Working in the voluntary sector

About this free course

This version of the content may include video, images and interactive content that may not be optimised for your device.

You can experience this free course as it was originally designed on OpenLearn, the home of free learning from The Open University – https://www.open.edu/openlearn/society-politics-law/sociology/working-the-voluntary-sector/content-section-overview

There you'll also be able to track your progress via your activity record, which you can use to demonstrate your learning.

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Working in the voluntary sector is a free badged course that lasts eight weeks, with approximately three hours' study time each week. You can work through the course at your own pace, so if you have more time one week there is no problem with pushing on to complete another week's study.

There may be several reasons for you studying this course – perhaps you've been thinking about volunteering or working in the voluntary sector and wanted to find out more about it; or you already work or volunteer and are seeking to build on your existing knowledge or skills. You may, of course, just have a general interest in voluntary organisations or are looking to develop your study skills for further learning.

There are many roles and responsibilities in voluntary organisations, and this course introduces you to some of the main activities carried out by volunteers and staff. These activities include working with volunteers; marketing and communications; working with budgets; fundraising; taking part in meetings; working in teams and partnerships; and managing stress and conflict. Even if you do not personally get involved with all of the activities covered in the course, learning about them will give you some background on how different organisations work and what staff and volunteers do. The course will provide you with knowledge and skills you can apply to your own work or volunteering, as well as to your everyday life.

All these aspects will be explained, so don't worry if they seem unfamiliar at the moment. You'll use plenty of real-life examples to help with this and you'll get plenty of opportunities to practise your new understanding and skills.

Part of this practice will be the weekly interactive quizzes, of which Weeks 4 and 8 will provide you with an opportunity to earn a badge to demonstrate your new skills. You can read more on how to study the course, and about badges, in the next sections.

As part of the course, there is a glossary which explains key terms used throughout the course.

After completing this course you will be able to:

- demonstrate an understanding of different roles and activities in voluntary organisations
- understand how to work with other staff and volunteers in your team and organisation
- use and apply your knowledge about the voluntary sector to your own work or volunteering experience
- link your learning with your own personal or career goals.

Introduction and guidance

Moving around the course

In the ‘Summary’ at the end of each week, you can find a link to the next week. If at any time you want to return to the start of the course, click on ‘Full course description’. From here you can navigate to any part of the course.

It’s also good practice, if you access a link from within a course page (including links to the quizzes), to open it in a new window or tab. That way you can easily return to where you’ve come from without having to use the back button on your browser.

If you enjoy this course and want to learn more about the broader context of the voluntary sector, you might like to take a look at our free course *Introducing the voluntary sector*.

What is a badged course?

While studying *Working in the voluntary sector* you have the option to work towards gaining a digital badge.

Badged courses are a key part of The Open University’s mission *to promote the educational well-being of the community.* The courses also provide another way of helping you to progress from informal to formal learning.

To complete a course you need to be able to find about 24 hours of study time, over a period of about eight weeks. However, it is possible to study them at any time, and at a pace to suit you.

Badged courses are all available on The Open University’s OpenLearn website and do not cost anything to study. They differ from Open University courses because you do not receive support from a tutor. But you do get useful feedback from the interactive quizzes.

What is a badge?

Digital badges are a new way of demonstrating online that you have gained a skill. Schools, colleges and universities are working with employers and other organisations to develop open badges that help learners gain recognition for their skills, and support employers to identify the right candidate for a job.

Badges demonstrate your work and achievement on the course. You can share your achievement with friends, family and employers, and on social media. Badges are a great motivator, helping you to reach the end of the course. Gaining a badge often boosts confidence in the skills and abilities that underpin successful study. So, completing this course should encourage you to think about taking other courses.

How to get a badge

Getting a badge is straightforward! Here’s what you have to do:

- read each week of the course
- score 50% or more in the two badge quizzes in Week 4 and Week 8.

For all the quizzes, you can have three attempts at most of the questions (for true or false type questions you usually get only one attempt). If you get the answer right first time you will get more marks than for a correct answer the second or third time. Therefore, please be aware that for the two badge quizzes it is possible to get all the questions right but not score 50% and be eligible for the badge on that attempt. If one of your answers is incorrect you will often receive helpful feedback and suggestions about how to work out the correct answer.

For the badge quizzes, if you're not successful in getting 50% the first time, after 24 hours you can attempt the whole quiz, and come back as many times as you like.

We hope that as many people as possible will gain an Open University badge – so you should see getting a badge as an opportunity to reflect on what you have learned rather than as a test.

If you need more guidance on getting a badge and what you can do with it, take a look at the OpenLearn FAQs. When you gain your badge you will receive an email to notify you and you will be able to view and manage all your badges in My OpenLearn within 24 hours of completing the criteria to gain a badge.

Get started with Week 1.

Introduction and guidance

Week 1: Getting started – working in a voluntary organisation

Introduction

Welcome to the first week of *Working in the voluntary sector*. This course explores the roles and activities that people carry out within voluntary organisations, either as paid staff or as volunteers. The term 'working' in the course title refers to both paid and unpaid work, which, after all, can be equally classed as 'work'.

What is your role? If you work in an organisation, what is your role within that? If you don't, what is your role in your family, your community or society? What are the roles of different types of organisation within the voluntary sector? The concept of role is key to understanding organisations.

Many of the topics covered in this course are issues or activities that are relevant to other areas of life beyond a job or formal volunteering. You may have attended a public meeting and asked a question, or had an opinion afterwards about how the meeting was run. If you are a patient or a carer, you may have experienced different support groups, or been asked your opinion on local voluntary organisations offering services. So, you may find you have a wealth of experience you can draw on. You'll begin by looking at the idea of a 'role'.

If you are not currently working or volunteering, we suggest you start thinking about an organisation you are interested in so that you can use it as an example for the activities throughout the course.

Start by watching this video, in which the course author Julie Charlesworth introduces you to Week 1.

Video content is not available in this format.

By the end of this week, you should be able to:

- describe the different ways of understanding what is meant by 'role'
- understand what roles you play
- explain influences on roles
- describe the roles and functions of voluntary organisations and locate your organisation within this description.

Another free course on OpenLearn, *Introducing the voluntary sector*, provides an overview of the sector. If you haven't already done so, you may wish to study this first if you feel that your knowledge of the voluntary sector is limited.

Before you start, The Open University would really appreciate a few minutes of your time to tell us about yourself and your expectations of the course. Your input will help to further improve the online learning experience. If you'd like to help, and if you haven't done so already, please fill in this optional survey.

1 Jobs, tasks and roles

Thinking about different roles can be challenging: you might work or volunteer with several organisations or groups – each with different ways of doing things and expectations of staff and volunteers. In one organisation you might be 'part of the team', but in another you might be expected to work alone. In other areas of life you might have different responsibilities: as a parent, carer or good neighbour. Roles are about expectations – people's own expectations about their roles as well as what they expect from others and what others expect of them.

This might sound complicated, so it is best to build it up in stages. You will start by looking at the tasks and activities you do in a job, as a volunteer or in other roles or positions.

'Task' is a word used in organisations, and particularly by managers, to sort out what people do. In the workplace or when volunteering, people are usually given a list of their tasks in the form of a job description.

Activity 1 What work do you do?

Allow approximately 5 minutes

As a starting point, write down everything you did in a recent activity. This could be something you completed at work, while volunteering or spending time with your family, or in your community or other position. For each task, note down roughly how much time you spent on this (either actual time in hours or as a percentage of the day).

You will return to this list in Activity 2.

Here is a list of tasks carried out by a garden volunteer.

Table 1 Garden volunteering tasks and time spent on them

Activity/task	Time spent
Pruned trees and shrubs	2 hours
Weeding, digging	2 hours
General chatting with staff/tea break	10 minutes
Talked to colleague about some gardens research	20 minutes
Arranged and led a planning meeting about forthcoming garden open day	45 minutes
Helped move some boxes	10 minutes
Talked to passers-by about the front garden	10 minutes
Listened to a fellow volunteer's concerns about the new expenses system	30 minutes
Measured up space for a new shed	10 minutes

Comment

You may have found from doing this activity that it is sometimes difficult to explain what your job actually is. You may have so many different responsibilities that it is impossible to sum up your job succinctly; for example, the list of activities you undertake may often go beyond your job description.

From this example, you can see that the volunteer does more than just straightforward gardening tasks. Although he was recruited to do garden maintenance (and this is what the volunteer job description specifies), he has also been involved in open days, events for donors and research on the local area. He has been asked to do these other activities because of his wider interests and experience. Other things he does because he has been asked by the staff, he has identified a need or he wants to help address other people's concerns. Like many people, he enjoys variety in his work or volunteering. Volunteers often have experience from other jobs that they like to draw on and that go beyond their formal job description.

1.1 What's in a role?

The idea of role is probably already familiar to you – the phrase 'wearing my other hat' is a cliché after all, but it is important to understand the two main ways in which the term 'role' is used in the context of voluntary organisations. As you have already seen, it may refer to a particular *organisational* position: for example, a fundraiser, volunteer coordinator, care support worker, museum guide or **trustee**. It also refers to *the part we play* in a given situation (as in the saying 'playing devil's advocate'). In practice, these two meanings of 'role' tend to run together, simply because many positions need to be improvised in different situations; they are often not set out in detail and fixed.

The term 'role-set' is the formal way of describing how your work, volunteering or other activities involve different roles. Some of the roles you may be called upon to undertake are shown in Figure 1.

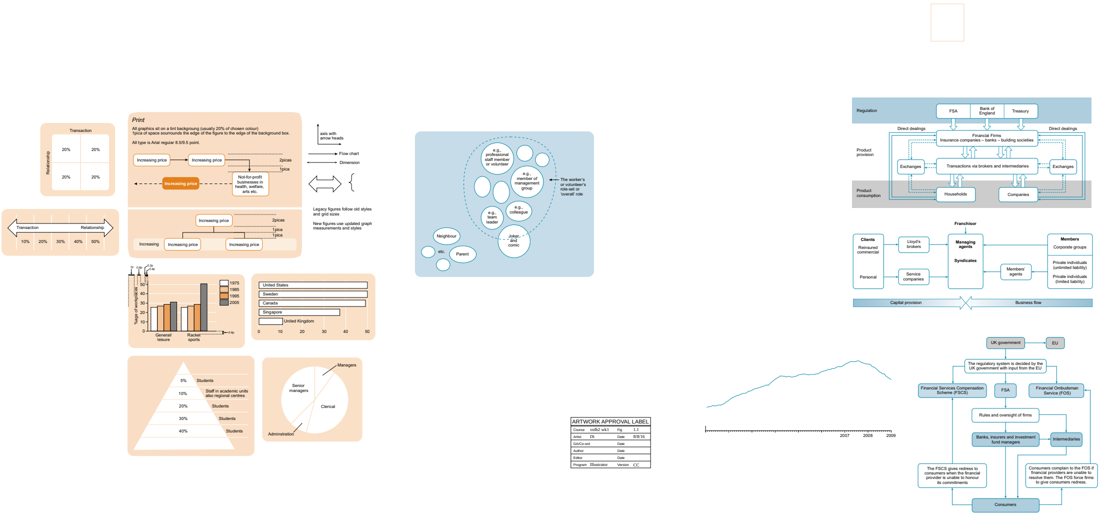

Figure 1 Roles within roles

1.2 Formal and informal roles

In Activity 1 you may have noticed that some of your responsibilities or tasks involve formal activities (as listed in your job description), as well as more informal roles that you have taken on that are not adequately captured by your job description. As Figure 1 highlighted, role-sets involve both formal and informal roles and you will now look at both aspects.

It takes a bit of thinking to see things in terms of roles rather than just tasks. Activities such as:

- answering the phone
- providing advice to service users
- interviewing some potential volunteers
- writing a new marketing leaflet
- completing a funding bid
- sending an email to the council about a local issue

are probably easier to express than the roles, such as:

- figurehead role (represented a group at a meeting or fundraising event)
- interpersonal/teamworking role (resolved a disagreement between two volunteers or neighbours; helped a distressed service user)
- negotiation or spokesperson role (summed up the key ideas and action points at a difficult meeting).

Activity 2 What's your role?

Allow approximately 20 minutes

Look again at the activities you listed in Activity 1. Make a list of two columns. The first will be formal activities. These are part of a job description, that is, part of your formal role as, for example, a fundraiser, team leader, charity shop volunteer or trustee. If your example was not drawn from work or volunteering, think of the 'formal' part as what you do regularly or what you think is expected of you.

The second column will be the informal roles that you have taken on at work or with other people. For example, some people who are good with computers take on an ICT troubleshooting role; others are skilled at 'peacemaking' when working relationships become fraught, or providing a shoulder to cry on when others have problems; and still others are good at communicating generally.

Now look at your two columns and say which roles you are *most* and *least* comfortable with.

Lastly, if you had to delegate (give away) some of your activities to a colleague or a friend, would you find it more helpful to think in terms of avoiding or passing on certain *roles* (rather than tasks)?

Discussion

Using the example of the garden volunteer in Activity 1, his two columns might look like this:

Table 2 Activities and roles

Formal activities (part of job description)	Informal roles
Pruned trees and shrubs	General chatting with staff (joker/teamworker role)
Weeding, digging	Talk to colleague about some gardens research (not part of the job description but could be part of an informal advisory/ educational role)
Helped move some boxes	Arranged and led a planning meeting about forthcoming open day (negotiation role)
Talked to passers-by about the front garden	Listen to a fellow volunteer's concerns about the new expenses system (interpersonal/teamworker role)
Measured up space for new shed	

This example shows that people often take on roles beyond their job description. The garden volunteer is a good listener; so people often take their concerns or problems to him, which has led to him taking on an interpersonal role. 'Listening to other people's problems' is obviously not listed in his job description as garden volunteer.

The point of this activity is to help you see whether you take on informal roles, which might be based on other work or volunteering experience, or on your qualities as; for example, a good listener or general troubleshooter. Sometimes you might be happy with these additional roles and they may be acknowledged by your organisation, perhaps in terms of when being interviewed for a promotion. For some people, however, these informal roles might become a burden in an already busy and stressful job.

If you work or volunteer, you may be fortunate enough to work for an organisation that acknowledges the importance of these different roles and has written job descriptions that incorporate them. In small voluntary organisations where resources are tight, however, people often have many different formal roles, as well as informal ones. This can lead to conflict and stress, although some people enjoy having lots of variety in their work and thrive under pressure.

2 Influences on role

Now that you have identified some different roles, you can move on to thinking about what influences those roles and the expectations people have of their roles. You will explore these influences through thinking about roles in organisations. If you currently work or volunteer (or are hoping to do so), then this section will help you to understand how people work within organisations and how they (and you) work with others such as colleagues, managers and trustees.

The roles that people play in organisations can be complex because they are shaped by different influences. People do not work in isolation – they work with colleagues in teams, are usually supervised or managed, and are guided by boards of trustees in voluntary organisations. This means that sometimes there are lots of influences on what people do in their jobs, as well as on the expectations about those jobs. The three main influences are shown in Figure 2 and they relate to task (what you do in your job), organisation (who you work for) and person (the type of person you are).

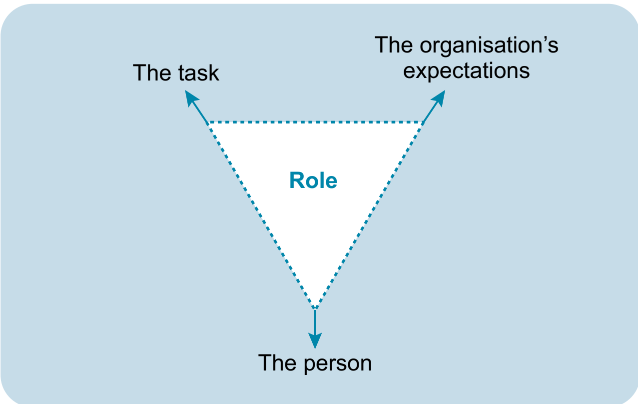

Figure 2 Sources of role

2.1 Influences on task and role

Job descriptions can be a useful guide to the work that has to be done, although they do not usually say *how* one should go about it. Occasionally, however, people complain that their job description lists activities without defining the *overall* task, or that it bears little relation to what they actually do, or that they have even had to write their own job descriptions. The reason for these complaints can usually be found in the things that influence the task.

Here is an example of task influence, which in turn affects someone's overall role.

Box 1 An example of task influence

A marketing assistant in a small voluntary organisation has a number of tasks, most of which relate to marketing:

'Over the last four years various fundraising activities have taken more and more of my time, but in my job description liaison with one funder is all that is mentioned.'

In other words, her overall role is as a marketing assistant. However, in a small organisation people often get asked to take on a range of tasks, and here the marketing assistant feels her role is being pulled into fundraising, leaving her with less time for her marketing tasks.

This shows a negative example, but influence can be positive too – perhaps if the changes in tasks lead to a promotion or the person doing the job finds they enjoy the variety.

2.2 Organisation and role

How staff and volunteers carry out their roles is also influenced by the demands and expectations that others have of them – particularly the organisation. Many of these expectations never appear in job descriptions, but their impact can be powerful. The two most common expectations that organisations have of roles can be described as 'role ambiguity' and 'role conflict'.

Role ambiguity

The roles that organisations expect their staff to play may be unclear or inconsistent. The term 'role ambiguity' is often used to refer to such situations of uncertainty about what is expected of a person in a particular role. This can occur where individuals have insufficient or deficient information about what is expected of them.

For example, an office manager of a small voluntary organisation is recruited to answer the phone, deal with the post, and to order supplies and equipment. She then finds she is expected by other staff to organise a volunteer recruitment day at the office. This is not in her job description but others think it is her role because it is an event in the office. She knows how to do the task but feels stressed about the expectations of others about an important event.

A further aspect of role ambiguity relates to a lack of information about whether people are making a contribution or doing their jobs well. Feedback through appraisals is therefore important for staff and volunteers, although paid staff are more likely than volunteers to have annual appraisals. Organisations with large numbers of volunteers often give positive feedback through group emails or in meetings.

Role conflict

Role conflict can arise when different people have different expectations of the role a worker or a volunteer should play. For example, if you are a volunteer coordinator, your team of volunteers may expect you to represent their views to the managers, but you are also expected to be loyal to the organisation in presenting its policies and decisions to your team. This can also happen if you represent your organisation in a partnership – there is an expectation that you will represent your organisation's interests but you also need to work with the partnership's own goals and expectations.

Both role ambiguity and role conflict can impact on how someone feels about their job or volunteering. Job satisfaction is important to people's motivation — even more so in volunteering, where a person can choose to leave because they are not there for the money.

You will come back to these ideas on role conflict and ambiguity in Activity 3.

2.3 Person and role

If you have many responsibilities, you may have to decide on the amount of time and energy that you can put into the different aspects of your overall role. You may choose on the basis of personal goals and preferences or your own ideas about priorities. For some people this may be a trade-off between being *effective* (so that they get results and have satisfied colleagues) and being *successful* (in terms of their own career advancement). Of course, not everyone has choice in their roles.

The kind of person you are influences the way in which you take up a role and the kind of role you take up. Some people find it easy enough to give directions; others are happier to work through consensus (i.e. getting everybody's opinion first). Some people are at their best in a crisis; others prefer an ordered life. Inevitably, 'who you are' will shine through in the roles you undertake.

Whether this works for or against you, and for or against your organisation, depends on the situation and the level you are at in your organisation. Where your experiences, aptitudes and values match the requirements and expectations of the job, you will probably carry out the role with a degree of confidence and satisfaction. It will be 'doing what comes naturally'. However, where you are expected to be and to do things that clash with your experience and values, you may encounter difficulties and tensions.

2.4 Reviewing expectations

The discussion about influences on roles highlights the fact that conflict can arise from people's expectations of you. Conflict is not always negative: it can open up discussions and lead to positive results such as acknowledging difficult issues that are then resolved, for example, a promotion, a pay rise, new training opportunities, new ways of working, and so on.

It is useful to consider what you represent to others, or what needs they have that they want you to respond to – expectations you may hardly be aware of. You do not need to be working as a manager to find that these issues crop up regularly.

In the next activity you will be thinking about how you work with others and whether there is any role conflict or role ambiguity.

Activity 3 Role expectations

Allow approximately 20 minutes

Choose an example from work, volunteering or in the community where you interact with other people. Draw a 'star chart' to represent your role as follows:

1. Quickly list the people you deal with and who are important to you in doing your work (paid or unpaid). Include people both within the organisation and outside it (for example, service users, funders, head office, local government, etc.). If there are more than, say, 10, try grouping similar ones together.

2. Draw a circle to represent yourself in the middle, and put the names (or types) of people you deal with around the circle. Place them nearer or further from the centre, according to the amount of contact you have with them.
3. Draw lines from the circle to the people, using thicker lines for more important relationships and thinner lines for less important ones. (A work relationship may, of course, be important without there being very much day-to-day contact.)

You can see an example in Figure 3 if you need some ideas to get you started.

Now briefly consider each relationship in turn and make a note of what you think is expected of you within the relationship. Finally, note any areas of actual or potential role conflict and ambiguity.

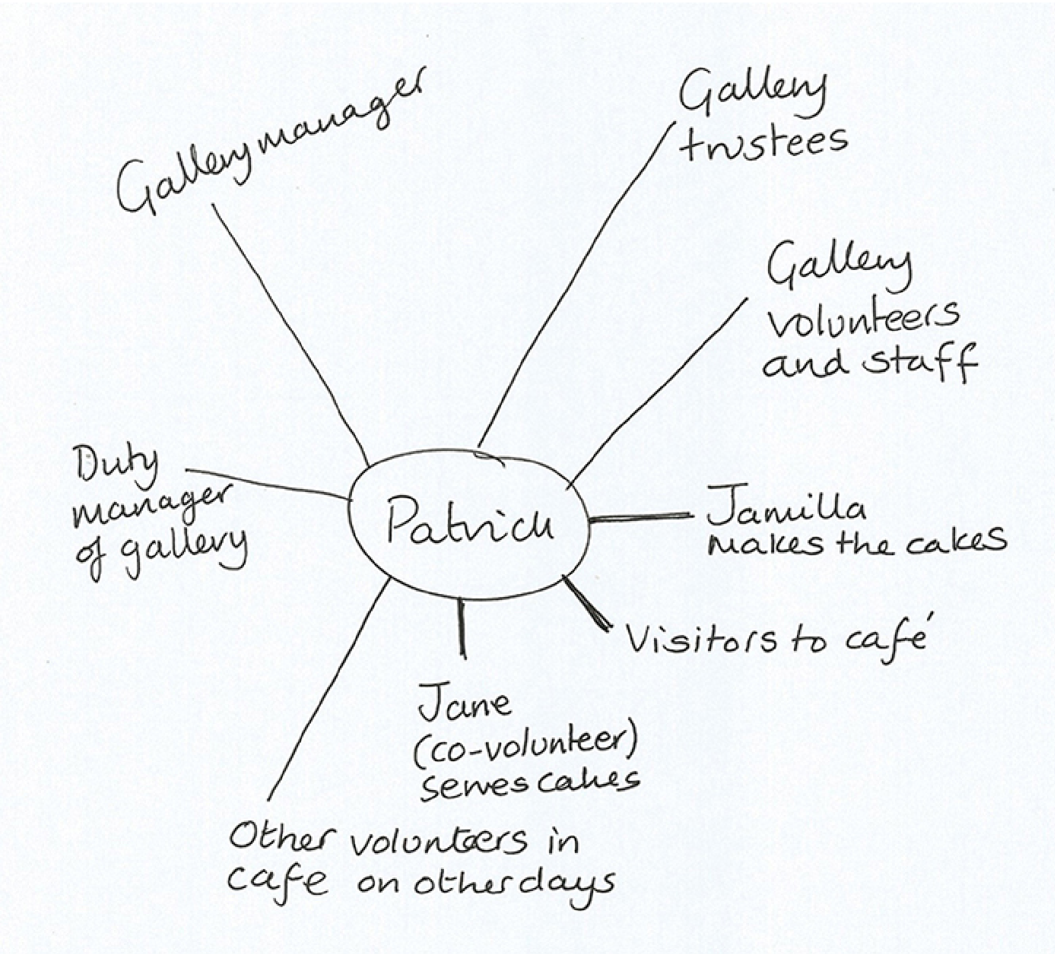

Figure 3 Example of a star chart: Patrick works in an art gallery café serving tea and cake to the gallery visitors

Discussion

Hopefully, this activity gave you some insight into which relationships are most important for your work, and the different expectations others have of you. It may also have clarified why some aspects of your work are more comfortable than others: are you expected to be a different person in some circumstances?

If you work or volunteer for more than one organisation, you might like to compare star charts for these different roles.

Activity 3 will have given you a sense of roles in organisations and how people work with others. If you are currently working or volunteering, it might also have started you thinking about how your organisation functions, how it is managed and who makes decisions, as well as whether you work with people in other organisations.

Voluntary organisations often work in partnership with outside agencies, such as local government or major funders. Some of these relationships can be complex and involve contractual relationships. You will now look at voluntary organisations in more detail.

3 Roles and functions of voluntary organisations

Figure 4 A voluntary organisation

This course is about working in the voluntary sector, so what are voluntary organisations and what is their role?

There are many differences between organisations classified as 'voluntary' and, inevitably, people working and volunteering in the sector will gain different experiences. If you work with a small organisation, such as a residents' group, you may have a very different experience of the sector than someone working for, say, Age UK.

Understanding the scope of voluntary organisations is important, both in understanding how effective and successful the organisation is, and in understanding the impact this has on its staff and volunteers. It will also help you to understand your own role.

How voluntary organisations differ

- The type of organisation – what is its function or purpose? For example, does it deliver services or does it campaign (or both)? How does its purpose fit with government policy? If there is a mismatch, is it struggling to find funding?
- Is the organisation a **registered charity**?

- Involvement of volunteers – all voluntary organisations rely on unpaid help. This might be the trustees or frontline workers. Some small organisations may not have any paid staff.
- The size and reach of the organisation and also the size of the part you are based in. For example, you might manage a charity shop and have a team of volunteers but you are part of an international organisation such as Oxfam.
- Funding – does the organisation receive government funding or is it dependent on donations from the public? Has the source or amount of funding changed in recent years?
- What is the organisation's history? Some voluntary organisations are relatively new, others have their origins decades or even centuries in the past. Some organisations started as campaigning and lobbying groups for social issues long before the Welfare State was introduced in the UK.
- Location – is the organisation where you work situated in a rural or an urban setting?

You will come back to these different aspects in Activity 4.

3.1 Purpose of a voluntary organisation

You will now look at the function or purpose of an organisation. If you have already studied the badged open course, *Introducing the voluntary sector*, you will be familiar with a classification of voluntary organisations by Charles Handy (1988). He distinguished between mutual support groups, service delivery agents and campaigning bodies:

- **Mutual support groups** – 'those organisations […] created in order to put people with a particular problem or enthusiasm in touch with others like themselves who can give them understanding, advice, support and encouragement'. Examples include hobbies and sports enthusiasts or local support groups for people with addictions and health problems.
- **Service delivery agents** – 'the biggest and most visible of the voluntary organisations' providing services to those in need. They often have many paid staff and operate across the UK. Examples include the Royal National Institute of Blind People (RNIB) and Citizens Advice.
- **Campaigning bodies** – some organisations were created to campaign for a cause or to act as a pressure group to represent and fight for a particular interest. Examples include Greenpeace and 38 Degrees.

Many voluntary organisations inevitably fit more than one category. Many organisations campaign, even if they have government contracts, while some small mutual support groups might move into campaigning or seek a contract for service delivery. An organisation might have started firmly in one category but, over time, have shifted their role.

Activity 4 Your organisation

Allow approximately 15 minutes

Look back to the list of how voluntary organisations differ and think about how an organisation you are interested in 'fits' in the voluntary sector.

Table 2 has been partly filled in to provide an example for the Society for the Protection of Ancient Buildings (SPAB) (a building conservation charity). As you can see, the table matches SPAB to each of the different aspects of voluntary organisations.

Complete the table for an organisation of your choosing. You do not need to worry about exact numbers or detail, rather just give an impression.

Table 3 The character of a voluntary organisation

Aspect	Example	Your organisation
Type of organisation (mutual support, service delivery, campaigning)	Campaigning	*Provide your answer...*
Registered charity?	Yes	*Provide your answer...*
Involvement of volunteers	Yes – trustees and volunteers across many activities	*Provide your answer...*
Size	Small by number of staff and income	*Provide your answer...*
Reach	National reach	*Provide your answer...*
Funding	Largely donations	*Provide your answer...*
History	Established 1877	*Provide your answer...*
Location	Urban head office	*Provide your answer...*

Discussion

This activity will have given you the broader context within which different organisations operate, and, in particular, how an organisation you are interested in fits into the voluntary sector. If you are already working or volunteering, it may be the first time you have thought outside your day-to-day role, although of course when you first took on your role, you probably looked at the **values** of your organisation and how they fitted with your own.

4 Influences on voluntary organisations

Figure 5 Near and far factors exert influences on organisations

You saw in Section 2 how people's roles can be influenced by various factors, which included the organisation. This also applies to organisations themselves: no organisation operates in a vacuum. This might be more obvious when thinking about a retailer or a manufacturer, for example, and how they are affected by an economic downturn.

However, voluntary organisations can be affected by many forces too. The word 'environment' is used to explain the context of an organisation. The organisational environment is subject to influences within the organisation itself, such as those from the people and organisations directly connected to the organisation (this is called the 'near environment'). The environment can also be influenced by what is happening externally (the 'far environment'; for example, political and economic changes).

Breaking it down further, influences can come from:

- the individuals and groups with whom an organisation works on a day-to-day basis
- the network of arrangements and regulations that define what an organisation can and cannot do
- the wider social and economic trends, political developments and changing values and belief systems that affect the particular communities and society within which the organisation has to operate.

The problem for voluntary organisations lies not so much in specifying what things usually make up these environments, but in deciding how to sort them out usefully and how managers and trustees can make sense of them.

Understanding these influences can help you to make sense of why changes might happen within the organisations you support or where you work. You could then help a colleague who might say 'I don't understand why they had to make the team redundant' or 'The organisation doesn't seem to be doing things in the same way it did when I started volunteering 10 years ago.'

You will now look at the near and far environments in more detail.

Near environment

The near environment relates to those factors and groups that impact directly on an organisation's work. This is sometimes called the operating or **stakeholder** environment. So, the near environment comprises an organisation's funders, clients, service users, **beneficiaries** and other organisations with whom it networks, collaborates or even competes.

An aspect of the near environment that is critical to voluntary organisations is the 'competitive environment': the number of organisations operating in the same industry (for example, health and social care), their sizes, strengths, weaknesses and plans. This environment can be mapped out in order to see whom to collaborate with or, increasingly, to see which other organisations might compete for government contracts. If a small voluntary organisation loses a major contract, it might need to make staff redundant and close services.

The far environment

The far environment comprises those factors that impact less directly, but not necessarily less importantly, upon the organisation. For example, some consequences of the government deciding to cut public expenditure could be less money for services and fewer contracts available to voluntary organisations. If the population has less money due to cuts in benefits they may not, for example, have money to keep their pets, which means animal charities will have more unwanted animals to care for. Alternatively, charities for homeless people and food banks will have more people seeking their services. Another example is changing demographics and lifestyles: there might be more people taking early retirement but they might be looking for things to do other than volunteer, so the pool of volunteers that some organisations have traditionally relied on might be changing.

Thinking in this way about outside forces and the trends affecting voluntary organisations can be used by managers and trustees to develop strategies for their organisations. Even if you are not involved at this level of decision making, you could use it to think about how and why an organisation you are interested in might experience challenges at different points in time.

You have covered a lot of different ideas and issues so far, which has hopefully given you a sense of your organisation and your role within it.

5 This week's quiz

This quiz will help you review your learning on this course so far. Before you start, you may find it helpful to look back over the week and your notes to remind yourself of what has been covered. You can stop at any time, and come back to the quiz later if you want a break.

Week 1 practice quiz

Open the quiz in a new tab or window (by holding ctrl [or cmd on a Mac] when you click the link).

6 Summary

In this first week of the course you have worked on understanding the different aspects of roles in organisations, as well as your own role in different situations. You also saw how conflicts might arise due to different expectations and influences. In addition you have thought about how the voluntary sector includes many different organisations. One of the key aspects of all voluntary organisations is the role of volunteers, and you will explore this in more detail in Week 2.

In Week 1, you have learned to:

- describe what a role is and relate ideas about role to your own experience
- explain the different influences on a role
- understand what voluntary organisations do and how they differ
- locate your own organisation within the voluntary sector.

Having completed the first week you might like to look at the topics that are coming up in the rest of the course:

- Getting started – working in a voluntary organisation
- Working with volunteers
- Introducing marketing and communications
- Working with financial information
- Introducing fundraising
- Effective meetings
- Working in teams and partnerships
- Understanding stress and conflict.

Whether you are interested in the voluntary sector as a supporter, a worker or a volunteer the course aims to equip you with knowledge about voluntary organisations as well as provide you with skills you can use in practice.

Next week you will explore how organisations involve and manage volunteers.

You can now go to Week 2.

Week 2: Working with volunteers

Introduction

Volunteers are the lifeblood of the voluntary sector, and many organisations would not be able to operate without their help and support. People volunteer in many roles, including being a trustee, or helping with operational activities such as assisting in a charity shop, fundraising, organising events, gardening, administration, caring for elderly people or children, and so on.

Last week you explored what roles mean in the context of work and volunteering, as well as in other settings. This week you will find out why and how volunteers are recruited and how they are retained – how organisations and groups attempt to motivate volunteers and keep them volunteering.

People often stay in paid work because they are dependent on the wages, but for volunteers non-financial reasons come into play. Commitment to a cause or an issue is important, but there are many other factors too.

You might have relevant experience that you can draw on this week – perhaps of being recruited as a volunteer or of having recruited volunteers yourself. If you are considering applying for a volunteering role, then this week will help you to understand the recruitment process, and give you a sense of what to expect as a volunteer.

Now watch Julie Charlesworth introduce this week.

Video content is not available in this format.

By the end of this week, you should be able to:

- understand why organisations and other groups need the help of volunteers
- describe the different methods used to recruit volunteers
- describe why induction is important
- understand how organisations motivate and retain volunteers.

1 Why do voluntary organisations need volunteers?

Figure 1 A café run by volunteers contributes funds to the organisation

Many definitions of volunteering are used by government and voluntary organisations, but one that probably best captures the essence of volunteering is given by Musick and Wilson (2008, p. 1). They describe volunteering as an altruistic activity, which has the goal of providing 'help to others, a group, an organisation, a cause, or the community at large, without expectation of material reward'.

What volunteers do and how they give their time varies considerably: some people volunteer regularly (e.g. once a week or month) or occasionally (e.g. for a one-off event); they might volunteer through one organisation or several. Some volunteering is even done online, with no need to go into an office or other venue. Microvolunteering, whereby people give small amounts of time (as little as 10 minutes and usually online), is increasingly promoted.

There is a difference between formal and informal volunteering. Formal volunteering relates to people giving unpaid help through groups, clubs or organisations. Informal volunteering relates to giving unpaid help as an individual to others who are not relatives, such as getting an elderly neighbour's shopping, clearing snow from the streets, and so on.

Now that you have a sense of what volunteering is, and how diverse it is, we'd like you to think about why organisations need volunteers. The provision of unpaid support is the key defining feature of voluntary organisations. Many voluntary organisations were started by volunteers, some continue to function with no or just a few paid staff, but all involve volunteers in some capacity or other.

Exploring why organisations need volunteers can help you to understand the important contribution volunteers make to society and their importance to your own organisation. Furthermore, if you are currently volunteering, in paid work and working with volunteers, or thinking of applying to be a volunteer, you will gain a stronger sense of your role and place in the organisation.

Activity 1 Why are volunteers involved?

Allow approximately 5 minutes

Read the following statements and decide which are valid reasons for involving volunteers in organisations. If you are involved with a particular organisation or group then you could also think about how the reasons apply to it.

- Volunteers are a 'free' resource and enable voluntary organisations or groups to do more work with limited resources.
- Many organisations were started by volunteers.
- Volunteers can help to break down the distinction between 'helpers' and 'helped'.
- Involving volunteers means the organisation is more in touch with the people it seeks to help.
- Organisations want service users or members to be involved in the control and running of the organisation, and becoming a volunteer is a step towards this.
- Volunteers can bring a different perspective to their work, as well as help organisations represent a range of views and experiences.
- Volunteers can bring in skills that the workforce might not have.
- Organisations want to give people a chance to contribute to the work and causes they support.

Provide your answer...

Discussion

Generally speaking, all these are valid reasons for organisations to involve volunteers, although different organisations will find some reasons more important than others. Inevitably, cost is a major consideration – often there is no money to pay staff and therefore the group can only run with volunteers.

Some public services have been cut (e.g. libraries) and paid staff have been replaced with volunteers. However, this list shows that volunteers can be involved for non-financial reasons too, and these are all important factors in helping volunteers to see the importance and value of their contribution. Many of these reasons will also have a direct bearing on how volunteer work is designed and how individuals are recruited.

Some voluntary organisations are largely staffed by volunteers, others operate with a mixture of voluntary and paid staff. In the latter case, the roles and jobs are usually distinct and different. It can be confusing for both groups of people if they are doing the same role, and could lead to resentment.

It is important for organisations to encourage interaction between the groups so that everyone feels part of the team. This means several factors have to be taken into consideration, such as:

- which jobs volunteers are being asked to do – and how they are supported and trained for them
- how volunteers work with paid staff and vice versa
- the level of resources invested in volunteers
- the relationship of volunteers with the decision-making processes of the organisation
- how volunteers will be recruited and selected.

This leads into the next section, where you will find out how volunteers are recruited and what this means for you if you are looking for a volunteer role, or if you are in a role where you might recruit volunteers. Many volunteers recruit other volunteers – either formally or informally.

2 Recruiting volunteers

Figure 2 Volunteer stewards at a rugby game

How organisations recruit volunteers will inevitably differ according to the size of the organisation, the budget available for advertising, how formal they want to be about the process, which activities they are seeking help with, and so on. Volunteers are not part of any workplace legislation, so there are no legal requirements relating to recruitment as there are with paid work. For example, there is no requirement to interview volunteers – although it is good practice to do so, even if it is described as an informal meeting rather than an interview.

There are also differences between recruiting paid staff and recruiting volunteers, which relate to the following issues:

- There is often a shortage of people coming forward to volunteer – this means that the needs of volunteers and *what they have to offer* (which might be slightly different from what is required) are taken into account.
- The organisation is *committed to helping* the type of person who is likely to volunteer, or it regards developing and nurturing its volunteer force as equally important – for example, in a volunteer bureau, a self-help group, a community project, and so on.
- The organisation has a policy of trying to accommodate all offers of help whenever possible.

Some organisations have formal procedures for managing volunteers, with written job specifications. They usually recruit by advertising for these roles. Smaller, more informal self-help groups may not necessarily recruit for specific roles and will match volunteers to the work that needs doing.

2.1 Methods of recruiting volunteers

There are many ways to recruit volunteers, and the use of social media such as Facebook and Twitter has become important. However, many groups realise that not all potential volunteers use social media or have access to computers, therefore, adverts are still important. Box 1 lists some typical methods of recruitment.

Box 1 How to recruit volunteers

- Word of mouth – current volunteers and staff ask their friends, family or acquaintances to volunteer. This often works particularly well, as they can enthusiastically and realistically explain what it is like to volunteer.
- Organisations' own websites usually include a section on volunteering, with specific roles or general appeals for help advertised.
- **Umbrella organisations** advertise vacancies for their members.
- National websites, such as do-it.org, advertise roles for large and small organisations.
- Adverts in local magazines or newspapers, organisations' membership magazines and newsletters. Features on a particular organisation in the press or on television often bring in volunteers, as they draw attention to a cause or an issue.
- Adverts placed in libraries, doctors' surgeries, hospitals and community meeting places, as well as around the organisation itself (offices and other venues).
- Social media such as Twitter, Facebook, Instagram, and so on.
- Recruitment open days at the organisation itself or where different organisations group together to hold a big volunteering recruitment event or charity fair.

Recruitment is a type of marketing, and you will find out more about advertising and communicating messages next week.

Activity 2 Looking at examples of recruitment

Allow approximately 5 minutes

If you are currently volunteering, or have volunteered in the past, which of the methods in Box 1 were used to recruit you?

Did you respond to an advert or a feature?

If you actively sought a role, how did you approach doing so?

If you are not volunteering, which of the recruitment methods do you think would most appeal to you and why?

Provide your answer...

Discussion

It is difficult to generalise about which methods appeal to people. Here is an example from Julie Charlesworth's experience:

I decided I wanted to volunteer in gardening, so I used the do-it website to search for opportunities within 20 miles of my house. I found a specific advert with the National Trust. The advert appealed to me because the head gardener was looking to develop a new team.

For my second volunteering role, I responded to a feature in a membership magazine where they asked for a volunteer gardener. I was not actually looking for another volunteer role, but the opportunity sounded so interesting I applied.

Most organisations use a mix of methods to recruit volunteers, depending on the role and the budget available for advertising. In the past, many organisations' adverts have been quite general, perhaps saying something like 'we need volunteers' and listing some activities or roles.

However, many organisations have changed their approach in order to appeal to more people, particularly where they have found it difficult to recruit or want to recruit different types of people. In these cases, they often focus on the reasons *why* people volunteer: for example, learning new skills, getting work experience, meeting new people, making a difference, getting out in the fresh air, health benefits, and so on.

Activity 3 Advert for a volunteer

Allow approximately 10 minutes

Choose an organisation or a group you are interested in and find an advert, social media message or website feature that it has used for recruitment purposes. Note whether the organisation uses the reasons why people volunteer as part of its advert. If it does, how does it do so? If it does not, can you think of how to improve the advert or do it differently?

Provide your answer...

Discussion

It is hard to generalise as all organisations are different. However, making adverts more specific seems to be a trend. Adverts that focus on what the organisation is looking for, as well as what the person will get from volunteering, are more commonplace today. These methods also give people a better idea of what they are applying for, and what their expectations of the role might then be.

2.2 Volunteer role descriptions

If you have applied for a job before, you will have read a job description. This is a list of the activities, duties and responsibilities the job entails, as well as the skills and knowledge required. Not all volunteer roles will have a written job description, but it is good practice to have one so that people know what they will be expected to do in the role. In addition, the person who coordinates or manages the volunteers will know what the team should be doing.

If the role involves particular requirements that not everybody can or wants to do (such as heavy lifting, outdoor work, working directly with members or service users), then this can be made clear in the description.

Box 2 gives an example of a job description that outlines clearly all the tasks involved, the skills and experience required and who will be managing the role.

Box 2 A volunteer role description

Volunteer Retail Assistant

We are an animal conservation charity and our busy shop sells second-hand and new goods to raise funds to help endangered animals. We need an enthusiastic assistant to help sort, select and sell our goods. You'll gain experience in a retail environment and the profits you generate will help animals around the world.

What's in it for you?

- Helping animals in need
- Becoming part of a friendly and dedicated team
- Meeting people from all walks of life and making new friends
- Improving your retail and customer-service skills
- Developing your knowledge and enhancing your CV

What's involved?

- Helping customers and answering the phone
- Selling products and working a till
- Restocking the shop floor
- Promoting Gift Aid
- Maintaining a clean and tidy shop

What skills and experience do you need?

- Excellent people skills
- Friendly and well-presented
- Reliable and enthusiastic
- Basic numeracy skills

You need to be at least 14 years of age to work in our shops.

Time commitment: Flexible to suit you but usually sessions of 3 hours.

Reporting to: Shop manager

Activity 4 Writing a role description

Allow approximately 15 minutes

Watch the following video in which Sas talks about volunteering for a charity that offers overnight accommodation during the winter months for homeless and vulnerable people. This gives you some context about the work of the charity and why Sas is drawn to this volunteer role.

Using the example in Box 2 to guide you, write some ideas for a role description for someone volunteering with this charity.

Video content is not available in this format.

Provide your answer...

Discussion

You might include similar points from the description in Box 2. For example, under ‘What’s in it for you?’, you might add something about ‘making a difference to people’s lives’.

In terms of ‘What’s involved?’, we don’t know from Sas’s description what activities are involved. However, given that the charity provides overnight accommodation, it is likely to include tasks such as:

- preparing food
- serving meals
- interacting with guests
- cleaning duties.

Skills and experience might be similar to the description in Box 2, such as:

- excellent people skills
- reliable

- understanding about homelessness.

2.3 Meeting/interviewing volunteers

As with paid jobs, many organisations will want to meet or interview people who have applied to volunteer. Applications might involve just an email message outlining the person's experience, while some organisations use application forms. For some roles volunteers will have to provide references.

The next step in the recruitment process is to meet the applicant. Some organisations might organise a group meeting of several volunteers, while others will have individual meetings or even formal interviews, depending on the role. If you apply to volunteer with vulnerable adults or children, then an interview is extremely likely as well as a Disclosure and Barring Service (DBS) check.

Activity 5 Being interviewed

Allow approximately 5 minutes

Imagine you have applied for a role at the charity helping homeless people (as in Activity 4).

- What questions would you expect to be asked?
- What questions would you ask?

Provide your answer...

Discussion

Given that you would be working with vulnerable people, you could expect to be asked about relevant experience and also why you want to volunteer there. A good interview or meeting for volunteering is not just about being asked questions; it is also important to see where you would be working and perhaps meet some existing volunteers.

You might ask the person showing you around what training is available and what time commitment is expected of you. The number of questions you need to ask is, of course, dependent on how well the person conducts the meeting or interview and how much information they give you first.

You have explored the main aspects of how organisations recruit volunteers. You will now look at what happens when volunteers have started working with an organisation or a group.

3 Induction and training

Figure 3 Induction is a key part of helping volunteers settle in

Induction is the process of introducing new volunteers (or staff) to their role, tasks, the skills required, the other people they will work with and the organisation. In small organisations and groups this might be a quick introduction, after which the volunteer is left to get on with their tasks. This may also occur in big organisations if the staff or volunteers responsible for looking after new volunteers are too busy or unaware of the importance of induction. However, it is important to settle new volunteers into their role so that they know what they are doing and feel comfortable. If you are a volunteer's manager, try not to overload a new volunteer with too much information as they may find it daunting.

Activity 6 Your experience of induction

Allow approximately 5 minutes

If you have had a volunteering role, did you have an induction session and, if so, what topics were covered?

If you have not had a volunteering role, what would you expect to happen in an induction session? (Imagine a role you would like to do.)

Provide your answer...

Discussion

Julie Charlesworth describes her experience of induction:

> As an example, in my first volunteering role I was shown where the facilities were, found out about health and safety, met some paid staff and other volunteers, and was given some information to take home to read. Everyone was friendly and welcoming. I was also given some basic training relating to my tasks.

In general, induction includes both general (organisational) and specific (role-related) information. Encouraging volunteers to ask questions is also important.

Induction usually happens on the first day. Training also usually starts on the first day and, depending on the role, may continue for some time.

4 Retaining and motivating volunteers

Figure 4 Volunteers often need downtime to bond as a team

This section explores how organisations attempt to keep volunteers. An organisation might have successfully recruited and trained new volunteers but that does not necessarily mean they will stay, however good their induction into the organisation.

Volunteers leave their roles for many reasons, and often the organisation or group cannot do much about it. People's lives change: they may need to do more paid work; take on additional family responsibilities; experience ill health; move out of the area, and so on.

Even if the volunteer really enjoys their role, and they feel valued by their organisation, various life events may mean they have to leave. If they have had an enjoyable and fulfilling experience with a voluntary organisation, however, they will hopefully return or find a new role at a later date.

In other situations, volunteers leave because they do not enjoy the role or find it unsatisfying. They may still be committed to the cause or issue that prompted them to volunteer in the first place, but they feel negative about the actual activities they were required to do, or the environment they were working in. Alternatively, they may not like or feel connected to the other volunteers or paid staff, or they may have felt stressed or overworked.

It may also be that the role was not what they were expecting. Expectations of paid and unpaid work form a major part of people's job/volunteering satisfaction: both before a person is recruited and then how the job works out in practice.

Some people will leave after their first session of volunteering and others will leave further down the line. Volunteers do not need to give notice in the same way that paid staff do, so it is disruptive for rotas when, on the day they were expected to work, people phone up to say they are leaving. Some volunteers just leave without any communication.

Generally speaking, organisations value their volunteers and appreciate their help. They want to keep them, especially if they have invested time and resources in training them. However, they might not always know how to express their appreciation, particularly when resources are tight and people are pulled in many directions.

4.1 Skills and tasks

People generally appreciate some variety in their activities and want to feel a sense of achievement, of doing something worthwhile or of having learned something new. Routine and repetitive jobs can adversely affect the health and well-being of the people doing them. Too many tasks with wide-ranging and unbounded responsibilities can be equally stressful. These are issues that could cause volunteers to leave organisations.

Box 3 outlines skill variety, task identity and task significance. These are aspects of jobs that affect job satisfaction and how people feel about their work and can be applied to volunteering roles.

Box 3 Skill variety, task identity, task significance

Skill variety is when a person carries out a variety of activities and uses a range of skills and talents to complete a particular job. People get a sense of achievement if they feel they are contributing specific skills that are valued. If there is not much variety, there is limited scope for learning.

Increasing skill variety can be achieved through job rotation (for either a few hours or a few months), or by providing training and/or development. However, too much variety can also be stressful and reduce job satisfaction.

Task identity is when a person is expected to carry out a job as a whole piece of work, from the beginning to end, with a definite outcome. Task identity can be increased by adding related tasks to the job.

Task significance is when a job has a substantial impact on the lives or work of other people, whether in the immediate organisation or the external environment. Some people (perhaps in campaigning or service delivery) can see the impact that they have, whereas others (for example, in administration) do not. Supervision and feedback can help volunteers to see how their work fits into the broader work of their organisation.

Activity 7 Thinking about your skills and tasks

Allow approximately 10 minutes

Choose a volunteering, paid or other role (e.g. family/caring responsibility) for this activity. Using the information in Box 3, write notes on the following:

1. Define your job or role in terms of the different skills you need to do it.

   Do you feel you have too much or too little skill variety (i.e. in the range of skills used)?

   Can you suggest ways in which the skill variety of your job might be improved?

Provide your answer...

2. Can you identify the whole of your task, from the beginning to the end, and what the outcome should be when it's been completed?

   If you are unable to identify the whole of your task, can you think of a way that your manager can help you understand it?

Provide your answer...

3. Do you feel you know why your task is significant (i.e. why it matters)?

Provide your answer...

Discussion

Here is an example of one volunteer's job role and how they feel about it:

> Jodie volunteers in a charity shop. She needs skills in operating a till and talking to customers and other volunteers. She is happy with this skill variety but would really like to learn how to create window displays. However, another volunteer who has been volunteering in the shop for 10 years has sole responsibility for this and will not delegate or share. Jodie would like to develop this skill as a more creative part of her work, as she is studying A-Level Art and is planning to study fashion at college.
>
> Jodie is happy with how her tasks fit together and their outcome in selling to customers. However, she feels that sharing the work on window displays would improve the whole selling-to-customers experience. She thinks that improving the window displays would sell more products.
>
> Jodie knows that every product they sell in the shop makes a difference to the people the charity aims to help. The shop manager gives them weekly sales figures, so the volunteers know how their efforts are contributing.

This might be the first time you have thought about your volunteering or other roles in this way. Of course, it may not be possible for organisations to make many changes to volunteers' actual activities (due to time and other resource constraints). It is good practice, however, for organisations to give feedback and acknowledge good performance as this helps to motivate and retain volunteers.

4.2 Motivation

So why is motivation (or, as some organisations now call it, 'engagement') important? As with paid work, volunteers will generally want to carry out activities they find satisfying and rewarding.

Understanding the volunteers' motivations is important: volunteers are not dependent on the organisation they work for, and are not tied by a formal employment contract. As a result, volunteers are usually freer than employees to pick and choose the organisation to which they give their time and efforts. If organisations do not provide an appealing environment and motivating work, they are likely to experience problems in recruiting and retaining their volunteers.

Activity 8 What motivates you?

Allow approximately 5 minutes

List at least four factors that have persuaded you to work hard and enthusiastically (in either a paid or an unpaid capacity), and four that have discouraged you and made you work less energetically and less willingly.

Table 1 Your motivations

Motivating factors	Demotivating factors
Provide your answer...	*Provide your answer...*
Provide your answer...	*Provide your answer...*
Provide your answer...	*Provide your answer...*
Provide your answer...	*Provide your answer...*

Discussion

There are dozens of possible factors that could be listed here. The purpose of this activity is to reveal the complexity of motivation and the range of factors that can influence it.

If you are in paid work, would it be true to say that although pay might have been listed, it was not necessarily the dominant factor? Probably the really important factors related to the nature of the work itself and how you felt about it – things like the 'buzz' that you got from doing the work or feeling you were contributing to a worthwhile service.

Similarly, you may have found that the demotivating factors were less related to pay than to the circumstances in which you were expected to work. For example, being fed up with being 'messed around', not liking the way things were going, or feeling a lack of support from colleagues. Or perhaps you felt that your contribution was not being recognised and acknowledged.

If you work in an unpaid capacity, you may have written down similar issues, so perhaps motivation between volunteers and paid staff is not so different?

Last week you explored expectations in relation to role. You will now move on to think more deeply about the relationship and expectations that exist between an organisation and its staff (and/or volunteers) – the 'psychological contract'. It will help you when thinking about how your own volunteering (or work) is managed, as well as help you to assess how an organisation or a group you are interested in approaches volunteer retention.

4.3 The psychological contract

The psychological contract is a theory that relates to the expectations that exist between an organisation and its staff (and/or volunteers). It was originally based on paid work, but it has also been found to be useful in understanding volunteers' motivations and why they might stay or leave their volunteering positions.

The theory suggests that people's motivations come from the relationship between the individual and the organisation (or other group) they work for (see Figure 5).

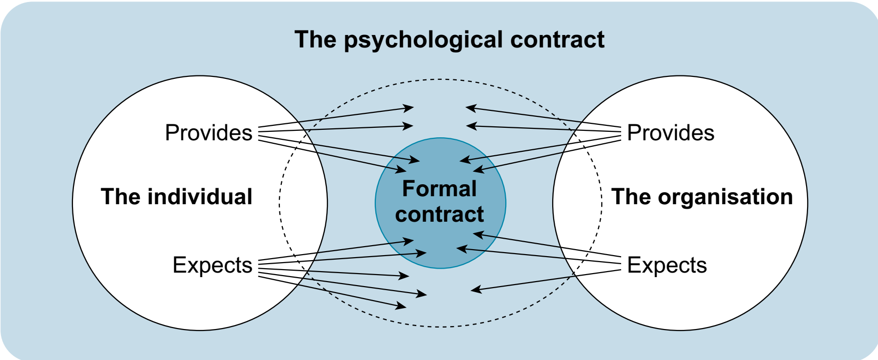

Figure 5 A diagrammatic representation of the psychological contract

The psychological contract is essentially a set of expectations. The individual has a set of outcomes or rewards that he or she expects in return for doing the work of the organisation. In paid work, part of this would be the person's wages, promotion, feedback, staff development, and so on. Similarly, the organisation has certain expectations of what it wants the individual to contribute to the work of the organisation, and certain rewards and outcomes that it will give the individual in return.

Unlike employment contracts or other formal agreements, the terms of the psychological contract are not usually written down or even mentioned. This means that in practice some people are unaware of their organisation's expectations of them.

Mismatch in expectations

The examples in Box 4 illustrate the psychological contract and the conflict caused by a mismatch in expectations.

Box 4 Mismatching expectations

Example 1

An occasional volunteer with an environmental organisation agrees to attend meetings of the management committee and be the Honorary Secretary, taking the minutes. Her psychological contract includes – *in the limited time I have, this is the most useful way I can make a contribution*, and *I'll be appreciated for this*.

The staff see her interest in the meetings as a basic commitment to the work of the organisation and seek to draw her in further. They invite her to help out at a volunteer recruitment open day. This will involve interviewing potential volunteers. They also ask her to join a sub-group looking at future plans for the organisation.

The result is that the volunteer feels put upon and mistreated and the staff start to feel she is not really committed and involved. Before the next AGM the volunteer announces that she will have to resign the post.

Example 2

Mo has been volunteering in a charity shop every other Tuesday for five years. He started volunteering in order to meet people, as he was feeling lonely after his wife passed away. He likes the other volunteers in the Tuesday team and has got to know regular customers.

A new manager decides she does not need so many volunteers on Tuesdays. She asks Mo and two other volunteers to change their day to a Thursday.

The volunteers don't mind this in principle, but Mo tries it for one week and finds that he has nothing in common with the new team, who work in a different way and are less sociable. He gives up his volunteering role.

Activity 9 Thinking about the psychological contract

Allow approximately 10 minutes

Look back to Example 2 in Box 4. What do you think are the terms of Mo's psychological contract with the charity shop?

Try to express this visually by drawing and annotating your own version of Figure 5.

Discussion

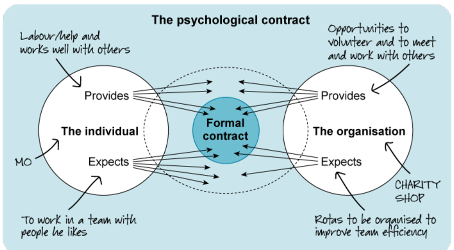

Figure 6 The psychological contract based on Mo and the charity shop

This is one way to draw the example – you may have expressed it differently.

The key thing to think about here is expectations. People are often not fully aware of their expectations or they may find it difficult to express them. They may lack confidence or feel it is somehow not legitimate to talk about their expectations. People's and organisations' expectations change over time and a psychological contract that was balanced at one point may become unbalanced.

A point to emphasise here is that volunteers do not have a formal contract in the same way that paid employees do. The psychological contract is a way of thinking about your own volunteering and how organisations seek to improve the experience of volunteering, which will then also provide positive benefits for the organisation and service users.

5 This week's quiz

The end-of-week quiz gives you the opportunity to check your understanding and progress. Again, it consists of five questions and will help you to prepare for the longer Week 4 badge quiz.

Week 2 practice quiz

Open the quiz in a new tab or window (by holding ctrl [or cmd on a Mac] when you click the link).

6 Summary

Your work this week should have given you some broader context about volunteering in which to understand your own role, if you are a volunteer or thinking about volunteering. If you are responsible for recruiting or inducting volunteers, then you also have some practical points to draw on, which you could use to increase your pool of volunteers or motivate and retain them.

In Week 2, you have learned:

- what volunteering is and why voluntary organisations rely on volunteers
- the different ways that organisations recruit volunteers
- how to write a volunteer role description
- the importance of induction
- the importance of motivation in retaining volunteers
- how the psychological contract theory can be applied to volunteering.

Next week you will explore the role of marketing and communicating clearly with stakeholders and others.

You can now go to Week 3.

Week 3: Introducing marketing and communications

Introduction

Effective marketing is crucial to the success of all voluntary and community organisations. In order to survive and thrive, voluntary organisations need to communicate and build relationships with many groups. These will include not only existing donors, supporters, volunteers and clients but also potential funders, donors, clients and others who might promote and support the organisation's cause.

An organisation's communications might include, for example, a newsletter for volunteers or members, an annual report, a website, Tweets or Facebook messages, or an advert to try to attract donations.

Marketing is carried out at all levels of an organisation and is not necessarily confined to people working as marketing assistants or officers. Volunteers are often asked to help design leaflets or to promote the organisation in other ways. New volunteers are often recruited by existing volunteers marketing the benefits of volunteering.

A key aspect of marketing is how good communication attracts people's interest. This week you will examine some of the ways in which organisations communicate and how these communications can be made effective.

Start by watching this video in which Julie Charlesworth introduces you to Week 3.

Video content is not available in this format.

By the end of this week, you should be able to:

- describe what marketing is
- describe what happens in the process of human communication using a simple model
- use the model to help explain what factors may influence whether a message is communicated successfully
- prepare effective messages, including what to say and how to say it to a target audience, and persuading people to take action.

1 What is marketing?

Figure 1 Cancer Research UK's marketing and branding for Race for Life

Marketing is a big topic to explore, but essentially it refers to communicating to customers the value of a product, a service or a **brand**. Marketing is also about engaging supporters and building loyalty to the organisation and what it offers.

This means that marketing is not just about selling things or services – organisations need to convince people to buy-in to what they do. These basic principles apply across different sectors, including the voluntary sector. In a crowded and competitive marketplace, organisations need to work hard to get their message across and this includes voluntary organisations.

In the context of the voluntary sector, customers are usually defined as an organisation's '**stakeholders**'. Some of these will be close to the organisation, such as volunteers, supporters and donors; others will be less directly involved.

Marketing is important in fundraising (which you will explore in more detail in Week 5). It can help to build a clear and identifiable image or brand for the organisation, so that potential supporters understand what the organisation does and why they might support that particular organisation's work rather than another one.

Activity 1 Communicating with stakeholders

Allow approximately 10 minutes

Watch this video featuring Alison McClary, Communications Officer at the Society for the Protection of Ancient Buildings (SPAB). Alison talks about her marketing and communications work. Make notes on who she communicates with and what methods she uses.

Video content is not available in this format.

Provide your answer...

Discussion

This video gives you a quick example of some of the ways in which voluntary organisations try to promote or market the work that they do. Alison highlights social media as a key way to get messages across. She mentions the organisation CharityComms, which provides advice on marketing and communication. If marketing or communication is part of your role (or an area you would like to explore), then you might want to visit their website at the end of this week or at the end of the course.

Now that you have a general overview of what marketing is, for the rest of this week you will explore how to communicate. The activities this week have been designed to help you improve your ability to convey messages – whether in promoting yourself at interviews or meetings, or in your day-to-day activities if your role involves marketing.

2 Understanding communication

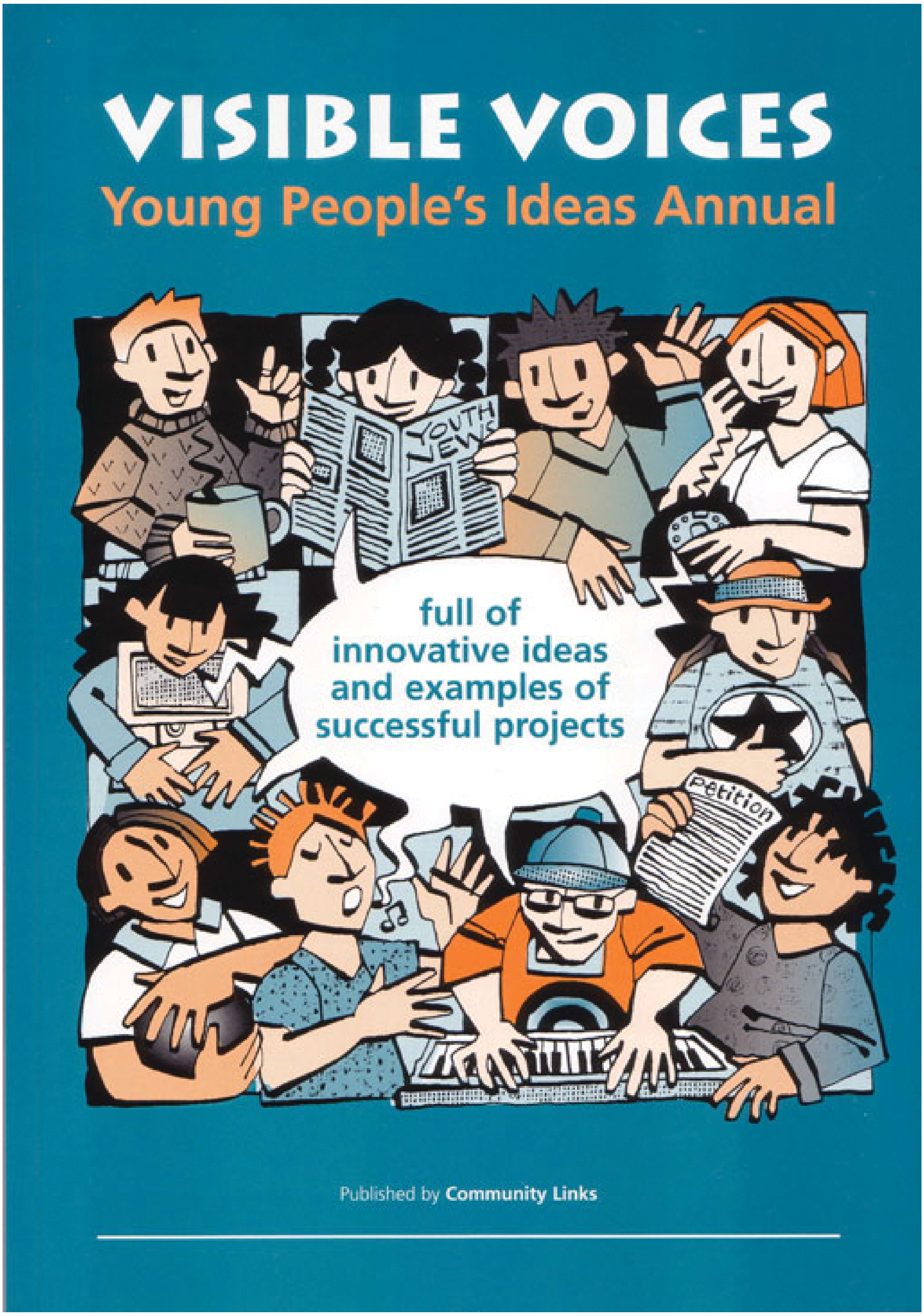

Figure 2 The front cover of Visible Voices (Source: Community Links, 2015)

What is happening when you try to communicate with someone? Figure 2 is an example of a publication by Community Links, a social action charity rooted in east London and nationally focused. It is the front cover of *Visible Voices*, a collection of projects run by and for young people around the United Kingdom (UK). It is one of a number of 'Ideas Annuals' published by Community Links in order to share good practice and inspiration among voluntary organisations.

Activity 2 Conveying a message

Allow approximately 5 minutes

Look at Figure 2 carefully and then try to answer the following questions.

Who do you think is intended to see this?

Provide your answer...

What other groups of people are likely to see it?

Provide your answer...

What message do you receive from it?

Provide your answer...

Do you think it is the message that the writer intended?

Provide your answer...

Discussion

Visible Voices is a publication intended for young people involved in community development, but it will also be seen by:

- members of the general public
- people in the media
- people working for companies or trusts that might fund some of the activities
- policy makers in government and elsewhere.

Here are some possible reactions to it:

- 'cheap and cheerful'
- rather messy and amateurish
- confusing
- fun
- happy
- political correctness
- a rose-tinted view of multicultural community action.

It is possible that the primary audience will find this rather informal style less intimidating than a more ‘professional’ looking document. However, the danger is that others might think the content will be amateurish, messy or, perhaps, too good to be true. In fact, the document is full of useful ideas, has a good contents page and is attractively laid out.

In the real world, it is rare for someone to do what you have just been doing in this task – to concentrate solely on a ‘communication’ for several minutes and analyse it in the way you have done. Most of the time, people are receiving messages with minimal interest or concentration. Because of this lack of concentration, many of the messages we receive are lost, misunderstood or garbled.

Even when you are talking to someone you know, face to face, you cannot be sure they are taking in all you say or understanding it in the same way you do. If you are communicating at one remove, perhaps by email, through a website or in a report, you have less chance to check what someone else is taking in, and so the chances of misunderstandings going undetected are higher.

These examples show that communication is not a straightforward process. Sending a message is not a guarantee that it will be received or, that if it is received, it will be understood in the way that you intended.

2.1 The communication process

Figure 3 shows a simple model of the communication process. The model comes from engineering, where engineers were concerned with how to transmit a message so that when it is received it approximates as closely as possible the message that was sent.

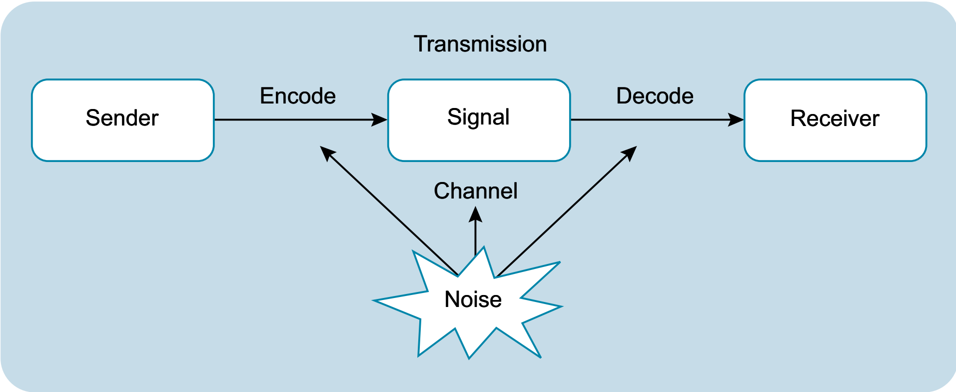

Figure 3 Communication as a technical process

To use the jargon of communications theory, there is a sender and a receiver. The sender encodes the message and sends it through a channel so that it can be decoded by the receiver. The aim is for the message 'received' to be the same as the message 'sent'.

In practice, there will be some noise, which tends to distort the message. Noise may be generated because the transmission system does not work perfectly (for example, a poor mobile phone signal), because of mistakes during encoding and decoding, or because of outside interference.

While this classic model of communication and the concept of noise are useful in explaining some of the ways in which messages can get distorted, they are limited for explaining human communication. The main differences arise because people are not machines: they do not just encode and decode messages, they actively select and interpret them, try to make sense of them and strive to give expression to their thoughts.

Activity 3 Communicating messages

Allow approximately 5 minutes

Imagine you are a volunteer coordinator in a voluntary organisation and you've been asked to brief the other volunteers about a change in how rotas will be organised. What might you do to prepare and communicate this message to these people?

Provide your answer...

Discussion

The message that we intend to communicate is rarely self-evident – it often consists of half-formed thoughts and ideas. In order to communicate, we have to give expression to those thoughts and ideas by putting them into acceptable words. It is often only in the process of expressing our ideas that we clarify our thoughts.

This has implications if your message is at all complex. You will need to express, clarify and polish up your ideas before communicating them. For written communication this usually involves a process of drafting and redrafting. Even for verbal communication you might want to make notes of the main points you want to communicate and, if your message is important, practise saying them.

You also need to think through how your message will be transmitted. Will it be via a medium such as an email, a mobile phone text, a phone call, a Facebook message or a newsletter?

The medium constrains and shapes the message that can be sent. For example, what you can say in a text can be very different from what you can say face to face. The medium can also give authority to your message or undermine it. For example, a confident, well-delivered presentation may add weight to your message, whereas a poor presentation may undermine it.

Even after you have delivered your message, you cannot just assume it has been received in the way you intended. People don't just passively receive messages: they actively select, filter and interpret them. If people do not think a message is likely to be interesting or important they may ignore it altogether, their minds may wander or they may switch their attention elsewhere.

The way people think about and decide to respond to a particular message depends in part on their existing values, beliefs and understanding. As a result, different people may make sense of and act on the same message in different ways. For example, a person who believes passionately that there is an environmental crisis is likely to understand and respond to a campaigning leaflet from Friends of the Earth differently than someone who is highly sceptical.

Figure 4 presents a model of human communication that tries to depict these differences.

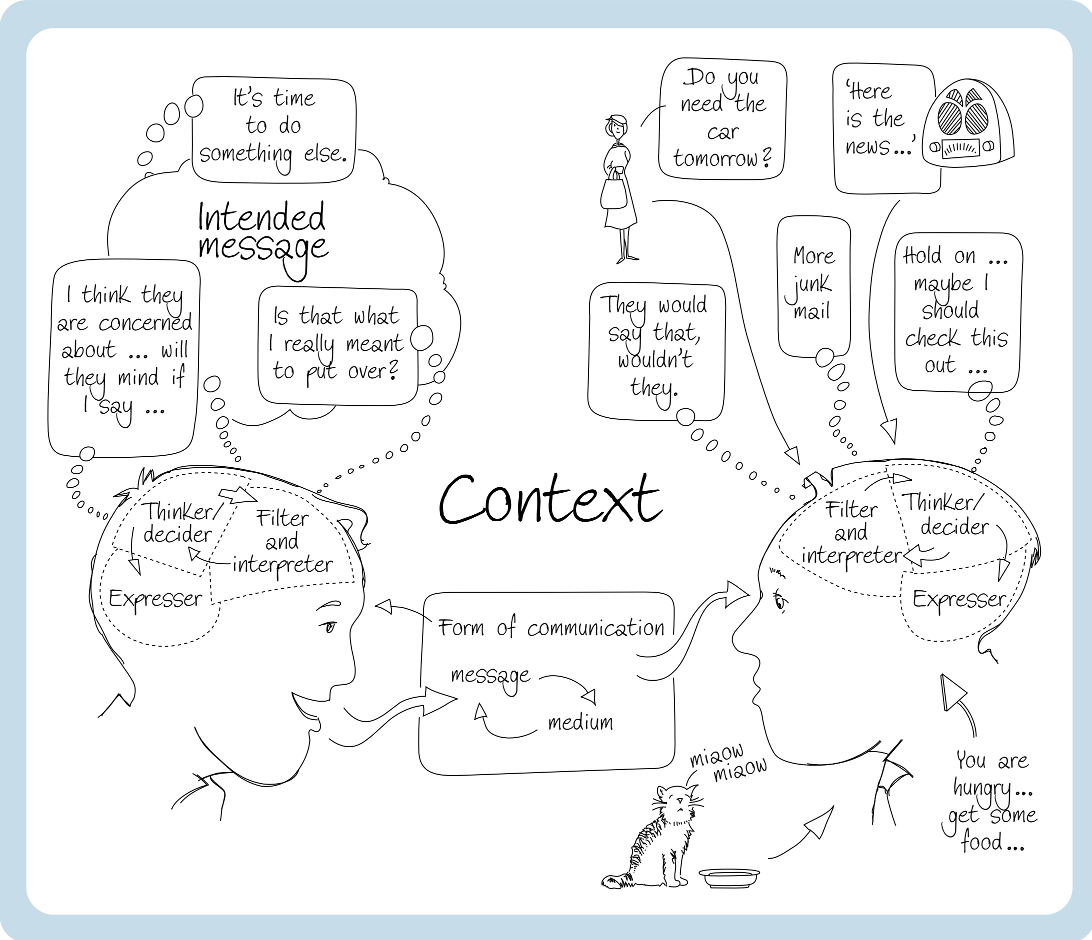

Figure 4 Communication as a human process

Activity 4 Thinking about communication

1. Using the model of human communication in Figure 4 to help you, list some of the reasons why misunderstandings might occur when one person is trying to communicate with another.

Provide your answer...

2. How can you tell whether your message has been understood or whether it has been misunderstood? What are the problems in deciding?

Provide your answer...

Discussion

Here are some of the main reasons why misunderstandings might occur:

- The sender might not have expressed his or her thoughts very clearly so the message does not really reflect what the sender thinks.

- The medium used for communication might distort the message in some way – for example, a poor telephone connection might mean that what the speaker says is misheard, or a journalist might misrepresent what the person they are quoting was saying.
- The person to whom the communication is directed might not receive it. For example, an email may be misaddressed, a letter might get lost in the post, or what you say might not be heard above the noise of a crowd.
- The person to whom the communication is directed might not give it much attention: they might not think it interesting or important enough, they might be interrupted, and so on.
- The person receiving the communication might interpret the message in a different way from that intended.

You may have been able to think of other reasons, too.

You can try to check if someone has understood you by getting feedback; for example, by listening to what they have to say, or seeing what they do, in response to your communication. This is much easier to do if you are communicating directly one-to-one with someone. It is much more difficult if you are communicating with many people at the same time.

Feedback is a form of communication, so the various reasons for misunderstanding listed above can also apply. In addition, people do not always say what they think – for example, they may feel that it is not polite, or too risky or too difficult, to disagree in public.

So the potential for non-communication or misunderstanding is great. This is why great care needs to be exercised when communicating.

In the technical model of communication (Figure 3), the problem of transmitting the message accurately is very important. Human communication is more complex – the sender, the message, the medium, the audience receiving the message and the context in which the message is sent are all important.

Preparing a compelling message often needs careful thought and crafting:

- What do you want to say and why?
- How is your audience likely to understand your message and respond?
- How can you get your message noticed and acted on?
- What are the secrets of clear communication that make the difference between being understood and being discarded?

3 What do you want to say?

The obvious place to start when designing any communication is to think about *what you want your message to achieve*. Your purpose and message are likely to vary depending on the audience. For example, existing donors or volunteers will usually be interested in what difference their contribution is making, whereas potential donors or volunteers will need more basic information about the organisation and its work.

Of course, it is important to see that there is a reasonable degree of *consistency* between these messages, or people may get confused or doubt your sincerity.

In much promotional and publicity work the *number of messages* you can successfully get across in any one communication is likely to be *strictly limited*. If you try to put over several messages at the same time you risk confusing your audience or losing their interest.

The *medium* in which you choose to deliver your message will also affect how much you can say, perhaps because of cost or space constraints. For example, what you say in a tweet or Facebook post will be very different from a newsletter, and adverts in newspapers or magazines can be expensive.

Be clear about your main message. It should usually be possible to express this in a few sentences. As with any communication, you may need to try expressing it in a variety of ways before you can see which will be the most effective and appropriate.

Activity 5 Communicating with different audiences

Allow approximately 5 minutes

Think of a voluntary organisation you are involved with, or one you are familiar with. Identify two audiences it communicates with regularly, preferably ones that are not too similar – for example volunteers or potential donors.

Write two or three sentences summarising an important message to each, such as something you might say to attract a donation or to get someone to volunteer.

Audience 1

Provide your answer...

Audience 2

Provide your answer...

Discussion

The two audiences will have different interests and concerns, so it is very likely that the messages you wrote were different.

You will look next in more detail at how you can keep your audience in mind when preparing communications.

4 Keeping your audience in mind

When preparing any communication it is useful to try to put yourself in your audience's shoes. Your message is more likely to be received and understood if it takes into account your audience's interests and concerns. For example, if you are approaching a trust for a grant, it will be important to know what the trust's priorities are and to say how what you want to do can help to meet those priorities.

One useful technique for trying to understand different audiences is a paper 'role play'. This involves thinking creatively about how different types of people get their information, what they like to read, see or hear, and what their interests are, and then to express this in terms of different characters (Kingham and Coe, 2005, p. 72). Box 1 illustrates this in practice.

Box 1 Imagining key audiences: a paper role play

A group promoting local organic food carried out a paper role play to understand three key audiences who could act as influencers on the Ministry for Consumer Affairs. Drawing on their research and understanding, they created three fictional characters with different personalities, lifestyles, information needs and media preferences. These characters were then used when planning communications aimed at promoting a change in government policy on local food.

Mr Khan is a senior official in the Department of Trade and Industry. His information comes from trade press, conferences, broadsheet newspapers, academic reports and websites. He prefers information with facts, statistics and models. Mr Khan is impressed by examples of good practice from local authorities in the area of local food. He can understand and absorb into his work detailed arguments from the group because he is a specialist.

Mrs Jones is a regular supermarket shopper. Her information comes from mid-market newspapers like the *Daily Mail* and the radio (both national and local to where she lives). She also enjoys reading gardening and food magazines. She particularly notices stories that have a human element. With a part-time job and young children at home, Mrs Jones does not have much time on her hands, so she appreciates simple, practical messages about local food that she can respond to easily (e.g. signing a petition).

Angela Whiting is a farmer and fresh fruit producer unable to get her produce into the supermarkets. She is an active member of a farming organisation, from which she gets much of her information about local food (through briefings and mailings). She watches news programmes on television, but does not have much time to go into complicated arguments. She tends to be most receptive to information that is clearly relevant to her professional interests and is presented in an accessible format (e.g. with visual aids, such as graphs). As Angela is involved in food production for her living, she can respond to relatively complex demands for support from the group.

(Source: adapted from Kingham and Coe, 2005)

Like the food group described in Box 1, much of the communication work that voluntary and other organisations undertake involves trying to persuade different audiences to do something: perhaps volunteer, sign a petition, write a letter to a Member of Parliament or make a donation. In these situations it is important to think through what you can realistically expect from different audiences, and to pitch your request accordingly. Because you cannot always accurately gauge what people may be able to do or give, it is often useful to suggest a range of realistic responses. This is why many charities often suggest a range of possible donations when asking for money.

It is also important to take into account your audience's circumstances (for example, the pressures they are under or their cultural background) as they might affect the communication process. So, for example, the medical jargon a doctor uses to talk to fellow medics is likely to be inappropriate for communicating with patients.

Cultural differences can arise for a variety of reasons touching on class, education, professional training, religion, ethnic background, regional differences, and so on. Unless you are sensitive to these differences, your message may be seen as inappropriate or may be misunderstood.

Activity 6 Communicating with key audiences

Allow approximately 10 minutes

Think back to the two audiences you identified in Activity 5.

1. Write two or three sentences about a fictional character from each of the two audiences. Make sure you cover the areas of job, information needs, information sources and likely levels of engagement, as in the role play examples in Box 1.

Provide your answer...

2. How do you think understanding your audience in this way might influence the way you communicate with each of these characters? What might you realistically expect from the characters in terms of a donation or another form of support?

Provide your answer...

Discussion

This approach is similar to **market segmentation** – trying to understand the needs of different elements of an organisation's market. It has the advantage of helping you keep in mind that the different audiences (or segments) with which you are communicating are a collection of individuals with their own interests and needs. However, you do also need to be aware of the danger of **stereotyping**.

Often when voluntary organisations communicate they are trying to persuade people to do something. Next you will look in more detail at how you can make your message attractive and persuasive.

5 Getting your audience's attention and interest

Figure 5 An attention-grabbing online campaign

In much fundraising, campaigning and promotional work, voluntary organisations are trying to raise awareness of an issue, get people interested in a cause, show them why they should get involved and, finally, persuade them to take some action. This action might be to become a member of the organisation, a volunteer, a supporter or a donor.

There is an acronym used commonly in marketing to help you think about this process: **AIDA**. It stands for:

Attention
Interest
Desire
Action.

In order to persuade someone to take action you have to:

- attract their *attention* so that they are aware of the issue or need
- generate *interest* about how the issue can be solved or met

which leads to:

- a *desire* to solve the issue
- a course of *action* that can be taken that will lead to a solution.

AIDA can be applied to a wide range of communication activities – from an appeal letter or email to a public meeting or a social media campaign.

Any messages that you want to communicate will be competing with a number of distractions. There is a danger that your message will get lost or distorted in this 'noise'. Box 2 contains a number of useful 'rules of thumb' that can be used to make your message stand out from the crowd and improve its chances of getting people's attention and interest.

Box 2 Creating the OOH! factor

1. Think 'YOU': For instance, you usually hear your own name, even in a noisy room. So a new message will be more easily received when it is linked to something that the receiver knows about already and is also something in which she or he is interested. Thus, a message that is personalised – about 'you' or 'your family' – is more likely to catch your attention than one about more general 'people' or 'families'.
2. Think 'NEW': 'Familiarity breeds contempt' is an old saying. It means a message that is too familiar will be disregarded as 'old hat' or boring, or will simply fail to be noticed at all. This is one reason why advertisers tend to carry on with successful themes for a long time, but continually refresh them with new treatments of the subject. Another way that you can catch people's attention and avoid over-familiarity is by an unexpected twist or surprise. Again, this is a technique heavily used in advertising – through the use of humour, pathos (evoking pity or sadness) or shock tactics.
3. Think 'BOO': Sheer loudness or size draws attention, though this might cause irritation, particularly if the place or time is inappropriate. A very loud message has to be very simple as well because we can only take in so much at a time – a poster in large letters might be unmissable, but there is only room for it to contain a few words.
4. Think 'VIEW': A strong visual image is one of the most successful ways to grab attention. This is why most advertisements include both a picture and words making the same point – the aim is to appeal to your emotions and your reason at the same time, as well as emphasising the message in two ways. This is even true of radio advertising, where images are created in your mind.
5. Think 'DO': Asking people to take an action also reinforces the message. Once you have filled in a form or made a purchase, you have developed some commitment to the item itself. You are now more likely to recognise its name if you see or hear it again and, if you then obtained satisfaction, to have built up a favourable conception. As the saying goes, 'Your best customers are your last customers.'
6. Think 'COO': A positive message is more likely to be picked up or responded to than a negative, downbeat one. Most of us have problems enough of our own without needing to add other people's to them. The key is to show how, say, a donation or support is making a difference by stressing what achievements will result. This is especially the case when an organisation is asking for support over a period of time.

Activity 7 Assessing the message

Allow approximately 5 minutes

Look at the poster in Figure 5 and then note down examples of where you can see the use of the rules of thumb described in Box 2.

Table 1 Analysing the OOH! factor

Rule of thumb	Example
'YOU' …	*Provide your answer...*
'NEW' …	*Provide your answer...*
'BOO' …	*Provide your answer...*
'VIEW' …	*Provide your answer...*
'DO' …	*Provide your answer...*
'COO' …	*Provide your answer...*

Discussion

YOU – The text asks for 'your' support and 'just £3 from you can help …' The poster is trying to make a generic appeal more targeted or personalised to individuals.

NEW – This was a 'NEW' campaign and poster, despite the issue being a long-standing one. Shelter usually produces a new poster each Christmas to raise funds for homeless children and families.

BOO – The poster catches the attention with a dramatic headline, 'Please don't forget our homeless children this Christmas', which is reinforced by the bold print to create a 'BOO' effect.

VIEW – The striking visual image of the child also catches the attention, humanises the story and is likely to evoke sympathy, particularly at Christmas.

DO – There is a clear call to action by asking you to donate by text with a specific amount of £3.

COO – The poster invites the reader to feel part of an important campaign that affects many people's lives, but also reminds people that not everyone has a home at Christmas. It highlights that money raised can help Shelter respond to an urgent call and find accommodation for homeless children.

Sharing and liking things on social media is more commonplace, but many voluntary organisations are trying to make more of this attention and translate it into actual support or fundraising. For example, Cancer Research was quick to respond to requests for information when the '#nomakeupselfie' interest started – people assumed the charity had started the campaign but they had not. The organisation then posted one selfie of a member of staff with their text code for donations, which resulted in a successful fundraising campaign (Miranda and Steiner, 2014).

6 Persuading people to take action

Figure 6 Social media can be powerful in marketing voluntary organisations

There are a number of other useful techniques that can help create the desire to act and to take action.

Sell benefits, not features

Detergent marketers all understand that people do not buy detergent because they want detergent. What they want is clean clothes. In other words, it is the results you are offering to achieve, rather than how you achieve them, that will interest your audience.

For a cancer research charity, for example, many donors are unlikely to be interested in the precise details of the medical research they are funding. They want to know that their donation is advancing the search for a cure, or at least some alleviation of the distress associated with the disease. If you are asking for a donation or support, let people know what it is that will be achieved with their help.

Include a ‘call to action’

People’s time and attention are limited. Having attracted their attention, stimulated their interest and aroused their desire, you need to finish the job by asking them to take action. The ‘call to action’ reflects the urgency of your cause. The secret is to make it as easy as possible for them to respond, so that the sense of urgency is not lost and you get the response you want. Donating by text or supporting campaigns via Facebook or Twitter is a common call to action used by many organisations and is quick to do.

6.1 Style and image

The overall style and layout of any poster or message is what readers notice first. If it is attractive and interesting, they are more likely to read what you have to say. Space, attractive typography, photographs and illustrations all contribute to the attractiveness and effectiveness. Images can be used to attract attention, to add human interest and to reinforce and highlight a particular message. In addition, pictures and illustrations can be used to break up text that might otherwise look boring. Using a consistent style will also make it easier for people to recognise your organisation's communications as part of its overall image or branding.

However, image is not just confined to your organisation's 'personality' in print or on the web. Professionalism can be communicated in a number of ways. A news release, a leaflet or an email needs to be drafted and redrafted, not rushed off at the last minute. And if you are communicating face to face or by phone, you need to work out your arguments precisely and think about what the other person may say in return – *before* you start.

These are some of the things you can do to get an audience's attention and interest, and persuade them to take action.

7 This week's quiz

The end-of-week quiz gives you the opportunity to check your understanding and progress. Again, it consists of five questions and will help you to prepare for the longer Week 4 badge quiz.

Week 3 practice quiz

Open the quiz in a new tab or window (by holding ctrl [or cmd on a Mac] when you click the link).

8 Summary

This week you have explored briefly how marketing can be applied to campaigns by voluntary organisations. You have also looked at some of the ways in which voluntary organisations communicate with different audiences, and how to make these communications effective.

In Week 3, you have learned to:

- understand how marketing is used in the voluntary sector
- consider what factors affect how messages are communicated
- assess effective messages and campaigns
- understand how to persuade people to take action.

Next week you will explore the importance of financial information in voluntary organisations and practise working with budgets.

You can now go to Week 4.

Week 4: Working with financial information

Introduction

Every voluntary organisation, no matter how small, needs to consider the role of financial information in its operations; that is, the money it has coming in and the costs involved in paying staff, running services and projects, rent, utilities, and so on. People often think it is the accountants or other specialist financial staff who are in charge of finances but, in reality, many staff, trustees and volunteers have some input into managing financial information, fundraising and setting budgets. This week will help you if you are asked to take responsibility for a budget or to comment on financial information within your organisation.

Good financial management is important for all organisations, even those with small incomes, and registered charities are regulated to ensure that they are being run appropriately, particularly in terms of how money is raised and spent.

You will look briefly at some of the key financial terms that relate to voluntary organisations (particularly registered charities), which will help you understand your organisation if you are new to working or volunteering in the sector. You will focus primarily on budgets this week – what they are, why they are important, and how to interpret them – as this is an area where many staff and volunteers are required to contribute information.

Budgets are used at different levels – organisational and departmental as well as for individual projects and activities. Understanding budgets can prove to be a useful skill, whether in your work or in your personal life. You might think that budgets are just about working out costs and doing calculations, but actually much of the budget process relates to asking questions, and presenting information clearly and communicating well.

You can also attempt the first compulsory badge quiz this week.

Start by watching this video in which Julie Charlesworth introduces you to Week 4.

Video content is not available in this format.

By the end of this week, you should be able to:

- understand different terms relating to financial management in the voluntary sector
- outline the different sources of income available to voluntary organisations
- describe the importance of budgets and why they are set
- interpret a simple budget
- describe how to balance a budget.

1 Finance, rules and regulations

Figure 1 Thinking about finance

Whatever industry or sector you work in, you may be required to handle financial information at some point – whether it is working out the costs of equipment or funding needs, paying staff or volunteer expenses, or spending money on stationery or marketing materials.

If you are a volunteer responsible for one aspect of the organisation's work, perhaps maintaining a garden or providing refreshments, you could be asked to work out a small budget. Alternatively, you may need to make a claim against a budget, so it is also useful to know where the money comes from, who decides what the budget is, and why there might be difficulties in paying for things.

Many people are probably accustomed to the phrase 'end of the financial year', which can mean departments rushing to do extra spending in order to use up their allocated budget or to say no to any further spending because they have already used up their funds.

Many elements of managing financial information may appear to be very focused on individual departments, projects and organisations, but wider issues of transparency and accountability are important. In other words, who is responsible for checking that organisations are operating ethically and spending income appropriately?

The voluntary sector is **regulated**, although this mainly applies to organisations that are registered charities. Those that are registered are subject to the Charities Act 2011 (England and Wales); The Charities and Trustee Investment (Scotland) Act 2005; and the Charities Act (Northern Ireland) 2008 and Charities Act (Northern Ireland) 2013.

Registration and regulation of charities is done by the Charity Commission in England and Wales; the Charity Commission in Northern Ireland; and in Scotland by the Office of the Scottish Charity Regulator (OSCR). Fundraising by charities is also subject to regulation, overseen by the Fundraising Regulator in England and Wales. The arrangements for Northern Ireland and Scotland were reviewed during 2016.

1.1 The role of trustees in financial management

Trustees or members of the organisation's **governing body** oversee the organisation. They have specific responsibilities relating to the organisation's **constitution** and meeting relevant legislation in the UK. They are entrusted to look after the organisation's money and other resources, and to ensure that these are used effectively and for the purpose they were given. These responsibilities (for trustees in registered charities) are legal requirements laid down by the various Charities Acts and regulatory bodies.

In some circumstances, trustees are personally liable for the charity's debts. Even when an organisation is not registered, trustees would normally be expected to take their responsibilities and liabilities seriously and ensure accountability to their stakeholders.

Box 1 outlines some of the things a trustee could be liable for.

Box 1 Trustee liability

Personal Liability:

- Breach of trust under charity law
- Acting as a charity trustee when disqualified
- Failure to comply with statutory requirements such as health and safety, etc.
- Failure to deduct an employee's PAYE
- (In some circumstances) the debts and other liabilities of the organisation

Breach of Trust includes:

- Spending the charity's money on activities outside of the charity's objects
- Failure to prudently protect the trust property
- Carrying out unpermitted political activity
- Fraud
- Serious negligence
- Trustee receiving personal benefit

Liabilities are likely to arise in two main areas of responsibilities:

- **Operational**: arising from what the organisation does. Example: where the trustee signs a lease for the organisation that fails to pay the rent.
- **Governance**: arising from the duties that a trustee has. Example: where a trustee had entered into a contract with an organisation that benefited him and he had to repay the improperly obtained profit.

(Source: Community Action Southwark, 2014)

If you are interested in becoming a trustee, hopefully this list of liabilities will not deter you! It shows the importance of financial and risk management in voluntary organisations, but if trustees act in good faith it is unlikely they will be held personally liable. Usually there will be one or two people with substantial financial experience on a board of trustees. They can help to check that the organisation's financial procedures meet formal regulations, as well as generally providing transparency and accountability.

As Miller (2014) states:

> Even the smallest charity needs someone with good financial skills and knowledge to ensure good financial management – they could be a trustee, a volunteer or staff member. The responsibility for managing finance needn't fall on one person's shoulders – the responsibilities can be shared among different people with different skills in the organisation.
>
> A common misconception is that finance managers need specific charity accounting experience. In reality, it's more helpful for them to have good financial knowledge, and the ability to communicate well so they can translate and interpret financial information into meaningful information for others and ask the right questions.

1.2 Financial statements

Organisations produce various statements or reports relating to financial information. For example:

- **Statement of Financial Activities (SoFA)**: registered charities are required to produce this statement. It details their surplus and deficit (rather than profit and loss, which is the terminology of private sector organisations). The SoFA is part of the annual report.
- **Balance sheet**: details assets, liabilities and funds held.
- **Cash flow statement (applies to larger organisations)**: analysis of movements of cash (and equivalent, such as investments), including all income and payments made. This helps to assess the organisation's **liquidity** and **solvency**. See Table 1 for the categories included in a cash flow statement.
- **Annual reports**: if an organisation is a registered charity, by law it has to lodge an annual report every year with the appropriate charity regulator for the part of the UK in which the charity operates. Annual reports generally highlight the organisation's main activities, achievements and challenges for the year, as well as information on expenditure and funding received from grants, contracts, donations, and income from investment and trading activities. Annual reports are useful ways to inform stakeholders about the organisation's work.
- **Budget**: these are internal documents that detail the organisation's income and expenditure for the coming year. You will read about these later this week.

Although you may not be involved in any of these statements or reports, this overview of the key statements and reports will hopefully give you a sense of the requirements and regulations your organisation might be subject to.

Box 2 outlines some financial management tips for small charities.

Box 2 Top tips

What essential finance processes are needed?

The foundation of good financial management in small charities is to keep it simple. Basic accounting records are a must to keep track of spend. A simple spreadsheet could be used to chart income versus expenditure. What's important, however, is that these basic records are kept up to date, with bank reconciliations taking place at least once a month. A cash flow forecast should also be created to predict movements in the bank account in forthcoming months. It is also important to have a good filing system or referencing system so any document or information needed can be easily retrieved.

Set up good processes and controls and involve others in financial management. Processes need to be established and documented for managing all aspects of finance, including monitoring the use of restricted and unrestricted funds, the authorisation of purchases and signing off when something can be paid. […]

In a small organisation, maintaining the books and records will often be sole responsibility of one person but this can be a mistake. No one person in a charity should be responsible for this and processes must be communicated and understood by everyone in the organisation.

Accounts – keep it simple and create a narrative

Even small charities need regular management accounts presented in a clear and simple way for senior managers and trustees to understand. One tip is to create a simple narrative to go alongside the numbers, so whoever is reading it, from the Chief Executive to the trustees, can answer any questions the numbers throw up. Sometimes the inclusion of bar charts or pie charts can make it easier for others to understand the accounts.

Annual statutory accounts also need to be produced by the organisation, which clearly represent its financial activity and current situation. The finance person must plan ahead and know when these are due so the accounts are prepared and filed in good time. The advice here is to keep them simple and include a good narrative to bring the numbers off the page. Financial performance should be linked with the activity to illustrate the impact the charity is having. This also ensures the charity complies with the annual statutory reporting requirements.

(Source: edited from Miller, 2014)

Activity 1 Thinking about financial information

Allow approximately 5 minutes

You will now reflect on your own experience of financial information. This might be in a paid or an unpaid capacity for an organisation, a group or at home.

Which of the following have you been involved with?

- Preparing accounts
- Helping with an annual report
- Collecting and counting money at a local event
- Costing some activities; for example, plants for a garden, new equipment
- Writing an application for getting some funding

- Providing information for a budget

Were there any you felt less confident with? If so, why?

Discussion

You will look later at budgets and costing. Often people feel unsure about financial information, as they worry their maths is not good enough or they do not understand what the accounting jargon means. If you work in a team, then hopefully there will be someone to work with you or to provide guidance. Being methodical about what you have done and keeping notes will help. As mentioned in Box 2, writing a ‘narrative’ or producing charts and graphs can help you make sense of your financial information.

2 Sources of income

Figure 2 Donations are an important part of charity income

Generally, voluntary organisations receive their income from four main sources:

- **Donations of various kinds**: these can be one-off donations from individuals or they can be small sums raised through appeals, sponsorship or events organised in the community. For example, in many villages and towns, people open their gardens to the public one weekend a year and charge admission, sell cakes and lunches and hold raffles for prizes. There may be sizable donations from charitable trusts for particular projects that fit the trust's aims. Business organisations may also offer donations or sponsorship. This is usually **unrestricted income**.
- **Grant funding**: this may come from local or central government, charitable foundations, companies or from some other statutory bodies. Many voluntary organisations, for example, have received funding from the National Lottery through the Big Lottery Fund or the Heritage Lottery Fund. This is usually **restricted income**.
- **Contracts and tenders**: these are usually with a government organisation to provide specific services. This is the area of voluntary sector income that has grown most rapidly, particularly as the UK government has moved from grants to contracts. This is restricted income.
- **Trading**: this may be from traditional charity shops, which are a feature of many high streets and are usually staffed by volunteers selling second-hand goods. In some cases (such as Oxfam), they sell new goods produced under fair trade standards overseas.

Income is usually a mix of unrestricted and restricted funding. Unrestricted income is money that can be spent at the discretion of trustees. Restricted income is money given for a specific purpose within the wider objectives of the organisation.

Organisations also often have reserves, which they keep invested to use at a later date. Charity reserves are a controversial issue. The media often criticise charities for holding large reserves while still carrying out fundraising appeals. Yet having reasonable reserves probably means that good financial management has been practised. The reserves provide a buffer or safeguard if income falls or if there are other unexpected calls on the organisation's funds.

However, because of concerns about financial management in charities, the Charity Commission for England and Wales states that voluntary organisations should 'explain and justify' the level of reserves they hold. Therefore, all organisations need to develop a policy relating to reserves.

Voluntary organisations often try to obtain their funding from different sources so that they are not over-dependent on one source. This can help to manage the risks associated with the fall of income from a particular source. You will explore more about income in Week 5, in the context of fundraising.

3 What is a budget?

Figure 3 All organisations set budgets

One common definition of a budget is a plan set out in monetary terms, for a given period (usually one year). People often use the term 'forecasting' in the same way as 'budgeting'. There is, however, a key difference: a forecast predicts what *may* happen; a budget is a commitment to what *will* happen. Typically, departments within an organisation forecast their activity and, based on this, a budget is produced showing all items of revenues and expenses for a specified period (often one year). These are then translated into a master budget for the organisation.

Once agreement has been reached on what resources are to be allocated to the budget, the task of the managers (or other staff or volunteers) of the various areas is to meet their budget (and ideally come in 'under budget').

All organisations set budgets. Budgets are practical statements because the budget establishes and directs what activities and actions can happen within the organisation. The budget is an estimate of what the organisation needs; that is, it addresses questions such as:

- How much will salaries be for the year?
- What expenses might staff and volunteers need to claim?
- What equipment do you need to buy this year?

In this way an organisation can avoid nasty surprises later in the year.

Clearly, before a budget can be set, people need to discuss and agree what the expenditure is likely to be in relation to the aims of the organisation for the year ahead. An organisation's financial staff will usually be involved in the finer details of the financial information, but 'ownership' of the budget should be perceived as wider and, in particular, not a **'top-down' approach**.

Budgets contain mainly financial information and are usually expressed in monetary terms. However, a budget can also be thought of as a *plan* expressed in financial terms. Budgets help organisations to achieve their aims with the resources available to them. In theory, they enable managers (paid or unpaid) to make better decisions, and to monitor and control the part of the organisation for which they are responsible.

Budgets are usually internal documents, although, for example, if you were writing a bid for funding to an external organisation, you would usually include a budget as an estimate of proposed costs. Budgets include information about income and expenditure (you will see an example of a budget later).

Activity 2 Why are budgets important?

Allow approximately 10 minutes

Imagine you have been asked to talk informally to new volunteers at an induction meeting at an organisation that you know. In the formal presentations, one of the senior managers mentioned the budget several times. Afterwards several of the volunteers ask you what she meant by it. Write some notes based on why it is important for an organisation to have budgets.

Provide your answer...

Discussion

Do not worry if you found this a difficult activity – the purpose was to get you thinking about how budgeting is done in an organisation you know. You might have come up with some of the following issues or points:

- ensuring the organisation knows what money it has coming in and what it can spend
- setting objectives based on the money coming in
- thinking about the best time to plan activities or projects
- taking action as planned during the year
- monitoring feedback on what really happened
- controlling costs.

3.1 What are budgets used for?

Budgets can be used for:

- **Planning**: All activities involve the use of resources and their conversion into goods or services. Planning what to do when and what to use is a key activity for organisations.
- **Coordination**: By obtaining regular information about how areas are performing, managers can assess performance and act together to take any corrective action required.

- **Communication**: A budget provides a commonly understood tool and language for expressing what the issues are for teams and to keep senior managers (and trustees) informed.
- **Motivation**: Knowing what is expected and working to exceed it can be a hugely motivating experience for teams and individuals. Budgets allow meaningful targets to be set and worked towards.
- **Control**: Using the feedback provided by budgetary information, managers can take corrective action on an ongoing basis to ensure their team performs well.
- **Evaluation**: Budgets allow actual performance to be compared with what was planned or committed to.

Many of the points on the list may not involve you and they can sound like something bigger organisations have to do. However, all organisations will use these processes to some degree, and not just at a senior level. More importantly, it illustrates that budgets are not static numerical information but tools to guide organisations in meeting their objectives.

3.2 Different types of budget

There are a number of ways in which an organisation may prepare a budget for the coming period. You may not know the technical term for your department or organisation's budget, but you might recognise it from one of these descriptions:

- **Incremental budgets**: Here, the next budget is based on the previous period's budget. There are generally few adjustments: perhaps an increase to allow for inflation, but sometimes there may be a reduction to encourage quality improvement and efficiency. It is simple, but it may reduce the process to an annual ritual without questioning the assumptions or reflecting changes in the real world.
- **Zero-based budgeting**: At the start of each budget round, managers 'go back to square one' and start from a blank sheet of paper. This may be time consuming, but it does mean that managers are required to examine their operation and question what they do. It may not be appropriate to use this method for each period, but doing so once in a while can be valuable.
- **Rolling budgets**: This approach is intended to allow for changes in the external environment that may impact on a budget. Based on the idea that the time horizon for many managers is quite short, it breaks down the budget for the overall period (for example, 12 months) into shorter periods (for example, three months). At the end of each short period the budget is reviewed in the light of reality, so that variations from planned budgets can be noted and explained. This may help if there are seasonal effects in the work that organisations do.
- **Flexible budgeting**: Here a budget is altered (flexed) to reflect changes in the level of activity over the previous year. This makes it more adaptable and realistic than an incremental budget. In doing so, a more meaningful analysis can be carried out.

Activity 3 Identifying types of budget

Allow approximately 5 minutes

Identify the type of budget that the manager is discussing below. Do you see any difficulties with the manager's approach to budgeting?

> I know my department's activities really well, probably much better than the operations director, so I'm very confident in saying that next year, the current costs in my department will increase by the rate of inflation.
>
> Actually, I like to add a bit on top of my final budget figures because then I know I'm covered if costs rise more than I anticipate.

Provide your answer...

Discussion

The manager is using an incremental budget approach, which takes the current period's costs and adds an amount to take inflation into account. When the manager can justify that this is likely to happen (perhaps by looking back at a trend from past years' costs), this approach is acceptable.

But what about the manager adding 'a bit on top'? Can the manager's actions be justified? If not, then inflating budget costs in this way leads to an unrealistic expectation of future costs and favours the manager when the actual costs appear to be lower than budgeted costs. It will appear that the manager is being effective in controlling costs when, in actual fact, the budget was overstated in the first place.

Using a zero-based budgeting approach removes the temptation to 'add a bit on top'. This approach asks, 'What activities will we need to do to carry out this operation and how much will each activity cost?' The activity cost is calculated from external sources as if the organisation was starting from zero.

4 Interpreting budgets

Now you will practise interpreting a budget using an example of a community association. First, you will look at income: on the budget this appears as a list of all the money the organisation has coming in or has in the bank as reserves or surplus. If the organisation is not intending to spend the reserves, they might not be mentioned, although the budget would usually refer to the expected interest to be earned for that year.

Activity 4 A community centre's predicted income

Allow approximately 10 minutes

Read the following case study and then answer the questions below.

Case study: Oldtown Community Association

Oldtown Community Association is a registered charity that was first set up in 1960. It aims to provide facilities for social welfare, recreation and leisure, to maintain and manage a community centre and to allow people to hire the hall in order to promote community activities. It is run by a general committee, which includes a representative from each of the affiliated groups and an executive committee of volunteers.

Membership is £2 per person, with affiliated groups paying £10 per year. Their fundraising activities have been fairly successful over the years and the organisation has funding from a Big Lottery grant, which is being used to modernise the centre. The Association has applied for a further grant to upgrade the car park but is still awaiting the decision.

Table 2 is an example of what the predicted income might be for the Association in the next financial year.

Table 2 Income for Oldtown Community Association

	Unrestricted funds	Restricted funds
Membership	£2,000	
Donations	£300	
Hire of the hall	£20,000	
Fundraising events	£4,000	
Big Lottery grant		£30,000
Grant applications (unconfirmed)		£5,000
Reserves	£10,000	

1. What is the Association's total predicted income?
2. What is the most important source of income?
3. Can you foresee any problems with these different sources?

Provide your answer...

Discussion

1. The total income is £56,300. The grant application is unconfirmed so cannot be included. If the Association's application is successful, the money is earmarked for a specific project, which could then go ahead.
2. The biggest source of income is the Big Lottery grant. However, this is for a specific purpose and is restricted. In the long term, the hire of the hall raises the most money. The organisation could consider raising its membership fees in the long term, but given the nature of the organisation this may not be successful.
3. In common with many voluntary organisations, funding is uncertain. Membership might fall or organisations might not want to hire the hall. It is sensible therefore to keep some money in reserves to deal with unforeseen changes. However, in this example, the modernisation of the hall should provide greater opportunities for more events.

4.1 Expenditure and costs

Expenditure involves everything an organisation might have to pay for and could include some of the following:

- salaries to staff
- volunteers' expenses
- building and energy costs
- office and cleaning supplies
- computer and website maintenance
- publicity.

It is important to be realistic about costs, so a new budget would require some research on what new items might cost or how much it costs to heat a building either monthly or quarterly, etc.

Costing is a common sense procedure with which many people are familiar; for example, when planning a holiday or buying a car. It involves identifying all the different items, estimating (or finding out) how much they will cost, and adding them up. Costing only becomes complicated if the activities being costed are complicated – or unfamiliar and uncertain. Some costs are more readily anticipated and calculated than others.

Formally, the term 'cost' refers to the amount of expenditure (actual or **notional**) incurred on or attributed to a specific item or activity. The costs you might have come across include:

- the costs or expected costs of different resources
- whether the costs for the service, project, unit or organisation are more or less than expected
- how much it costs to undertake specific activities.

Some costs vary with the level of activity while others do not; some costs can be attributed to certain activities and some cannot.

- **Fixed costs**: Some costs are not affected by changes in the level of an organisation's activity. For example, the rent that an organisation pays for its premises will not vary with the volume of the work that it does. The rent paid is independent of the level of the activity.
- **Variable costs**: Some costs increase or decrease as the level of activity rises or falls; for example, photocopying costs.
- **Direct costs**: Sometimes it is possible to attach or attribute a cost to a particular activity. For example, a member of staff works for so many hours with service users or clients, and so that cost can be calculated as part of a contract with a local authority.
- **Indirect or overhead costs**: Not all costs can be attributed to particular tasks. For example, it might be difficult to attribute general marketing costs to particular activities.

This gives you a brief overview of the different types of cost so that if you are asked to look at a budget and give your opinion, you will recognise some of the terms used.

Activity 5 Looking at costs and expenditure

Allow approximately 5 minutes

Table 3 shows the forecast expenditure for Oldtown Community Association. Read the table and then answer the questions that follow.

Table 3 Forecast and expenditure within a budget

Insurance	£ 2,000
Energy costs	£ 3,000
Volunteers' expenses	£ 500
Marketing and fundraising events	£ 1,200
Telephone	£ 200
Printing and stationery	£ 150
New computer and printer	£ 500
New desks and chairs	£ 1,500
Building work	£32,000
Car park work	£ 5,000

1. What is the Association's total annual budget expenditure?
2. What is the single largest category of expenditure?
3. Compare Table 2 with Table 3. (You might find it easiest to do this by opening Table 2 in a new tab or window.) Does the budget balance; that is, is the *estimated income* the same as the *planned expenditure*?

Provide your answer...

Discussion

1. The total forecast expenditure is £46,050. However, the £5,000 for the car park is uncertain as the grant application has not yet been approved: this work will only go ahead if the application is successful.
2. The building work is the highest cost for the financial year. Unforeseen problems mean that the building costs will be more than the grant. This means the shortfall will need to be found from elsewhere or they might choose to cut costs elsewhere. However, the committee would need to check the terms of their grant to ensure they are fulfilling them.
3. The total projected income is £56,300. Therefore, all being well, they will spend £15,250 less than this, which gives them a good contingency and would cover the extra projected building costs. This figure does **not** include the car park work. The car park work will only go ahead if they get the grant so that £5,000 is separate in terms of both expenditure and income. It might be that the committee would review these figures and decide to do some other projects. Their reserves are potentially available but are usually only drawn on in emergencies and not for routine expenditure.

5 Balancing the budget

Organisations need to decide whether their budget should balance or not. In some cases, the organisation might want to project an imbalance of revenue over expenses (a surplus), perhaps because of plans for bigger expenditure the following financial year or just as a safety net.

A **deficit budget** might also be acceptable: for example, if there is an urgent need to spend on a big project or to invest in new staff or service improvement that will require the use of some funds from reserves. Trustees and staff will obviously need to look at the different implications. If they are not happy with expenditure exceeding income then the organisation will need to rethink the plans. This might involve postponing some activities.

However, the focus should not just be on whether the figures balance, but also on how well the organisation's objectives and wider resources can be best used to help the maximum number of beneficiaries.

Occasionally, things go wrong with organisations and for many reasons: poor financial management is often a root cause. With some high-profile cases, such as the collapse of Kids Company in 2015, have come increased calls for more regulation and checking on what voluntary organisations are doing.

Hind (2015) described the collapse as a 'wake up call for the whole sector'. He also highlighted that other, earlier, high-profile failures such as Refugee and Migrant Justice were caused by organisations being too dependent on one source of income, particularly government contracts.

Although the reasons for organisations failing are likely to be complex and intertwined, better financial management, together with maintaining stakeholder support, is important.

6 This week's quiz

Now it's time to complete the Week 4 badge quiz. It is similar to previous quizzes, but this time instead of answering five questions there will be fifteen.

Week 4 compulsory badge quiz

Remember, this quiz counts towards your badge. If you're not successful the first time, you can attempt the quiz again in 24 hours.

Open the quiz in a new tab or window (by holding ctrl [or cmd on a Mac] when you click the link).

7 Summary

Congratulations on reaching the end of Week 4 – you are now halfway through the course. This week has focused on an overview of the main types of financial information that voluntary organisations use and some of the issues and challenges that may arise. You should now have a basic knowledge of the importance of budgets and should feel able to interpret a budget for an organisation you are interested in, and perhaps contribute if asked.

In Week 4, you have learned:

- how voluntary organisations are regulated in relation to financial information
- what the role of trustees is in financial management and what their liabilities are
- about the different types of financial information used in voluntary organisations
- the importance of budgets and how to interpret them through understanding income and expenditure.

Next week you will explore the different approaches used in fundraising and the challenges presented.

You can now go to Week 5.

Week 5: Introducing fundraising

Introduction

All voluntary organisations need funds to achieve their aims and carry out their activities. As you saw in Week 4, funds come from a variety of sources, from donations to contracts, and many involve considerable effort, such as writing applications and nurturing relationships with individuals and organisations. Some organisations have staff and departments whose main responsibility is to carry out all aspects of fundraising, whereas smaller organisations or groups tend to involve all their staff or volunteers in planning, writing grant applications and building relationships with donors.

There are many ways in which voluntary organisations might ask people or other organisations for money; for example, through street collections, jumble sales, events, and so on. Asking people for money inevitably has an ethical dimension: the people being asked may feel a degree of pressure or obligation, and some older or vulnerable people may feel they cannot say no. In recent years, some voluntary organisations have come under the spotlight for their highly pressurised fundraising approaches. Consequently, there have been calls for greater regulation of fundraising.

Even if you are not directly involved with fundraising, this week's topics and issues will give you a greater understanding of the importance of effective and successful fundraising to your organisation. It will also provide you with the **ethical** context for asking people for money.

Start by watching this video in which Julie Charlesworth introduces you to Week 5.

Video content is not available in this format.

By the end of this week, you should be able to:

- explain what fundraising is
- know how organisations raise money from individuals and other organisations
- explain the ethical challenges of fundraising
- identify the skills involved in fundraising.

1 What is fundraising?

Figure 1 Fundraising at a music festival

Fundraising is the act of raising money by asking donors (individuals or other organisations) for it. The money raised pays for an organisation or a group's work, services and the costs of delivering services (buildings, staff, and so on).

The following examples show the variety of methods used to raise money and how they can be small to large scale, and short to long term:

- selling tickets for an Easter egg trail in a museum
- writing an application to the Big Lottery Fund for £2 million to refurbish an old building and turn it into a community centre
- organising a craft fair with the proceeds going to a play group
- stopping people in the street and asking them to sign up to become regular donors to an animal charity
- asking people to leave money in their wills to a charity
- organising a social media campaign to raise money for a particular project.

Generally, organisations aim to use different methods and different sources of income in order to be sustainable and resilient, so that if one source of money dries up, they have other funds potentially available. Gaining long-term funding is obviously crucial, as it helps with planning as well as the stability of the organisation.

In larger organisations, fundraising is generally done by professional fundraising staff. However, other staff, trustees and volunteers may also be involved, through building relationships, gaining trust from supporters, the public and other stakeholders, and promoting the work that the organisation does.

Activity 1 Starting out in fundraising

Allow approximately 5 minutes

Listen to Anna Page talk about the process of fundraising for an organ restoration project in her church. What did she learn from the process?

Video content is not available in this format.

Provide your answer...

Discussion

Anna talks positively about the experience, even though she and her team of volunteers were all new to it. She explains how everyone contributed something, whether skills or ideas. She talks about a 'snowball effect' and how one idea or initiative led to another and how they kept going, even when some things didn't work. She explains that the team, and nurturing it, was important to the process. You will learn more about teams in Week 7.

Income streams

The National Council for Voluntary Organisations (NCVO) (undated) classifies income into four main streams:

- **Gifts** from donors (donations of money; legacies in wills) involve *asking*.
- **Grants** from funders (money for a particular project) involve *asking*.
- **Contracts** with purchasers (to deliver a product or service for a fee) involve *earning*.
- **Trading** with customers (selling products on the open market, e.g. Fairtrade products in Oxfam) involves *earning*.

NCVO describes these sources as a 'spectrum' that moves from 'asking' for money to 'earning' money. Each type of funding relies on building a good relationship with an individual or organisation. You will apply this model in the next activity.

Activity 2 Thinking about fundraising

Allow approximately 10 minutes

Listen to Matthew Slocombe, Director of the Society for the Protection of Ancient Buildings (SPAB), talking about fundraising in his organisation. Then answer the questions that follow.

Video content is not available in this format.

1. Write down the sources of funding Matthew mentions and where they fit on the NCVO income spectrum.
2. What challenges to fundraising does Matthew mention?

Provide your answer...

Discussion

1. Matthew mentions membership as the main source of income for the SPAB. This is a relationship similar to a gift (as described on the NCVO income spectrum): members give money (subscription) and in return they receive some benefit, such as a magazine or a reduction in fees for attending an event. Members are more likely to give other donations and support fundraising events too. Matthew also mentions donations and legacies (gifts), which he highlights as useful for long-term activities.

   In terms of grants, Matthew mentions Historic England, Historic Scotland, Cadw (the Welsh Government's historic environment service working for an accessible and well-protected historic environment for Wales), and the Heritage Lottery Fund for specific and bigger projects. He also says they often need to find **match-funding** for bigger projects, which involves approaching trusts and other funding bodies. Matthew mentions the Maintenance Cooperatives (which involves volunteers caring for buildings of worship): this project involved substantial Heritage Lottery funding as well as donations and support from many other organisations. Thinking about the other elements of the NCVO income spectrum – contracts and trading – Matthew does not specifically mention these.

2. In terms of challenges, Matthew says it is becoming increasingly competitive and difficult to find funding, as there is less money available in the public sector. His organisation (in common with many others) has to work harder and look for other sources.

You will now move on to look at methods of fundraising based on asking individuals for gifts (money).

2 Asking individuals for money

Figure 2 Traditional fundraising

There are numerous ways to ask for money (far too many to cover in this course), so this is just a snapshot of some of the methods available.

As the fundraising marketplace becomes more competitive, organisations attempt to be more innovative in their approaches. Sometimes, asking individuals for money may involve giving them something in return; for example, when raising funds through **crowdfunding**, which is explained below. Estimates suggest that, on average, people in the UK give around 1 per cent of their income to charity (NCVO Knowhow Nonprofit, 2016).

Different ways that people donate to charity

Many people give one-off cash amounts to charities. It is usually a spontaneous gesture, such as putting coins into collection boxes in shops or pubs, a street collector's bucket or an envelope put through their door. They might pay for tickets to fundraising events, such as school fetes, or sponsor someone on a charity run. Although many people give money in this way, it is a small percentage (around 18 per cent) of the total income from donations (NCVO Knowhow Nonprofit, 2016).

Planned giving is important to voluntary organisations as it involves a regular and potentially long-term commitment. This involves giving via direct debit; that is, paying a set amount each month. There is always scope to go back to the donor and ask them to raise their amount, too. However, if a person has felt pressurised into signing up, perhaps by a '**chugger**', they might cancel their direct debit at a later date.

Fundraising 'products' include child sponsorship, food, blankets for people sleeping rough, endangered animal sponsorship, and so on. These can be made available through specialised websites such as goodgifts.org or as one part of some charities' fundraising activities; for example, Oxfam in their 'unwrapped gifts'. People pay the specified amount for the product and know what their donation has paid for.

Crowdfunding involves advertising online (usually through specific crowdfunding websites) a particular initiative or activity for which a voluntary organisation is seeking money. The idea is that a lot of people give a small amount of money that adds up to a large amount. Sometimes this method involves getting something back, such as a book or a bag connected with the campaign, or an invitation to an event. The bigger the amount donated, the better the reward.

Gift aid enables UK registered charities to claim tax back from the government: they can claim 25p every time an individual donates £1. The donor needs to be a UK tax payer and is also required to complete a form.

Payroll giving is where employees donate to any UK registered charity from their gross salary (before tax is deducted) and receive tax relief.

2.1 How to ask donors for money

The vast majority of people become donors only when they are asked. People are turned into donors by being provided with suitable opportunities to contribute. As a fundraiser, it is your request and your approach that lay the foundations for each individual donor relationship. It is your subsequent actions that will sustain – or otherwise – the nature and amount of any further donations and support from that donor.

There is no such thing as a common donor motivation that organisations can simply tap into. Altruism, enlightened self-interest, nostalgia or indignation may come into it. The 'ask' can take a whole variety of forms – a phone call reminder about a subscription, a letter seeking a one-off donation, a text message, an email, or simply a collecting tin sitting on a shop counter.

It is the fundraiser's action in 'making the ask' that triggers, creates and shapes the donor relationship. The information that fundraisers have about their donors, and the sorts of communication they then develop with them, determine the ways and the extent to which donors continue to give their support.

Imagine you are working as a fundraiser: the whole asking–giving relationship is often formed and developed at a distance. That distance means that your work with donors and supporters can be difficult. To be effective you must be able to relate to each and every donor and supporter as a unique individual, while managing your work with them as a whole.

You must be able to construct forms of communication with donors that are both mass produced and personalised. You must provide opportunities for donors to become more committed without pestering them or implying that they have not done enough. These considerations all involve some sensitive balancing acts, as well as an awareness of the ethical context.

'Making the ask' is a phrase that is often used to describe this vital feature of fundraising work. Your work may involve all sorts of activities, but the success and effectiveness in securing resources and support will be very limited if fundraisers do not, in the midst of everything else, actually 'make the ask'.

2.2 Feeling confident to ask

Many of us feel awkward about asking people for things. It often seems intrusive. It flies in the face of the accepted conventions of polite, interpersonal behaviour. To begin to get a sense of how to be more confident and effective in asking individuals for support, think about your own feelings and approach.

Activity 3 How confident are you about asking?

Allow approximately 5 minutes

Consider each of the following requests. Type yes or no into the blank cells to indicate which you would feel confident about and which you would feel uneasy about. Write down why you think you would feel this way about each scenario.

Table 1 How confident are you in asking for a donation?

Scenario	Confident	Uneasy
Asking a member of your family for a loan of £10	*Provide your answer...*	*Provide your answer...*
Asking a member of your family for a loan of £5,000	*Provide your answer...*	*Provide your answer...*
Making a house-to-house collection for a national charity	*Provide your answer...*	*Provide your answer...*
Making a house-to-house collection for a local hospital	*Provide your answer...*	*Provide your answer...*
Asking your immediate colleagues to donate to the leaving present of a colleague	*Provide your answer...*	*Provide your answer...*
Asking a local business to contribute to the purchase of a minibus for your child's school	*Provide your answer...*	*Provide your answer...*

Asking a meeting to donate to a pressure group of which you are a member	*Provide your answer...*	*Provide your answer...*
Phoning someone 'cold' (that is, knowing nothing about them other than their name and phone number) to ask for a donation of £50	*Provide your answer...*	*Provide your answer...*
Taking a long-standing contributer to your organisation to dinner to ask her to leave some money to your organisation in her will	*Provide your answer...*	*Provide your answer...*

Discussion

Here are some of the reasons people commonly give when asked why they are confident or uneasy when asking for money.

Confident

- I know who I am talking to and how they are likely to respond.
- I believe strongly in what I am asking for.
- I know exactly what I am asking for and why.
- I never ask for more than someone can afford.
- I like talking to people – however fleetingly.
- Without learning to ask, we simply would not have been able to have an orchestra.
- I try to be as honest and open as I can – and not pretend that I am more confident or sure than I am.
- If you don't harangue people or use moral pleading, then the vast majority of people are quite nice and enjoy being able to contribute.
- I found I could handle this asking business as soon as I stopped expecting that everyone ought to agree with me. I always try to respect their right to say no to my request.

Uneasy

- I am unsure of my own commitment. I always feel that I am conning people.
- I am afraid people will say no.
- I don't like getting into arguments.
- I don't like being rejected.
- I basically don't agree with asking for money for social welfare. I think its funding should come from taxation.
- I feel I am intruding on people's privacy.
- I know it sounds funny, but I think we ought to be able to manage on what we've got already.
- I don't like rich people – they make me feel angry and uncomfortable – and I don't think we should ask poor people.
- It's just begging on a large scale and I find it is demeaning to me and to the people I ask.
- As a disabled person I want rights, not charity.

- I can't get rid of the sense that I am a second-hand car dealer.

2.3 Developing your ability to ask

There are two related ways in which you can develop your ability to ask for resources and support. The first is rooted in your *performance* and highlights some of the key behaviours of asking. The second starts from an understanding of the overall *process* you are engaged in.

As far as performance is concerned, Box 1 summarises some of the accumulated wisdom about how to organise your behaviour as you conduct an interview with a 'prospect', and relates to both small and major contributions.

Box 1 How to ask someone directly for a contribution

- **Make it a special occasion**: It's worth thinking carefully about the setting and timing of any request for major support.
- **Dress appropriately**: If it is a face-to-face meeting, then respectful, non-verbal communication is an important part of the process of asking.
- **Set yourself and your prospect at ease**: Always allow some time for you and your prospect to settle yourselves into the encounter.
- **Establish some form of mutuality**: Pay attention to your prospect's motives, aspirations and concerns. It is important to acknowledge difference and their right to be who they are and, at the same time, to establish a basis of common interests.
- **Explain who you are**: Be very clear about what you and your organisation do and do not do. Be proud of its accomplishments. Be specific. Do not apologise for wanting a financial contribution. Invite and answer questions.
- **Ask for a specific amount of money**: Make a precise request along the lines of 'I would like you to contribute £1,000 to the museum.' Then remain silent! It is inappropriate to hustle people. If an uncomfortable amount of time passes, ask them whether they have any questions.
- **Listen and respond appropriately**: If the response is non-committal, work on the relationship and present your case more carefully. If the response is positive, restate what has been promised to make sure you have understood it correctly. Make a written agreement there and then – do not leave your prospect to contact you later – they rarely will. If the response is negative, it may well be that you can make a further approach another day with a different request to which they will respond more positively.
- **Always say thank you**: Where possible, send a personal thank-you letter, email or text within forty-eight hours, no matter what you receive.

The process approach

The second approach to asking – the *process* approach – does not provide a 'recipe' to follow in the same way. It sees asking as a creative activity: creating a suitable opportunity for someone to give. It is based on four key aspects of the process of asking, but without presenting these as a series of steps. The business of asking is essentially relational and interactive. Figure 3 and Box 2 summarise the relationship between the four aspects.

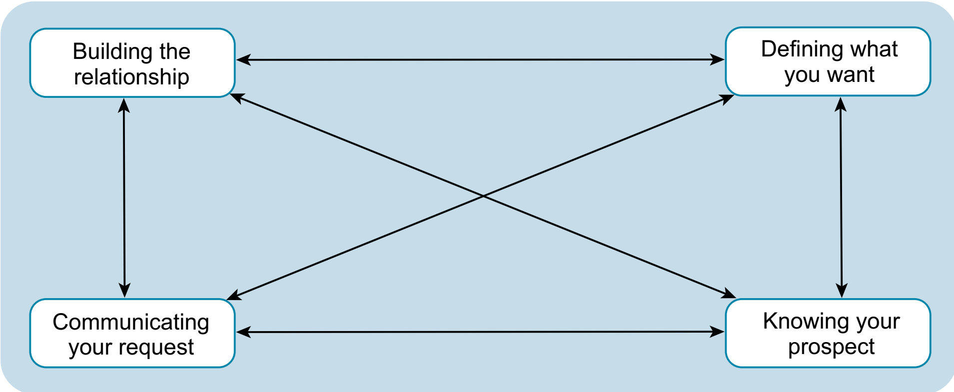

Figure 3 The process approach

Box 2 The process of asking

Each of the elements in Figure 3 involves you in making judgements and identifying options in light of the information you are receiving.

1 Knowing your prospect

You do not have to be personally acquainted with a prospect before you can ask for anything, but you have to make some preliminary attempt to assess how they are likely to respond and the sorts of thing they support. This is not just a matter of detailed, initial research. Someone collecting for an environmental organisation outside a supermarket on a Saturday morning is continually making quick judgements of people based on eye contact, what's in their trolley, what they are wearing, and so forth. These signals will contribute to some sort of initial assumptions about reasons for responding to any request for support.

2 Defining what you want

You need to be specific about what you want from an individual prospect and why you want it. You will have to indicate a level of donation or a type of involvement, and the reasons you believe it merits their consideration. Offer scope for them to explore, discuss and negotiate. What you are looking for is a request that they can define and respond to in ways that are appropriate and meaningful to their needs and concerns.

3 Communicating your request

There is no ideal way of actually putting a particular request. Communicating your request involves thinking through how your proposal is likely to be received and amending your style if necessary. Link your request with other information and requests your prospect might have received from your organisation.

4 Building the relationship

You need to create – or sustain – an appropriate relationship. How far are you asking your prospect simply to slot into a standard relationship – as a member, an occasional or one-off contributor, a long-term supporter, a benefactor? Alternatively, what is the scope for an individual negotiation of the relationship in light of his or her concerns and aspirations? Although the request may be for a specific purpose, you will want to create a basis for both of you to develop the relationship further.

There is much common ground between the performance and the process approaches to asking for support from a potential contributor. You can use either or both as a basis for planning and reviewing the way you make specific requests. In practice, you have or will develop a style and an approach with which you are comfortable. But however you ask, one other feature of one-to-one asking still has to be considered:

A superb personal performance and a flawlessly sensitive and flexible process will not guarantee you the outcome you seek.

This is not your fault, nor the fault of the prospect. Even if fundraising uses terms such as 'prospect', you are not in the technical business of oil exploration. You are engaged in a much more fragile business of fostering new relationships and identities. You are asking people to change, to be a bit different, to adjust their ideas of themselves. It is hardly surprising, therefore, that many people are not always prepared to make these changes just because you ask them and when you ask them.

It is in the nature of this sort of work with individual donors and supporters that you will often fail – or not succeed immediately. The most important skill you need in this interpersonal area of work is the ability to handle the answer ‘no’ and yet still continue.

While you need to have a strong personal commitment to the success of the individual request, you also need to place it firmly in the context of the bigger picture. Concentrate on learning from the experience. The person whose donation you are soliciting is an individual among many other possibilities. In the words of a successful appeals manager: ‘“No” today does not imply “No” tomorrow. I always try to retain the relationship.’

2.4 The contribution multiplier

One mistake inexperienced fundraisers often make is to think they have to do all the work themselves. However, the most effective way to get resources is not only to ask other people to help with either money or time, but also to ask them to ask their friends to help – this is known as the contribution multiplier (see Figure 4).

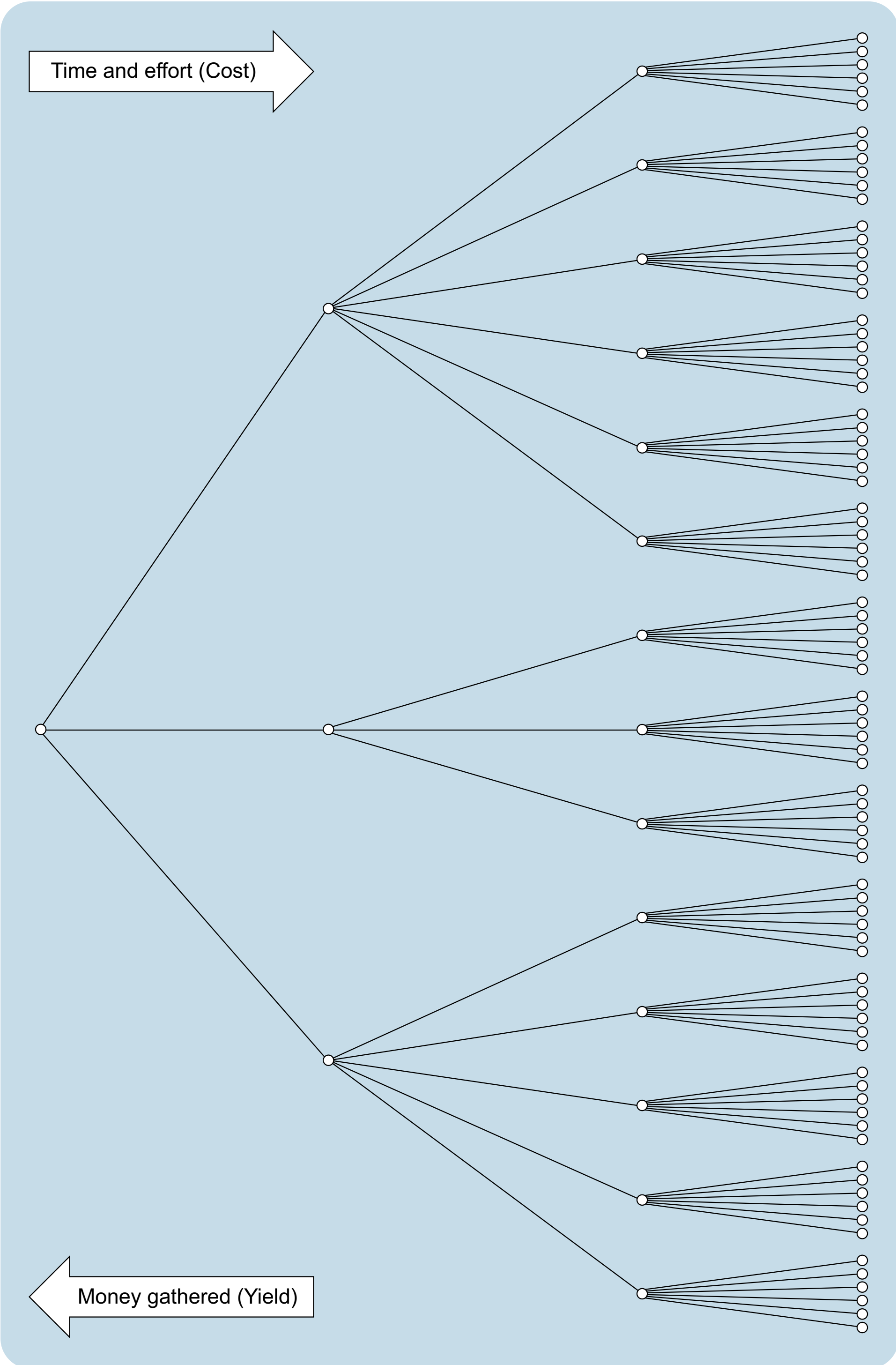

Figure 4 The spread of participation: a chain of contributors

A good example of the contribution multiplier is a sponsored event. For example, a marathon where people who take part not only pay a fee to enter, but also ask some of their friends and relations to sponsor them to complete the event. This both reduces the time and effort you need to put into contacting potential supporters and increases the amount of resources you can get, as others will ask more people than you could possibly contact. Their chances of success are also likely to be higher as they will often be asking people they know to sponsor them.

If you think back to Activity 1, Anna talked about the importance of involving different people in her fundraising team and how this brought in new people over time. She described it as a ‘snowball effect’, which is similar to the multiplier effect.

You will now look at what might be involved in fundraising for particular projects or activities through writing an application for funding.

3 Asking other organisations for money

At some point, most voluntary organisations attempt to raise money from writing a grant application to funding bodies, trusts and foundations. In common with much fundraising, such applications might be done by staff, trustees or volunteers, depending on the size of the organisation and the nature of the application.

Grants usually involve large amounts of money and are for a specific project or activity. Writing an application is time consuming: there are no guarantees of success and, as you saw in Activity 2, grants are increasingly sought-after. Often, staff, volunteers and trustees in smaller organisations embark on writing an application for the first time and with no outside help. Activity 4 introduces some of the issues that might arise during this process.

Activity 4 Dealing with the process

Allow approximately 5 minutes

Listen to Anna Page (whom you met in Activity 1) talking about the challenges of compiling a grant application to the Heritage Lottery Fund. What positive and negative aspects of writing a grant application does she mention?

Video content is not available in this format.

Provide your answer...

Discussion

In terms of positive aspects, Anna says that the process challenged them to think in different ways. They were able to involve more volunteers and they learned a lot, particularly in terms of thinking about what the funding body wanted, which made them more methodical in addressing all the questions.

Negative aspects included the paperwork being off-putting, relentless and tiring. The team undoubtedly felt downhearted when they were rejected the first time, but they turned it into a positive experience by learning from it.

3.1 The role of planning in obtaining resources

Talking about her experiences in applying for a grant, Anna implies that her team learned how to be methodical and to plan better, particularly in terms of addressing what the funding body wanted. In order to obtain resources for organisations, it is vital to plan carefully. Think about when you last drew up a plan. Or maybe you have never had to draw up a plan because it is the sort of thing you leave to other people?

Plans are made for particular purposes. We plan *for* something. Organisations can have many types of plan: from big, strategic plans for how the organisation as a whole can achieve its purposes, through to project plans for specific activities. Project plans usually require explicit targets for what should be achieved by when in order to realise the project. When seeking funding, it is important that the issue for which you are fundraising fits with the organisation's strategic purposes, and that the funding body definitely funds the type of activity you want to do.

There are three basic components to a plan:

- the aims and objectives to be achieved
- a specification of the steps or activities needed to achieve these and when they will be completed
- estimates of the resources required to carry out these activities.

It is often difficult to get a plan right the first time you attempt it, so planning is often an iterative process. In other words, you will keep revisiting and revising the plan as the project develops and circumstances change. Moreover, planning needs to involve everyone who will play a part – at some point – as you need to build commitment to the plan. Thus, planning is not simply a matter of researching and deciding what needs to be done. It is both an analytical *and* a social process.

When planning, it can be useful to think about SCHEME. This is a popular mnemonic that can help you to remember a checklist of things to think about, whatever kind of planning you are doing:

> **S**pace – what accommodation and facilities are needed to carry out the plan?
>
> **C**ash – how much will be needed to run the planned activity?
>
> **H**elpers – how many people will be needed and what skills will they need?
>
> **E**quipment – from vans to move things to teacups and kettles
>
> **M**aterials – food, stationery, balloons, whatever
>
> **E**xpertise – any specialist advice needed about the project or the locality, legal matters, insurance implications, and so on.

Activity 5 Applying the SCHEME analysis

Allow approximately 10 minutes

Think back to the organ restoration fundraising project that Anna discussed in Activity 1 and Activity 4. Apply the SCHEME analysis to this project. Obviously you do not know all the details so use your imagination in planning this kind of initiative.

Provide your answer...

Discussion

Hopefully, you found SCHEME useful in analysing the things that you would need to address. Here are some ideas relating to Anna's project:

Space – for meetings about the project; exhibition space explaining what is happening to the organ; is the organ being sent away or restored in situ?

Cash – money for the specialist restoration and transport; extra insurance if the organ is moved off site.

Helpers – volunteers are needed for writing the application, liaising with the funders and the restorers, writing information and newsletters about the progress.

Equipment – exhibition stands.

Materials – refreshments for meetings.

Expertise – legal matters, conservation advice, insurance.

4 Challenges of fundraising

Figure 5 Ethical issues are important in fundraising

Getting it right in fundraising is very important. We all know when things have gone badly wrong, for we see headlines like ‘Pair jailed for pocketing cancer cash’ or ‘Kidney charity closes after damning report’.

But how do organisations get into such messes? Generally, most people undertaking fundraising activities do not set out to break the law. It usually happens because those in charge did not pay sufficient attention to the ethics of fundraising and making sure there were adequate systems in place to account for the money collected.

Fundraising thrives on innovation and new ideas to capture the interest and enthusiasm of donors and supporters. But what if these approaches to fundraising take organisations into unchartered territory where the ethical implications are unclear?

Ethical behaviour is about making moral judgements about what is right and what is wrong and then developing codes of practice to hold these beliefs in place and provide the bases for expressing them in action. Many ethical issues are given force by legal requirements – for example, there are strict laws governing the conduct of much fundraising practice, from the handling of people’s data to the regulation of house-to-house collections and raffles. The majority of complaints about fundraising tend to relate to phone calls, street sign-ups, doorstep collecting and direct mail, all of which are often perceived as aggressive and highly pressured.

The fundraising profession in the UK has extensive guidelines for all aspects of fundraising practice in its regularly updated Codes of Fundraising Practice. However, due to media attention and cases of malpractice in fundraising during 2015, new regulations are currently being discussed to ensure tighter controls.

The Fundraising Standards Board (FRSB) has provided an independent public complaints system for complaints about charity fundraising, which is now under review. The Public Fundraising Association (PFRA) is the standards and membership body for organisations carrying out face-to-face fundraising on the street. This is defined as:

> The solicitation of a regular gift to charity, usually by direct debit or standing order.
>
> (PFRA, 2015)

You may have heard the staff who approach people on the street referred to as ‘chuggers’, and there have been increased concerns about their behaviour in recent years. The PFRA has developed codes of practice (rule books) for face-to-face fundraising on the street and for knocking on doors, ensuring that the public are respected, safeguarded and informed about what they are being asked to sign up for.

5 Skills needed for fundraising

Figure 6 Learning to be a fundraiser

Now that you have read about what fundraising entails, what do you think it takes to be a fundraiser? As you have seen this week, fundraising is often carried out by professional staff with the relevant training and experience, but many members of staff and volunteers will also be involved at all levels, whether collecting at events or writing grant applications.

Core competences

The following list of '**core competences**' shows the types of activity, skill and knowledge required of fundraisers.

- Plan, implement and review particular events, appeals or campaigns, including identifying needs, setting goals, managing the planning process, and planning events.
- Effective communicator with external and internal audiences, including identifying audiences, writing skills, using the media, presentational skills, and persuasiveness.
- Managing staff and volunteers, including recruitment, motivation, supervision, support, development, and working with groups and committees.
- Collect, analyse and manage relevant information, including prospect research, developing and acquiring lists, and storing, analysing and updating information.
- Develop and maintain effective relations with donors, supporters and other relevant agencies, including understanding donor motivation, and developing and sustaining donor commitment.
- Deal effectively with the commercial aspects of fundraising, including costing projects and plans, tendering and negotiating contracts, trading, and both legal and tax requirements.
- Choose and apply various approaches or techniques for fundraising, including knowledge of a range of fundraising and campaigning techniques within an understanding of ethical principles and the external fundraising environment.

Activity 6 Thinking about your fundraising skills

Allow approximately 5 minutes

Look at the list of 'core competences' above and identify:

- which areas you do now
- which areas you would like to do in the future
- which areas you do not wish to do.

Then note your reasons for each in the table below.

Table 2 Core competences

Now	The future	Not interested
Provide your answer...	*Provide your answer...*	*Provide your answer...*
Provide your answer...	*Provide your answer...*	*Provide your answer...*
Provide your answer...	*Provide your answer...*	*Provide your answer...*
Provide your answer...	*Provide your answer...*	*Provide your answer...*
Provide your answer...	*Provide your answer...*	*Provide your answer...*
Provide your answer...	*Provide your answer...*	*Provide your answer...*
Provide your answer...	*Provide your answer...*	*Provide your answer...*

Discussion

Even if you do not think you want to do fundraising as a main activity, you may have seen that some of the skills involved can be applied to many areas of your work or volunteering. Some of the core competences are particularly useful when working to ethical standards (all of the competences relate to this); working in teams (managing staff and volunteers core competence); and working on projects (plan, implement and review; collect, analyse and manage relevant information). You should now also understand how fundraisers might work in your organisation and the challenges they face.

5.1 Learning from the fundraising process

As you heard earlier, when Anna was talking about the organ fundraising project, the people involved often learn a lot from the process. In the next activity, you will hear Patrina Law reflecting on her experiences as a fundraising volunteer.

Activity 7 Reflecting on the fundraising process

Allow approximately 5 minutes

In this video, Patrina Law reflects on the process of getting involved with the restoration of a village hall.

Write notes on the following questions:

1. Why did Patrina get involved with fundraising?
2. What did she learn from the process?

Video content is not available in this format.

Provide your answer...

Discussion

1. Patrina didn’t set out to volunteer or fundraise – she got involved because she used the hall as a dance teacher and wanted to help save the building.
2. Patrina says that her work skills came in useful, and she learned to be patient when filling out forms and thick-skinned when they had knock-backs. She says that she and the committee grew in confidence in applying for more grants after one success.

   Patrina learned to involve more people and to communicate with the local community about the threat to the building. She also says that she is still learning from others on the committee. Overall, their fundraising has been a success because they have saved the building, restored it and enabled it to function profitably.

6 This week’s quiz

The end-of-week quiz gives you the opportunity to check your understanding and progress. Again, it consists of five questions and will help you to prepare for the longer Week 8 badge quiz.

Week 5 practice quiz

Open the quiz in a new tab or window (by holding ctrl [or cmd on a Mac] when you click the link).

7 Summary

In some ways, this week could simply be concluded with the statement that getting adequate and sustainable resources for a voluntary organisation is generally difficult and requires hard work. However, by thinking about where you might get funding and the implications of seeking that funding, you may come up with some better approaches. Planning and relationship-building are also part of this process, and everyone in the organisation has a role to play in making sure that the organisation has a good reputation, works ethically and makes best use of scarce resources.

In Week 5, you have learned:

- there are many methods of fundraising, on a spectrum from asking to earning
- the importance of using different fundraising methods to achieve sustainability
- how individuals give money and the skills needed to ask donors for money
- some of the things that people new to fundraising learn from the process
- what is involved in applying for grants
- how fundraising needs to be ethical and regulated
- what skills are needed to be a fundraiser.

Next week you will explore different types of meeting and how these can be made more effective.

Week 6: Effective meetings

Introduction

Meetings are used to coordinate and plan work, to make decisions, to monitor progress, to consult with volunteers or users of the organisation's services, to give support and for many other reasons.

In the past, meetings often took place in formal settings, such as offices and meeting rooms, and nearly always involved people meeting 'face to face'. Times have changed though, and you have probably experienced sitting in a café hearing people nearby taking part in a meeting via their mobile phone or laptop.

There is much more flexibility now, but does this mean people find meetings more effective? The chances are that people still complain about having too many meetings, as well as ones that accomplish little. When resources are tight and people have too much work to do they may feel that yet another meeting is unhelpful.

However, meetings do not have to be a bad experience. During this week you will engage in a variety of activities and tasks to help you think about what can be done to make meetings more effective and enjoyable.

Start by watching this video in which Julie Charlesworth introduces you to Week 6.

Video content is not available in this format.

By the end of this week, you should be able to:

- analyse and describe the strengths and weaknesses of meetings you are familiar with
- distinguish between different types of meeting and the activities that are appropriate in each
- plan what you need to do to prepare for a meeting in which you are to take part
- explain what is involved in being an effective chair, secretary or participant in a meeting
- analyse your own strengths and weaknesses when taking part in meetings and what you might do to address any weaknesses
- know what is involved in recording and following up on meetings.

1 Meetings: good and bad

Figure 1 A typical meeting

Meetings are not just part of organisational life – they also take place in less formal settings such as schools, village halls, pubs and cafés. The focus this week is primarily on meetings that voluntary organisations engage in and which may involve staff, volunteers, carers and service users, as well as other agencies. Even if you are not directly involved with a voluntary organisation, you can probably draw on your experience of attending other types of meeting.

In the first activity for this week we'd like you to recall some of the meetings you've attended and to think about why some meetings work and others don't.

Activity 1 Thinking about meetings

Allow approximately 5 minutes

1. Think about a meeting that you have been involved in that went really well. List the reasons why you think it worked so well.

Provide your answer...

2. Think about a meeting that you have been involved in that did not work well. List the reasons why you think it worked poorly.

Provide your answer...

Discussion

This is what one volunteer had to say about meetings they have attended.

> When meetings have gone well, some of the reasons are:
>
> - the meeting had a clear purpose
> - people were prepared for the meeting
> - the agenda was not too long
> - the **chair** made sure we kept to the main issues, provided useful summaries of our progress and made sure people kept to the point
> - people trusted and respected each other's opinions.
>
> Conversely, some of the reasons why meetings have not gone so well are:
>
> - very long agendas
> - the chair allowed some individuals to dominate or not keep to the point, and did not keep to time
> - people were poorly prepared for the meeting; for example, perhaps not having papers in advance or not having read them
> - the meeting went on too long without a break.

You may have thought of some other reasons why meetings are successful or not.

A successful meeting is often about good planning, being prepared for the meeting and ensuring that the meeting is handled well. For the rest of this week you will examine these issues in more detail.

1.1 Why have meetings?

Meetings are a central part of running many voluntary organisations, so it may seem strange to ask 'Why have them?' However, meetings do have a tendency to proliferate. Once established, they have a habit of persisting and can take on a life of their own. As a result, it is worth asking periodically whether particular meetings are necessary or whether other means could be used to achieve the same ends. You may find you need to attend a meeting to discuss whether meetings are necessary!

Some of the possible advantages and disadvantages of meetings are shown in Box 1.

Box 1 Some advantages and disadvantages of meetings

Advantages

Meetings can:

- improve decision making by involving more points of view
- give a shared sense of ownership and commitment among participants
- facilitate good communication
- keep managers, staff and volunteers in touch with one another
- keep the organisation's membership or service users involved
- help to improve the communication and decision-making skills of those involved
- allow participation in decision making.

Disadvantages

Meetings can:

- tie up people's time, taking them away from other work
- be expensive – eight people meeting for an hour is the equivalent of a day's work
- reduce speed and efficiency – it can often take a lot longer if it is necessary to wait for a meeting before making a decision, and in the meantime opportunities may be lost
- dampen individual initiative and responsibility if too many decisions are only made during meetings
- lead to poor decisions or delays because of the need to reach agreement among many people.

Activity 2 Was that meeting needed?

Allow approximately 5 minutes

Think about two or three meetings in which you have been involved. For each meeting answer the following questions:

1. How necessary do you think the meeting was?
2. Could some or all of its work have been carried out in other ways?

Meeting 1

Provide your answer...

Meeting 2

Provide your answer...

Meeting 3

Provide your answer...

Discussion

Meetings are only one way of dealing with work, so it is important to think about whether alternatives may be better. For example:

- Some decisions can be delegated to individuals rather than taken at meetings.
- Information can be shared at meetings, but it can also be disseminated in a variety of other ways: through notice boards, newsletters, email, websites, discussion groups, etc.
- Consultations can also take place through one-to-one meetings, telephone calls, computer conferencing and emails.
- Support can be given through individual supervision or peer support, as well as in groups.

Even when meetings are necessary, it is worth asking whether everyone has to be physically present in the same room – particularly where this would involve people travelling long distances. It may be more efficient to hold a telephone or computer conference for some or all of the participants.

2 Types of meeting

Figure 2 An informal meeting in a café

Not all meetings are the same. They may differ in terms of their purpose, the expectations that people bring to them and the rights and responsibilities of those involved. They can range from formal business meetings to informal social meetings. This is important because the type of meeting affects how it is best run. Box 2 outlines different types of meeting.

Box 2 Different types of meeting

Business meetings

Business meetings are usually for making decisions, with a formal agenda where information is shared, issues discussed and decisions taken – for example, the meeting of a charity's board of trustees. Business meetings often have a lot of items to get through and usually there is not time for long discussions, developing ideas or providing emotional support. They usually benefit from having a clear agenda, relevant information in advance and decisive chairing. Common problems include going on too long or, conversely, when items are rushed to fit them into the time available.

Consultation meetings

These meetings are used to consult a group of people before any decisions are made about an important issue that is likely to affect them.

It is important to be clear about the purposes of the consultation and how far those being consulted can influence any decisions. Otherwise, there is a danger that unrealistic expectations will be raised and those consulted will be unhappy with the outcomes.

To work well, consultation meetings need to be planned and have a clear brief. They should be chaired by someone who is good at encouraging people to contribute, but firm enough to keep the meeting on track and deal with any conflicts or disagreements.

Briefing meetings

The purpose of briefing meetings is to inform people about their work or important new changes that will affect their organisation. Planning and decision making has occurred elsewhere, and the briefing is to let people know what is happening, what is expected of them and to answer any questions they may have. Briefing meetings are common in larger organisations, where people are more likely to be unaware of what is happening elsewhere in the organisation.

Planning meetings

Usually there is not enough time in business meetings to think about strategy or long-term plans. Planning takes time, and it is often better to delegate much of the detailed work to a smaller subgroup with a clear brief. However, at various stages it may also be appropriate to provide opportunities for a wider group of people to contribute – perhaps the organisation's members, volunteers, users or board members.

At planning meetings it is important that people have time to think about, discuss and contribute creatively to the issues involved. Some organisations run periodic 'away days' for this purpose, where people will not be interrupted by everyday work.

Team meetings

These meetings are used to discuss and plan the work of a team. They are often smaller and less formal than a business meeting, and are usually led by the team leader or manager.

Support meetings

Many voluntary organisations in fields such as health and social care hold regular meetings for casework supervision, or more general support and discussion of the personal and emotional issues that may arise from working in stressful situations. These meetings require the development of trust, and time to explore what can be sensitive and difficult issues. It is often helpful if they are run by a trained facilitator. This type of meeting probably works best in face-to-face settings.

Social meetings

Many social meetings happen completely informally, where people chat, exchange personal news or information and gossip. Some organisations have regular social events, like a team lunch, outing or celebration. Social activities may also get tacked on to other meetings – for example socialising over refreshments before or after a meeting.

Of course, in practice life is not always as neat as this, and many meetings may combine different functions. So, for example, a business meeting may also be used to brief people or have a social side, such as people having lunch together or going to the pub after the meeting. One of the potential difficulties of combining different types of meeting is that those involved may be unclear about what is expected of them. So, for example, it is important to signal when moving from more informal discussions into a formal business meeting.

3 Planning a meeting

Figure 3 People often join meetings online

Good meetings are normally well planned. In formal meetings it is usually the chair and the secretary who are responsible for organising the meeting. For more informal team or project meetings, the responsibility usually falls on the team leader, manager or whoever calls the meeting. Where it is not obvious who has this responsibility it is a good idea to appoint someone to do the job.

Below is a list of useful things to do when preparing for a meeting (most of which apply to face-to-face meetings).

Purpose and participants

- Decide the purpose of the meeting and what type of meeting you want it to be. (Remember different types of meeting may require somewhat different things.)
- Think through who needs to participate in the meeting. Sometimes this will be fairly obvious, but in other cases – for example a public consultation meeting – you may need to think quite carefully who you would like to invite and how they can best be reached, as it might include people attending by phone or online.

When and where

- Decide a place, date and time to hold the meeting. If it is a face-to-face meeting, make sure the venue is suitable for the number of people you expect to attend, the type of meeting it is and that it meets the needs of any people with special requirements, such as wheelchair access, and so on.

- If any special equipment is needed for the meeting, such as flip charts or laptop and projector for presentations or for people joining online, make sure these are available.
- If it is to be a long meeting, it is often a good idea to organise some refreshments or to remind people to bring their own.

Constructing the agenda

For formal meetings it is normal to have an agenda and any papers or reports in advance of the meeting so that people have time to read and prepare. At more informal meetings it may be acceptable for people to raise issues at the meeting itself and plan together how they will work through the items. Below, the emphasis is on preparing an agenda for formal meetings.

- It is normal for the chair and the secretary to put together the agenda for formal meetings. Often there may be a number of standard items that appear regularly on the agenda, such as any apologies, previous minutes and matters arising at the beginning, and any other business and the date of the next meeting at the end. Some items may occur periodically, such as financial or progress reports, and others will depend on what are important issues at the time.
- After a rough agenda has been constructed, it is useful to go through the items and decide which are main discussion items, which require decisions and which are just for information or for ratification. Then allocate a rough time for each item, making sure the important discussion items get the most time. If the meeting is long, make sure you plan in a break, so people can get refreshments or go to the toilet. Add up the times and make sure it does not exceed the time available for the meeting. If it does, the agenda may need reducing or the approximate timings may need revising.
- Make sure the agenda and any papers are circulated in advance of the meeting. It is usually a good idea to circulate them at least a week before a business meeting.

Activity 3 Agendas

Allow approximately 5 minutes

Think of a meeting in which you were recently involved.

1. Did you receive an agenda and any reports or papers in sufficient time to prepare adequately?
2. Was the agenda appropriate?
3. Was the right amount of time allowed for each item?
4. In light of your answers, how could the preparation for the meeting have been improved?

Provide your answer...

Discussion

As an example, a trustee recently attended a meeting in a room that was far too small for the number of participants. The agenda and papers arrived by email on the day, so there was no time to read everything and to feel well prepared. However, the agenda worked well for the time available for the meeting, and after an initially shaky start, the meeting improved. Certainly, better preparation beforehand would have improved how people felt before and at the start of the meeting.

A number of functions are important if meetings are to be run successfully: someone needs to chair and facilitate the meeting and someone needs to record what happens.

In formal meetings, these functions will usually be undertaken by the chair and the secretary respectively, who are normally appointed to serve for a number of years. In more informal meetings, who carries out these functions may be decided at the meeting or rotated on a regular basis. However, what this ignores is the contributions of ordinary members, which, of course, are also crucial to the success of any meeting.

How to carry out the functions of chairing, participating as an ordinary member and recording what happens will be explored in the next section.

4 Chairing meetings

Figure 4 Taking the lead

Any meeting with more than a few people usually requires someone to take the lead in organising what it does. In small, informal meetings this may simply involve asking a few questions, such as: ‘Shall we start?’, ‘What have we got to talk about?’, ‘When shall we finish?’, ‘Who is going to take notes?’

At the other end of the spectrum is the traditional chair of formal meetings whose job is to run the meeting in accordance with given rules and procedures. He or she makes sure the necessary business is done and that any decisions are properly recorded. Chairing meetings is not just the responsibility of managers: asking someone to chair a meeting who has not done it before can be a good way to involve or empower others.

Whatever the style of chairing, it is important that it is:

- appropriate to the type of meeting
- a good fit with the culture or style of the organisation or group
- supported by the majority of the meeting’s members.

Table 1 contrasts the different functions carried out by two types of chair. The traditional chair is typical of formal meetings, while the facilitative chair is typical of a more informal, consensual style of meeting. However, in practice the distinction between these two styles of chairing is often not so clear-cut. Many traditional chairs will adopt some of the practices of facilitative chairs and vice versa.

Table 1 Contrasting styles of chairing

Traditional chair	Facilitative chair
Main role and responsibilities	**Main role and responsibilities**
t1: make sure the business gets done t2: stay in charge t3: remain neutral	f1: help the group decide what it wants to accomplish f2: help the group carry this out f3: avoid getting too emotionally involved
Agenda and timekeeping	**Agenda and timekeeping**
t4: open meeting and state purpose t5: arrange who will introduce agenda items t6: get through agenda on time t7: close meeting	f4: seek and get agreement on agenda items f5: keep meeting on agreed agenda f6: keep track of time
Discussion	**Discussion**
t8: select speakers t9: ask questions to clarify points or seek further explanations t10: ensure people stick to the point t11: control interruptions or side conversations t12: handle disagreements t13: close discussions	f7: encourage everyone to participate f8: help people stick to the point f9: make it safe to share views and feelings f10: suggest ways to handle disagreements and conflict f11: help clarify and summarise discussion
Decision making	**Decision making**
t14: ensure decisions are taken t15: decide when a vote is needed t16: conduct vote t17: decide who will carry out actions	f12: look for areas of agreement f13: test to see if there is agreement f14: if consensus can't be reached agree procedure for taking decision or moving forward f15: decide who will carry out actions
Formal rules	**Formal rules**
t18: have a good knowledge of relevant rules t19: make sure meeting is called in agreement with rules t20: rule on points of order or procedure	
Outside meeting	**Outside meeting**
t21: act on issues delegated to the chair t22: make sure decisions are acted on t23: represent the group	help group to decide: f16: who will act on its behalf f17: who will pursue decisions f18: who will represent the group

Activity 4 Chairing compared

Allow approximately 15 minutes

Think of a meeting you have been involved in, then answer the following questions:

1. Write down the numbers of the activities in Table 1 that you think are currently carried out by the chair of this meeting (for example, t1, t3 … f4, etc.).

Provide your answer...

2. Write down the numbers of any other activities you think ought to be carried out by the chair but are not currently.

Provide your answer...

3. Do you think your chair adopts a mainly traditional or a mainly facilitative style? Or do they have a fairly even mixture of the two styles?

Provide your answer...

Discussion

The activities the chair performs will probably depend in part on the type of meeting it is and the preferred style of the chair. If it is a formal business meeting, then it is more likely that the chair will adopt many aspects of the style of a traditional chair. The smaller and more informal the meeting, then the more likely it is that aspects of the style of a facilitative chair will be adopted. However, there are no hard-and-fast rules, and many chairs combine elements of both styles.

It is also important to remember that responsibility for the success of a meeting does not lie just with the chair, but also with the ordinary members, which we will look at next. No matter how good the chair, if members are ill-prepared or do not contribute appropriately, the outcome can be an ineffective meeting.

5 Taking part

The success of any meeting will depend not just on how the chair and the secretary perform, but also on all its members. This section looks at what ordinary members can do to help meetings be successful.

Be prepared for the meeting

- Arrange for any items you want discussed to be put on the agenda.
- Put time aside in your diary when you can prepare for the meeting.
- Read the agenda and any papers in advance.
- Decide which items you may want to speak about and consider what you want to say. It can be helpful to make notes, particularly if you are not confident about speaking in meetings.
- If you feel items are likely to be controversial or complex you may want to sound out others or lobby potential allies in advance of the meeting.
- Plan your day so you arrive in plenty of time and can stay for the whole of the meeting.

Speaking

- You may need to raise your hand or catch the chair's eye in order to speak. How will you do this if you are joining the meeting by phone?
- In very formal meetings you may need to address your remarks through the chair; for example, 'Chair, I think it would better if …'
- Try to speak clearly and distinctly, so everyone can hear you.
- Keep to the point and be as brief as you can, otherwise people may stop listening.
- If the point you want to make is complex, it is often useful to summarise your main point or argument at the end.
- When responding to others, or asking questions, be succinct and keep to the point. Try to raise one question or respond to one query at a time, rather than combining multiple questions or responses. This is easier for other people to understand and respond to.
- Try not to worry about asking what you may feel is a naive or obvious question or saying you do not understand. If you are feeling this way, it is likely others are, too.

Listening and thinking

- Listening is as important as speaking. If everyone spoke and no one listened, then meetings would get nowhere.

- Anxiety about speaking, or thinking through at the meeting what you want to say, can make listening difficult. Prepare what you want to say in advance if you can and then you will be better able to concentrate on listening to others.
- Listen empathetically; put yourself into other people's shoes and consider why they hold the views they do. This is particularly important if you are trying to reach a consensus.
- Try not to interrupt.
- Concentrate on the logic of the argument and the values being expressed. What are the strengths of the argument and what are the weaknesses or flaws?
- Keep in mind the mission and values of your group or organisation. Do the discussion and resulting decisions reflect these?
- Look for ways to summarise usefully or to clarify the discussion.

Help other group members

- Encourage others by being accepting and responsive to them.
- Make an effort to draw out and listen to members who may be shyer or less articulate.
- Express what you feel and respect other people's feelings.
- Look for ways to handle disagreements and conflicts positively; be willing to negotiate and compromise.
- Try to be aware of your own behaviour and how it might be affecting the meeting. Are you talking too much or too little, too aggressively or not assertively enough, and so on?

Supporting the chair

- Speak in turn or when requested and avoid interrupting others.
- Respect the chair's decisions.
- Respect the rules of the meeting.

Now that you understand what actions can lead to a successful meeting, the next activity encourages you to think about your own behaviour at meetings. Can it be improved?

Activity 5 What part do you play in meetings?

Allow approximately 10 minutes

When answering the questions below, consider your own strengths and weaknesses as an ordinary member attending a meeting. Also use the list of points above to help you think this through.

1. What are your strengths and weaknesses in the following areas?
   - Preparing
   - Speaking
   - Listening and thinking

  - Helping other group members
  - Supporting the chair
2. What do you find most difficult to cope with at meetings?
3. What would you like to change about the way you behave at meetings? What would help you make these changes?

Provide your answer...

Discussion

If you want to make changes to improve your performance in meetings, it is a good idea not to be too ambitious – start with small changes that you should be able to achieve. Are there some weaknesses from your list you think you could address? Perhaps ask a supportive colleague to help by giving you feedback or encouragement.

6 Recording and following up meetings

Figure 5 Meeting minutes are important

There are a number of reasons for keeping a record of what goes on at meetings, such as:

- to record what was agreed and any actions that need to be taken
- to remind people of the actions they personally need to take as a result of the meeting
- to help settle any future disputes about what was agreed
- to inform others who were absent or have an interest in what was said or agreed at the meeting.

In a formal meeting it is the job of the secretary to write and keep the minutes. In more informal meetings someone may be asked to take on the task of taking the notes or minutes of the meeting.

When taking minutes, usually the most important things to record are any decisions and actions that need to be taken. In a formal meeting where voting takes place, it will be important to record accurately any proposals and resolutions and the results of voting. It can also be helpful to summarise the main discussion and arguments.

The minute-taker can play an important role in helping to clarify what has been agreed by checking back with the chair and other attendees if he or she is not clear. This can be helpful in avoiding later disputes and disagreements over what was decided. It is usual in formal meetings to record who was present and any apologies for non-attendance.

The style of minutes can vary from the abrupt (Example 1) to the chatty (Example 2).

Example 1

Volunteers' regional conference. Verbal report received from delegates.

Example 2

Volunteers' regional conference. Omar and Suzy reported back that the conference had been a great success. Many useful suggestions had been made about how to improve the volunteers' newsletter, which they intend to take forward. Omar is to join a subgroup that has been set up to review and improve the training available to volunteers. Suzy will …

There is often a difficult judgement to be made over the amount of detail that is required. If minutes are too brief it may be difficult for those not at the meeting or those looking back later to make sense of what happened. However, if they are too detailed, people may miss the main points or be put off reading them.

One useful device is to have an actions column in the right-hand margin of the minutes or to use capital letters so the actions stand out. This can be used as well to note the name or initials of the person who has agreed to carry out the action. This can act as a reminder and make it easier for subsequent meetings to follow-up on whether the actions were taken. It is also useful for minutes to be received soon after the meeting so that actions can be followed up sooner rather than later.

7 This week's quiz

The end-of-week quiz gives you the opportunity to check your understanding and progress. Again, it consists of five questions and will help you to prepare for the longer Week 8 badge quiz.

Week 6 practice quiz

Open the quiz in a new tab or window (by holding ctrl [or cmd on a Mac] when you click the link).

8 Summary

Using the ideas from this week should help you to run or participate in meetings more effectively. However, it is worth remembering that life is sometimes messier than the theory suggests, so even the best planned meetings may run into trouble from time to time. What people thought was a straightforward problem may be more complex: there may be a personality clash, someone the meeting is depending on may not have done the work they said they would do, or everyone is tired and not able to give their best.

However, you are much more likely to have a good meeting if it is well planned and people are prepared – just do not expect it to be perfect. If the business usually gets done in the time available, if decisions get made and are acted upon, attendance is good and there is a productive atmosphere, then it is likely the meetings are good enough.

In Week 6, you have learned to:

- explain the advantages and disadvantages of meetings
- describe different types of meeting
- understand how good preparation can help meetings go well
- describe different ways of chairing meetings
- feel more confident in taking part in meetings
- understand different ways of recording and following up on meetings.

Next week you will explore how people work in teams and why partnerships between organisations are important.

You can now go to Week 7.

Week 7: Working in teams and partnerships

Introduction

A team is a group of people working together to achieve a common goal. The idea of ‘belonging to a team’ can be very appealing – it conjures up images of everyone working together well, knowing their role within the team and working towards a shared purpose. Teams do not just ‘gel’ overnight, however – team building takes time and there is usually someone in the role of team manager or leader facilitating the process. Sometimes teams do not function well and experience conflict. People are all different, and some may resist working in teams or have had negative experiences of teams.

Teams occur in most organisations, irrespective of sector. What is unique about the voluntary sector is that teams often involve both paid staff and volunteers, as well as teams made up entirely of volunteers. In the voluntary and public sectors, there is considerable cross-organisational working to achieve common goals, for example on a regeneration project or a social care initiative. These are usually described as partnerships.

Working in a team brings together many of the issues you have already covered on the course so far: for example, how to communicate well, how to work with volunteers and how to participate in meetings. These are all key elements of working in a team or a partnership. You were also introduced to the idea of teams in Week 5, where Anna and Patrina talked about the importance of team work and learning from each other while fundraising.

Start by watching this video in which Julie Charlesworth introduces you to Week 7.

Video content is not available in this format.

By the end of this week, you should be able to:

- recognise the differences between groups and teams and understand the importance of teams
- outline what the roles are in teams
- outline the different stages of team development
- explain the importance of partnership working and its role in the voluntary sector
- describe your own experiences of teams and partnerships.

1 What is a team?

Figure 1 Working in a team

The terms ‘group’ and ‘team’ are often used interchangeably, so is there really a difference between the two terms and, if so, what is it?

A starting point in exploring this difference is to say that *all teams are groups but not all groups are teams*. From this, it follows that what is said about groups will apply to teams, but that teams will have special characteristics of their own.

Teams are groups of people working together to achieve a shared goal. This togetherness is a defining feature; unless there is (and needs to be) interaction between members, they are not really a team. A group of people working for a single manager, who never meet or interact in any way, are not a team by this definition. Alternatively, people doing exactly the same job in a call centre dealing with fundraising, with the same individual targets and being overseen by the same supervisor or manager, may be called a team, but would be best described as a working group.

So, when does a group become a team? The example in Box 1 illustrates the difference very simply.

Box 1 Group or team?

A number of people kicking a football about in the car park at lunch time is probably a group. There is little structure to what is happening; it is just a few people acting in whatever role they choose (or possibly several) because they want to get some exercise and/or they like spending time with their friends before going back to work.

However, taking this group and turning it into a football team would be a major task. Unlike the group, the team would have a clearly stated aim: for example, winning as many matches as possible. Ensuring that the team performed this task would involve choosing the right people to perform clearly defined roles according to their abilities and particular skills.

Team training would need to be available to help the individuals work better together. The performance expectations of individuals would be defined by the roles they held. For example, no one expects, except in very unusual circumstances, that the goalkeeper will score goals or that the strikers will defend the goal. When a game is won, the team is seen to have achieved the task, although individuals may still be singled out for praise, or for criticism, as appropriate.

Examples of teams in voluntary organisations could include:

- volunteers organising a village festival
- volunteers and trustees writing a grant application for refurbishing a community centre
- paid staff organising an annual conference
- staff providing care for children with disabilities in a small after-school club
- trustees of an animal protection voluntary organisation meeting regularly and liaising by email and phone
- a team of garden volunteers meeting on the same day every week in a historic garden and working closely with paid staff
- the senior management team of paid staff in a large registered health research charity.

You probably noticed that these examples include a mix of paid and unpaid staff and a mix of teams meeting regularly. They also include long-term teams, as well as short-term and project-specific teams.

The reason teams are considered important is because people are seen to be more effective when working together towards shared goals. In other words, a group of people can achieve more together than they can individually. The theory behind this is that team members understand each other's strengths and weaknesses, and cooperate.

In theory, team working appears to have some benefits: it provides a structure and a means of bringing together people with a suitable mix of skills and knowledge. This encourages the exchange of ideas, creativity, motivation and job satisfaction, and can extend individual roles and learning. In turn, this can improve productivity, quality and focus. It can also encourage employees to be more flexible and can improve the ability of the organisation to respond to fast-changing environments.

However, this does not always happen in practice, but then organisational life is not that straightforward.

As discussed by NCVO Knowhow Nonprofit, teamwork is important in the voluntary sector because organisations:

- constantly have to adapt to changes in government policy
- have a culture of participation and democratic forms of decision making
- need to consider the views of multiple stakeholders and service users
- attract trustees, employees and volunteers who often have strong and passionate views

- are particularly vulnerable to resource scarcity.

(Source: NCVO Knowhow Nonprofit, 2016)

Activity 1 Have you worked in a team?

Allow approximately 10 minutes

Thinking about the examples and features of teams mentioned so far, think about whether you have been part of a team. (The team might be at work, a volunteer or community group, or even a sports team.) Write notes on the following questions:

1. Who is in the team? (For example, paid staff and volunteers, users and carers, and so on.)
2. Where are they based? (For example, in your office or building, in another building, in another organisation.)
3. How often do you interact with different team members? (Daily, weekly, monthly, rarely?)

Provide your answer...

Comment

This reflection activity might have helped you think about some of the issues about teams. Often teams are larger than they first appear: for example virtual teams are becoming common, given the potential savings of not having face-to-face team meetings. So, by the end, you might have moved from thinking about 'Who is in the team?' to 'Am I really in a team?'

You might have started thinking about the different characteristics of a team, such as shared goals, whether you feel a bond with the team and its members, and whether it would be difficult to manage a team of very different people.

1.1 What makes a team effective?

The effectiveness of a team depends on the contribution of the people in it, and each person is likely to have a particular role to fulfil. You may recall the discussion in Week 1 on roles and tasks and you will look at the idea of 'team roles' later this week.

Here is an example of a team not thinking through its aims and who will do what.

Case study: An ineffective team

A group of enthusiastic volunteers have the idea of getting together one Saturday a month to clean up a park (with the support of the local council).

They did not communicate beforehand about allocating jobs and who would cover which section of the park. More importantly, they did not decide who would direct or 'lead' the team.

After the first two Saturdays, the team disbands due to arguments between team members and a lack of progress.

The requirements for effective teamwork are perceived to include:

- clear and agreed goals for the team – that is, the team members all know what the team is trying to achieve and agree with its goals
- appropriate team membership – the team needs to be the right size and include the skills, knowledge and preferred ways of working to be effective
- good communication between team members
- attention to both task and processes – the task is what the team exists to do, but the team will only achieve it if equal attention is given to the processes and relationships involved
- a means of measuring progress – if people cannot see how well they are doing they may feel discouraged.

The downside to teams can be that bringing individuals together can sometimes slow down and complicate everyday processes and create conflict, which can make even the simplest task difficult to achieve, as illustrated in the case study below. However, good teamworking (and team leadership) skills can resolve difficulties at meetings and will help make the members relate well to each other to complete the task.

Case study: A team meeting

This conversation takes place during a committee meeting of the trustees of an animal shelter. Marek is chair of the trustees and chairing the meeting. Also present are Mina (leads on social events), David (leads on administration) and Vasu (leads on animal care).

Marek: I haven’t done an agenda because the main thing we need to do is sort out the programme of events for the next three months.

Mina: Oh. I thought we were just going to talk about the Christmas party.

Marek: That isn’t for four months.

Mina: Yes, but if I am going to book a decent band, I need to do it soon, and we don’t have another meeting for two months. It is already getting a bit late to book a hall, too.

David: Well I really hope you get a better band than last year. They were dreadful. I won’t come if you book them again. The food wasn’t really very good either.

Mina: It took me ages to find anyone who was free that night and when I emailed people to get their opinion, no one answered. If I don’t get any support from anyone you can’t blame me if you don’t like it.

[The meeting continues for a further ten minutes with discussions about previous parties the members had been to.]

Marek: Actually we’re wasting time here and I know Vasu needs to leave at 8 pm. Mina, why don’t you look into options for the party and email us? We’ll all commit to responding this time. Would you like someone else to help you with the arrangements as it sounds like we all let you down last year!

Mina: Yes, that would be very helpful, thank you.

Vasu: I wonder if we could now talk about our volunteer numbers. I know it's not on the agenda but we've lost five people in the last two months, and if we don't replace them soon we are going to be in serious trouble. We haven't got enough people to cover the rota.

Marek: That's a good point, Vasu. That's a much more pressing concern than social events.

[The meeting continues for 10 minutes with everyone contributing ideas and suggestions about volunteer recruitment and retention.]

Marek: We've got some good ideas here but I think further discussion about volunteers will be needed, especially as Kai isn't here and as our lead on volunteer coordination, he must be involved. Vasu, would you be able to liaise with Kai and take forward our discussions from today? We ought to finish the meeting now. David – could you write the minutes for today's meeting?

David: But we didn't agree anything about the events programme and it needs to be printed this week.

Marek: Oh yes of course! Why don't I circulate an email tomorrow with the suggestions we've had over informal chats recently and then we can vote on what we want to do?

Activity 2 Case study on teamwork

Allow approximately 10 minutes

Reread the case study. Write brief notes on the extent to which the committee met the following team and meeting requirements.

Clear and agreed goals for the team

Provide your answer...

Appropriate team membership

Provide your answer...

Good communication between team members

Provide your answer...

Attention to both task and processes

Provide your answer...

A means of measuring progress

Provide your answer...

Discussion

This framework should help you to develop your thinking about teamwork, and how teams that you know are structured and whether they work effectively.

Some issues you might have thought of including:

- **Clear and agreed goals for the team/meeting**: It would have been more effective to send out an agenda beforehand, saying what the meeting was scheduled to discuss. Vasu (and possibly Kai) would then have had a chance to say the volunteering issue was getting urgent and needed adding to the agenda, and Mina could have raised the Christmas party issue.
- **Appropriate team membership**: Marek is the chair of the trustees and chairs their main meetings; Mina looks after social events and particularly the Christmas party; David does administration and the minutes of meetings. Not all the team was present at this meeting (Kai was mentioned as being absent) and Marek suggests that Vasu meets with Kai to take forward the discussions about volunteers. It is sometimes difficult to get everyone you need at a meeting (particularly with volunteers or trustees) so it is important to set a schedule of meetings well in advance so that everyone can attend.
- **Good communication between team members**: You probably noticed that there was more talking than listening at first, and it took Marek a little while to get the meeting back on track. Again, this shows the importance of planning a meeting and ensuring that the key issues are on the agenda. However, Mina had obviously been harbouring some grudges about the lack of support over the Christmas party so perhaps this had been her first chance to air her concerns. It did cause some conflict but Marek helped resolve this eventually.
- **Attention to both task and processes**: The team in question are the trustees of an animal shelter. Trustees generally provide the overall strategy and leadership for a voluntary organisation. In this case study, if team meetings regularly happen without agendas or all team members being present, then this could affect how the team functions and meets its objectives. Marek seemed a little slow in resolving conflict in the team relationships but did so by the end of the meeting. He did this by making suggestions of how to help Mina with the Christmas party, but also by giving a steer to Vasu for taking forward the crucial question of volunteer recruitment and retention.
- **A means of measuring progress**: This is less clear from this case study but Marek does suggest further meetings or email communications for moving issues forward. The meeting appeared to end on a positive note.

2 Team roles

Figure 2 People in teams fulfil different roles

In creating a team of people, a useful aspect to consider is the roles people prefer to take on. R. Meredith Belbin (1981, 1988) observed several teams in action and concluded that, to be effective, a number of roles were needed. He further suggested that different people had different preferred roles. Belbin's categories are still widely used to understand roles in teams and how they relate to each other.

Box 2 Belbin's team roles

Action roles

Completer–finisher

Good at the end of the task at making sure that work is fully polished and of a high quality.

Implementer

Good at planning a practical, workable strategy and carrying it out efficiently.

Shaper

Dynamic and thriving on pressure, they tend to provide the necessary drive to ensure that the team keeps motivated and does not lose focus or momentum.

Social roles

Coordinator

Good at maintaining focus on the team's objectives, drawing out team members and delegating work appropriately.

Resource investigator

Great networkers, they exploit their inside knowledge and connections to secure resources and promote the team's ideas.

Teamworker

Good at helping the team to 'gel' and use their skills to do what is necessary for the team's success.

Thinking roles

Monitor–evaluator

Adopts a logical approach and makes impartial judgements where required: they are happy to weigh up the team's options in a dispassionate way.

Plant

Tends to be highly creative and good at solving problems in unconventional ways. It helps to 'plant' one in each team.

Specialist [not in the original list, but added later]

Have an in-depth knowledge relevant to a specific task, who may not be needed in general teams but will be vital in other types of team.

(Source: adapted from Belbin, 2016)

However, each of Belbin's team roles usually has a downside as well as an invaluable contribution to make. For example:

- specialists tend to have a narrow focus
- plants tend to be poor at actually getting something done
- completer–finishers may not be particularly creative.

It is important to bear in mind that Belbin's roles are preferences rather than inevitable determinants of behaviour. People may also be able to perform more than one role. This means that people can consciously adopt less preferred roles if they realise that there is a 'gap' in the team.

Teams are often put together on the basis of the availability and skills of individuals, and managers are often not in a position to select team members. Yet such teams can and do function well.

Belbin's theory (1981) of team roles remains popular and influential, but what managers really require is an understanding of how people are likely to behave in a team. It is important to note that people's behaviour is not fixed: rather, it is influenced by context and the behaviour of others.

Activity 3 Identifying team roles

Allow approximately 10 minutes

Look back at your responses to Activity 2 and write notes on the following questions:

1. Which of Belbin's roles would you have expected Marek, the chair of the trustees and of the meeting, to play?
2. Which roles were missing?
3. If you had been at the meeting, which of these missing roles might you have felt comfortable to take on yourself?

Provide your answer...

Discussion

Coordinator is an obvious chairing role – indeed 'chairman' was the term Belbin used for this role in his original (1981) list. Resource investigator, team worker and shaper would also be appropriate roles for a team leader. In the case study, Marek didn't always exhibit expertise in all these roles and, inevitably, not all team leaders or chairs of meeting are comfortable in all these roles. Indeed, they may not have had relevant training to meet the demands of the role.

The missing roles at the meeting perhaps included a monitor–evaluator, completer–finisher and implementer. The case study implies that Kai, who was not present at the meeting, was a specialist in volunteer issues.

Other members can do much to improve the effectiveness of the meeting by quietly taking on one or more of the missing roles. Perhaps a timekeeper is needed. Someone else could focus on keeping other team members motivated by both summarising progress and commenting on the usefulness of particular contributions. Someone could also take on the completer–finisher role if discussion moves on without necessary actions being agreed.

A team is more than a set of individuals with the appropriate skills. People bring to teams not only their knowledge and skills, but also their personal attributes and the ways in which they behave, contribute and relate to others.

A popular idea is that these individual characteristics should be taken into account when constructing teams. A person who is known to be confident and enthusiastic is likely to behave in the same way when he or she joins a team. However, if all team members behave in the same way, then not only is conflict likely but the quality of the task is also likely to suffer.

The weakness of Belbin's framework is that people's behaviour and interpersonal styles are influenced by context: that is, the other people in the team, their relationships with them and by the tasks to be performed.

3 Building a team

Figure 3 Teams get to know and trust each other

The size of the team needed is an important consideration when forming a team. The larger the team, the greater the potential variety of skills and knowledge, but as the size of the team increases each individual will have fewer opportunities to participate and influence proceedings. The size of a team is therefore a trade-off, or balance, between variety and individual contribution.

A team of between five and seven people is considered best for the effective participation of all members. However, to achieve the range of expertise and skills required, the group may need to be larger. This brings with it the challenges of how to manage and supervise a large team.

Homogeneous groups, that is, those where members share similar values and beliefs, may be more satisfying to work in and may experience less conflict, but they tend to be less creative and produce greater pressures for conformity. In contrast, heterogeneous groups, whose members have a wider range of values and beliefs, are likely to experience greater conflict, but they also have the potential for greater creativity and innovation.

3.1 Stages of team development

Teams normally go through different stages of development, from forming to disbanding. Note that the stages cannot always be clearly identified: this is likely to be the case if a team operates for a few days or if a team changes its membership. In the first case, there may be little 'storming' (explained below), and in the latter there may be a considerable amount of it.

Managing a team means managing it through the ups and downs of the team process from beginning to end. The idea of different ‘stages’ of team development is useful in understanding what the team needs and how best to provide support. The stages of team development were most famously described by Tuckman and Jensen (1977) as:

- ‘Forming’: the pre-team stage where people are still working as individuals.
- ‘Storming’: the stage of conflict that many teams need to go through to achieve their potential. During this stage the team challenges previously agreed or taken-for-granted rules and restrictions.
- ‘Norming’: the consolidating phase in which the team works out how to use the resources they have to apply to the task.
- ‘Performing’: the optimal stage in which the team works well and strives to be even better by concentrating on the development of the team, individuals and the task in hand.
- ‘Adjourning’ (sometimes also referred to as ‘mourning’): the stage when the team disbands and individuals move on to other responsibilities.

Tuckman and Jensen’s team stages do not always follow this linear sequence. For example, if new members join during the project, the team may need to return, at least in part, to the ‘forming’ stage while ‘performing’ at the same time. A variety of other changes may cause ‘storming’ in well-established teams. However, the idea of team stages can be useful in anticipating what kind of support a team may need at a particular time.

Activity 4 Thinking about team development

Allow approximately 5 minutes

Thinking back to your own example of a team in Activity 1, did you experience any of these stages?

Provide your answer...

Discussion

It may be that your experience was not quite as simple and linear. One criticism of the Tuckman and Jensen model is that some of the stages overlap to a degree, and that groups can move backwards as well as forwards. For example, a team might be bonding well and then the team leader leaves for another job and a new, very different, person takes over. The team might go back to its norming or even storming phases.

The continued use of this long-established model may stem in part from its relative simplicity, and from the fact that the titles rhyme, making it easy to remember. It probably also tallies with many people’s experience, at least to a degree. It is useful to know that storming is normal as it may make this stage less stressful for team members. In addition, it may mean that team leaders allow time for groups to go through the early stages before expecting them to be fully effective.

3.2 Team conflict

Teams are made up of individuals: they have different personalities, backgrounds, experiences, statuses, values and beliefs, expectations and perceptions about their own degree of power within a team. Many teams experience conflict, in particular due to power differences between team members. In some teams, the source of the conflict is due to the different statuses (e.g. seniority) of team members and how they might use their power. Other team members may feel they cannot speak, or are not listened to if they do, because of their professional status, gender or ethnicity. This can lead to complete disempowerment in a team and probably its failure.

You will find out more about conflict in Week 8.

4 Working in partnership

Figure 4 Working together

Partnerships are a complex type of team: they usually involve different organisations or different groups (e.g. staff and volunteers or service users) working together to achieve a common goal. The focus here is more on multi-organisational partnerships, whereby voluntary organisations work together or with organisations from other sectors.

A multi-organisational team is one drawn from different organisations. These may be within the same sector, but more often than not the organisations are drawn from different sectors as well. They could be a mix of organisations from the public, private and voluntary sectors such as:

- a charity working with a local authority
- a small voluntary organisation working with the police on a community event
- voluntary organisations, local authorities and private sector organisations collaborating on a major initiative.

In some cases, for example in child protection, multi-organisation teams are a legal requirement, but in other settings, organisations have come together voluntarily because they can see advantages in pooling resources and expertise. In theory, partnerships can help voluntary organisations have a voice in decision making and give them access to more resources.

Partnership teams are complex because they involve all the issues raised so far about effective team working, but then a further layer of complexity is added. People from different organisations will be attempting to achieve a common goal but still bringing their own organisations' objectives, viewpoints and challenges to the partnership table. As you can probably imagine, partnership working might not always run smoothly.

Many voluntary organisations will have experienced working in partnership, particularly in health and social care, where service users' needs are complex and cut across departments and organisations. In these situations collaboration (another word for partnership) across organisational boundaries is vital to delivering better care. Other examples of partnerships where the voluntary sector plays a role could include urban regeneration, community projects, environmental initiatives, social housing, heritage projects or events, and so on.

Partnerships can be formal, with their own shared budgets and management committee, or informal. For example, people from different organisations meet occasionally to share ideas and plan joint events but still have a particular aim, such as developing a shared protocol for best practice in volunteer management in a particular field.

Many voluntary organisations run services for local authorities. This is usually a contractual relationship rather than a partnership. If the same voluntary organisations are asked to contribute to meetings discussing the future of services in a particular locality, then this might be more of a partnership. The difference is the degree to which partners are contributing to decision making and have a voice beyond a specified contract.

You might have direct experience of partnership working through representing your organisation at a partnership meeting, or perhaps you are aware that your organisation is involved with one or more partnerships. You might also have wondered why your colleagues contribute effort and resources to take part in what can be complex and time-consuming arrangements.

4.1 Why do organisations work in partnership?

The main reason organisations work together is similar to the reasons for creating any team, i.e. that more can be achieved together than individually. This is what Huxham and Vangen (2005) termed collaborative advantage in the partnership context.

However, they also talk about collaborative inertia, where the group's work slows down more than expected. This is usually because the partnership has not maintained a clear focus on the potential results and has failed to develop a clear vision or to create trust between group members. Organisations may have pursued their own agenda rather than what is best for the partnership.

Working in a multi-organisational team can be difficult: conflict and competition between organisations can persist, and some individuals and organisations may feel their role is not equal to those of other team members.

When it works well, however, partnerships between organisations could include the following benefits:

- developing a shared vision and aims and objectives, in order to deliver an integrated strategy or services better able to meet the needs of service users
- involving a wider range of people and organisations in decision making to ensure a more participative way of working
- improving communication between organisations
- pooling resources such as funding, staffing, equipment, office space, training
- sharing expertise from organisations and individuals working in a similar field

- enabling staff and volunteers from different organisations to encounter different organisational cultures and ways of working, share good practice, and to learn from the experience.

(Charlesworth, 2013, p. 196)

Activity 5 Thinking about partnership working

Allow approximately 5 minutes

Choose an organisation you know well and think about a project where the organisation could work in partnership.

1. Who would be the partners?
2. What would be the purpose (goal) of the partnership?

Provide your answer...

Discussion

This activity might have got you thinking about areas of work in your organisation where working with others could improve what you do by bringing in other expertise, pooling resources, or sharing thoughts and ideas instead of working alone. In terms of other partners, you might have thought about other voluntary organisations, the local authority or a local business.

It is useful to think about the purpose or goal of the partnership in terms of outcomes and what difference the partnership will make. For example, the partnership could be formed to run a successful community event, to refurbish a building, to provide a new service for older people or to provide a more comprehensive advice service for carers of patients with dementia.

Using the following questions to help you think in this way will also help to focus the partnership and its meetings:

- What do you want to achieve?
- What do you need to get there?
- What can each partner bring to the team?

4.2 Barriers to partnership working

Partnership working is usually a lengthy process. The team will usually go through the stages of team formation that you read about earlier, but with added layers of complexity.

Organisational culture

Different organisational cultures present one potential barrier. All organisations have their own cultures, which relate to ‘the way we do things around here’. Often this is so pervasive through the organisation that people do not necessarily realise they are making assumptions or doing things in a certain way.

The staff and volunteers might not realise that other organisations might do things in very different ways. For example, one organisation might emphasise punctuality, and if individuals turn up late for meetings they might be seen as disorganised and less trusted. In another organisation, meetings might be seen as less important and it might be acceptable to turn up late if another task needs completing.

If these two organisations begin to work in partnership, assumptions will be made early on, possibly causing some arguments, but hopefully the organisations can work out the rules of the group and meetings before it results in conflict.

Communication

Differences between organisations potentially create communication problems, particularly through the use of jargon, which is different from everyday language and can be bewildering for other organisations. It might even make some people feel excluded from contributing to discussions. People seeking wider input from other groups need to make their language more accessible and inclusive in order to reduce concerns about power imbalances in the team. It can often be useful to have training days to help participants express themselves and gain confidence, and enable the different groups to share thoughts on their own jargon and language use.

For partnerships to work successfully, all parties need to feel they have an equal voice and be able and willing to share power. Representatives from smaller voluntary organisations have often expressed concerns that they do not have a position equal to others in the partnership because they do not have financial power and may feel their input is tokenistic.

Of course, this varies depending on the context, and often voluntary organisations will have initiated the partnership and be the ones leading it. Furthermore, partnerships often provide great opportunities for different people to lead groups as they cut across traditional organisational ways of doing things, hierarchies of staff, and so on.

Where partnerships are large and complex, communicating with everyone can be a challenge. Sometimes there can be too many emails and an ‘information overload’. In other circumstances, people may worry they are being excluded and that decisions are being made behind the scenes by more powerful partners. Lack of communication can lead to distrust and, ultimately, the partnership failing.

Activity 6 Skills for partnership working

Allow approximately 10 minutes

Now that you have read about partnerships as well as teams, what skills would be needed to make the partnership successful?

One way to think about this might be to picture yourself at a meeting where things are not going well. What skills do you have that could help?

Provide your answer...

Discussion

Some of the skills mentioned in research on partnerships include:

- good communication skills – listening and talking
- good at chairing meetings and facilitating discussions
- negotiation skills
- networking skills
- empathy with others and respecting different points of view
- building trust with others
- being prepared to learn about other organisations, their ways of doing things and what resource constraints or other challenges they might be dealing with
- being prepared to delegate as well as to allow others to take the lead.

You may have thought of other skills. Working in partnerships, as well as in teams more widely, requires a lot of skills but mainly requires the ability to see other people's points of view.

5 This week's quiz

The end-of-week quiz gives you the opportunity to check your understanding and progress. Again, it consists of five questions and will help you to prepare for the longer Week 8 badge quiz.

Week 7 practice quiz

Open the quiz in a new tab or window (by holding ctrl [or cmd on a Mac] when you click the link).

6 Summary

Understanding how teams and partnerships work draws on many aspects of working with others and building relationships. Some people will have positive experiences of both, whereas others will be more negative about how teams and partnerships work. The reality is, however, that teams and partnerships are a big part of how voluntary organisations (and organisations in other sectors) operate. If a team works well, then it can be an uplifting and motivating experience in your work or volunteering.

In Week 7, you have learned:

- how to distinguish between groups and teams and how teams might work in the voluntary sector
- what makes teamworking effective
- how team members fulfil different roles
- the development stages a team goes through
- what partnerships are and their benefits and challenges
- about your own role in teams and how your own organisation might work in partnership.

Next week you will explore stress and conflict in organisations.

You can now go to Week 8.

Week 8: Understanding stress and conflict

Introduction

Working for voluntary organisations has many rewards – not least the feeling that you are doing something worthwhile. However, there can be aspects of working in voluntary organisations that can make it stressful and difficult. Many of the ideals of the sector, such as the participation of service users and beneficiaries or the strong **value commitments** that people hold, bring excitement and a feeling of passion on the part of those involved.

Sometimes, however, the features of voluntary organisations bring tension, stress and conflict when things are not going so well. Reasons for this include the informality of some smaller organisations, or the hierarchies of some larger organisations, uncertain funding arrangements and the strong value commitments of the people involved.

Understanding and improving well-being at work has gained greater attention in many sectors and professions. Not all stress is bad; however, not everyone is the same and we all deal with stress in different ways.

This week you will explore some sources of stress and conflict, which might help you to understand how you are feeling or have felt in the past. It will also help you to understand why your colleagues might be experiencing stress or conflict.

You can also attempt the compulsory badge quiz this week.

Start by watching this video in which Julie Charlesworth introduces you to Week 8.

Video content is not available in this format.

By the end of this week, you should be able to:

- identify and describe some sources of stress and the strategies to deal with them
- explain a number of issues about working in the voluntary sector that can lead to tensions and conflict
- describe sources of conflict and identify some strategies that can help you to cope with these issues
- understand the constructive benefits of conflict.

1 What is stress?

Figure 1 Pressures surround us at work and at home

Stress is a feeling of being under too much mental or emotional pressure, and a feeling that you are unable to cope. Most people experience stressful situations at some point and our bodies generate stress hormones (which trigger our internal 'fight or flight' response) to help us deal with them. However, if we are constantly feeling stressed, these hormones remain in our bodies and start to affect our physical and mental well-being. We become increasingly unable to cope with the demands placed on us – whether at work or at home.

Statistics from the Health and Safety Executive (HSE) (2016) on stress illustrate what a problem stress is for organisations. In Great Britain in 2014/15:

- the total number of working days lost was 9.9 million – 43 per cent of all working days lost due to ill health
- stress accounted for 35 per cent of all work-related ill health cases
- stress is more prevalent in public sector occupations.

The HSE reports that stress due to workload pressures included meeting tight deadlines, too much responsibility and a lack of support.

1.1 Causes of stress

The exact *causes* of stress are often difficult to pin down. Someone might think that work is the root of their stress because it manifests as a work issue, but the source might actually be a problem at home, or an event or experience from the past resurfacing. The opposite is a possibility too – stress at home with children, ill parents, buying a house or other life event affects how some people cope at work. For some, it becomes a cycle of stress, affecting all aspects of a person's life.

Furthermore, everyone is different: what causes stress in one person might actually be a source of motivation for another. Some people seem more susceptible to stress for whatever reason. These are all issues to bear in mind when working or volunteering with others: empathy with colleagues when they are going through difficult times, and understanding how people experience and deal differently with stress are essential work skills.

Understanding your own reaction to stressful situations is equally important. You will now do a short quiz to assess the level of stress currently in your life.

Activity 1 How stressed are you?

Allow approximately 10 minutes

Rate yourself on each of the questions below, according to how you normally behave. There are no right or wrong answers. Make a note of your points for each question. When you've completed the questionnaire, add up your total number of points. To find out 'how stressed you are', look at the score key in the comment that follows.

1 = Strongly disagree

2 = Generally disagree

3 = Neither agree nor disagree

4 = Generally agree

5 = Strongly agree

1. I get impatient with delays or interruptions	*Provide your answer...*
2. I find it difficult to 'switch off' after work	*Provide your answer...*
3. I don't sleep well	*Provide your answer...*
4. I take on too many responsibilities	*Provide your answer...*
5. I lack confidence in myself	*Provide your answer...*
6. I find it difficult to trust other people	*Provide your answer...*
7. I feel guilty if I'm not doing something	*Provide your answer...*
8. I get aches and pains in my back, neck and shoulders	*Provide your answer...*
9. I go over and over issues and problems in my head	*Provide your answer...*
10. I get very frustrated when I have to wait in a queue	*Provide your answer...*

11. I can't relax	*Provide your answer...*
12. I don't have enough time to finish all the things I have to do	*Provide your answer...*
Total points	*Provide your answer...*

Discussion

12–26: You are unlikely to suffer from stress. However, your life may lack stimulation.

27–45: Although you may feel stress from time to time, in general you are likely to handle this well.

46–60: You may be suffering from excessive stress.

This is just a quick quiz to give you a sense of some of the things that people find stressful. If you are worried that you are suffering from excessive stress, then the section on working with stress could help you. The Further reading section also has links to help you seek further help and support.

Some of the issues you might have started to think about in terms of stress and work might include:

- Your feelings about your job – are you a perfectionist, for example? If so, you may need to learn to accept that some issues just cannot be resolved, and that your work only needs to be good enough rather than perfect, or that some tasks need more resources than your organisation has.
- Other people in your organisation and how you work with them. Being clear about the limits of your own and other people's remits can help to resolve stresses about what it is you are expected to do and what you can expect from others.
- Resourcing issues, such as the amount of funding available to undertake a task that really requires more than is available.
- The availability of support for you and your work – often there is not enough or the person who is supposed to support you does not have enough time to meet your needs.

1.2 Causes of stress in the voluntary sector

Working in the voluntary sector can be very satisfying and at times exciting, but there are aspects of working in the sector that some people find very stressful. Some stress is necessary or we would never do anything at all, but sometimes stress can get out of hand and then it is counterproductive both to effective working and to your own health.

One thing that can make stress and conflict more difficult to manage in the voluntary sector can be the strong value commitments of the people who work in it. Both paid and unpaid staff often have a strong identification with their work, which can make challenging situations or individuals more difficult to address because a person's whole identity may be bound up in what they do.

In addition, many organisations are under-resourced when compared with other sectors. This means that managers may find it difficult to make time or may lack the skills to diagnose and address both the sources and the symptoms of stress and conflict.

In some organisations there may not be formal methods for dealing with problems or, if these do exist, they may be difficult to put into practice. Making use of such methods may feel like stirring up trouble (rather than being a normal means of dealing with issues) because relationships in voluntary organisations are often more intense.

Large organisations often have formal processes for managing problems such as grievance and disciplinary procedures, but these can be difficult to implement in smaller organisations (even where they exist) because of the highly personalised nature of relationships. However, all organisations can be stressful at times, particularly when external expectations are high.

A third factor that can cause stress and anxiety is the often highly uncertain nature of funding arrangements, which can lead to worry about continuity of projects and job security. Even if this does not affect your own role in the organisation, the fact that others may be worried about their future and their job may make for tensions in the organisation.

Cost-cutting on the part of funders means that those running organisations often have to make do with inadequate resources so that there may not be money to pay for the infrastructure – such as record-keeping or secretarial support – that employees in other sectors expect as the norm. All of this can lead to workers in the voluntary sector feeling thinly stretched and stressed. This can also put pressure on the organisation, and at times this can cause conflicts and disagreements as well.

Conversely, the employees of an organisation experiencing a major funding success may also find it stressful. The organisation may grow rapidly, taking on more staff and responsibilities, and those who started the organisation, or have worked there for years, may struggle with the new commitments, particularly in managing many more staff and volunteers.

Finally, some staff (and sometimes unpaid coordinators) look after large numbers of volunteers. Sorting out rotas for volunteer help, arranging cover for absent volunteers, or dealing with volunteers' own problems and stress can all be challenging at times. Who do volunteers turn to if they feel stressed?

There might be mechanisms in place for paid staff through HR departments, but volunteers often resign or go off sick for weeks. Many organisations may feel it is not their responsibility to help volunteers with stress unless it originates within the organisation. As you saw earlier, it is extremely difficult to know the exact source of stress – it may manifest as a work issue but the source may be a problem at home or even from the past.

2 Coping with stress

Figure 2 Coping strategies

As Hackston and Moyle (2013) report, understanding the triggers to stress provides the first step to gaining control: we cannot avoid stress, so it is important to find the best coping strategies that work for us. Different people will find different strategies more or less helpful. People's differing circumstances and access to help at work or from professionals varies, although there is much support available for free and online.

Sources of help include:

- in the workplace from managers, HR or occupational health departments
- from your GP or other healthcare professional
- professional counsellors (sometimes available on the NHS)
- self-help available online from organisations such as MIND or the NHS.

In general, organisations recommend that people look after themselves first by improving their eating and sleeping, being active, relaxing and having fun (NHS Scotland, 2016). These strategies may help with distracting people from lower-level stress and making them feel more positive. Then they may feel able to move on to working through their problems, thinking straight, talking to others (friends, health professionals, managers), and also better able to plan ahead so that stressful situations can be anticipated and coping strategies put in place.

One coping strategy that has gained in popularity in recent years is that of 'mindfulness'. This is based on meditation as part of a mindfulness-based cognitive therapy (MBCT), which has helped people cope with depression, anxiety and sadness. One definition of mindfulness is:

> a mental state achieved by focusing one's awareness on the present moment, while calmly acknowledging and accepting feelings, thoughts, and bodily sensations. By being fully present in this way – not forcing things or hiding from them, but actually being with them, we create space to respond in new ways to situations and make wise choices.
>
> (Source: Be Mindful, 2016)

You might have already tried meditation or you might feel very sceptical about it! In the next activity, you can revisit your technique or try it out for the first time.

Activity 2 Meditation

Allow approximately 10 minutes

Read the technique below, then try it out (wait for a suitable moment if now is not convenient). Write some notes afterwards about how you felt doing it.

A one-minute meditation

Sit erect in a straight-backed chair. If possible, bring your back a little way from the rear of the chair so that your spine is self-supporting. Your feet can be flat on the floor. Close your eyes or lower your gaze.

Focus your attention on your breath as it flows in and out of your body. Stay in touch with the different sensations of each in-breath and each out-breath. Observe the breath without looking for anything special to happen. There is no need to alter your breathing in any way.

After a while your mind may wander. When you notice this, gently bring your attention back to your breath, without giving yourself a hard time – the act of realising that your mind has wandered and bringing your attention back without criticising yourself is central to the practice of mindfulness meditation.

Your mind may eventually become calm like a still pond – or it may not. Even if you get a sense of absolute stillness, it may only be fleeting. If you feel angry or exasperated, notice that this may be fleeting too. Whatever happens, just allow it to be as it is.

After a minute, let your eyes open and take in the room again.

(Source: Williams and Penman, 2011, p. 4)

Provide your answer...

Discussion

Meditation is a difficult thing to get to grips with immediately, so do try it again on a different day, perhaps even on several occasions, before making up your mind about whether you think it might be useful or not. If you think you would find meditation useful, there are many organisations that offer taster sessions and courses, and there are also materials available online.

You will now move on to thinking about conflict, particularly within organisations.

3 What is conflict?

Conflict at a basic level involves a serious disagreement or argument. There can be conflict at home between family members or between countries at an international level. Here the focus is on conflict in the workplace.

As the Advisory, Conciliation and Arbitration Service (ACAS) (2016) states, conflict in the workplace could involve just two employees, an individual in conflict with their manager or rivalry between teams. Alternatively, there might be a lack of trust and cooperation within a whole organisation.

Conflict can be either informal or formal (NCVO Knowhow Nonprofit, 2016). Informal conflict may involve a minor disagreement between two people. Formal conflict could result in a claim brought against an organisation in an employment tribunal.

In the case of the voluntary sector, there could be conflict between employees as well as between staff and volunteers, or among volunteers. However, as you saw in Week 2 on volunteer management, volunteers are not subject to the same legislation as paid employees. Good practice in supporting volunteers in dealing with conflict is appropriate, though.

3.1 What does conflict look like?

Figure 3 The hidden dimension of conflict

Conflict may result from poor communication, but it is much more likely to arise when people are stressed, which can lead to tensions in the organisation. However, before you can begin to deal with conflict, you need to be able to recognise that it exists.

In many cases, the signs of conflict will be highly visible – there may be arguments, 'sniping', rows, raised tempers and emotions, possibly even formal disputes and grievances. Such conflicts are easy to spot, but many conflicts are much less visible, particularly as the ethos of many voluntary organisations – with the sector's strong commitment to caring – can lead to conflict being suppressed.

Like an iceberg, the conflicts lie mainly submerged below the surface of everyday life in the organisation. However, as with icebergs, there is usually something visible above the surface if you look carefully.

Some signs of potential hidden conflict include:

- a coolness or rigid formality in relations between the individuals or groups involved
- difficult or uncomfortable silences at meetings
- issues that seem to keep coming back onto meeting agendas time after time but never seem to be resolved
- an unwillingness to communicate between individuals or groups
- one individual or group ‘putting down’ another
- the withdrawal of parties from discussions and the avoidance of certain issues
- constant referral to formal rules and procedures.

The list of symptoms looks deceptively simple, and what you may actually experience could be some partial showing of some symptoms, or a combination of the above. For example, the desire in an organisation ‘not to wash our dirty linen in public’ may give rise to a partial exhibition of a selection of the symptoms described above in terms of communication.

Similarly, other signs listed above may be all that shows on the surface of what might be termed the ‘open secret’, something that ‘everyone’ knows is a source of enormous friction, but which no one seems capable of dealing with.

The actual problem itself is widely talked about in private, but in its true form never really surfaces. Instead, there may be a rigid formality in relations, difficult silences in meetings, withdrawal and greater use of formal rules and procedures.

Likewise, one of the classic symptoms of inter-departmental rivalry in larger organisations is a rigid correctness in the relationships. The metaphor ‘the elephant in the room’ is applicable to these situations (Figure 4).

Figure 4 The elephant in the room

Activity 3 Your experiences of conflict

Allow approximately 5 minutes

Have you experienced conflict yourself or witnessed it with colleagues? Write some notes on the following questions:

1. What were the signs of conflict?
2. What do you think caused the conflict?

Provide your answer...

Discussion

Perhaps you experienced or witnessed arguments or 'frosty' interactions. You might have identified several reasons for the conflict – perhaps people under stress with deadlines.

You will find out more about the causes of friction in the next section.

3.2 Causes of conflict

When addressing problems in a voluntary organisation, it is important to be clear about the difference between symptoms and causes. Just as with an illness, there is no point in simply suppressing the symptoms, like a runny nose, if the underlying cause – an infection – is not tackled.

Conflict results from differences between people and that can lead to blame focusing on individual issues, but conflict is complicated because the causes can arise at different levels in the organisation. Conflict may manifest in one context, but its causes and roots may lie in interpersonal differences, in a mismatch between personal and organisational values, or in factors external to the organisation, even in society at large.

It is important to recognise where the causes of conflict arise. For example, if you are able to recognise that what feels like a conflict at a personal level is in fact caused by difference derived from different priorities in the organisation, then this could make a significant difference in how you deal with it. In reality, of course, the picture usually is not quite as clear-cut as this.

Conflict is often derived from a mixture of causes from all the levels of the explanation mentioned above. Therefore, in seeking to understand the causes of conflict, we use a set of categories – the 'layers of conflict' – that recognises these levels and the complex overlaps between the categories.

The 'layers' in organisational conflict

A useful way of thinking about the causes of conflict is to see the differences and disagreements as comprising various interrelated layers. Conflict will often involve several of these layers. As a result, quite different sorts of disagreement and sources of conflict are superimposed on each other, making the conflict difficult to analyse and pin down. Table 1 distinguishes five layers of conflict.

Table 1 Five layers of conflict

1. Misunderstandings	These are differences and conflicts resulting from genuine misconceptions about what is said or implied – people 'getting hold of the wrong end of the stick'.
2. Differences in values and beliefs	People's values and beliefs influence how they view and act in the world. Differences in values are likely to manifest themselves in disagreements over how the organisation should be run. For example, people may disagree over whether to accept sponsorship or assistance from particular companies.
3. Differences in interest	These arise primarily from competition for scarce 'goods' and resources. These 'goods' may be things that people want as individuals – status, power and position – or the difference can arise as departments or sections compete for limited resources within the organisation.
4. Interpersonal differences	For all kinds of reasons, people can have difficulty in 'getting on' with others – differences in personality, temperament or style may be involved. A 'personality clash' is the usual term for this.
5. Feelings and emotions	It is difficult to separate hurt feelings from the things with which we disagree. Equally, conflict itself can arouse strong emotions and

	lead to further conflict. Emotions aroused in one situation can easily spill over into another situation. Often, we only realise *after* the turbulent meeting that it was what we represented that was attacked, rather than us personally.

Multi-layered conflict

Several or all of the layers outlined in Table 1 may be involved in a conflict. A conflict in any one layer may aggravate a conflict in another layer. This helps to explain why conflict can be so hard to analyse and resolve. For example, many so-called personality clashes may be, in part at least, symptoms or expressions of other differences concerning organisational values or pressures due to differing stakeholder interests.

The following case study illustrates a multi-layered conflict.

Case study: A multi-layered conflict

Jamie was employed in an advice agency, advising migrants and refugees. His post was funded by a local authority grant. The agency was run by a management committee including lawyers, civil liberties experts and others. The paid director had previously held a prominent position elsewhere in public life. There had been tension and various conflicts between Jamie and the director from the time the latter first joined the agency. Jamie did not fit in well with the respectable image that the director was keen to project for the agency. Other staff felt that they both 'rubbed each other the wrong way'.

One dispute centred on Jamie's clothes. The director complained that Jamie dressed too casually when presenting appeals to an immigration appeals tribunal. The director felt that this could undermine the credibility of the agency and possibly jeopardise support. Privately, he also felt that Jamie reflected badly on him and undermined his position when dealing with officials.

Jamie, on the other hand, argued that he was conscious of the need to maintain the confidence of his clients, and that he dressed according to their expectations. Privately, he was also keen to maintain his credibility with activists working in the area.

Finally, the conflict came to a head when the director discovered that Jamie had links with local businesses who employed people without work visas. The director suspended Jamie, pending dismissal.

Activity 4 Layers of conflict

Allow approximately 10 minutes

Reread the case study, using the idea of 'layers' of conflict to identify where the causes of the problems lay between Jamie and the director.

Make notes on:

- misunderstandings
- differences in values and beliefs
- differences in interest

- interpersonal differences
- feelings and emotions.

Provide your answer...

Discussion

At one level there was a personality clash between the director and Jamie, with the two 'rubbing each other up the wrong way'. However, this may have been a symptom of much deeper differences concerning values and beliefs. Jamie seemed to believe that his role was to help people with immigration difficulties, using all practical means at his disposal. The director, however, seemed to believe that Jamie should not act in a way that might prejudice the image or the reputation of the agency.

Interests were also involved. Jamie would probably claim that he was acting in the best interest of his clients. The director would probably have disputed this and so probably felt that Jamie was prejudicing the interests of the agency as a whole, and possibly his clients, too.

Personal interests also seem to be involved – Jamie's credibility with 'activists' and the director's own position and reputation, which he felt could be undermined by Jamie's activities.

4 Coping with conflict

On an individual level there are several things you can do to help you cope with or improve stress levels, and deal with conflict. Someone might say to another person they are disagreeing with, 'You may be hearing me, but you are not *listening* to me!'

As you saw in Week 3, communication is not always easy. One of the first things to do when a situation is getting stressed or heated is to try to listen to the other person and clarify what it is that they are really trying to communicate to you.

4.1 Active listening

'**Active listening**' is a technique that can help you to concentrate on what other people are really saying.

Active listening helps to:

- **Avoid misunderstandings**. Many rows develop mainly from misconception and misunderstanding. 'Getting the wrong end of the stick' happens to all of us and can cause confusion, mistakes or duplication of effort.
- **Build relationships**. Active listening demonstrates respect for, and acceptance of, the other person. By acknowledging how things are for others and taking them seriously (regardless of whether we end up agreeing with them), we build the firmest possible foundations for a good working relationship. Indeed, active listening helps to ensure that the other person will treat you seriously, in turn.
- **Encourage people to say more and to say it frankly**. One of the reasons that authoritarian organisations are ineffective is because people at the bottom dare not tell those 'at the top' what is really happening.
- **Give people some 'space' to sort out and make sense of their ideas about an issue**. Active listening is a powerful technique for helping people articulate what is on their minds, especially when they are 'stuck' on or uncertain about a difficult problem.

Activity 5 Thinking about active listening

Allow approximately 5 minutes

Write some notes on situations where active listening might be useful.

Provide your answer...

Discussion

Here are some of the contexts in which active listening could be particularly useful:

- when you and a colleague are disagreeing
- when you are being given guidance or instructions by your 'boss'
- when you are meeting a new colleague or working with someone for the first time
- when someone comes to you with a problem that he or she wants to talk over
- when you are sought out as a 'sounding board' for ideas

- when you are receiving a report on the progress of a project or on how an event went
- when 'coaching' a less experienced member of your team to improve his or her performance.

4.2 Assertive communication

Communication is a two-way process. Listening well is probably the most important part of it, but we also need to find ways to communicate how we feel about some issues without getting flustered or simply *not* saying anything at all because we fear the consequences. Times when many people find it difficult to speak plainly can include:

- when expressing one's feelings
- when disagreeing with another's views, particularly if that person is in a position of authority
- when making a request
- when refusing a request
- when giving criticism
- when responding to criticism
- when giving praise
- when responding to praise.

Almost certainly you will find some of these situations much more difficult than others. However, it is probably also true that much depends on the *context* – especially who else is involved. While it would be possible to write a whole course on assertive behaviour, it is possible to learn enough of the basics to help with problematic conversations fairly quickly. Assertive conversations are about making your points clearly and firmly, without being aggressive. They can help to avoid misunderstandings and also potentially divert conflicts.

Assertive conversations involve four stages:

- acknowledge the other person's point of view (active listening)
- tell them how you feel
- tell them what you want
- explain both the benefits and consequences if you do or don't get what you want.

When planning for a particularly difficult conversation, you could rehearse the script beforehand, thinking through carefully what you want to communicate and how best to get your point across.

However, assertiveness is not the answer to everything: you do need to recognise that there are some situations where assertiveness may not resolve problems. For example, neither active listening nor assertive communication takes into account the political and structural imbalances in organisations and society at large, so an assertive response from someone who is not expected to be assertive (because of their position) may elicit a hostile response. Equally with assertiveness, there is a tendency to encourage individuals to take on the responsibility for righting wrongs that may lie outside their control and to feel it is their own fault if they are unsuccessful.

4.3 Negotiation

A further skill that can help you deal with difficult situations is **negotiation**. This may be used either with a line manager or with the other party involved in the conflict. Formal negotiating or bargaining meetings are only one of the many means of handling conflict situations.

Being prepared and feeling confident enough to negotiate and bargain is an invaluable skill for people working in voluntary and community organisations. Not only is it necessary for handling conflicts in which you are either a party yourself or you have to act as arbitrator – it is also useful as a way to deal with situations of potential conflict before they get out of hand.

The ability to bargain and negotiate is a useful tool for advancing and advocating the interests of your organisation. Applying for funding, sorting out external contracts and dealing with inter-agency relationships all involve an element of negotiation and bargaining – sometimes quite explicitly. In other words, although the subject of negotiating is introduced here in the context of conflict, the approaches and the skills can be applied in many other contexts.

One situation when you might want to use negotiation skills is when negotiating changes to your own job. In the private sector often there is a concern to ‘enrich’ jobs that might otherwise be felt to be repetitive or boring. In the voluntary sector often the opposite is true, and many jobs have too much to them. Too many demands can in themselves be stressful. Talking to your line manager and using negotiating skills may be one way forward.

5 Understanding conflict constructively

Conflict is not necessarily bad or unproductive, either from the point of view of the organisation as a whole, or from the point of view of the individuals or groups within it. It is important to realise that whether a conflict is viewed as constructive or destructive will depend very much on the position and point of view of the people observing it. A dispute between two departmental managers over their respective shares of new resources may benefit the organisation because it creates a better understanding of the two departments' needs, but it may still be painful for one or both of the individuals involved.

There are several ways in which conflict can have benefits.

Improved interpersonal relations

- People need room to release the strong feelings that they are likely to have about at least some aspects of work and their colleagues. This is probably healthier than harbouring anger or resentment.
- We often fail to realise how strongly someone feels about certain issues. A sudden confrontation may help to reveal why particular relationships have not been successful and so help to improve them in future.

Improved group dynamics

- Conflict can help to improve group dynamics by revealing personal agendas and laying the foundation for appropriate group goals, norms and procedures.
- If some group members are able to disagree in an open way, this can encourage other, less confident or less assertive members of a group to contribute their ideas more actively.

Improved ideas and practices

- Being forced to justify ideas may help a person or a group to think them through more clearly and vigorously.
- Hearing alternative suggestions and ideas may enable a group to arrive at a better solution to the problem at hand.
- The conflict may reveal some deeper underlying structural or procedural problem that needs to be addressed. For example, a volunteer organiser felt herself to be the focus of personal conflict from the volunteers. When she confronted one or two of them about it, she discovered that the problem actually lay with the new rotas.

6 This week's quiz

Now it's time to complete the Week 8 badge quiz. This is similar to previous quizzes, but this time instead of answering five questions there will be fifteen.

Week 8 compulsory badge quiz

Remember, this quiz counts towards your badge. If you're not successful the first time, you can attempt the quiz again in 24 hours.

Open the quiz in a new tab or window (by holding ctrl [or cmd on a Mac] when you click the link).

7 Summary

You should now have a much better idea of what stress is, why it arises in voluntary organisations and how this can contribute to conflict. It is worth bearing in mind that conflict can also have its positives. You have learned some strategies for dealing with stress and conflict, but you might want to look at the Further reading section after you have completed your quiz.

In Week 8, you have learned:

- what stress is and its impact on the workplace
- how the causes of stress are interrelated and hard to identify
- what causes stress in voluntary organisations
- some strategies for dealing with stress
- what causes conflict between employees
- strategies for dealing with conflict
- how to apply the issues to your own experience of stress and conflict.

Now that you have completed the whole course, you should have an overview of some of the key aspects of working or volunteering in the voluntary sector. Remember to include this course on your CV as it will be relevant to jobs and volunteering in the sector.

If you've gained your badge, you'll receive an email to notify you. You can view and manage your badges in My OpenLearn within 24 hours of completing all the criteria to gain a badge.

Tell us what you think

Now you've completed the course we would again appreciate a few minutes of your time to tell us a bit about your experience of studying it and what you plan to do next. We will use this information to provide better online experiences for our learners and to share our findings with others. If you'd like to help, please fill in this optional survey.

Where next?

If you've enjoyed this course you can find more free resources and courses on OpenLearn. If you have not already done so you might be especially interested in looking at more of our badged courses, such as *Introducing the voluntary sector* and *Succeed in the workplace*.

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Further reading

CharityComms was established by a group of communications directors from some of the UK's biggest charities with the aims of raising standards of communications and connecting professionals through sharing best practice. Their website has articles and case studies and they provide further information to members.

Advisory, Conciliation and Arbitration Service (ACAS)

Be Mindful

How to manage stress

Moodzone: stress, anxiety and depression

Steps for Stress – Scottish Government's website for information and strategies for coping with stress

Acknowledgements

This course was written by Julie Charlesworth.

Week 1

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Week 3

Text

Box 1: Extract adapted from: Kingham, T. and Coe, J. (2005) p. 72 *The Good Campaigns Guide*, London, National Council for Voluntary Organisations Publications.

Images

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Week 7

The information on teams is adapted from Y032 *People, Work and Society*, Block 2.

Text

Box 2: Extract adapted from Belbin, R.M. (2016) *Belbin Team Roles*.
http://www.belbin.com/about/belbin-team-roles/

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Week 8

Text

Activity 2: extract adapted from Williams, M. and Penman, D. (2011), p. 4, *Mindfulness: A Practical Guide to Finding Peace in a Frantic World*, London, Piatkus.

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