HANDBOOK 4

DAY TO DAY OPERATIONS

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1. PLANNING FOR SUCCESS

What is strategic planning?

Strategic planning is simply looking forward to what your group wants to achieve over the next few years, and how you are going to make that happen. It will allow you to feel like all group members are working towards a common goal, as well as taking advantage of any opportunities that come up, and identifying potential problems before they become a threat to your group.

Good strategic planning means the work you do will be more effective and enjoyable, and you will be better able to identify and celebrate your achievements. It doesn't need to be very complicated or long-winded, in fact the best strategic plans are short and to the point.

How do we start creating a plan?

To start creating a plan, you need to allocate a few hours to sit down with all the key group members, where everyone understands that the aim is to create a plan for the group.

In creating a plan, you should start with a general discussion on the current situation of your group, making sure someone is taking notes. All aspects of your operation should be open for discussion, whether positive or negative. Avoid making traditional assumptions about what does and doesn't work, and instead think about your own situation. Particularly consider any past attempts you have had at strategic planning and what has or hasn't worked for you.

Consider and discuss the following points:

- **Where are we now:** what are we proud of in our work to date, what are the strengths and achievements of the group, what do we like about the group and how it works, how do we operate internally and within the broader community, and what resources do we have including technical and other skills.

- **Where are we going:** where do we want to be in 5 years' time, what else do we want to achieve, and what are our priorities for action.

- **What are the challenges:** what are the issues that may hold us back, are we lacking resources, skills or knowledge, what has hampered us in the past, and what are the particular issues for our group or sector.

- **What do we need to get there:** what skills and knowledge do we need, do we need to change our ways of working in a team, are we effective in turning our ideas into action, do we have enough people, how can we recruit and retain members, how can we avoid burnout, spread the workload and encourage future leaders, could we work more effectively with the government, other community groups, businesses, the media, do we need to consider our legal status, e.g. become incorporated or a charity, and how can we recognise and reward achievement, and celebrate our wins.

What are the main topic areas we need to include in our plan?

Once you feel everyone is on the same page about the priorities and aims for your group, start creating your strategic plan under the following headings. You can review your strategic plan at any point, and you should ideally set aside a time to revisit and update it once per year.

- **Vision:** The first part of your plan should be the shared vision of your group. This is the long-range goal, your purpose in the community. Ask yourself, "What is the best possible outcome for our group? What is our preferred future?" It is a unifying statement which reminds your group of what you are striving to reach.
- **Mission:** Your mission statement identifies how your group aims to achieve your vision. This may be a few lines that state your core business, your operational priorities, what makes you unique, and who are your key stakeholders.
- **Goals:** Based on your vision and mission, make a list of your key goals for the year. There may be only one goal or there may be twenty, depending on your group size and capacity. For each goal, determine a timeline, key actions, and who is responsible for each of these.

If possible assign projects to groups rather than individuals to avoid burnout or problems if someone leaves. Be strategic about what you need to do; and what you have the time and capacity for. You don't have to scale up and expand if you are working well: it's better to do a few things well than attempt too much.

2. LEGAL STRUCTURES FOR COMMUNITY GROUPS

How should our group be structured?

Your community group can take on whatever structure suits those in the group, and is most useful for achieving your purpose. You can employ paid staff or remain as an entirely voluntary group. The pros and cons of the group structures most often used by community groups are:

Structure	Pros	Cons
Informal Network	A large scope to determine your purpose or work on loosely related projects	Limited ability to run large projects or receive funding. Members are personally liable
Workers' Cooperative	Consensus-based decision making, flat governance structure, autonomy	Limited ability to receive funding, effort required to maintain the structure
Incorporated Association	Can take on larger projects and issues, apply for grants, lease land, accept bequests, borrow money, and liability of committee members is limited	More structure and legal obligations. Ongoing fees, reporting requirements, insurance and auditing. Limited to operation in Queensland.
Company limited by guarantee	Can take on substantial public trading, operate nationally, only 1 member required	Complex legal obligations, higher fees especially for late lodging of finances

Initially you may want to start up a membership scheme for your group, where people who are interested in your club can pay to join it, usually in return for a benefit such as a discount, advice or a newsletter that non-members would not receive. These annual fees provide you with an ongoing revenue stream as well as a way for people to connect to your group and increase their involvement.

In addition to a formal structure, it is also important to specify how decisions will be made within your group. This may be through the voting of all members or just of the management committee. Consider if consensus needs to be reached or whether a majority vote is sufficient. How many members or committee members need to be present in order to take a vote on an important decision? Can management committee members make decisions on behalf of the larger group?

Should our group become incorporated?

Incorporation is a voluntary means of creating a legal identity. It gives an association legal advantages, in return for accepting certain legal responsibilities. When you incorporate your association, it becomes a legally separate entity with the same powers as an individual. An incorporated association can own land, sign a lease and appear in court. It provides protection to the management committee from personal liability for the actions of the association. Certain types of groups, such as partnerships, Parent and Citizen Associations and industrial organisations, cannot become incorporated. To incorporate an association in Queensland, your group must be a not-for-profit association with at least seven members.

However, there are also many obligations for incorporated associations which will take time and money, such as auditing your finances annually, having a management committee and taking minutes at committee meetings.

Your financial matters will be available for public scrutiny and you will most likely need to obtain public liability insurance. Before deciding to incorporate, your group should consider whether it is necessary for you, and whether you can meet the legal obligations.

Generally, once the group starts to accumulate money and assets and starts to become active in the community, it should seriously consider incorporating. For many groups, it is beneficial to become incorporated in order to access government grants, rent or own land or limit the liability of members. It also formalises your objectives and simplifies and clarifies the management of the group's money.

There are alternatives to becoming incorporated, for example auspicing, where your group can access funding opportunities with the legal support of an incorporated organisation.

We have decided to become incorporated. How do we go about this? What are our responsibilities?

Your incorporated association must comply with both the *Associations Incorporation Act 1981* and *Associations Incorporation Regulation 1999*. To incorporate, an association needs to convene a general meeting where several decisions must be made, including: passing a motion to incorporate; choosing an unique and appropriate name; adopting a set of rules or a constitution; and electing a President, Secretary and Treasurer.

As soon as your association becomes incorporated (there is a 3-4 week processing time after lodging your application), there are a number of tasks you need to complete immediately. You need to: get a common seal (rubber stamp) to identify your organisation; open a financial account in the organisation's name; obtain insurance if necessary; and transfer and assets or property held by your group into your new name.

While running your incorporated association you will also have regular legal obligations. They include: having a management committee of at least 3 members which meets at least once every 4 months; ensuring the financial records are audited and submitted annually; holding an AGM every year; and keeping minutes of meetings, a register of members and other records.

Do we need to register as a charity or for Deductible Gift Recipient (DGR) status?

If you will be looking to raise money or receive donations for your group, you may need to register as a charity and/or a deductible gift recipient. You do not have to be incorporated to apply to register as a charity, however most groups that wish to operate at this level would usually have some sort of formal legal structure.

The Australian Charities and Nonprofits Commission (ACNC) approves and regulates charities in Australia. You will need to register with them if you wish to raise funds for charitable purposes, including supplying help, aid, relief, support, care, housing or education to any person or group in need. You also need to apply if you wish to raise money for community purposes, including promoting the public's general welfare.

You don't have to have DGR status to receive grants, membership fees or donations, however it is an incentive for people or organisations to donate money to your group since they can claim it as a tax deduction. If donors wish to claim tax deductions they must be making a solely charitable donation – i.e. they cannot also have input into what your group chooses to do with the money. Funding that has obligations tied to it is seen as grant funding or sponsorship.

The Australian Taxation Office (ATO) regulates deductible gift recipient status. You can also apply for this status at the same time as you apply to become a charity, and you must meet certain criteria, including having an ABN.

3. RUNNING A MANAGEMENT COMMITTEE OR BOARD

Why do we need a management committee?

If you wish for your group to become incorporated, you are legally required to have a management committee of at least three members, including a President and a Treasurer (who cannot be the same person. You are also required to have a secretary for your group however they do not have to be on the management committee. Committees may also have other office-bearers (such as event manager and newsletter editor) and ordinary members.

What are the responsibilities of the management committee?

It is the role of the committee to ensure that the group complies with all its legal obligations as an incorporated association. These obligations include: interpreting the group rules; taking out insurance where necessary; and submitting an audited financial statement each year. If the audited annual financial statements and associated documents are not lodged with the chief executive of the Office of Fair Trading each year, the treasurer, president and secretary are liable to a penalty.

Certain committee members also have extra responsibilities:

- The **president** acts as the leader of the organisation and is responsible for chairing and conducting orderly meetings. They usually act as the representative of the organisation and sign legal and financial documents.

- The **treasurer** is responsible for ensuring that all financial transactions of the organisation are properly recorded and reported on. They present financial reports at management committee meetings, and keep documentation of all money received and paid out.

- The **secretary** is the public point of contact for the organisation. they have a number of responsibilities including: calling meetings of the committee and taking minutes at these meetings; receiving and keeping records of the organisation's correspondence; and keeping a register of the group's members.

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Do we need to hold an Annual General Meeting?

Yes, if your organisation is incorporated you are required to hold one AGM every year where all management committee positions become open for nomination and re-election. The annual general meeting (AGM) is an important event for every organisation as it gives the ordinary members, general public and the committee an opportunity to review the state of the organisation.

The Office of Consumer Affairs needs to be advised within one month, if a new secretary, president or treasurer has been appointed. The secretary is required to lodge with the Office of Consumer Affairs the audited financial statement within one month of the AGM.

How do we run management committee meetings?

Meetings are necessary for making decisions, communicating information and developing relationships. Meetings can take up a lot of time and if they are to be of maximum benefit they need to be run properly. The basis of any meeting is the agenda. An agenda gives a meeting direction, structure and purpose.

The president should chair the meeting and ensure it is conducted in an orderly and timely fashion. A typical management committee meeting might follow the framework of: welcome, apologies, minutes of the last meeting and tasks arising, reports from the secretary, treasurer and sub-committees, general business, and setting the date and time of the next meeting.

What is the role of a sub-committee?

Sub-committees are a way of distributing the workload of a management committee, and for making the most use of the expertise of the organisation's members. In this way, people who may not have the time to serve on the management committee can be co-opted onto a sub-committee for a limited time to carry out a specific project.

Sub-committees should be small in size (3 to 5 people), and they should be formally established at a management committee meeting. They should be provided with written guidelines, time frames, duties and powers, and one person should be nominated as a convenor of the sub-committee.

When would we need a board? How do boards operate?

If your organisation is a company limited by guarantee you are legally required to have a board of directors. A company limited by guarantee must have at least three directors, a secretary and at least one member. Larger incorporated associations may also choose to have a board instead of a management committee since a board is usually separated from the day to day management of the organisation and provides more impartial governance and strategic direction.

The role of a board is to set the long term vision and protect the reputation and values of their organisation. To make a difference a board needs to have proper procedures and policies in place but it also needs to work well as a team and have good relationships within the organisation. An effective board will develop a long term plan for the organisation, recruit suitable new board members, monitor the budgets, progress and results of the organisation and behave with integrity.

It is important to ensure you have a diverse range of people on your board to represent the needs and interests of your organisation. This should include directors from varying careers and backgrounds, with an appropriate mix of gender and age.


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4. MANAGING RISK & ENSURING SAFETY

What do we need to know about risk management?

Risk management involves identifying any risks to your organisation or its employees/ volunteers, what the likelihoods are of each of these risks, what the consequences of each would be, and therefore what you should do to minimise or eliminate the risks.

For example, there is a risk of a fine or penalty fee if an incorporated organisation fails to submit its annual audited financial report. There is a risk of injury to your volunteers (and therefore a risk of your organisation being sued) from setting up a marquee at a community event.

Risk management is a management committee responsibility. You should develop a risk management plan so that you are aware of and prepared for any issues your organisation might face. New ventures, changed legislation, altered work practices, a change in staffing, and so on, can all affect the range of opportunities and risks you face. Your risk management plan needs to be kept up to date to reflect such changes.

What types of risk do I need to consider for my small community organisation?

Workplace health and safety concerns, such as potential injuries to your staff, volunteers or clients, are a major risk to most non-profit organisations and are covered more fully later in this section. However there are other risks that your management committee should consider. These include:

- Loss, theft or damage to property that you own or lease
- The impact of natural disasters such as storms or floods
- Failing to comply with your legal requirements as an incorporated association or other entity, e.g. submitting financial reports
- Staff and volunteer retention and the loss of knowledge from a high turnover
- Conflict within your organisation
- Loss of your organisation's good name
- Discrimination or misconduct
- Intellectual property

How do I know which risks are the most important?

Once you have assessed the various risks to your organisation you need to determine how important they each are, and what your response would be to each risk. To determine the importance of the risk, you need to rank the risks according to how likely they are to occur, and how severe the consequences would be if they did occur. A useful approach is to use four categories of severity and four categories of likelihood.

The four categories of severity are: disastrous risks, very serious risks, serious risks and minor risks. The four categories of likelihood are: almost certain, very likely, likely and unlikely. Those risks that should concern you most are those that are likely to happen and which would have quite serious effects. There are a number of references in *Handbook 6* to assist you with this ranking process.

How can I minimise the risks to my organisation?

Once you have ranked the risks that face your organisation, you need to decide on an appropriate response for each of them. There are four main strategies for minimising risk:

- Avoidance: This is the preferred method of risk management, e.g. you avoid the risk of having your money stolen by depositing it with a bank
- Transference: You can transfer the risk to someone else, e.g. through purchasing a warranty when you buy goods, or having volunteers sign a form waiving their rights to sue you
- Control: You can try to reduce the likelihood or the consequence arising from a risk, e.g. you can reduce the risk of injury from fire through installing fire alarms and holding fire drills.
- Insurance: When it is difficult to completely avoid or mitigate the risk, you can insure against it, e.g. through public liability insurance in case your staff or volunteers injure themselves
- Retaining: You may choose to retain some risks if the effects are not severe, e.g. you may choose to appoint a person as secretary even though they are often late for meetings.

Some of the main measures you can implement to control and reduce risk in your organisation are:

- Make sure that there are clear procedures in place for areas with identified high risks, such as fire management, dealing with hostile clients or financial management.
- Provide training - the likelihood of risk will be greatly reduced when staff and volunteers have received proper training, for example in managing difficult clients.
- Make backups - the impact of the loss, theft or damage of files can be reduced if paper and computer copies or backups of important files are kept.
- Assign responsibilities and be clear about who can represent your organisation in different settings, sign cheques, enter into contracts, make media releases or represent your organisation's policy position at public events.

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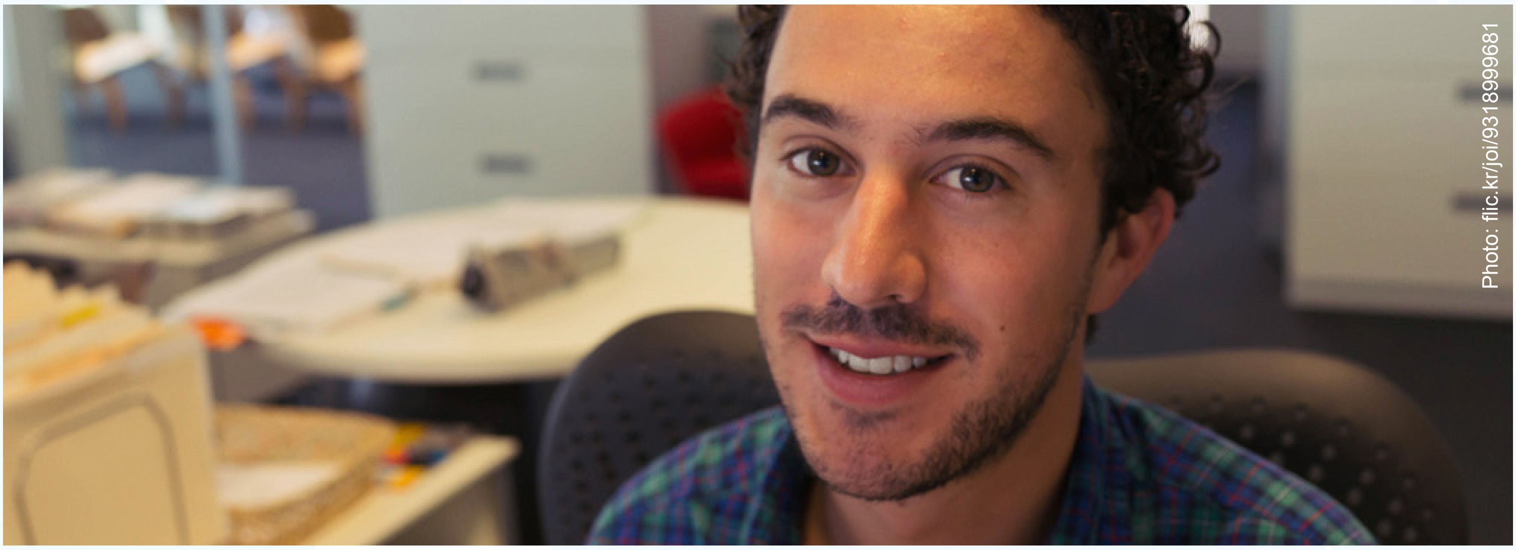

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What is Workplace Health & Safety?

Workplace health and safety is an area concerned with fostering a safe and healthy work environment for all parties. Under the Work Health and Safety Act 2011 (Qld), anyone conducting a business or undertaking has an obligation to ensure the health and safety of workers and others that they engage. This includes businesses and also non-profits and volunteer organisations that employ paid staff, as well as their volunteers. Workers also have the obligation to take reasonable care of their own health. There are significant penalties for failing to comply with this legislation.

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SafeWork Australia and the Queensland WorkSafe websites provide a range of detailed information on health and safety obligations and legislation. SafeWork Australia has also produced guides on Volunteer Health and Safety for volunteers and for organisations employing volunteers. All community organisations should download and refer to these documents.

What are our legal obligations to our volunteers around Workplace Health & Safety?

All groups with paid staff have obligations under the Workplace Health and Safety Act 2011. If you have paid staff and volunteers, you must provide your volunteers with the same protections as your paid staff. This includes safe equipment, personal protective equipment (PPE), safe systems of work, adequate facilities, necessary training, monitoring worker health and ongoing consultation.

Note that it is not just your office that is a workplace. If you send staff or volunteers out to a private home to conduct work on behalf of your organisation, the private home is also considered a workplace. You should take reasonable steps to ensure it is a safe place, for example through a questionnaire to the home owner or information from the staff member or volunteer. Where staff or volunteers are transporting clients in their own vehicles, you are responsible for ensuring they have the correct licences to do so and that the vehicles is roadworthy and registered.

Staff and volunteers are also responsible for taking reasonable care of their own health, complying with reasonable policies, procedures and instructions, and taking care not to compromise the health and safety of others.

If your group is only made up of volunteers you do not have legal obligations under the Workplace Health and Safety Act 2011, but it is a good idea to follow the guidelines in general, in order to protect your volunteers from harm. Showing volunteers that you value them and you are serious about their health and safety can also lead to increased satisfaction and volunteer retention.

How can we minimise health & safety risks for our staff, volunteers & clients?

Take a systematic approach to risk assessment and control as outlined above, by identifying all the health and safety risks your staff, volunteers and clients may face, ranking and prioritising the risks, and then taking steps to remove or control them as appropriate.

- Look around your workplace and identify potential risks: Are there hazards for children, older people or people with impaired sight? What are the fire hazards? Are there loose electrical connections, or damaged furniture? How hot is your hot water?
- Do staff members work with potentially dangerous clients? Are staff required to perform physical activity which may result in injury (for example, lifting clients)? Is your organisation's work particularly stressful? Are staff required to do a lot of driving?
- Common situations that can result in injury or illness for community organisations include: driving a motor vehicle, street fundraising, running a charity shop, running a sausage sizzle, hazardous substances and working alone in someone else's private home.
- You should develop plans showing high risk areas and fire escape routes where necessary. Provide information, such as "fire exit" signs, "warning" signs near hazardous materials, and information on how to use equipment or what to do in the event of accidents. As a minimum you should provide first aid kits. Some groups may need trained first aid officers or first aid rooms.
- Outline the health and safety procedures to new staff and volunteers, as well as the requirements and limits of their role, situations they should remove themselves from and who to talk to if they have questions. Try to match volunteers with roles that are suited to their experience and skills so they don't put themselves or others at risk.

5. INSURING AGAINST RISK

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Why do we need insurance?

Insurance is one form of risk management, but you should view it as a last resort. The preferred options are to avoid, manage or mitigate the risk. Sometimes it is impossible to predict or avoid all types of risk, so adequate and appropriate insurance for staff and volunteers is essential for all community-based organisations. Remember that insurance does not prevent an accident or event – it only provides some compensation for financial loss if the event does happen. Insurance should only be used to cover risks which you feel are not adequately covered in other ways, along with any insurance that the law requires you to take out.

What types of insurance might our group need?

There are many types of insurance which should be considered to reduce risks to your organisation, and in the case of unincorporated associations, risks to the committee members personally.

- **Worker's compensation insurance**: This is compulsory insurance required by all organisations with paid staff to cover injury, sickness, or death of their employees. If your organisation employs a contractor to perform work which does not involve the supply of materials to you (such as a gardener or cleaner), it is also compulsory for your organisation to take out WorkCover insurance to cover that contractor. Failure to take out workers' compensation insurance will leave the organisation open to any claims for compensation by employees and subject to a severe fine.

- **Personal accident insurance**: This insurance is critical if your organisation has volunteers, since workers' compensation insurance does not cover them. Personal accident insurance applies where a volunteer is injured or dies as a result of an accident while they are volunteering or while travelling to or from their voluntary work.

- **Public/civil liability insurance**: Public liability insurance protects the organisation, staff and volunteers should someone else be injured or their property damaged as a result of an accident caused by the organisation, a staff member, or on property owned or leased by the organisation. It is essential for most community organisation and is covered more fully later in this section.

- **Motor vehicle insurance**: If your organisation owns vehicles you will need to take out motor vehicle insurance: you can choose comprehensive insurance, which covers damage to your organisation's vehicle and damage to other people's property of any type, including vehicles. Or you can choose third party, fire and theft insurance, which is cheaper and covers damage to other people's property, but only covers your vehicle for fire and theft, not damage. If staff or volunteers are driving their own vehicles, you should ensure their insurance policy covers them for damage occurred while working for your organisation.

- **Building insurance**: This covers damage to structures owned by your organisation. Policies may cover damage caused by fire, storm, tempest, rainwater, lightning, and explosion, impact by vehicles, animals or aircraft, earthquakes, riots, malicious acts and flood.

- **Contents insurance**: If your organisation is leasing premises the landlord will usually be responsible for building insurance, but this will not cover contents owned by your organisation, including any fixtures that you have installed. Contents should be insured against damage or destruction as well as theft. You should take care to identify whether the policy provides for indemnity, in which case only the depreciated value of insured items will be paid, or for reinstatement or replacement, in which case the new replacement cost will be paid.

- **Professional indemnity insurance**: If your organisation claims to provide reliable advice to the public, you may consider a professional indemnity policy in case the information or advice given by staff or volunteers proves to be incorrect, in which case you may be liable.

- **Manufacturer's liability insurance**: If your organisation manufactures any item which is sold to the public, even to benefit charity, it must be fit for the purpose for which it is sold. Manufacturers and retailers may decide to take out a products liability policy to insure against claims arising from defective products.

- **Association liability insurance**: This insurance is designed to protect a community organisation and its board or management committee against liabilities that arise out of the work of the organisation. While incorporation does provide some protection to board and committee members it does not prevent individuals from being sued for acts of negligence. Claims could include incompetent supervision, misuse of assets, discrimination and wrongful termination. Where such cases can be proven the personal assets of negligent board and/or committee members can be seized to meet any damages.

Is it essential for us to have public liability insurance?

Public or civil liability insurance is relatively inexpensive and is essential for most community organisations. It covers your organisation's liability to pay compensation to anyone other than your employees who suffers injury or damage to property on your premises or as a result of your operations. For example, it is likely to cover a person who enters your premises and slips due to a wet surface and sustains a serious head injury. Public liability insurance is especially important in the case of unincorporated associations because every member can become personally liable.

In order to lease premises you will usually be required to have public liability insurance for a certain amount, and it is also often a condition of applying for funding and grants. Common amounts required to be covered are $10-$20 million. If your organisation is running a function (such as a fair, workshop or fundraising event) at premises owned by another party, it is advisable to arrange public liability insurance to cover that particular function.

Volunteers are protected from incurring personal civil liability while undertaking voluntary work if they are acting in good faith and performing organised work for a government agency or incorporated association.

Where can I get more advice or purchase insurance?

No person can tell you definitively what type of insurance policy your organisation needs. It's up to you to read what each policy offers, assess your organisation's risks and make a decision based on those assessments. Be mindful that most policies will only cover your organisation and members when they are acting in authorised activities. You should check to see that your insurance company or broker is registered with the Australian Prudential Regulation Authority (APRA).

You may also be able to participate in a group insurance scheme to receive cheaper rates. For example, QWALC, LLCQ and the ACNC offer group insurance schemes to certain community organisations (see Handbook 6 for links to these schemes). Even if you are not eligible through these agencies, a group of non-profits with a common thread such as similar activities, funding or location can join together to obtain a master insurance policy with reduced individual premiums.

6. MANAGING YOUR MONEY

What are the responsibilities of the treasurer?

It is a legal requirement of an incorporated association to nominate a treasurer for the organisation. While all members of the management committee are responsible for managing the association's finances, the treasurer ensures that financial transactions are properly recorded and reported on.

The treasurer presents financial reports at management committee meetings. There should be receipts for all money received, evidence that it has been banked, and available documentation for all money paid out. The accounts should be reconciled at least once per month and audited every year, in time for presentation at the Annual General Meeting.

A treasurer may also be responsible for preparing an annual budget and monitoring it regularly, reviewing procedures and financial reporting, and advising the board or management committee on financial and fundraising strategies. The treasurer must also ensure that the organisation meets all its tax responsibilities where relevant - and takes all its tax opportunities.

How should we manage our day to day expenses?

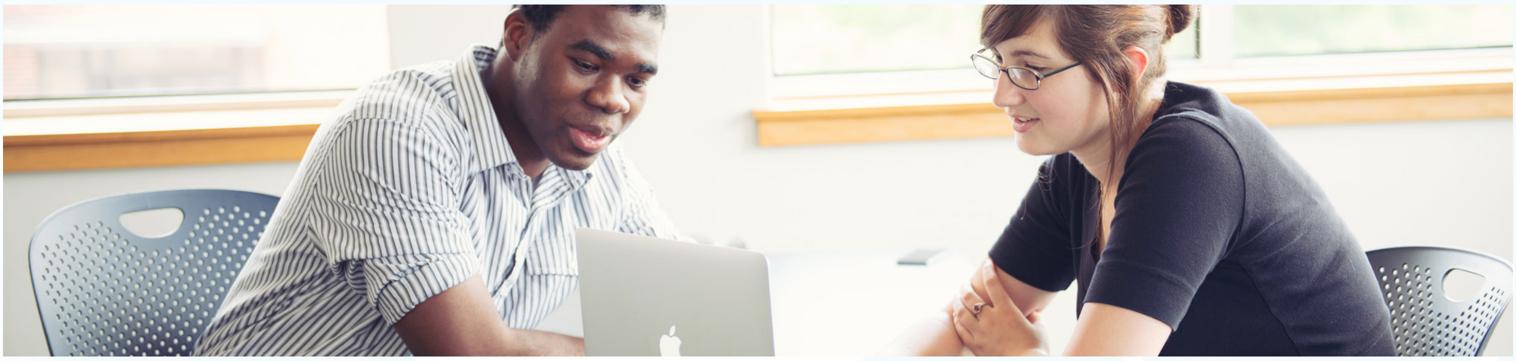
The treasurer is responsible for the day to day management of your organisation's money, however any financial decisions (major expenses, fundraising events, etc) need to be approved by the management committee. The organisation should have its own bank account, which will need to have at least two signatories (usually the President and Treasurer). If your organisation is unincorporated you can keep the organisation's money in trust in a personal bank account. See *Handbook 6* for excellent detailed resources on money management for community organisations.

Will our organisation have to pay tax, submit a tax return, or collect GST?

Not-for-profit organisations may have to pay income tax, Goods and Services Tax (GST), fringe benefits tax, and payroll tax. This will have implications for the way you keep your accounts and your transaction records. Most non-profit organisations are exempt from paying income tax and will not need to lodge tax return. Visit the ATO website for more information.

If your non-profit organisation has a GST turnover of $150,000 or more (or $75,000 for organisations that are for-profit), it must register for GST. If your organisation has a GST turnover of less than $150,000, it can choose to register for GST. Non-profit organisations that are registered as charities also have access to a range of GST concessions.

Most non-profit organisations in Queensland can also claim exemptions from duties, payroll and land tax with the Queensland Department of Treasury and Trade. If you are classified as a charity, your staff can salary-package up to $30,000 worth of benefits before triggering the Fringe Benefits Tax (FBT). These concessions allow charities who can't pay high wages to attract good quality staff by offering attractive packages.



7. TECHNOLOGY & RECORD KEEPING

What are the responsibilities of the secretary?

Every incorporated association in Queensland is required to have a secretary. They are the public point of contact for the organisation and key to its success. The secretary has a number of obligations under the Associations Incorporated Act, as well as unwritten obligations that will depend on the activities of the organisation.

The main functions of the secretary are: calling meetings of the association, including arranging the venue, preparing an agenda an taking minutes; keeping copies of all correspondence to and from the organisation, and drafting letters on behalf of the organisation; ensuring the register of members is up to date; and filing and keeping track of any records the organisation is required to keep.

What sort of records do we need to keep?

There are many records that a community organisation should consider keeping. Overall it is important to document information about your organisation rather than keep it in people's heads. Ensure there is an electronic or physical backup for each record in a separate location to the original.

Some of the main records you may need to keep are:

- A register of members, usually maintained by the secretary. This may also include details of membership fees, interests, membership of sub-committees and correspondence
- A register of assets held by the organisation
- Employment records where appropriate
- Receipts, plans, photos and documentation about major projects you undertake, particularly if they are funded through a grant or donation
- Official policies and procedures, which may include your constitution, set of rules, code of conduct, recruitment policy, conflict resolution policy and fundraising strategy
- Procedures on how to implement any of the major activities undertaken by your group in case members or volunteers move on, for example how to edit the website or newsletter

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How do we develop policies & procedures?

A policy is a statement of agreed intent that clearly sets out an organisation's views on a certain matter. Policies translate the philosophy, mission or purpose of the organisation into work practices by acting as a guide to decision-making. *Handbook 6* has a number of resources where you can find templates to develop your own policies and procedures. In particular the VOICE resources on Community Door have a broad range of different templates to cover almost any situation you may encounter.

What types of technology are useful for small community groups?

Technology is now a part of most things we do and even small community groups need to use multiple types of technology. But how do you know where to start? You most likely don't need every new computer or device but a better phone system or simple website could help clients find you. A cloud system might be cheaper or a better printer could assist you to save on out-sourcing.

You can access free software and donated computer products if you are a non-profit organisation (see *Handbook 6*). ImproveIT is a comprehensive national IT resource that can provide you with advice, tools and information on how to get your organisation up-to-date and technology savvy.