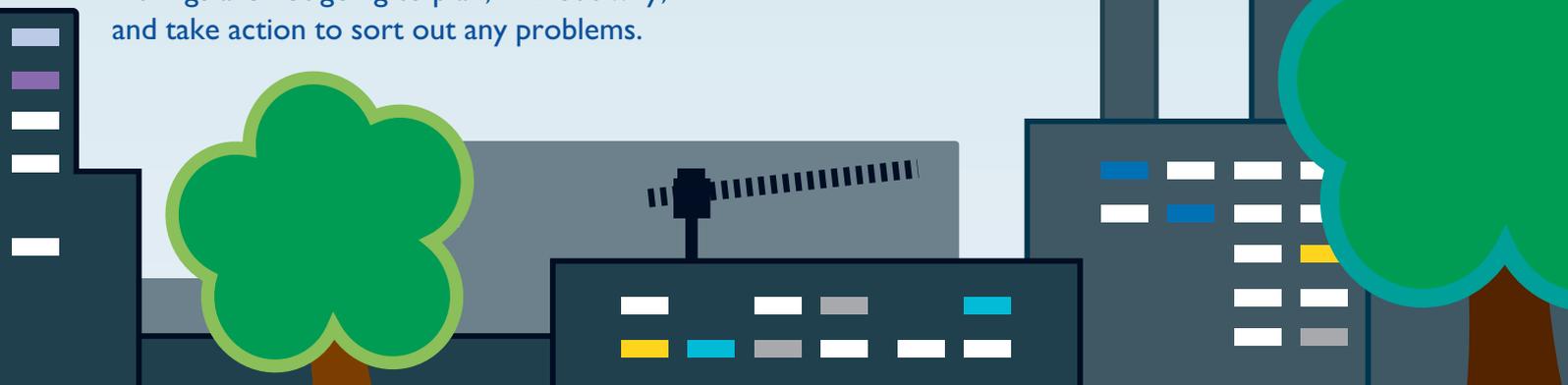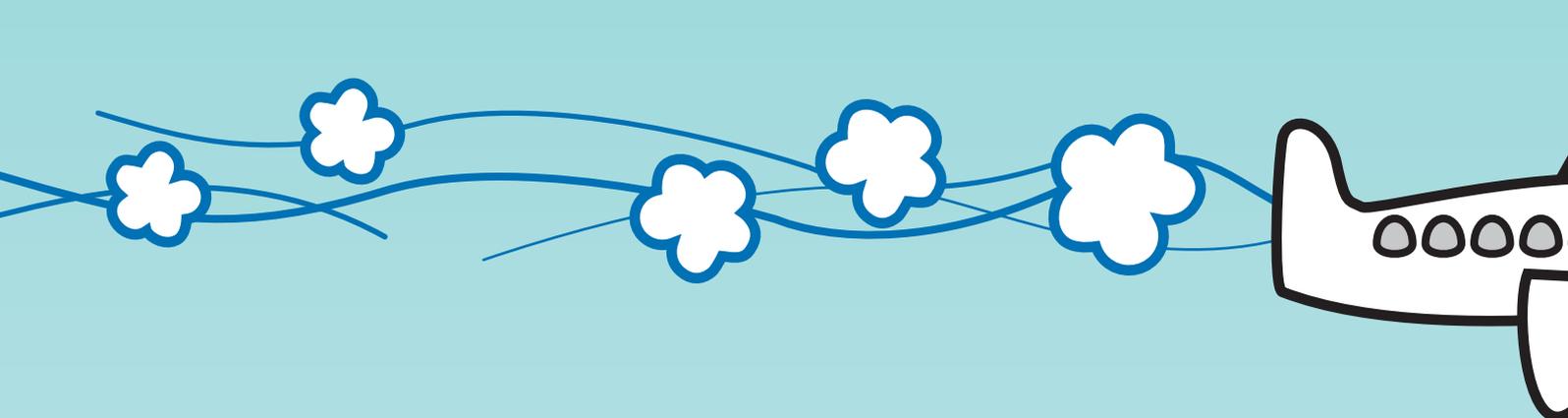
Maintenance tips

Review your performance: Identify the skills, knowledge and experience the Committee members bring against what the organisation needs. Assess whether they are contributing what is required. Look ahead to make sure you recruit new Committee members with the skills and experience needed for the future. Plan for the succession of people who are going to leave. Help people to move on when their contribution is coming to an end.

Review the organisation's work: Some organisations or projects are set up for a short or fixed length of time. Others might be needed for many years. Take time out to think about whether what you are doing is still relevant, or whether you need to change the way you work. If you have done all you can, then it's fine to wind up or merge with another group.

Support the Committee: Identify what support the Committee members need to do their job. Arrange for individual and group training and support, not just at the beginning but later on as well. Help Committee members stay up-to-date with newsletters and briefings.

Review how things are done: Keep track of changes in laws and regulations. Make sure for its needs. Make sure you have the right people doing the right jobs. Make the changes needed to stay effective.

Advanced flying

This leaflet is based on a more formal document, called *Good Governance: A Code for the Voluntary and Community Sector*. The Code sets out detailed requirements for the boards of all types of voluntary and community organisations, and is of particular relevance to larger organisations with a staff team.

If you would like to get a copy of the Code, you can download it from www.governancehub.org.uk or tel: 0845 458 9910. You can also get more copies of this leaflet in the same way.

The Code and this leaflet have been produced by a group of organisations called the National Hub of Expertise in Governance, which includes members from all parts of the voluntary and community sector. The Code and leaflet have also been endorsed by the Charity Commission.
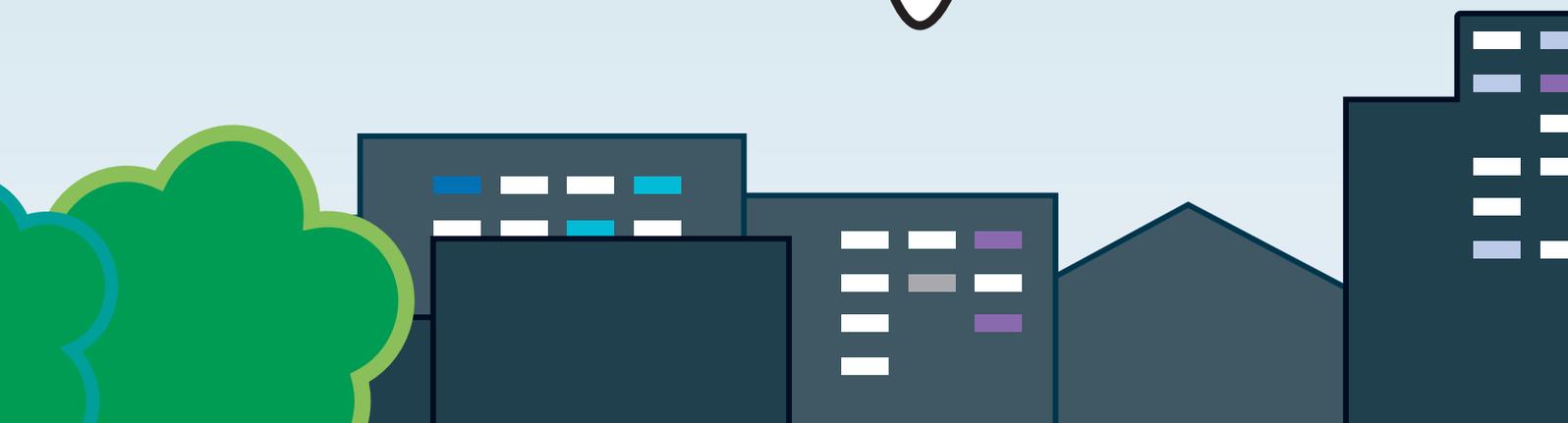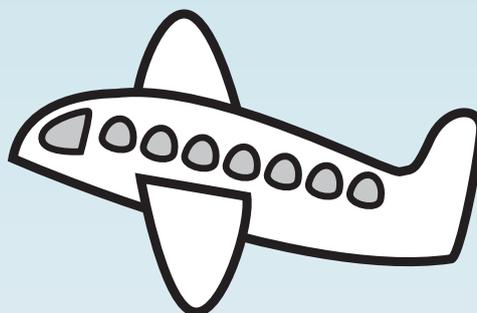
Organisations that can help

**Association with Communities
in Rural England (ACRE)**
www.acre.org.uk, tel: 01285 653477
Supports Rural Community Councils
and other rural initiatives.

bassac
www.bassac.org.uk, tel: 0845 241 0375
Membership network of community organisations.

Black Training and Enterprise Group (BTEG)
www.bteg.co.uk, tel: 020 7713 6161
Aims for improvements for black people,
in areas of employment, regeneration,
education and enterprise.

Charity Commission
www.charitycommission.gov.uk, tel: 0870 333 0123
The Charity Commission is the regulator
for charities in England and Wales.

Charity Trustee Networks
www.trusteenetworks.org.uk, tel: 01482 243327
Charity Trustee Networks provides support
to networks of charity trustees.

Companies House
www.companieshouse.gov.uk, tel: 0870 33 33 636
Incorporates and dissolves limited companies;
stores information delivered under
the Companies Act.

Community Matters
www.communitymatters.org.uk, tel: 020 7837 7887
The nationwide federation for community
organisations.

Ethnic Minority Foundation
www.ethnicminorityfund.org.uk, tel: 0800 652 0390
Committed to extending opportunities to people
from ethnic minority communities.

**National Association of Councils
for Voluntary Service (NACVS)**
www.nacvs.org.uk, tel: 0114 278 6636
The network of over 300 Councils for
Voluntary Service (CVS) throughout England.

NCVO
www.ncvo-vol.org.uk, www.askNCVO.org.uk,
Freephone HelpDesk: 0800 2 798 798,
(textphone 0800 01 88 111)
The umbrella body for the voluntary
sector in England.

**Voluntary Sector National Training
Organisation (VSNTO)**
www.voluntarysectorskills.org.uk, tel: 020 7713 6161
Supports learning and development within
the voluntary sector.

Volunteering England
www.volunteering.org.uk, tel: 0845 305 6979
The national volunteer development agency
for England.