

Motivate and co-ordinate members of an organisation



Level 2

Learner Manual

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- Learner Manual -

The development practice project

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



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OVERVIEW

Welcome to this manual on ***Motivate and co-ordinate members of an organisation.***

This learner manual, accompanied by a facilitated programme of activities, should be followed up by practical 'on-the-job' experience and practice (supported by a mentor if possible). Once you have read through this learner manual, done all the exercises, implemented the learnings in your organisation, you will be ready to have your competence assessed, if you choose.

Below follows the Specific Outcomes and Assessment Criteria that this learner manual is based on. This means that at the end of your learning period, you will be able to practice all the points listed below. During the learning period you will be reminded to keep and file proof of your work. This is called a Portfolio of Evidence. It is a collection of evidence to show what was learnt during the course and from past experience, including all other training courses attended. Recognition of prior learning (RPL) is when all your learning is taken into account and acknowledged when assessed for a specific standard. Outcomes are the result of your learning. At the end of each section there is a symbol for you to check your understanding.

Please read the competency standard below carefully.



SPECIFIC OUTCOMES AND ASSESSMENT CRITERIA

Specific outcomes	Assessment criteria
<i>Competence in this standard means that the learner has clearly shown that s/he is able to...</i>	<i>Tasks and activities completed by the learner contain the following evidence of competence...</i>
SO 1: Facilitate a meeting to take decisions	<p>A group of people are gathered to discuss an issue or tasks.</p> <p>AC1: Facilitate agreement on objectives and activities</p> <p>AC2: All voices are heard, listened to and responded to respectfully.</p> <p>AC3: Encourages participation from all</p>
SO2: Co-ordinate group activities	<p>AC1: Roles and responsibilities are clearly defined and recorded</p> <p>AC2: Tasks are allocated and agreed to</p> <p>AC3: Group planning and reflection meetings are conducted and decisions recorded</p> <p>AC4: Opportunities for stakeholders to speak openly and influence decisions are created</p>
SO3: Build healthy group dynamics	<p>AC1: Potential tensions or conflicts are identified</p> <p>AC2: Acts to reduce tension and resolve conflict are described</p> <p>AC3: Encourage participation and respectful interaction</p>

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.



ACTIVITIES

There are a number of activities in the manual. These activities are an important part of the learning approach and you are encouraged to complete them as part of your learning process. They will become part of your own “toolkit” to help you operate more effectively. Some of these activities can also be used as part of your portfolio of evidence (PoE), which you need to compile if you wish to be assessed for competence in this standard.

Symbols used in this workbook



Important thought

This sign shows an important thought or idea for you to take note of.



Definition

When you see this sign, a term is explained here.



Self-test

This designates a self-test section - this is an opportunity for you to check your understanding and if you are unclear, to discuss with your trainer.



Case study/Example

Case studies or examples will tell you about a practical application of something that has been discussed or covered in the course.



Individual activity

This sign marks an activity – either during the class or as homework. These activities are important to complete – both for your understanding but also as they can be included as part of your Portfolio of Evidence (PoE) for assessment.



Group activity

This sign means that this activity is a group work activity.

INTRODUCTION

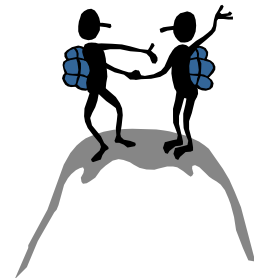
One of the most important aspects of any organisation is its people. The way in which we motivate staff and volunteers to work together is important to ensure that the organisation runs well. There are different ways to motivate people. This can be done by making them feel welcome, including them in the decision-making and planning processes of the organisation. Each member of the organisation and often the beneficiaries and community members have insights into the learnings and future direction of the organisation. It is therefore in the organisation's best interest to plan and make decisions in a participatory way that includes as many of those affected as possible and allows for everyone's viewpoint.

Whether you are dealing with new people who need to get to know how the organisation works or whether you are working with your existing team of staff and volunteers on a project, it is important to ensure that everyone feels included and has the opportunity to express their views.

It is also necessary for the work of all team members to be well co-ordinated so that everyone is aware of what is expected of them. This will help to avoid conflict and encourage people to work together.

In this manual, we will cover the following sections:

1. Facilitating meetings and taking decisions together;
2. How to co-ordinate group activities;
3. How to build health group dynamics.





MAKING DECISIONS TOGETHER

Every group or organisation has to make decisions and the way in which these decisions are made will affect the commitment of the members to the work of the group or organisation. If people feel that they have been part of the decision-making process, they are more likely to carry it out.

Involving as many people as possible and getting information from a variety of stakeholders will contribute to the viewpoints that will assist you in understanding any issue.

As a manager you will often have to play the role of a facilitator. This means, being a chairperson or facilitator in a meeting to ensure that:

- everyone in the meeting has a chance to speak and participate
- agreement is reached on specific objectives and activities and
- everyone is encouraged to participate



Definition

What is facilitation? To facilitate means to *make easy*. To facilitate agreement means to assist a group to come to an agreement together. It does not mean to do for others but to assist a group to do something for themselves.

In organisations, the role of the facilitator is often taken by the leader or project manager. In their role as facilitator, they are tasked with assisting groups to plan together, to allow for discussion and feedback in order to monitor and develop the work of the organisation and to build a consensus together.



Example

When you are starting a new project in your organisation, there can be lots of different opinions from the staff and volunteers. As the leader of the organisation, it can be challenging to ask for the opinions on this new project from everyone, especially if you want everyone to agree with you. Here are some ideas in which you can facilitate this decision making:

- call a meeting
- discuss the new idea
- ask for information or participation from everyone
- take a decision



Group activity

- 1) Have a group discussion if you think there are any other ways in which you can get everyone to participate.

There are times in the organisation that you would want everyone to gather to discuss an issue or task:

- When a new person has joined the organisation and you want everyone to share what they do, as an introduction to the organisation;
- When you need to discuss the a new project or activity that the organisation wants to undertake;
- When you need to discuss a specific issue that needs support through advocacy.



Group activity

Discuss the following in your group:

- 1) When do you have meetings in your organisation?
- 2) What is the purpose of the meetings? Most meetings start off as information sharing and accountability but also include opportunities for group decision making.
- 3) Do you make decisions together?
- 4) How do you feel about group decision making?

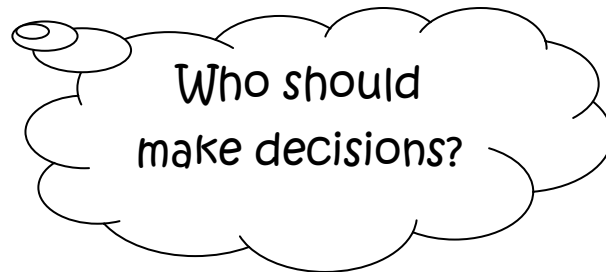
Sometimes it can be difficult for groups to make decisions together. Not everyone should make all the decisions. The key to democratic leadership is to decide who should be involved in making decisions. The basic rule is that the more deeply people are affected by a decision, the more they should share in making it.



Other difficulties in making decisions are:

- Fear of consequences
- Conflicting loyalties
- Interpersonal conflict
- Hidden agendas
- Clash of interests and
- Inadequate leadership

In order to make good decisions together, people need to have a clear goal and the ability to think creatively. The leader's role is to encourage them to discuss their ideas freely and support their contributions by motivating them.



Most often it is not possible (or helpful) for everyone to be involved in all decisions. The more important the consequence the more important it is to get people involved. People should be involved when:

- a. Many voices and views are needed
- b. When the group will feel the effect of the decision
- c. When the group must carry out the decision
- d. When the group has learnt to work together well, can share leadership functions and can handle decision-making procedures easily.



Group activity

A good way to practice the things that you have just learnt is to do a role play. This can help you look at what to do in a specific situation and other group members can give input as to how one can handle specific situations better.

Divide into smaller groups and set a scene of a meeting in an organisation. Choose one person to lead the meeting and practice how you would facilitate a meeting so that everyone is encouraged to participate and all voices are heard.

Encouraging everyone to participate

In order to ensure that decisions are made in a participatory way, it is important that we encourage everyone to take part in meetings. These elements help make a participatory approach successful:

- Good timing and clear purpose
- Involvement from as many parties as possible
- Openness and transparency
- Commitment and/or involvement of leaders in the organisation or community
- Support from those in positions of authority or power
- Overcoming mistrust
- Strong leadership

Notes



It is very important to remember that during planning and decision-making, one should also consult with those outside the organisation.

A facilitator should be able to increase the participant's contribution to the discussion by using questions rather than giving the answers. Some hints for using questions are:

- Beginning discussions with specific and well-prepared questions.
- Encouraging participants to ask questions, but also being prepared that participants are often quiet at the beginning
- Giving time and waiting for answers
- Try not to ask questions with obvious answers
- Use open questions that begin with “what”, “when”, “where”, and “how”
- Don't always agree or disagree with the answers
- Use the phrase, “What questions do you have?” honestly



Stakeholders can be both inside and outside your organisation, from the community. Examples of stakeholders are:

- Government departments

- Staff
- Volunteers
- The clients or beneficiaries of the Project
- Other organisations doing similar work
- People who have the power to help or block a decision
- People who will be affected by the result



Individual activity

As homework go back to your organisation and look at what you can do to ensure that the decision-making processes in your organisation involves everyone.

Look at the following:

- How can you facilitate agreement on activities in the organisation?
- How can you ensure that everyone's voice is heard in a meeting and that people feel that they are being listened to?
- How can you encourage everyone to participate?
- How can you create opportunities for your stakeholders to speak openly and influence decisions?



Self-test

You should be able to:

- Facilitate agreement on objectives and activities
- Allow all voices to be heard, listened to and responded to respectfully
- Encourage participation from all
- Create opportunities for stakeholders to speak openly and influence decisions

Please ask your facilitator if you are unsure of any of the above.



CO-ORDINATING THE ACTIVITIES OF YOUR GROUP

When you are planning together and taking joint decisions it is important that everyone in the organisation is clear about what their roles and responsibilities are. This will help to clarify what everyone in the group does.

Let's look at the roles of the manager or leader as well as the group or team members.



Definition

Leadership is the way in which a person leads or guides a group to achieve a specific goal. Leadership is an important quality for a good manager to have.

A good leader will do a number of different things in a group. Below are some:

- **Observe the team** – identify where the problems are. What are the strengths and weaknesses? What jobs are being done and what still needs to be done?
- **Identify critical issues** – as a team, find what is important for success.
- **Learn ways to solve key problems** – Try to involve people and get them to participate in solving the problems themselves.
- **Practice what you preach** – Remember that if you preach about listening well or participation and empowerment, you need to demonstrate this as a leader too. There cannot be different rules for the leader than for those being lead as this builds resentment and mistrust.

- **Observe people's feelings** - note how people feel, particularly about difficult issues and try and make time to discuss and resolve this in the group.
- **Be aware of the needs of the group** – more on this in the next chapter.
- **Listen** – listen to people and try not to judge them. Do not interrupt people when they are speaking and try not to jump to conclusions about what they are saying but ask questions to clarify.
- **Be flexible** – be prepared to change for the group and to let go of some of your ideas and opinions.
- **Encourage feedback and openness** – try to encourage these practices in your team and take seriously the feedback you receive about your actions. There is more on this topic later in this manual.
- **Be accountable** – always take responsibility for what you do, right or wrong.

Adapted from *The New Toolkit for CBOs*, Vol. 3, pg 6

Different leadership roles are:

- Goal setting
- Communicating
- Building team spirit
- Motivating
- Disciplining
- Supporting



A leader or manager should focus on strategy and consider the skills of the team. It is important to develop a structure in your organisation that relates to the organisation's values and the skills of the team.

Many leaders have more than one role. You will need to pass some of the responsibilities onto other team members. **You can only pass on responsibility but not accountability.** Strong leadership is based on your personal values. Once you have shared and agreed on the vision of your organisation, you can look at how to delegate certain roles to different people. If goals and milestones are clear and specific you will need good methods of tracking to ensure that these are met.

Guidelines for delegating or giving responsibilities to others

- Define what is to be done. Give responsibility for specific tasks to people with the specific skills needed.
- Be clear on how the task is to be done and why.
- Set deadlines and give the information or instructions on how to find the right information.
- State clearly who has what responsibilities.
- A time limit must be set for each responsibility.
- Follow up on the due dates that were set. It is important not to check too quickly after giving a responsibility to a team member.
- Have a follow-up system in place. Set dates or other meetings that work for the project to help with accountability and getting feedback.





Individual activity

How would you describe yourself as a leader. Think of the following questions:

- 1) What are my roles and responsibilities as a leader?
- 2) Do I delegate some of my responsibilities to other team members?
- 3) How can I improve the delegation or giving of tasks to others?

All the members of the team need to know exactly what is expected of them. Their roles and responsibilities can be outlined in a job description or a task list.



Definition

A **job description** provides an outline of the responsibilities and key tasks of the staff member or volunteer.

Remember the following with regards to job descriptions:

- Job descriptions must describe the staff member's or volunteer's key tasks and duties;
- Job description should be written in such a way that each task and duty can be measured;
- Copies of job descriptions should be kept by the staff member or volunteer, and their supervisor in their personnel folder;
- Job descriptions must be updated. This will assist with the review meetings where the staff members or volunteers and the supervisor can think about what went well and what needs to be improved.

It is also important that your staff and volunteers have a contract that will specify what is expected of them in the organisation. At the end of this manual is an example of a Volunteer contract.



Group activity

In your groups discuss and prepare a job description of a common job in an organisation. List the tasks.

Planning together and reflecting on our decisions

When everyone knows what they are responsible for in the organisation it makes planning easier. Often organisations respond to the needs of their communities and don't always think about ways to improve their work. Planning is important to the successful running of programmes in any organisation. When planning, you should remember the lessons of the past and the picture of success the programme wants to reach.

We need to make time in our organisations to reflect on the programmes that have been planned, their successes and what still needs to be achieved.



Definition

To reflect means to re-look and think about activities and events so that you are aware of what worked and what did not. This helps you to start working on what did not work. This is called reflection.

What caused our success? What helped and what didn't? Looking at what happened from different angles. We often do this naturally, but don't know it – normally it only happens after a crisis. Therefore we need to practice and make sure that time is set aside for this.

Reflection is only useful if we learn something from it. We need to take lessons from the past that can influence us to do things better in the future.



The next step is to plan – this means to put the lessons learnt into action and try new activities. Planning that does not take into account the lessons learnt and insights received from the past, is a waste of time!

Facilitating planning processes

If we are going to plan in a group then it helps for the following to be in place:

- Clear goals
- Clear understanding of who is responsible for the decisions
- Ways of stimulating and sharing ideas
- Effective leadership and structures to deal with the size of the group
- Commitment of the leader to genuine group involvement
- Agreement before hand of what procedures will be most useful.

It is therefore the task of the facilitator to ensure that these are in place.



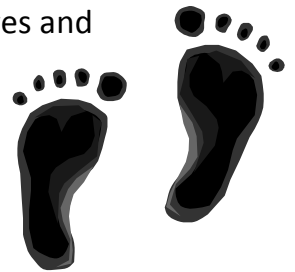
Group activity

What are the steps in planning and what is the role of the facilitator at each stage

Steps in planning together	The role of the facilitator

In order to facilitate planning in a group, the following steps are helpful:

- What are the problems? What are the needs?
- What do we want to achieve? What do we want the result to be?
- What are the possible ways of achieving this (brainstorm ideas)
- What are the advantages and disadvantages of each idea (positives and negatives)? How much time and effort will be needed for each idea?
- Which ideas do we accept?
- Who will do what, when, where and how?
- At what point do we evaluate? How will we evaluate?



Important thought

Remember that all decisions taken in meetings must be minuted and recorded.

A participatory planning approach provides an opportunity to:



- Create excitement for a common vision;
- Use the excitement from the team, their contributions and interesting ways of thinking;
- Find different ideas on issues;
- Allow team members to take part in and feel part of the decisions that are taken.



Self-test

You should be able to:

- Define and record the roles and responsibilities of different group members
- Delegate tasks that are allocated and agreed on
- Plan as a group and hold reflection meetings

Please ask your facilitator if you are unsure of any of the above.



BUILDING HEALTHY RELATIONSHIPS IN YOUR GROUP

Whenever we work in a team there is the potential that people may not always get along. Tension between different people in a group can lead to conflict. This can make it difficult for everyone to work together effectively.



Group activity

Brainstorm in your group what the potential tensions or conflicts are that may arise in a group.

Conflict is a natural part of life and relationships. If there is no conflict, it can mean that no-one feels safe enough to say difficult things or to speak out about issues because there is not enough trust.

So we see that conflict is not always a bad thing. It is very important how we manage the conflict!

When managing conflict we should look out for the following:

- not to avoid conflict situations
- not to solve the conflict prematurely
- not to stifle discussion of differences

To resolve any conflict, we need to believe in win-win. This is the idea that it is possible to find a solution in which both parties win. Our old way of thinking is that conflict normally ended in win-lose. Someone had to lose. Win-win solutions are possible but they take time and effort to search for a solution in which everyone gains something.

Steps in resolving a conflict

1. Confront the opposition
2. Jointly define the conflict
3. Communicate any changes of positions and feelings
4. Communicate co-operative intentions
5. Take the other person's perspective accurately and fully



6. Co-ordinate your motivation and the other's to negotiate in good faith
7. Reach an agreement



Important thought

When you are dealing with a difficult situation, where there is conflict, remember to:

- Try to understand the deeper needs of each person in the situation
- Give people a chance to express themselves
- Listen carefully to everyone
- Create safe environments where people feel they can speak about the difficult situation
- Ensure confidentiality
- Look for win-win solutions



Group activity

- 1) In your group discuss the kind of difficult situations that happen in your organisations or the groups you are part of. These are situations where there is conflict between people or where people do not agree on certain issues.
- 2) Discuss ways in which you can handle these conflict situations.
- 3) Use one of these situations as a role play. Give different people roles or act out the scene.
- 4) After the role play you can look at the good ways in which conflict was handled and maybe some of the wrong ways. Make suggestions about how you can improve the wrong ways.



Self-test

You should be able to:

- Identify potential tensions and conflicts
- Describe acts to reduce the tension and resolve conflict


Please ask your facilitator if you are unsure of any of the above.

ADDENDUM

Volunteer contracts

The same contract is used for staff and volunteers.

Remember that working with volunteers is an essential part of any community-based organisation. It is therefore very important to look after your volunteers properly.



Definition

A volunteer is defined as a person who freely gives of their skills, their time and their labour and/or ideas without a salary or wages

In some the organisations all positions are held by volunteers because there is no funding for payment of staff. Volunteers are best looked upon as a partner and as a gift to the organisation.

The needs of volunteers are very similar to that of paid staff, namely to:

- be protected against any form of discrimination;
- be recognised and acknowledged as individuals for their skills and talents;
- be provided with a safe and healthy workplace;

- be able to participate in an orientation process and training to enable them to carry out their work;
- be trusted and supported in their work;
- be given a specific tasks and responsibilities;
- be able to participate in the decision making of the organisation;
- be able to participate in the planning, monitoring and evaluation of their work;
- know the limits of their authority and the areas in which they can make decisions without having to refer to paid staff or other volunteers;
- be challenged and provided with opportunities for growth by having their performance regularly reviewed;
- be provided with constructive feedback about their tasks and duties;
- be thanked and acknowledged for their contribution.





The learning materials for Development Practice and Management were specifically designed to complement and give substance to the competence standards drafted with the assistance of community based development practitioners in South Africa. It is envisaged that practitioners, capacity builders, grant-makers and others will use these standards and learning materials, improve them and in turn share their learning with others via www.developmentpractice.org.za.

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