

Management of staff and volunteers of a CBO

Level 4

- Facilitator Guide -

The development practice project

These learning materials were generated by the Development Practice project, hosted by the [Sustainability Institute](#) and in partnership with [Community Connections](#), [AIDS Consortium](#) and [Keystone](#). This project generated a set of competence standards with development practitioners in Cape Town, Johannesburg and Durban, between 2005 and 2009. This manual is part of a set of materials consisting of a competence standard, learner's manual, facilitator's guide and an assessment tool. More information on this project is available on the [Development Practice](#) website.

ACKNOWLEDGEMENTS

The Development Practice Project wishes to acknowledge and thank the following contributors:

- [Investec](#) for providing principle funding
- [C.S. Mott Foundation](#) for providing seed and continued funding
- Karin Webber of DTF Solutions for researching and compiling this set of learning materials
- The partner organisations who contributed their materials
- The many other thinkers, writers, and published works that contributed indirectly to this product
- The project team for logistics, coordination and editing

Questions and queries on the project and materials can be forwarded to info@developmentpractice.org.za.



LICENSING

These works are licensed under a Creative [Commons Attribution Non-commercial-Share Alike 3.0 Unported License](https://creativecommons.org/licenses/by-nc-sa/3.0/).

ATTRIBUTION NON-COMMERCIAL SHARE ALIKE (BY-NC-SA)



- ⓘ **Attribution.** Others can copy, distribute, display, and perform the copyrighted work — and derivative works based upon it — but only if they give credit the way it is requested.
- Ⓜ **Non-commercial.** Others can copy, distribute, display, and perform this work — and derivative works based upon it — but for non-commercial purposes only
- ♻️ **Share Alike.** Others are allowed to distribute derivative works only under a license identical to the license that governs this work.

CONTENTS

SOME NOTES ON FACILITATION SKILLS	7
What is facilitation?	7
Your role as the facilitator is to:	7
Key principles of facilitation	8
Do's and don'ts of facilitation	9
Critical skills of a facilitator.....	10
Qualities of a facilitator	11
The difference between facilitation and presentation	11
Tips for being a good facilitator	12
OVERVIEW	13
SPECIFIC OUTCOMES AND ASSESSMENT CRITERIA.....	14
MANAGEMENT OF STAFF AND VOLUNTEERS – LEVEL 4: COURSE PLAN	16
Workshop – Day 1	16
Workshop – Day 2	20
Workshop – Day 3	23
Workshop – Day 4	27
ADDITIONAL INFORMATION.....	31
Introductions	31
Expectations	32
What is organisational structure?	34
Different leadership roles and structures	36
Principles and processes for managing staff and volunteers	38
Systems to manage and co-ordinate staff	41
Job descriptions and contracts.....	43
Performance appraisal	45

Effective communication at work - listening skills	48
Running meetings	50
Legal requirements.....	54
Problem-solving skills	55
Staff well-being and development	56
Supervision and mentorship	57
Development plan for your organisation	59
Different management styles.....	60
Course evaluation form	61

SOME NOTES ON FACILITATION SKILLS

What is facilitation?

Facilitation is the process of making learning easy. This is done through the use of various approaches such as small group discussions, debates, question and answer sessions, personal reflection and sharing, experiential activities and practical exercises. You allow participants to discover solutions for themselves and encourage them to internalise lessons learnt, rather than lecture on topics.

Your role as the facilitator is to:

- Give direction to the group
- Create a comfortable and friendly environment for the group
- Observe what goes on in a group
- Identify the main needs of the group
- Learn ways to address these needs
- Adjust to the level of the group – in language, content, presentation, and pace.
- Apply and practice these skills in many different situations



Key principles of facilitation

Confidentiality: What is shared in the group remains in the group. Personal and sensitive information will not be told to others. However as evaluations of the course need to be done, and lessons learnt from each course, obviously you will need to discuss some of the content with your colleagues.

Respect: We should respect each other's opinions and experiences, even if they are different from our own or we do not agree with them –this includes the facilitator, who needs to display respect for every learner's opinion and contribution, and to make sure that s/he provides opportunity for all to participate.

Non-Judgmental: It is fine to disagree with another person's point of view but not to judge or put down another person because they do not feel the same as you do. This is particularly important because as a facilitator you have a lot of power in the group (people look up to you) and so you need to make sure that you do not appear to judge or dislike someone.

Use I-statements: Using I-statements ensures that the view you are expressing comes from you. It also shows confidence and assertiveness. It clarifies that you are speaking for yourself and not for the group.



Integrity: Walk your talk! Be a role model for the group. For example, the ground rules apply to the facilitator the same as for the participants – if it says cell phone silent, do not answer calls in the workshop!

Do's and don'ts of facilitation

Do's	Don'ts
Plan and prepare for sessions in advance	Create a long dialogue with one participant
Show interest when listening	Criticise on a personal basis
Use simple language	Dominate the group
Act responsibly	Be biased
Be patient	Be insensitive
Allow participants to discover	Allow domination
Encourage active interaction	Go beyond time allocated
Ask for suggestions from the group in answering questions	Exaggerate enthusiasm about delivering session – be false.

Critical skills of a facilitator

Listening: You pay attention to what is being said, show interest by nodding your head and maintaining eye contact. Allow the speaker to finish without interrupting (unless they are dominating the group and haven't allowed others to speak).

Paraphrasing: You repeat what the person said using your own words (i.e. interpret or reword). This is to ensure you understand and are not making assumptions.

Summarising: You sum up by going over the main points. You help participants to gain a better understanding of the subject.

Creativity: You must always have a plan B. Be imaginative and stimulated. Make your sessions fun yet educational by ensuring that the group does not miss the learning points. You know when and how to use ice-breakers, energisers and humour (without being offensive). Identify different ways of achieving the objectives without compromising the quality of the session.

Awareness: You pay attention to what is not being said in the group, their unspoken needs and watch out for group dynamics that need attention. You are able to “read” the energy and level of the group and adjust your programme accordingly.



Qualities of a facilitator

Good	Bad
Punctual and organised	Disorganised
Presentable	Messy, no care taken in presentation
Confident	Low self-esteem
Assertive	Passive
Friendly	Rude or impolite
Knowledgeable	Uninformed
Approachable	Intimidating
Creative and flexible	Rigid and unaccommodating

The difference between facilitation and presentation

Facilitation	Presentation
Interactive process	One way process
Use of different methods of approach	More formal
Participants discover for themselves	Audience receive the message
Facilitator works with participants as a team	Presenter delivers the message
Use different ways of facilitating (e.g. role plays, debates, small groups etc)	Use one way of presenting – normal “lecture” style

Tips for being a good facilitator

- Remember that you are a role model. Do your best to practise the behaviour you are talking about
- Keep studying and researching, learn about the issues, develop leadership skills
- Share information, be open to new experiences – there is always something to learn
- Ensure that you give accurate and updated information
- Understand your target audience
- Use target/age appropriate activities
- Always strive to keep to time
- Use ice-breakers and energisers that add value to sessions (and where possible, link to the content presented)
- Keep your mind open and flexible
- Have fun, love and enjoy what you are doing



OVERVIEW

Welcome to this facilitator’s guide. This guide was developed to – Manage staff and volunteers of a CBOs (Level 4). The manual provides information that will assist you to help learners to develop skills and acquire knowledge to manage staff and volunteers more effectively and within the legal framework that is required.

What you will cover in this course

This course consists of the following:

1. Develop and maintain a clear organisational staff structure.
2. Develop and maintain systems to manage and co-ordinate staff
3. Ensure that the organisation can comply with the standard legal requirements
4. Implement staff well-being and development processes
5. Manage in a participatory and consultative manner



SPECIFIC OUTCOMES AND ASSESSMENT CRITERIA

Specific outcomes	Assessment criteria
<p><i>Competence in this standard means that the learner has clearly shown that s/he is able to...</i></p>	<p><i>Tasks and activities completed by the learner contain the following evidence of competence...</i></p>
<p>1. Develop and maintain a clear organizational staff structure</p>	<ul style="list-style-type: none"> • Leadership structure and lines of accountability are explained • How to develop basic roles and job descriptions is described (and an organogram developed)
<p>2. Develop and maintain systems to manage and co-ordinate staff</p>	<ul style="list-style-type: none"> • A staff code of conduct is developed • Principles and processes for managing staff are described • An appropriate staff structure is described in terms of leadership roles, lines of accountability, basic job function • A basic job descriptions is developed and mutual expectations are clarified • Effective staff meetings are run and accurately minuted • Processes of participatory performance appraisal are described and demonstrated • Essential staff policies and procedures are listed (e.g. leave policy, overtime, salaries)
<p>3. Ensure that the organisation can comply with</p>	<ul style="list-style-type: none"> • Basic conditions of employment are explained (with reference to leave, working hours etc)

<p>the standard legal requirement</p>	<ul style="list-style-type: none"> • Relevant South African laws are briefly described and their impact on the organisational practise noted (Occupational health and safety act; tax regulations like PAYE, UIF; skills development act) • Basic legal documentation for staff is drafted (employment / volunteer contract at a minimum)
<p>4. Implement Staff well-being and development processes</p>	<ul style="list-style-type: none"> • The need for staff care and development is explained • Various methods to develop supportive work environments are described (and practical examples provided) • Ways to provide developmental supervision and/or mentorship are described and demonstrated • An appropriate development plan for staff is drafted (based on the organisational capacity and individual needs)
<p>5. Manage in a participatory and consultative manner</p>	<ul style="list-style-type: none"> • Participatory approaches are explained • Consultation with staff is demonstrated • Good communication skill is demonstrated (listen attentively, respond attentively; give feedback appropriately) • Personal management style is described and analyzed for strong and weak points

Note: Tasks may be presented for an actual or hypothetical organisation but must be learner’s original work and not copied from existing documents. Learners should be able to explain and justify their statements.



MANAGEMENT OF STAFF AND VOLUNTEERS – LEVEL 4: COURSE PLAN

Workshop – Day 1

Time	Topic	Activity/Method	Aids/Materials	SO	AC
09h00	Welcome, expectations and overview of course	<p>Welcome and introductions: Do an introduction activity with the group to allow the group to get to know each other and the facilitator.</p> <p>Group contract: As the group will be dealing with issues that may be sensitive it is important to agree on a group contract before the start of the workshop to ensure that everyone will feel comfortable to participate. This will include the group norms or rules for interaction within the group. Learners must also feel safe to share and ask questions.</p> <p>Expectations and Overview: Give the learners an opportunity to state their expectations for the course. Use this to introduce the different modules that will be</p>	<p>Nametags Coloured cards Koki's Newsprint Prestik</p>	All	This exercise is used to illicit the steps and processes that will be covered in the course and used to discuss expectations



Time	Topic	Activity/Method	Aids/Materials	SO	AC
		dealt with and also to ensure that they know what will not be covered. Explain the outcomes of this Level 4 course and the assessment process. Briefly explain what the portfolio of evidence is about.			
09h45		Tea			
10h15	Organisational structure	What is organisational structure? For this activity the group will be working in smaller groups and also individually. See detailed activity.	Name labels for group members Newsprint Koki's Prestik	SO1	This exercise is used to ensure that all learners have a clear understanding of organisational structure
11h00	Organisational structure	Different leadership roles and structures? Ask the group to use the information from the previous exercise to look at the leadership roles and structures in their organisation. Use the picture to answer the following questions: <ul style="list-style-type: none"> ▪ Who does what in the organisation? ▪ Who is responsible for what? 	Newsprint Koki's Prestik	SO1 SO1	Leadership structure and line of accountability are explained Organogram is developed



Time	Topic	Activity/Method	Aids/Materials	SO	AC
		<ul style="list-style-type: none"> Who is responsible to whom and for what? <p>See detailed activity. Organogram of organisation Ask each learner to complete the organogram of their organisation now, using the worksheet.</p>	Worksheet A: Organogram in Learner manual		
13h00		Lunch			
14h00	Systems to manage and co-ordinate staff	<p>Principles and processes for managing staff and volunteers During this exercise the learners will have an opportunity to look at the various policies and procedures needed to manage staff and volunteers effectively in the CBO.</p> <p>Also introduce the learners to the Action learning cycle at this point. They will be using the principles of action learning throughout the course to reflect and adapt what they are currently doing in their organisation.</p>	<p>Worksheets B Template: Volunteer participation record Template: Confidentiality agreement</p> <p>Information in Learner manual</p>	SO2	Principles and processes for managing staff are described



Time	Topic	Activity/Method	Aids/Materials	SO	AC
		See detailed activity.			
15h00		Tea			
15h15		Continue with previous activity			
16:00	Closure for the day	<p>Final thoughts: Share any final thoughts with the group.</p> <p>Brief evaluation: Ask the group for feedback about what they experienced and learnt during the day – what did they like, not like; or would like to change for the next day.</p>	Post-its Koki's Newsprint		



Workshop – Day 2

Time	Topic	Activity/Method	Aids/Materials	SO	AC
09h00	Recapping of Day 1	Thoughts and ideas from the previous day			
09h15	Systems to manage and co-ordinate staff	<p>Code of conduct The Code of conduct is important for the management of the staff and volunteers in the organisation as it provides a framework for positive and constructive behaviour.</p> <p>Ask the learners to develop a code of conduct for their organisation.</p> <p>See detailed activity.</p>	Example of Code of conduct in Learner manual	SO2 SO5	A staff code of conduct is developed Consultation with staff is demonstrated Personal management style is described and analysed for strong and weak points
10h30		Tea			
11h:00	Systems to manage and co-ordinate staff	<p>Job descriptions and contracts Ask each group to use the information in the template to complete the worksheet and develop a job description for a specific position in the organisation.</p> <ul style="list-style-type: none"> ▪ Director or Senior manager 	Templates: Learner manual	SO2	An appropriate staff structure is described in terms of leadership roles, lines of accountability, basic job function A basic job



Time	Topic	Activity/Method	Aids/Materials	SO	AC
		<ul style="list-style-type: none"> ▪ Finance manager ▪ Volunteer ▪ Field worker ▪ Supervisor of field workers ▪ admin assistant or secretary ▪ Board members ▪ Professional staff e.g. social worker or nurse <p>See detailed activity.</p>			description is developed and mutual expectations are clarified
13h00		Lunch			
14:00	Systems to manage and co-ordinate staff	<p>Job descriptions and contracts (continue)</p> <p>Continue with the exercise before lunch and complete all the job descriptions. As each member of the group will develop one of the job descriptions, make copies of all the completed job descriptions so that each learner has a complete set of examples of job descriptions.</p>		SO2	A basic job description is developed and mutual expectations are clarified
16:00	Closure for the day	<p>Final thoughts: Share any final thoughts with the group.</p> <p>Brief evaluation: Ask the group</p>	Post-its Newsprint		



Time	Topic	Activity/Method	Aids/Materials	SO	AC
		for feedback about what they experienced and learnt during the day – what did they like, not like; or would like to change for tomorrow.			



Workshop – Day 3

Time	Topic	Activity/Method	Aids/Materials	SO	AC
09h00	Recapping of Day 2	Thoughts and ideas from the previous day			
09h15	Systems to manage and co-ordinate staff	Performance appraisal Role-play: See detailed activity	Definitions on slide or newsprint Information in Learner manual Template: Performance appraisal	SO2	Processes of participatory performance appraisal are described and demonstrated
10h30		Tea			
11h00	Systems to manage and co-ordinate staff	Effective communication at work – Listening skills See detailed activity.		All SO5	This exercise is aimed at ensuring a cross cutting competency is mastered Consultation with staff is demonstrated Personal management styles is described and analysed for strong



Time	Topic	Activity/Method	Aids/Materials	SO	AC
					and weak points Good communication skill is demonstrated
11h30	Systems to manage and co-ordinate staff	<p>Effective communication at work – Running meetings Running meetings well is a very important skill to have. Part of managing staff effectively is being able to have regular, effective staff meetings with a clear agenda and good minutes from previous meetings.</p> <p>Use the worksheets to look at setting an agenda and taking minutes.</p> <p>Use a role-play to practise all the skills learnt during this activity.</p> <p>See detailed activity.</p>	<p>Information in Learner manual</p> <p>Post-its</p> <p>Newsprint with timeline (4weeks, 3 weeks, 3 weeks, 1 week, 2 days before etc.)</p> <p>Worksheet C: agenda</p> <p>Worksheet D: Minutes</p>	SO2	Effective staff meetings are run and accurately minuted
13h00		Lunch			
14h00	Legal requirements	<p>Legal requirements Discuss the different laws in SA</p>	Information in Learner manual	SO3	Basic conditions of employment are



Time	Topic	Activity/Method	Aids/Materials	SO	AC
	for effective staff and volunteer management	that are relevant to staff management with the group.	Slide or information on newsprint		explained Relevant SA laws are briefly described and their impact on organisational practise noted
15h30	Maintain systems to manage and co-ordinate staff	Effective communication at work – Problem-solving skills Use the slides with the information about the Steps for problem-solving to introduce the activity. Divide the group into smaller groups and give each group a case study. Let them use the steps for problem-solving to come up with solutions to the staff management problems in each case study. See detailed activity.	Case studies Slides or information on newsprint	All	This exercise is aimed at ensuring a cross cutting competency is mastered
16h30	Closure for the day	Final thoughts: Share any final thoughts with the group. Brief evaluation: Ask the group			



Time	Topic	Activity/Method	Aids/Materials	SO	AC
		for feedback about what they experienced and learnt during the day – what did they like, not like; or would like to change for tomorrow.			



Workshop – Day 4

Time	Topic	Activity/Method	Aids/Materials	SO	AC
09h00	Recapping of Day 3	Thoughts and ideas from the previous day			
0h15	Staff well-being and development	<p>Staff well-being and development</p> <p>Ask the group why, they think there is a need for staff care and development in their organisation. Let them brainstorm this.</p> <p>Now let them look at various methods to develop a supportive work environment in their CBO. Divide the learners into smaller groups that work in similar organisations. Ask them to provide practical examples. Let each group present and give input on the methods.</p>	<p>Learner manual</p> <p>Newsprint Koki's Prestik</p>	SO4	<p>The need for staff care and development is explained</p> <p>Various methods to develop supportive work environments are described</p>
10h30		Tea			
11:00	Staff well-being and development	<p>Supervision and mentorship</p> <p>Supervision is often seen as a negative thing. In this exercise</p>	<p>Case studies</p> <p>Slides or</p>	SO4 SO5	Ways to provide developmental supervision and/or



Time	Topic	Activity/Method	Aids/Materials	SO	AC
		<p>the learners will look at ways to provide developmental supervision.</p> <p>Give the learners input on the definitions of developmental supervision and mentorship. See Learner manual.</p> <p>See detailed activity.</p>	information on newsprint		<p>mentorship re described and demonstrated</p> <p>Consultation with staff is demonstrated</p>
13h00		Lunch			
14:00	Staff well-being and development	<p>Development plan for your organisation</p> <p>Ask the learners to use all the information that they have gained through the course and to take into consideration their own organisational capacity and individual needs to draft a development plan for their organisation.</p> <p>This plan will form part of their portfolio of evidence.</p> <p>Give some input on the steps to develop such a plan.</p>	<p>Slide or information on newsprint.</p> <p>Information in Learner manual</p>	SO4	An appropriate development plan for staff is drafted
15:30	Management	Different management styles	Slide or	SO5	Participatory



Time	Topic	Activity/Method	Aids/Materials	SO	AC
	styles	<p>This activity will be done as a group activity as well as an individual exercise.</p> <p>Provide input to learners on the different styles of leadership.</p> <p>See detailed activity.</p>	information on newsprint		<p>approaches are explained</p> <p>Consultation with staff is demonstrated</p> <p>Personal management style is described and analysed for strong and weak points</p>
16:30	Closure for the day	<p>Final thoughts and closure: Bring the session to a close with a reminder of how much knowledge and experience we already have to share among ourselves. This is also the last session of the workshop and so this is a time for each participant to say how they felt about the workshop and what they learnt during the course</p> <p>Ask the participant to your right to share with the group "One new thing which I have learnt today is....."Then ask the next person to speak. Go round the circle, finishing with your own, so that</p>			



Time	Topic	Activity/Method	Aids/Materials	SO	AC
		<p>everyone has made a contribution. Ask each participant to identify one thing that they will share with someone else. Finish off by thanking everyone once more for coming to this session.</p> <p>As this is the last session the facilitator may ask the participants to fill in the feedback sheets and to hand them in at the end of the session.</p> <p>Explain the importance of feedback - that it will help to improve the way you facilitate as well as the content of future workshops</p>			



ADDITIONAL INFORMATION

Introductions

Purpose:

- To stimulate discussion and consider the positive and negative aspects which may occur in training
- To encourage a positive learning environment where learners share and take risks

Time required: 30 minutes

Materials: Newsprint, prestik, koki's

Introduction:

Explain that the effectiveness of a training programme depends on the atmosphere and the group support established. The extent to which the group members feel accepted and part of the group will influence their ability to consider and discuss issues. This activity is one way for people to begin to get to know one another.

Procedure:

1. Ask learners to introduce themselves giving the following information: Name, area in which they work something they like very much and something they don't like. These questions can be substituted by anything that you want.
2. Begin the activity by introducing yourself.



3. As introductions take place, the facilitator should use the following options to help learners feel more at ease and encourage them to share:
 - listen to each, as they share their information
 - make eye contact
 - show support by nodding and understanding by rephrasing or summarising what was said or done

Expectations

1. Explain to the group that it is always a good idea for the facilitator to find out what a group is thinking and it would be nice to keep a record of this to look back on at the end.
2. Going round the circle, ask each group member in turn to express one thing they want and one thing they do not want from the workshop. They should be encouraged to say “I want ...” and then “I do not want ...” Finish with your own statements.
3. Do not make any comments about their wants and concerns as you go round the circle, but record them on the flip chart.
4. Once everyone has stated a want and a concern, you should make some comments. If any hopes are beyond the scope of the workshop, you should explain this now. You could reassure people about their fears.



It is also a good idea to allow the learners to set personal expectations for the course. These may take the form of an action plan that will help them look at their strategies for influencing authority or raising awareness about specific issues.



What is organisational structure?

Purpose:

- To allow learners to understand what organisational structure is
- To examine the different roles people play in organisations
- To examine the different lines of accountability that exist in the organisation

Time required: 60 minutes

Materials: Newsprint, prestik, koki's

Labels with job titles for group members

1. Hand out the different job titles to each group member. On each card will be instructions to the person on how to act during the activity in the role they have been given.
2. Ask the group to now plan an activity for their organisation e.g. an event for World AIDS day. Each group member needs to play their specific role during this time. Give them about 15 minutes to prepare.
3. Once they have completed their activity ask them to analyse the activity using the following questions:
 - What role did each person have?
 - What was each person responsible for?



- Who gave most of the instructions?
 - How were instructions given?
 - Who reported to whom?
 - What happened if there was a problem?
4. Allow the group to give feedback about this. Unpack with the group what they have learnt about each person's role in the organisation. Also look at why is it important that each person has a clear role to play in the organisation.
 5. Provide the group with additional information about the definition of **organisational structure**.
 6. Give each learner a clean page. Ask each learner to now think of their own organisation. Let them draw the structure in their organisation. See Learner manual. Let them draw each person in the organisation and where they fit. Let them keep this page as they will be referring to this throughout the course.



Different leadership roles and structures

Purpose:

- To allow learners to learn about different leadership roles and structures
- To consolidate the information that they have learnt about organisational structure
- To allow learners to look at different lines of accountability
- To develop an organogram for their organisation

Time required: 80 minutes

Materials: Newsprint, prestik, koki's
Worksheet A (Learner manual)

1. Give the learners input about the different leadership roles and structures that are found in organisations. See Learner manual.
2. Ask the group to use the information from the previous exercise to look at the leadership roles and structures in their organisation. Ask them to add the following information to the picture that they have:
 - Who does what in their organisation?
 - Who is responsible for what?



- Who is responsible to whom and for what?

The answers to these questions will help build a picture of the different leadership roles that people play in the organisation.

3. Now that they have a picture of what their organisation looks like, give them information on what an organogram is.
4. Ask each participant to now complete the organogram (Worksheet A in Learner manual) for their own organisation. This organogram will form part of their portfolio of evidence.



Principles and processes for managing staff and volunteers

Purpose:

- To discuss different policies and procedures for use in their organisation
- To provide learners with templates so that these can be used to draw up policies for their organisations

Time required: 2 hours

Materials: Newsprint, prestik, koki's

Worksheets B: Volunteer registration form

Template: Volunteer participation record

Template: Confidentiality agreement

1. Explain to the group that in order for an organisation to manage their staff and volunteers effectively a few steps need to be followed:
 - The organisation needs a vision and mission that will guide the principles that will be used for managing staff and volunteers
 - Specific policies and procedures need to be in place
 - The organisation needs to ensure that policies and procedures are in line with legal requirements (details will follow on Day 2).
 - The policies and procedures need to be clear and all staff must know what they are.



2. Ask the group to identify the different policies and procedures that they have in their organisation. Let each learner complete the list in Learner manual.
3. Explain to the group the different policies and procedures that are needed in an organisation:
 - Salary
 - Working hours
 - Leave – including sick leave, occasional leave and holiday leave
 - Overtime
 - Volunteer policy
 - Grievance and disciplinary policy
 - Use of organisation’s resources e.g. vehicle policy
 - Marketing and promotion
 - Financial policies and procedures e.g. fundraising policy
 - HR Policies
4. Ask the group to follow the steps in the Learner manual to look at developing policies and procedures for their organisation.
5. Introduce the Action Learning cycle to the learners here. Explain what action learning is and how they can use it to reflect on what they are currently doing in their organisations and then adapt or make the necessary changes to improve things. See Learner Manual for details.



6. Highlight the most important policies that need to be in each organisation to ensure good management of staff and volunteers:

- Volunteer policy
- Salary
- Working hours
- Leave – including sick leave, occasional leave and holiday leave
- Overtime
- Volunteer policy
- Grievance and disciplinary policy
- Use of organisation’s resources e.g. vehicle policy

Other policies like job descriptions and performance appraisal are also essential but will be dealt with in the next section. Financial policies will also be looked at in a different course.

7. Divide the group into smaller groups and give each group one of the policies. Let them use the steps to develop a policy – they can also use the templates provided as a guide. As the different groups will each develop one of the policies, make copies of all the completed policies so that each learner has a complete set of all the examples of policies.

Systems to manage and co-ordinate staff

Code of conduct

Purpose:

- To allow learners to draw up a code of conduct for their organisation
- To allow learners to look at how they would consult with their staff in drawing up a code of conduct for the organisation

Time required: 1 ½ hours

Materials: Newsprint, prestik, koki's

Example of Code of conduct

Slide with Definition (or information on newsprint)

1. The Code of conduct is important for the management of the staff and volunteers in the organisation as it provides a framework for positive and constructive behaviour.
2. Give the definition of a Code of conduct to the group. Ask the learners if they have a Code of conduct in their organisation. If anyone does have one, ask them to share it with the group.



3. Divide the group into smaller groups and ask each group to:
 - Look at how they would consult with their staff when drawing up a Code of conduct for their organisation? Why would consultation be important
 - List the rules and principles that need to be covered in the Code of conduct.
 - Ask them to draw up a Code of conduct for a specific organisation based on this information. They can choose one of the organisations in their group as an example.
4. Ask each group to present their Code of conduct. Discuss them and add any information that may be needed.
5. Once they have done one in the group ask the learners to develop a code of conduct for their organisation



Job descriptions and contracts

Purpose:

- To describe an appropriate staff structure in terms of leadership roles, lines of accountability and basic job functions.
- To develop job descriptions for different people within an organisation
- To look at the link between job descriptions and employment contracts
- To ensure that expectations from both organisation and staff are met when developing a job description

Time required: 1 ½ hours

Materials: Newsprint, prestik, koki's

Template: Job description (Learner Manual page 36)

1. Explain to the group what the definition of a job description is.
2. Divide the group into smaller groups and look at what roles of an organisation are represented in each group.
 - Director or Senior manager
 - Finance manager
 - Volunteer



- Field worker
 - Supervisor of field workers
 - Admin assistant or secretary
 - Board members
 - Professional staff e.g. social worker or nurse
3. If all the positions in the organisation are not represented in the group, allocate a position to each person. Ask each group to use the information in the template to complete the worksheet and develop a job description for a specific position in the organisation.
 4. As each member of the group will develop one of the job descriptions, make copies of all the completed job descriptions so that each learner has a complete set of examples of job descriptions.
 5. Allow the groups to ask questions about the job descriptions that they are developing, if necessary.



Performance appraisal

Purpose:

- To allow learners to describe and demonstrate processes of participatory performance appraisal
- To provide learners with the skills to conduct a performance appraisal session
- To provide learners with the templates to use in performance appraisal

Time required: 1 ½ hours

Materials: Newsprint, prestik, koki's

Role play scenarios

Definitions on slide or newsprint

Template: Performance appraisal (Learner manual)

1. Ask the group what they understand performance appraisals are and why they are necessary in the organisation? Brainstorm this and write their answers on the newsprint.
2. Give the definition of performance appraisal and explain how the process for performance appraisal works, as well as the reasons why it is important for an organisation to have a performance appraisal system.



3. Explain that the following questions can help to start the appraisal process.
See details in Learner manual

▪ **What are the staff members or volunteers doing?**

- How do they feel generally about the quality of their work?
- What is their progress in each specific area of their work?
- Have they reached the goals they set for themselves last time you met?

▪ **How are the staff members or volunteers feeling about the organisation?**

- Do the staff and volunteers feel listened to by the organisation?
- Are their opinions valued?
- Do they feel able to share concerns openly with the person to whom they report and the people above them?
- What concerns do they currently have that they would like to share with the leadership of the organisation?
- Do they understand the policies and procedures of the CBO and are they being applied consistently and fairly?

4. When doing a performance appraisal, you need to use the person's job description. Brainstorm the following questions with the group:

- Who should conduct the performance appraisal?
- How often should a performance appraisal be done?



Now you are ready to look at how to conduct a performance appraisal. Divide the group into smaller groups and give each group one of the job descriptions that were worked on in Day 2. Ask the group to role-play a performance appraisal using this job description. One person in the group will be the manager doing the performance appraisal, one will be the staff member and the other group members will observe and give input.

Group members can also change roles so that different people get a turn.

NOTE: A role-play is when people pretend to be someone else and speak like someone else, they are role-playing and imitating. This is the technique used in dramas.

Role-plays may be used to:

- **liven up a story**
- **convey a message**
- **to practise a new skill**
- **to learn a new skill**

Often role-plays are not performed to anyone, although important learning has taken place in the process of acting out a problem and working out the solution.

5. Once the groups have completed the role-play, ask if there are any questions and discuss any questions or comments that the group might still have.



Effective communication at work - listening skills

Purpose:

- To allow learners to learn and practise effective listening skills
- To examine the importance of good listening skills when managing staff
- To help learners to demonstrate consultation with staff.

Time required: 30 minutes

1. Ask the group to sit in a circle. Play music in the background. Explain to the group that you are going to whisper a statement into the first person's ear and then they have to pass in around the circle. When the message gets to the last person, that person must say the message out loud - usually the message has been distorted along the way. Read out the original message and ask the group for comments. Some of the comments that may emerge are:
 - Things were added to the message or taken away
 - People passed on what they thought they heard
 - Some may have changed the message because it didn't make sense and they wanted to give it meaning
 - The message may end up much shorter or longer than it initially was.
2. Ask the group what the implications are of this exercise for good communication.



3. Let the group brainstorm what good listening skills entails and why it is important to have good listening skills when you are managing staff and volunteers.



Running meetings

Purpose:

- To allow learners to learn and practise effective listening skills
- To examine the importance of good listening skills when managing staff
- To help learners to demonstrate consultation with staff.
- To ensure that learners know how to run meetings effectively, take minutes and draw up an agenda

Time required: 1 ½ hours

Materials: Post-its

Newsprint with timeline (4 weeks, 3 weeks, 2 weeks, 1 week, 2 days before etc.)

Role-play scenarios

Worksheet C: Agenda

Worksheet D: Minutes

1. Running effective meetings is a very important skill to have. Part of managing staff effectively is being able to have regular, meetings with a clear agenda and good minutes from the previous meeting to guide the present one. Explain the three phases of a meeting:

- Setting up (preparation for meeting)
- Conducting the meeting



- Following through (making sure decisions taken at meetings are implemented)
2. Hand out post-its to the group and ask them to think of the things that need to be done or prepared before a meeting can take place. Ask them to write down one thing on each post-it and then stick it on the board, according to a time-line – see what should come first.
 3. Once everyone has placed their ideas on the board, discuss this in the bigger group. Create a clear picture using the existing knowledge of the group.
 4. Brainstorm in the group the different types of meetings that take place in their organisations e.g. team meetings, staff meetings, board meetings etc. Using the different types of meetings also look at what the purpose or desired outcome of the meeting is.

Type of Meeting	Purpose of meeting (Why)	Desired outcome(What do you want to achieve at the end of the meeting)



5. Discuss any questions the learners might have about this exercise.
6. List on the newsprint, who should attend the different meetings that are held in the organisation.
7. Divide the group into smaller groups. Ask each group to draw up agendas for one the following meetings:
 - Monthly staff meeting
 - Home-based care volunteers meeting of 12 people in order to receive information on nutrition
 - Open community meeting in order to discuss a project to start a food garden and look for volunteers (50 – 100 people to attend meeting)

Draw up the agenda so that the meeting is not longer than one hour. Give each group a piece of newsprint on which to draw up their agenda so that it can be discussed during the feedback session.

8. After each group has presented their agenda. Discuss the agendas and also look at whether there are any physical arrangements that need to be prepared for the meeting such as: venue, invitations, budget, catering etc. See checklist in Learner manual.
9. Once it has been discussed, ask each learner to complete the Worksheet C in the Learner manual. If there is more than one person from an organisation at the workshop they can use this time to draw up the agenda for their next organisational meeting.



10. Form three groups and give each group a sheet of newsprint. Ask each group to look at the roles and responsibilities of the following persons during a meeting:

- Chairperson (director of organisation/ chairperson of board/ team leader)
- Secretary (office manager/ secretary/ volunteer/ staff member)
- Other members of the meeting (staff/ volunteers/ community/ service-providers/ board members)

Put all the lists on the wall and review.

11. One of the other important tasks in a meeting is to take good minutes during the meeting. Ask the group to list:

- why minutes should be taken
- what has to be stated in the minutes
- are any documents or other input required
- how to correct any discrepancies in minutes

12. Let the learners use Worksheet D in Learner manual to practice minute taking.

13. End the activity with a role-play where the different group members can get a chance to prepare for the meeting, conduct the meeting and take minutes.

Legal requirements

Purpose:

- To explain the basic conditions of employment
- To provide basic information to learners about the relevant SA laws related to managing staff and volunteers

Time required: 1 ½ hours

Materials: Slide or information on newsprint

1. Discuss with the group the different laws in South Africa that are relevant to staff management.
2. Let each learner complete the activity in the Learner manual about the legal structures and documents that relate to their organisation.



Problem-solving skills

Purpose:

- To ensure that cross cutting competencies are practised
- To practice skills needed to solve problems effectively when managing staff and volunteers

Time required: 60 minutes

Materials: Slide or information on newsprint

Case studies

1. Use the slides with the information about the Steps for problem-solving to introduce the activity.
2. Divide the group into smaller groups and give each group a case study. Let them use the steps for problem-solving to come up with solutions to the staff management problems in each case study.



Staff well-being and development

Purpose:

- To explain the need for staff care and development
- To examine various methods to develop a supportive work environment

Time required: 1 ½ hours

Materials: Newsprint, prestik, koki's

1. Ask the group if they think there is a need for staff care and development in their organisation and why. Let them brainstorm this.
2. Now let them look at various methods to develop a supportive work environment in their CBO. Divide the learners into smaller groups that work in similar organisations. Ask them to provide practical examples.
3. Let each group present and give input on the methods.



Supervision and mentorship

Purpose:

- To provide ways to develop a developmental approach to supervision and mentorship
- To practice skills needed to consult with staff on important issues
- To understand the concepts of developmental supervision and mentorship

Time required: 2 hours

Materials: Slide or information on newsprint

Case studies

Supervision is often seen as a negative thing. In this exercise the learners will look at ways to provide developmental supervision.

1. Hand out 2 small pieces of paper to each learner. Ask them to write their definition of supervision on the one and mentorship on the other piece of paper.
2. Let them get together in smaller groups and ask them to put their definitions together and come up with one definition for each term. Ask each group to present their definitions to all.
3. Once they have presented their definitions give the learners input on the definitions of developmental supervision and mentorship



4. Ask each learner to make a list of their qualities as a supervisor or manager. See Learner manual. Discuss these qualities in the group.
5. Let the learners think about their own organisation and their position as supervisor or manager in the organisation. Which supervision tasks are they responsible for? Let them complete task in the Learner manual.
6. Divide them into 3 smaller groups and give each group a case study. Use the case studies to look at ways in which mentorship or developmental supervision could be implemented.



Development plan for your organisation

Purpose:

- To draft an appropriate development plan for the organisation

Time required: 1 ½ hours

Materials: Slide or information on newsprint

1. Ask the group what they think a development plan is. Provide them with the necessary information.
2. Ask the learners to use all the information that they have gained through the course and to take into consideration their own organisational capacity and individual needs to draft a development plan for their organisation. This plan will form part of their portfolio of evidence.



Different management styles

Purpose:

- To explore the different management and leadership styles that exist
- To examine personal styles of management
- To explain participatory approaches to management
- To demonstrate consultation with staff
- To analyse the strong and weak points of their own personal management style

Time required: 60 minutes

Materials: Slide or information on newsprint

Worksheet E: Management styles (Learner Manual)

1. Ask the group to brainstorm different styles of management that they know. Ask them to write it on newsprint and then give feedback to the group.
2. Let each learner complete Worksheet E in the Learner manual to examine what their own natural style of leadership is.
3. Once you have identified your own style of leadership you need to also look at what motivates you as a leader. Give the group the following examples of different motivators for leaders and managers and ask them to look at which one describes them the best.
4. Discuss in the group what the best leadership styles are and how best to ensure a participatory approach.



Course evaluation form

Date: _____

Facilitator/s: _____

What did you like about the course?

What part of the content was most useful to you?

What was not useful to you?



What did you not like or would change about the course?

Please rate the following (circle or underline your choice):

Facilitation	Excellent	Good	Not Good
Pace	Perfect	Too fast	Too slow
Content	Appropriate	Not appropriate	

Do you have any other comments or feedback for the facilitator/s?

What support would you like in implementing the learnings from this course?

