CAPACITY BUILDING TRAINING FOR CATCHMENT MENTORS (CHAMPIONS)

ADMINISTRATIVE SKILLS MODULE 6

SECTION 2: LEARNERS GUIDE

Integrated Water Resources Management

Strategies, Guidelines and Pilot Implementation in Three Water Management Areas, South Africa

Department of Water Affairs and Forestry

South Africa

This module contains restricted information and is for official use only.

Ref. J. No. 123/138-0154

Carl Bro a|s

FPCD

Date: September 2003

The content of this training material is in line with SAQA guidelines

THIS WORKBOOK BELONGS TO:

...

HOW TO USE THIS MANUAL

This manual provides an introduction and background to some basic **Administrative Skills.** It aims to provide learners with the necessary skills to plan and arrange meetings and to conduct meetings in an efficient manner. Learners are also informed of the various roles and responsibilities of the chairperson, the secretary and the members. They will also learn to compile the minutes of meetings, to prepare the necessary documentation for future meetings and to undertake follow-up actions resulting from the outcome of the meeting. In addition, attention is given to basic administrative functions to ensure that the necessary office systems are in place for the successful execution of forum activities.

It is expected of the participants to attend the training sessions and participate in all the exercises. You are encouraged to study the whole manual carefully and, where needed, to make notes in it. The wide margin on the right of each page can be used for this purpose.

In addition, the results of the various exercises must be verified against the information in this manual.

You must make sure that you understand the work presented in the notes and never hesitate to ask questions.

We hope you will enjoy this course and gain much from it.

TABLE OF CONTENTS

ADMINISTRATIVE SKILLS - MODULE 6

1. AN INTRODUCTION TO MEETINGS

The objectives of this learning unit are to:

- ❖ Explain the concept of a meeting and the various types of meetings.
- ❖ Inform you of some factors to be taken into account when arranging a venue for a meeting.
- ❖ Set out the necessary information required for a notice and an agenda of a meeting.
- ❖ Equip you with the necessary skills to plan and arrange the various types of meetings required for the functioning of the forum or other institutions forming part of IWRM.

1.1 INTRODUCTION

Activity 1

In order for learners to get to know one another an "ice-breaker" game will be played. The rules are as follows:

- ❖ Each student receives a bottle of water. You may drink the water but please keep the bottle-top.
- ❖ Each student draws a number to determine to which group he/she will belong.

a) Goal-setting game

Students are divided into groups of five. Each group selects any ten items from the box provided by the facilitator.

Each group also select a news item provided by the facilitator

b) Do the following:

1) Each of you has a bottle-top. Write your initials on the bottle-top with a marker pen.
2) Cut out a small card from the A4 paper provided by the facilitator.
3) Write one goal that you wish to accomplish in the next two years on the card.
4) Share this goal with the members of your group.
5) The task of your group is to use the items taken from the box to create an obstacle course on a sheet of newspaper. It must be difficult – but not impossible – to move the bottle-top from one end of the paper to the other.
6) You have to put your cards on the opposite end of the obstacle course. The aim is to get the bottle-top to reach the card with your goal written on it.

c) Rules of the game

1) The bottle-tops can be moved in any way.
2) You are not allowed to make the bottle-tops fly, jump or skip over obstacles.
3) The bottle-tops must be moved in such a way that they touch each of the obstacles as they move along.
4) You are to take turns to try to move their bottle-tops from the one end of the paper to the other.
5) You have to negotiate each obstacle. The tops can be moved sideways or any direction you wish.
6) If you wish, the group may keep changing the obstacle course so that each member has a slightly different challenge.
7) You have 15 minutes to get all the bottle-tops on the cards at the end of the obstacle course.

ROLES IN GROUP TASKS

Your facilitator has 5 cards. Each member of the group draws a card to determine which role he or she will play during the remaining activities. The cards refer to the following roles:

Role 1: Timekeeper

The timekeeper has the task of reminding the group how much time is left for an activity. He/she must also ensure that they complete the task in the given time.

Role 2: Scribe or Secretary

The student who plays this role must do the writing and recording during group discussions. If a learner who has drawn this feels that his/her skills are inadequate for this role, he/she may exchange roles within someone else in the group.

Role 3: Co-ordinator

The task of the co-ordinator is to ensure that learners adhere to the topic or task under discussion. He/she should ensure that every member of the group gets a chance to speak, and that no-one takes over and controls the discussion.

Role 4: Mediator

The task of the mediator is to prevent arguments in group from escalating into violence or insulting behaviour. He/she will also ensure that nobody leaves the group and that each student has an equal opportunity to state his or her case.

Role 5: Encourager

The role of the encourager is to be positive about the task, to motivate the group, and to counter any negative influences within the group.

1.2 WHAT IS A MEETING?

1.2.1 Definition of a meeting

A meeting is a gathering of a group of people with a common purpose or interest, where these people come together in one place at the same time to discuss this mutual issue

Activity 2

Divide into groups of three.

Discuss the last soccer game in your area within 10 minutes.

*When people discuss the latest Chiefs -Pirates game at the taxi rank on Monday morning, they are having a **discussion**. Although a discussion is in many ways similar to a meeting, it is not one.*

Activity 3

Divide into groups of five and discuss the following:

1. Have you noticed any advertisements about a meeting that will be held in your area in the near future?
2. Where and when the meeting be held?
3. Scan the news items and see if you can find a notice of a meeting, which will be held.
4. Who must attend the meeting?
5. What do you think will happen at the meeting?

*If the same people mentioned in Activity 2 above gather in the community hall that Monday evening at 19h00 at to discuss the water situation in Mafefe, and if the discussion guided by a chairperson according to an agenda, the people are attending a **meeting**.*

Remember!

What is a meeting?

Meetings can be large, with **whole communities** present, or much smaller, with only **three or four members** of an executive committee present.

1.2.2 Functions of a meeting

These include:

- Making various decisions
- Sharing ideas and information
- Planning activities
- Delegating responsibilities

1.2.3 Requirements of meetings

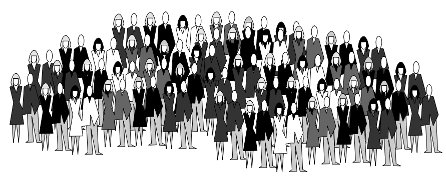
Formal meetings are similar to discussions, but have the following requirements:

- Formal meetings must have rules and a constitution that govern conduct.
- Formal meetings must have a Chairperson, Secretary and Treasurer with specific duties.
- A Notice of the meeting must announce formal meetings.
- Formal meetings must be conducted according to an <u>Agenda</u>.
- A formal record of the meeting procedures (<u>minutes</u>) must be kept.

1.2.4 Types of meetings

a) General Meetings

A general meeting is a meeting where the public or the majority of a community may attend. A **public meeting** can be classified as a general meeting. General issues are discussed and the various committees and community leaders give feedback to the community regarding progress made, decisions taken and new projects planned. The community also gets a chance to state their problems, expectations and needs. Should differences occur, voting may take place to settle the matter in a democratic way.



General Meeting

b) Committee Meetings

A committee meeting is a meeting attended by people elected to fulfil a **specific mandate** on behalf of the **people by whom they were elected**. Committee meetings take place on a regular basis, often in the same place and at the same time. Committees often address an ongoing issue. A Catchment Management Committee (CMC) is an example. They meet on a regular basis to address the relevant issues specified by their mandate.

Committee Meeting

c) Ordinary or regular monthly meetings

At these meetings, **day-to-day** matters are discussed and are usually held at the same time on the same day of every month. Notices are therefore not always sent out for these meetings. A reminder might be sent out.

d) Special Meetings

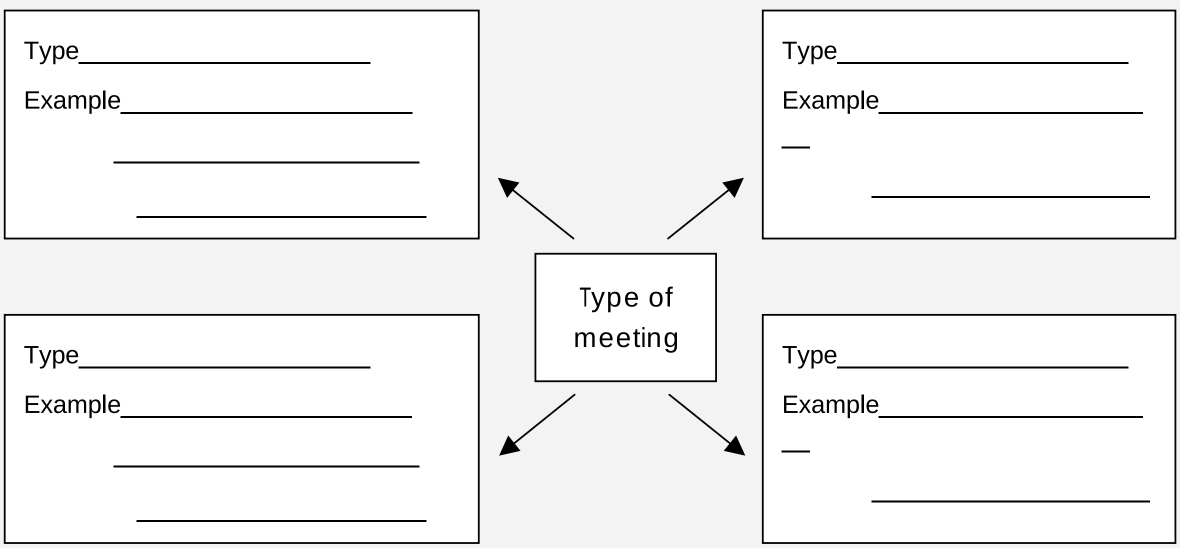
A special meeting is a meeting where **urgent** issues and problems are addressed. For example, these might be issues so urgent that they cannot wait until the next scheduled or routine meeting. Such meetings usually focus on single issues, and the agendas are short. The item "general" will not appear on the agenda and usually the minutes of the previous meeting are not read or discussed. A special meeting can take the form of a special community meeting or a special committee meeting.

Activity 4

Return to your groups. Each group member assumes the role allocated to him/her.

Do the following:

1. Any member of the group can draw the following diagram



2. The scribe/note keeper enters the information as the group discusses it.
3. Discuss the different types of meetings
4. Provide examples of meetings that you have attended.

1.3 THE ROLE AND RESPONSIBILITIES OF MEMBERS AND OFFICE BEARERS

The chairperson is the most important role player, not necessarily because this position holds the power to dictate, but because without a chairperson a meeting would erupt in chaos. The chairperson functions as the chief administrative officer and as a leader.

1.3.1 Responsibilities

A meeting should have a responsible chairperson

The chairperson's formal responsibilities with regard to meetings include:

- Preparing the agenda for the meetings with the assistance of the secretary;
- Officially opening and closing the meetings;
- Putting matters to vote, where necessary; and
- Maintaining good order and discipline during meetings.

A good chairperson is someone who acts as a referee or "traffic officer." The chairperson must ensure fair play in a meeting. This is achieved by:

- Allocating an order for speakers;
- Giving everyone a fair chance to speak;
- Guarding against undue interruptions;
- Discouraging apathy, inattentiveness, the tendency of people to talk past one another, and distracting behaviour such as holding a conversation while another speaker is talking.
- Guiding and structuring the discussion, ensuring that speakers keep to the point;
- Clarifying and summarising the debate from time to time to focus the meeting and to tie up loose ends;
- Ensuring that a decision is taken on a matter and that everybody knows what the decision entails;
- Managing the time allocated to the meeting; and
- Generally, seeing that agreed-upon procedures and the rules of the meeting are followed – but without "blowing the whistle" like a real referee every time that rules are broken!

1.3.2 Meeting Checklist

Numerous things should be checked

a) Before-meeting checklist

The following checklists can help a chairperson in the execution of his/her task. A chairperson should strive towards the point where he/she can answer yes to every question in the checklists.

Complete the following checklist before a meeting to ensure that the meeting will proceed smoothly:

	Yes	**No**
Is the objective of the meeting clear to everyone?		
Are the time and place for the meeting appropriate?		
Has an agenda been prepared?		
Have people been given enough time to prepare for the meeting?		
Have the minutes and the handouts of the previous meeting been sent out?		
If any reports or proposals are required for the meeting, have these been prepared?		
Is the chairperson well prepared for the meeting?		

b) During-meeting checklist

	Yes	**No**
Did the meeting start on time?		
Do all the attendants have a copy of the agenda, and do they understand it?		
Is everyone present aware of his/her important role?		
Is everyone aware of the rules and procedures governing the meeting?		
Does everyone know that the goal during this meeting is a win/win solution?		
Are the people who are present aware of constraints such as time?		
Is there an easy conversational flow?		
Does everyone get a fair chance to make a contribution?		
Does the chairperson have eye contact with everyone present?		
Is progress being made in the discussion?		
Is the chairperson neutral and unbiased?		
Is there order in the meeting?		
Is the secretary keeping up with note taking of the decisions made?		
If there are any problem people in the meeting, Is the chairperson dealing well with them?		

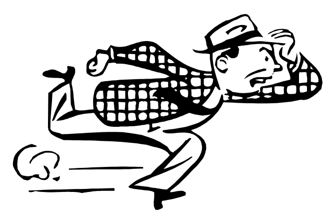
c) After-meeting checklist

	Yes	No
Has the chairperson discussed the minutes with the secretary?		
Did the secretary capture the proceedings (decisions, names of speakers and seconders, financial transactions etc.) correctly?		
Has the chairperson seen to it that the minutes are being despatched timeously?		
Has the chairperson followed up the tasks that he/she was given during the meeting?		
Has the chairperson made sure that the secretary has done the tasks given to him/her during the meeting?		

1.3.3 Typical problem areas

Unfortunately it is the chairperson's task to deal with problem people in a meeting because they are the potential disrupters of meetings. In good meetings the influence of problem people is minimised. The following are a few examples of problem people:

- The **latecomer** always arrives late at the meeting and causes some kind of commotion, from greeting everyone by hand and enquiring about their health, to bumping and shuffling to get to a seat. When the latecomer has eventually settled in, he/she wants to be brought up to date on the progress of the meeting. The handling of this problem person will be dealt with together with the next one.



Latecomers disturb meetings

- The **early leaver** drains the energy of the meeting by leaving early. Early leaving is often accompanied by clock-watching, finger-tapping, paper-gathering, apologising in various directions, and saying goodbye to all and sundry, eventually exiting in a crouching manner.

  Dealing with latecomers and early leavers: It is very important to settle the matter of punctuality among a group who has regular and frequent meetings. It should also be noted in the minutes when someone arrives late or leaves early. In any case, common meeting rules require that early leaver obtain the approval of the whole meeting before excusing themselves.

- The **broken record** keeps bringing up the same point over and over again. This person may not act in this way by choice, but because no one would listen to him/her or because he/she really needs more explanation before understanding. The chairperson should make sure that everyone present knows what the discussion is all about and, once a decision has been made, should see to it that it is recorded. It is a good idea if the chairperson or the secretary reads a decision before the meeting moves on to the next item.

- The **head-shaker** non-verbally disagrees or agrees in a dramatic and disruptive manner. In addition to shaking their heads, they might also roll their eyes, pull faces, throw hands in the air as if in despair, and laugh soundlessly. The head-shaker is either a very animated person, in which case he/she will probably not realise what he/she is doing, or has a low opinion of the rest of the participants and watches them as if they are actors in a comedy. The best way to deal with the head-shaker is to force him/her to translate his/her body language into words. Every time the head-shaker makes a gesture the chairperson should ask him/her to comment. In that way he/she will become aware of the mannerism and will have to defend his/her reaction to the rest of the meeting.

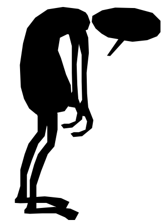
- The **clown** is a potential disrupter of a meeting. He/she usually tells jokes or makes funny remarks aside, which are only heard by the people sitting close by. The clown enjoys the attention of at least part of the group. His/her remarks cause peals of laughter from the people nearby. A bit of humour in a serious discussion is good, but the problem with the clown is that his/her humour is meant only for the people nearest to him/her. This can lead to the beginning of a subculture in the vicinity of the clown. Establishing eye contact and forcing him/her to be serious by asking his/her opinion may change the mood.

Jokers disrupt meetings

- The **Doubting Thomas** constantly puts down everything. He/she is always negative. You are wrong until you prove yourself right. No solution will ever work. It is good to be critical, but there is a difference between being critical and being aggressively negative. The Doubting Thomas must be kept honest. Every time he/she reacts negatively, he/she must be requested to substantiate the reaction.

- The **orator** makes a speech instead of an input. A speech is time consuming and tends to deal with various matters that are not totally relevant. A speech also tends to stifle lively discussion. The chairperson has a very difficult task in finding the opportune moment to interrupt the orator and quickly give someone else a chance to speak. In any case, the rules of the meeting should stipulate that a contribution should not be longer than a prescribed period of time.

- The **gun jumper** does not wait until the chairperson gives him/her a chance to speak. When a discussion is really going well, it is inevitable that a few people would have indicated to the chairperson that they would like to make a contribution. The chairperson must keep a waiting list in his/her head so that everyone can have a fair chance to speak. The gun jumper ruins this orderly proceeding and the chairperson must be very strict and not allow him/her to rob someone else from making a contribution.



Dropouts do not participate

- The **dropout** sits at the back of the room, does not say anything, never looks up, appears to be reading something or doodles. The dropout is especially disturbing to the chairperson. It is the chairperson's task as facilitator to get the whole group to participate freely. If there is a dropout, this is living proof that the chairperson is failing. Dropouts can be dealt with by changing the seating arrangements: there should be no "back-of-the room" seating, and no person should be able to hide behind anyone else.

  Another solution is to bring the dropout into the discussion by asking for his/her opinion.

- **Silent observers** differ from dropouts because, although they never say anything, they follow the discussion and may even nod now and then. The silent observer is usually a shy person who is unsure of him/herself. The chairperson should reassure this person that his/her contribution is also important and should help him/her summon the courage to participate.

Personal attacks are not allowed

- The **whisperer** is constantly whispering to the person next to him/her. Eye contact with a whisperer may cause him/her to stop, or else physical movement towards him/her may stop the whispering. To ask the whisperer to repeat to the whole meeting what has been whispered may also quiet him/her down.

- The **attacker** launches personal attacks on other members in the meeting. This person is aggressive by nature and may even enjoy conflict. Such attacks cause anger, shock and even fear. The attacker must be stopped and it is best if the chairperson can get the whole meeting to censure him/her. The rules of the meeting should also stipulate that no personal attacks may be made.

- The **loudmouth** talks too much and too loudly, dominates the meeting and is seemingly impossible to shut up. In many cases the loudmouth is more senior than the rest. He/she then regards it as his/her right to dominate. The loudmouth usually makes it difficult for other people to participate so that a meeting quickly degenerates into a dialogue between the loudmouth and the chairperson. The chairperson should simply say at some stage that he/she is not interested in contributions from only one person, thus forcing the loudmouth to keep quiet while other people have the floor.

Activity 5

Conducting Meetings

Role Play

Divide into new groups by drawing a number card. Then draw your role card and then complete the following activity:

Discuss the behaviour of a chairperson at a meeting that you have attended. Determine whether the chairperson was a good facilitator or whether he/she could have handled some matters differently.

Activity 6

Conducting Meetings

Divide into new groups by drawing a number card. Then draw your role card and complete the following activity:

Have you experienced problem people at meetings that you have attended? Try to determine if all these "problem people" sort in any of the categories discussed earlier, or whether new categories of "problem people" should be created for some of them.

If you could think of any new categories of "problem people," give them names and describe them in the table below.

Category of problem people	Description of behaviour

1.3.4 The Roles and Responsibilities of the Secretary

It is said that having an effective secretary enables a chairperson to be effective as well. It is also true that an effective secretary makes for an effective meeting. The secretary is the **scribe** and the **assistant** to the chairperson. He/she must help the chairperson to keep track of the proceedings and keep to the agenda. An important role of the secretary is that of supplying relevant and necessary information for a meeting. The secretary must also note important points of debate and must record decisions so that accurate minutes can be written later. The following is a more detailed description of the secretary's tasks:

a) Before the meeting

- Draw up the agenda in consultation with the chairperson.
- Discuss the agenda with the chairperson item by item so that he/she can be fully prepared.
- Arrange for a venue where the meeting is to be held.
- Book or bring the necessary equipment (chairs, tables, microphone, audio-visual aids etc.) to be used during the meeting.
- Send out a notice of the meeting within the time period prescribed and include the agenda.
- Gather and/or prepare all the necessary information regarding the items on the agenda.
- Ensure that all minutes are up to date.
- Bring all the necessary documentation plus some clean writing paper to the meeting.
- Arrive early in order to get everything ready for the meeting.

The secretary fulfils a very important function

b) During the meeting

- Let everyone present complete and sign the attendance register.
- Report on the number of people present so that, if necessary, the chairperson can establish whether a quorum is present.
- Read out the minutes of the previous meeting if it was not sent out in advance.
- Supply the meeting with the necessary information for each item.
- Advise the chairperson on an ongoing basis throughout the meeting.
- Record the proceedings of the meeting (decisions, motions, proposers, seconders, etc.).
- Collect copies of any documentation distributed at the meeting for filing purposes.
- Ensure that, for every decision, an action (what), deadline (when), persons responsible (who) and manner of completion (how) has been identified.

c) After the meeting

- Discuss the outcome of the meeting with the chairperson.
- Write the minutes as soon as possible after the meeting and send them to the chairperson for verification.
- File a copy of the minutes and other documentation.
- Despatch the minutes timeously.
- Follow up all tasks assigned to the secretary.
- Advise the chairperson regarding all tasks assigned to him/her.
- Start collecting items for the agenda of the next meeting.
- Deal with correspondence to and from the organisation.

Activity 7

Divide into groups of five:

The Catchment Management Forum has advertised for a qualified secretary in the newspaper.

Discuss what you would regard as the secrets of a secretary's success in this forum.

NB: The note-keeper documents all aspects that are identified during the discussion.

Participants should prepare for the meeting

1.3.5 The Roles and Responsibilities of the Members

The ordinary members of a meeting are not spectators to be entertained, but active participants with a great responsibility. They must:

a) **Come prepared for the meeting**

This means that they must have read the agenda, studied any addenda to the agenda, and checked the minutes of the previous meeting for mistakes.

b) **Contribute to the common knowledge and insight of a meeting**

A meeting is a pool of knowledge and insight from which everyone can draw. But members should also stock the pool with their insight and knowledge.

c) **Help the meeting to run its course in a productive and orderly manner**

This means that members should say what they know and what they think. They should share their insights about relevant issues – but they should do so without breaking the procedural rules of the meeting.

d) Help the meeting to make good decisions

Members cannot disassociate themselves from group decisions, even if there is a procedure for doing just that. Every member is equally responsible for ensuring that each decision that is made is an enlightened one, and that it is the best choice that could be made under the circumstances.

e) Carry out the tasks allocated to them

Members have tasks, not only during meetings, but also between meetings. They must know that if they do not carry out the tasks allocated to them, the whole action process of the group may be jeopardised because one task often depends on another.

f) Be loyal to the decisions taken by the meeting

Members may never criticise decisions made by a group of which they are members. Where a voting system is used, it happens all the time that some members are unhappy with decisions. They may and should make their feelings known to the meeting, but never outside of it. Where decisions are made through consensus, they have no reason to be displeased about any decision. Quite often members are bound by a rule of secrecy not to divulge any of the deliberations or decisions. In meetings where the public can attend as observers there is no such rule; however, members of such meetings should still be loyal to the group and its decisions.

Activity 8

The whole group is to participate in the "role play" of a meeting.

The imaginary **aim of the meeting** is to give feedback to communities about the activities they have undertaken during the year.

Choose a Chairperson and a Secretary from the members of the group. Their tasks are:

1. To arrange the Annual General meeting of the Catchment Management Forum;
2. To prepare a Notice and Agenda for the meeting; and
3. To distribute the notices of the meeting.

Members of the group should also be chosen to play the roles of Treasurer (financial) and Community leader (reporter). The rest of the group members will play the roles of Forum members.

The following should take place during the enacted "meeting":

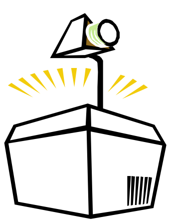
1. The items on the agenda should be discussed.
2. The "members of the community" should actively participate in the meeting.
3. The Secretary should take minutes of the meeting.

2. PLANNING A MEETING

It is usually the secretary' s task to arrange a venue for a meeting. Quite often an institution such as a committee or forum will have a fixed venue for all its meetings. But, if this is not the case, a venue must be arranged. Certain criteria must be taken into consideration when arranging a venue. The criteria for a venue are as follows:

- It must be **available** for the date and time the meeting is to be held, and for the duration of the meeting. It is no use to arrange a venue that can only be used for an hour if we know that the meeting will last longer.
- It must be **within fairly easy reach** of the members. People do not want to spend a lot of time on the road getting to a meeting, and they do not want to spend a lot of money getting there, either for petrol or for a bus or train ticket or a taxi fare.
- The members must know how to get to the venue; otherwise, some will get lost and as a result will be late. If the **address of the venue** is obscure a very simple map may be enclosed with the notification of the meeting.
- The venue must be **appropriate** for the meeting. It must have appropriate **size**. You do not want a huge auditorium for a meeting of ten people. It will have a very negative effect if ten people find themselves in such a large place. The group will feel threatened and defenceless, and that will have a psychological influence on the group that inhibits confident and progressive group work. Also, you do not want to force fifty people into a classroom. That will be very uncomfortable and will make the members irritable – which, again, will have a negative impact because people will be in a hurry to get out of the uncomfortable situation. The whole group will also be more prone to conflict.

- Persons who convene a meeting sometimes require specific **equipment** (e.g. visual aids, such as an **<u>overhead projector or microphones</u>**). If the venue where the meeting is to held does not have these, either seek another more suitable venue or bring the equipment along.



- It must be relatively free of outside **noise** such as traffic or children playing. The reason is obvious: a meeting is a communication exercise and noise hinders good communication. No one wants to be in a meeting where the communication is poor.
- There must be sufficient **light** and **air flow**. In winter, it should be warm without being stuffy. A meeting as such is difficult enough. The venue must assist in its successful completion by being pleasant and appropriate. This will place people in a good mood and help to make them relaxed and productive.

Remember!

If there is a fee attached to the use of the venue, the necessary approval for the expense must be obtained before notices are sent out for the meeting. This rule also holds if someone must first give permission for the use of the venue.

People Arriving at the Venue

It is preferable to have one venue for all meetings of a specific group such as a committee or forum. It takes away the regular problem of looking for a suitable venue and after a while members identify with the venue. The group to which they belong becomes associated with the venue and that helps in providing identity to the group – something that is often overlooked, but very important for the well-being of a group.

Activity 9

Group discussion

1. Think of a time when you attended a meeting in a suitable venue.
   - Name reasons why you think the venue was suitable.
   - What did you learn from that meeting?
   - Would you like to attend a similar meeting? Why?
2. Now think of a time when you attended a meeting in an unsuitable venue.
   - Name reasons why you think the venue was unsuitable,
   - Was it pleasant to attend this meeting?
   - Explain.

2.1 NOTICE OF THE MEETING

Once the venue has been secured, the relevant participants should be notified of the meeting. A notice is a short document informing the members that a meeting will be held at a specific time and place.

a) Distributing notices

The notice informs people who should attend the meeting. It has to be sent out well in advance to give everyone enough time to arrange their priorities. The notice can be distributed in various ways. It can be:

- Posted to the relevant people;
- Faxed;
- Send by e-mail;
- Distributed as pamphlets or posters through the community;
- Put up on notice boards in the community; or
- Circulated by word of mouth. (Word of mouth should, however, rather be seen as an additional means of distribution and should be used in conjunction with one of the other methods.)

b) Information on a notice

The notice for a meeting must contain the following information:

- Who the invitation is for?
- What organisation or committee is convening the meeting?
- The postal or physical address of the organisation convening the meeting. This is so those members can send formal apologies if they are unable to attend.
- What type of meeting is being held, e.g. a general or special meeting.
- The date the notice is sent out as well as the date of the meeting.
- The time of the meeting.
- The venue where the meeting will take place.
- The agenda for the meeting.
- The signature of the chairperson.

One can also add a paragraph indicating why the meeting will be held, especially when you are introducing a new concept, e.g. IWRM, to a community. If the attendants are not familiar with the venue, a map or directions to the venue would also be helpful.

Activity 10

Divide into groups of five and discuss the following:

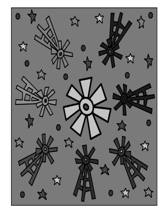
1. Which form of notice is suitable in your community?
2. Provide reasons for your answer.
3. Design a notice with all the required information on the cardboard provided.
4. Think of an issue that is presently a problem in your community, and that could be discussed at a meeting.

c) Typical notice of a meeting

The following is an example of a typical notice. As you see, it includes an agenda. Guidelines for drawing up of an agenda, and the details that should be included in an agenda, will be discussed in the next section.

14/8/2002

Mafefe Catchment Management Committee
PO Box 11
Mafefe
1269



NOTICE OF A MEETING

THE MAFEFE CATCHMENT MANAGEMENT COMMITTEE MONTHLY MEETING

Date: **24/8/2002**
Time: **19h00**
Venue: **Staff Room: Mafefe High School**

All members of the Mafefe Catchment Management Committee are hereby invited to attend the monthly meeting.

The proposed Agenda is as follows:

1. Opening and Welcome
2. Register and Apologies
3. Reading of previous minutes
4. Matters Arising
5. Awareness creation campaign for IWRM related matters in Mafefe community
   - Water problems experienced in sub-catchment areas
   - General
   - Date of next meeting

Closure

-

Signed
J C Mshonga
Chairperson

2.2 COMPILING AN AGENDA

A Typical Agenda

Compiling the agenda is usually the task of the secretary, but it is always done in consultation with the chairperson. An agenda should reflect what will take place at a meeting and what will be discussed. It is therefore the programme of the meeting: it structures and directs the entire business of the meeting. Members also use the agenda to prepare themselves for the meeting.

If members want to request that the secretary adds items to the agenda, this should be done well in advance. An item cannot be added just before the meeting starts, because then no one has prepared for the discussion of that item. The agenda is therefore also an indicator of what will not be on the table at a particular meeting. One of the rules of meeting procedure is that no item *not* on the agenda may be discussed. Ideally, the agenda should be distributed to the members well in advance of the meeting to give them enough opportunity to prepare for it.

Items on an agenda should reflect activities that will form part of the meeting. It should therefore contain the following:

a) Opening and welcome

A meeting must be formally opened. This distinguishes it from an unstructured, informal discussion. A meeting starts and the meeting rules take effect the moment that the chairperson declares it open. This brief ceremony will also include a word of welcome.

b) Application for leave of absence or apology for absence

When members cannot attend a meeting they should send their formal apologies in writing, or, more correctly, should request the meeting to grant them leave of absence. Asking a member of the group to apologise for your absence on your behalf is a bad habit! An apology should be in writing, normally in the form of a request for permission to be absent. The meeting must then decide whether your excuse is a legitimate reason for absence. If someone else does the apology orally, the chances are that that person will not know the reason for absence.

Procedural rules for meetings often include a **quorum**, which is the minimum number of people who should be present before the meeting can make any decisions. The chairperson should the check if there is a quorum for the meeting. If there is not, the meeting should be postponed for a short while to see if any additional members arrive. If not, the meeting should be cancelled. Alternatively, it could continue with the understanding that no binding decision can be taken.

c) Reading of previous minutes

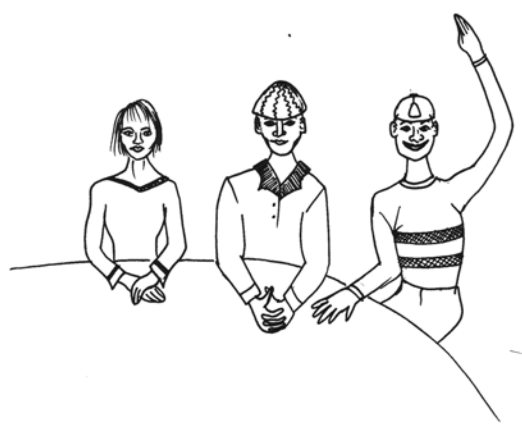
The minutes of the previous meeting must be read and approved as a correct reflection of the procedure at the previous meeting. Minutes may only be changed to improve the wording so that it better reflects what has been said at the previous meeting. Once the minutes have been approved they obtain the status of a legal document.

d) Matters arising from the minutes

All matters discussed at a meeting are not necessarily concluded by the time the meeting is adjourned. Sometimes, for various reasons, a matter has to be followed up at the next meeting. It might be a report that was called for, or information that had to be obtained. All such issues should be identified by the secretary and listed under the item "matters arising" on the agenda. This item therefore refers to any issues arising out of the previous meeting. It is the important, but difficult job of the chairperson to ensure that the whole debate that already took place on a certain point during the previous meeting is not repeated at the present meeting.

e) New matters or motions

New matters come to the attention of a meeting through correspondence, reports and requests via the secretary. Members can also table fresh motions for deliberation by the group at its next meeting. It is important to understand that new items are tabled for deliberation at the *next* meeting, not the present one – even if it is an urgent matter. The executive usually has the power and responsibility to attend to urgent matters. All such fresh matters must be listed in the agenda. The agenda should preferably contain appendices with information on the new matters. This information is necessary to enable a meeting to make informed decisions about a matter. It is usually the secretary in collaboration with the person who tables (records) a motion to obtain the necessary information for dissemination to the members.



Matters under general is raised from the floor

f) General

Most meetings have an item with the heading "General." This item on the agenda is not an opportunity to place new matters for discussion and decision on the table. Rather, it is an opportunity for general announcements or for suggesting motions to be placed on the agenda for the next meeting. It is sometimes also used for tabling uncontested motions such as condolences, congratulations or other personalia.

g) Date of next meeting

The date for the next meeting must be set and announced. Even if the meeting regularly takes place on the same day of the month, it is important for the minutes to reflect when the next meeting will take place.

h) Closure

A meeting should be formally opened and formally closed. What happens between those two items has a different meaning compared to what happens outside of this period.

2.3 ADDITIONAL GUIDELINES

Here are some additional guidelines for drawing up an agenda:

- Agendas must be written in point form. Full sentences should be avoided, but could be used for clarification.
- Number each of the items on the agenda. This will make it easier for members and the Chairperson to refer to specific items.
- If one item depends on another, the two items must be listed in the correct order.
- Note the type of meeting, date, time and venue on the agenda.

After the venue has been arranged and the agenda has been drawn up and finalised, a notice must be sent out to the members to inform them of the date, time and venue of the meeting. The agenda must be attached to the notice.

Activity 11

Individual Assignment
Plan and arrange meetings: **Choose one of the following**

The community must be informed of the concept of IWRM, Catchment Management Agencies and Catchment Management Forums. You are responsible for planning and arranging the meeting. You have to complete the following tasks:

- Decide which type of meeting would be most suitable.
- Develop a notice and agenda for the meeting.
- Discuss how and where these notices should be distributed.

OR

The Chairperson of the Makhobe Catchment Management Forum has resigned due to pressure from the other members of the forum (he was accused of mismanagement).

- Arrange and plan a special meeting to address this issue.
- Draw up an agenda and invitation that would be suitable for the situation.

3. CONDUCTING MEETINGS

The objectives of this learning unit are to:

- ❖ Provide learners with the necessary skills to conduct meetings.
- ❖ Inform learners about the roles and responsibilities of the chairperson and secretary.
- ❖ Inform learners about the roles and responsibilities of the other members attending a meeting.
- ❖ Prepare learners to conduct meetings for the Catchment Forum.

3.1 RELEVANT MEETING PROCEDURES

First and foremost, meeting procedures are contained in the agenda. The agenda ensures that a meeting has an orderly sequence. Organisations and institutions usually also have a set of meeting procedures to ensure orderly discussion and to guide certain aspects of decision-making. Typically, these procedures will tell you the following:

- ➢ What to do if there is not a quorum present;
- ➢ It formalises voting procedures within a meeting;
- ➢ It orders the discussion so that every member has only one turn to speak per item;
- ➢ It specifies that members cannot speak before they are recognised by the chairperson; and
- ➢ It stipulates that members should address the chairperson, not one another.

3.2 RULES OF ORDER

Most organisations have certain “rules of order” or “constitutions”. A constitution is a body of formal rules and regulations that have been drawn up to regulate the manner in which the affairs of the organisation are conducted. These rules would usually also include a section on meeting procedures. The rules are deemed to have been agreed to by every member of the organisation. You can imagine what could and probably would happen in a meeting if these rules of procedure did not exist. It is just as bad if those present do not know the procedures or do not care to give them any thought.

The following is a discussion on the **procedures** usually followed during meetings.

a) The motion

A motion is a formal proposal for action to be taken by the meeting (the body convening the meeting or those representing that body). Motions can be put to meetings in writing (well in advance of the meeting date for inclusion in the agenda) or orally by an attendant. When a motion is put to the meeting, the chairperson will ask if someone is willing to **second** the motion. Whoever seconds a motion is therefore the second person to propose that motion, and needs to be indicated as such in the minutes. This procedure is undertaken to ensure that there is some support for the motion. If no one seconds a motion it cannot be passed and is not worth discussing.

Motions can also be amended if the attendants do not fully understand the motion or if it is not properly phrased. In this case, the motion is referred to as the substantive motion.

b) Voting

Different voting procedures exist. The voting method to be used depends on the nature of the meeting, the issue to be voted on, and the number of attendants involved. The main methods of voting are the "voice vote" and the "show of hands". The "voice vote" should only be used in small groups and the "show of hands" in larger groups. The show of hands should be avoided if there are not enough people to count the hands as people can easily vote twice. Usually a majority vote (half the numbers of the attendants plus one) is sufficient to pass a motion, but sometimes a special majority is needed (e.g. when the constitution should be changed).

Voting by ballot – which involves issuing each person with a piece of paper indicating the possible choices (yes, no, or names of candidates) – is time-consuming and is therefore resorted to only in exceptional circumstances. A vote by ballot is known as a 'secret' vote, since the vote of each member is not open for all to see. This method is therefore suitable when the issue voted about directly impacts on individuals – e.g. a vote to elect office-bearers.

A deadlock arises when there is no majority vote because the members are equally divided on an issue. The Chairperson would then be granted a casting vote.

Some meetings make decisions based on **consensus** rather than voting.

c) Resolutions

Once a motion has been passed it becomes a **resolution**, which is a binding agreement or statement about actions to be taken. It is therefore necessary to minute (record) resolutions correctly so that they accurately reflect the motions upon which they were founded.

3.3 PROBLEM AREAS

Why are meetings often a waste of time? Why are they so unproductive? Why does it seem that they will never end? The answer is that there is a set of common problems experienced in meetings of all kinds. If you have not experienced at least some of these problems, you have not attended many meetings. It is amazing to see how different people in different places and at different types of meetings experience the same problems. A few of these common problems are discussed below so that you will be able to avoid them as far as possible.

Roles and responsibilities must be clear

a) Unclear roles and responsibilities

Participants are sometimes uncertain about the roles they are to play during and after a meeting, or about who is responsible for what. They might also be unsure about their status and power. Roles must be established, perhaps over some time, but eventually these roles must be clear to everyone.

b) The multi-direction syndrome

This refers to situations in which everybody goes off in different directions at the same time. In such situations, the meeting lacks focus and no one tries to let the participants move in tandem in the same direction. Avoiding such a problem is obviously the responsibility of the chairperson. Focus and order are two of the most important ingredients of a successful meeting. If they are absent, it is unlikely that a meeting will be effective.

c) Confusion about procedure

If participants have not agreed on the procedure to be followed during meetings, it can happen that the discussion of items on the agenda is frequently interrupted by questions or differences of opinion regarding procedure. If this happens, it is an indication that the chairperson is failing in his or her task. The best solution is to have standing procedures that are familiar to everyone and that can be followed at every meeting.

d) Personal attacks

Individuals making statements that are not acceptable to all are sometimes verbally attacked. In such situations, the focus has shifted from the ideas of people to the characters of people who dare to voice an own opinion. It is, of course, fatal for any organisation or group when their members get abused for having their own opinion.

Do not get personal!

e) Traffic problems

It is difficult to leap into the conversational flow and thus getting a chance to participate. This can lead to more than one conversation going on at the same time. It can also discourage some members from participating, thereby paving the way for a few individuals to dominate the proceedings.

f) Expectations and questions of power

There is sometimes confusion about the purpose of the meeting and about what authority the meeting has. Is it only an information meeting or are the participants supposed to make decisions? Does the meeting have the power to approve things or can it only make recommendations for approval by another body? Such confusions are often the fault of the chairperson, and they might arise because the chairperson is trying to boost his or her image by pretending that the meeting has certain powers that it does not actually possess.

g) Manipulation by chairperson

People should not be manipulated

A chairperson sometimes uses meetings to rubber-stamp his/her decisions. In such situations, meetings become monologues by the chairperson, and the other members merely nod their consent or agreement now and then. This is surely the worst problem a meeting can have because it defeats the very purpose of meetings, which is to solve problems through debate.

h) Problem avoidance

Participants are sometimes so scared of conflict that they avoid all issues that can lead to a difference of opinion. This attitude is not conducive to problem solving. Unbridled conflict is bad – but if conflict is avoided at any cost, things have gone too far in the opposite direction. A difference of opinion, debate and talking 'against' someone's ideas or views are not necessarily conflict. Instead, it is an indication of maturity if participants can freely speak their minds without falling into conflict situations.

i) Repetition and wheel-spinning

A meeting sometimes fails to "gain momentum": it is stuck at the same place and every speaker repeats the same old ideas. No new arguments are offered and no progress towards a decision is made. This usually happens when a meeting lacks focus. In such cases, the members are not sure where they are and what has been decided. The result is repetition and lack of progress.

j) Win/lose approach

It is often taken for granted that, every time that there is difference of opinion, one party must win and the other must lose. If a meeting is governed by this assumption, it will tend to put everything to the vote as soon as possible instead of discussing matters thoroughly. This saves time and enables the meeting to make fast progress, but it introduces a sense of strife and competition into a meeting that makes open debate impossible.

k) Data overload

Too much data is confusing!

Participants sometimes receive so much written or oral information on an item that they cannot remember it all and become confused. Information overload often occurs because it is easier for a secretary to just put a lot of documents together than to sort out the really relevant portions. It is then left to the members to decide what should be read and what can be omitted. Unfortunately, many people do not have the ability to do that.

l) Poor meeting environment

If a meeting is held in a room that is too small, hot, noisy, draughty or dark, it will be unpleasant and even unproductive. This problem is relative, of course: a person accustomed to modern and sophisticated facilities might be uncomfortable in a meeting environment that others find quite satisfactory.

m) Pre-set ideas and assumptions

Sometimes, the result of deliberations is a foregone conclusion, and a meeting can only decide in favour of one side. In such situations, everything that happens before a decision is made is just window-dressing. This problem can arise if there is a lot of talking and caucusing among members before a meeting, so that their ideas and perceptions are set by the time the meeting takes place. Pre-set notions are usually very difficult to change.

3.4 CRITERIA FOR A GOOD MEETING

Just as ineffective meetings suffer from a number of common problems, good meetings meet a number of basic criteria. Here are a few of these criteria:

- There must be a common focus on content.
- There must be a common focus on process.
- The chairperson must see to it that there is an open and balanced conversational flow.
- The chairperson must protect individuals from personal attacks.
- The meeting must agree on the basic principle that a win/win solution will be sought.
- Everyone’s role and responsibility in the meeting must be clearly defined and agreed upon.
- The meeting must be governed by a set of rules to which all participants subscribe and which all participants know.

4. RECORDING OUTCOMES OF MEETINGS AND FOLLOWING UP ON ACTIONS TO BE TAKEN

The objectives of this learning unit are to equip learners with the necessary skills to:

- ❖ Compile the minutes of a meeting
- ❖ Develop a diary system for follow-up actions to be undertaken.

4.1 WRITING MINUTES

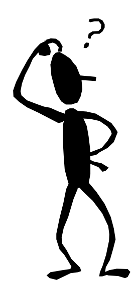
The minutes of a meeting is the official record of what took place at that meeting. It is a record of deliberations as well as decisions. The secretary should take notes during the meeting and write these out in the form of minutes after the meeting. Taking minutes at a meeting is of the utmost importance, since minutes serve as:

- ❖ A record of development;
- ❖ A working document;
- ❖ A source of reference;
- ❖ An official record;
- ❖ An information document;
- ❖ A binding document;
- ❖ A useable record;
- ❖ A basis for the following meeting;
- ❖ A document reflecting policy;
- ❖ A document initiating action; and
- ❖ A document assigning responsibility.

Minute taking is an important function

Minutes should follow a pattern and method of presentation that permit **rapid understanding** of the **proceedings.** They should conform to the following standards:

- ❖ Clarity
- ❖ Completeness
- ❖ Precision
- ❖ Reflection of personal arguments
- ❖ Reflection of the mood of the meeting
- ❖ Reflection of decisions
- ❖ Accuracy
- ❖ Truthfulness
- ❖ Absence of bias or manipulation



- Logical soundness.

Keeping an accurate record of conversations requires basic background knowledge of the subjects being discussed.

The following knowledge assists in writing minutes:

- An in-depth knowledge of the activities of the committee or forum;
- Knowledge of the key players and personalities;
- Knowledge of the contents of the agenda and subject matter; and
- A list of participants.

Remember that the taking of minutes must often happen quickly. The secretary must write down enough of the conversation so that he/she will be able to write the full minutes afterwards using those notes as a guide. The meeting should not have to pause to wait for the secretary to catch with them. A few tips are provided below for taking notes with a view to writing the minutes in a way that will not take a lot of time:

- Try to convert statements **into short five-word sentences** written directly underneath one another using the speaker's key phrases and words.
- At important negotiations it is desirable to attribute statements to individual speakers. You must therefore know their names.
- Use standard abbreviations or ones you have developed yourself.
- Some words or phrases are used over and over and these can be indicated by easily recognisable signs or symbols.
- Take down as much of the proceedings as possible.
- You have the right to ask the chairperson to summarise complicated decisions to ensure the clarity of the minutes.
- For easy reference, the numbering and headings of the minutes should be the same as those describing the items on the agenda.

When writing the minutes from your notes, the following points are important:

- Minutes are not a verbatim (word for word) record of the discussion.
- The best way of presenting the minutes is to reflect the essence of what was said and decided, with sufficient recognition to the arguments and reasoning of speakers.
- However, when pronouncements are made on important policy matters, it is necessary to be as true as possible to the words of the speaker.
- Key words or phrases of the speaker's statement that are repeated in the text of the minutes confirm the accuracy of the minutes in the minds of the members present.
- Statements must always be reported within the context in which they were intended.
- Utterances during discussions must be reported interpretatively so that all present will have the same understanding of them.
- The final minutes must contain no words or sentences that may have a double meaning.

- Minutes should be written in the past tense. The transcription of a verbatim report into minutes entails converting the direct speech into reported speech.
- Ensure that points are presented in a logical order.
- Keep your sentences and paragraphs short.
- Use parenthesis, brackets, bold type, etc. freely whenever they are appropriate.
- Use simple and familiar words with few syllables. If speakers use complicated sentence construction, this should be simplified in the minutes.
- Try to avoid noun clusters.
- Watch out for redundancy.
- Minutes should be readable and have a natural “flow”.
- You can set out the minutes in columns to make it easier for members to read and determine the actions to be taken. You could, for example, draw a column for the number of each item, another for the title and details of the item, and a third for the actions, and a fourth listing the responsible persons.

There are two reasons why it is important to write the minutes as soon as possible after the meeting:

1) Your memory will still be fresh and you will be able to remember the detail of the meeting.
2) The minutes must be distributed to members as soon as possible because they might have to follow up certain matters reflected in the minutes. Remember that, at this stage, the status of your minutes is still that of a draft. In other words, it can still be changed, but after the next meeting has approved it, it will have full status as official and legal minutes. Minutes that have not yet been approved should be titled “draft minutes” to indicate that they are not perfect and may still be corrected.

The minutes must be sent to all members, including those who were absent, because everyone must be informed of developments and should not arrive at the next meeting ignorant of the progress on certain items. If you do not send minutes to members that were absent, they might lose interest because they will feel that they are cut off from the life of the group. They can then easily become hangers-on or sleeping partners.

Activity 12

Group work

Divide into two groups

Group 1 represents the Local Authority

Group 2 represents the Catchment Management

Elect a chairperson and a secretary for each group.

Make notes while debating the following issues in each group:

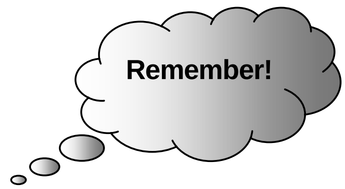
1. Lifestyles in your area
2. Management in your area
3. Control
4. Client Service
5. Attitudes

5. CREATE AND USE A DIARISING SYSTEM

5.1 IMPORTANCE OF DIARISING

One of the most serious dangers facing a secretary or administrative assistant is that he/she might forget about certain matters until there is an enquiry about them. This can mean that target dates and deadlines have not been met, that a whole process flowing from this one matter has been delayed, and that the urgency of the matter has now fallen away so that it no longer serves any purpose to pursue it.

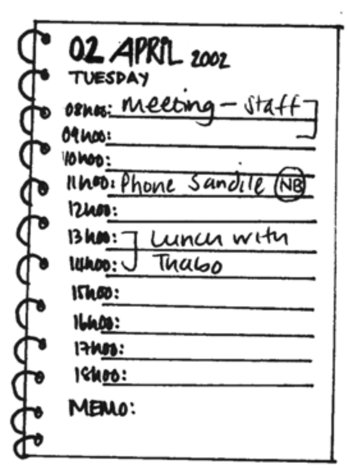
To ensure that all matters are being kept track of, a diarising system should be used.



Diarising means recording a matter in a diary for a future date when one will further attend to it.

5.2 DIARY ENTRIES

Suppose you wrote a letter, and are now awaiting a reply. You would then diarise the item at a date about two weeks later than the date at which the letter was posted. When you come across the matter in your diary two weeks hence, you will then be reminded to check whether a reply has been received. If not, a reminder can be sent and the matter can again be diarised. The same goes for the tasks to be done after a meeting. Perhaps the secretary has six tasks to attend to after the meeting. It is obvious that he/she cannot attend all of them simultaneously and therefore the tasks must be prioritised. Now the secretary can work out a schedule of when to do each task and write the dates with the matter concerned in the diary. The matter can then safely be left in abeyance until the diary warns the secretary that it now needs his/her attention. The chairperson's tasks should also be diarised in this fashion to enable the secretary to follow up the cases and make sure that the chairperson completes the tasks that were assigned to him/her.



A diary is important!

5.3 PLANNING AND DAILY USE OF DIARY

One of the most important advantages of diarising is that it enables us to spread our work over time. Work can be staggered in such a way that we do not have hectic periods with masses of work followed by quiet periods with little or no work. If the work is spread out more evenly we will automatically manage our available time better. Our time use will not fluctuate between maximum and minimum all the time, but will rather maintain an optimal level. In other words, we will have good **time management**.

Activity 13

Divide into groups of five, and then complete the following tasks for the next meeting:

1. Develop a diary system for the follow-up actions to be taken after the meeting.
2. Develop a system of your choice. Remember that you should make provision for various tasks to be undertaken by different people.
3. Put a system in place to check whether the tasks assigned to various people have been undertaken, are in progress or have been completed.

6. ADMINISTRATIVE PROCEDURES

The objectives of this learning unit are equip you with the necessary skills to:

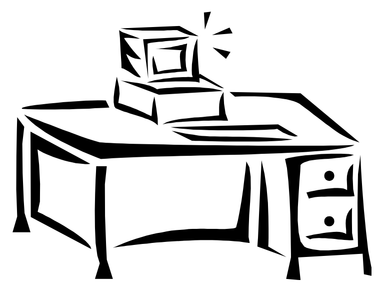
- Administer the Catchment Management Forum's activities.
- Ensure a good flow of information, with emphasis on secretarial work and the operation of the Forum's office.

6.1 SECRETARIAL WORK: RUNNING AND OFFICE

Secretarial work for an organisation is done in the organisation's office. Various tasks are included in the secretarial role, e.g. correspondence, interaction with visitors, handling of information and filing. These functions would also be necessary for catchment management institutions, but should be adapted to suit the needs of the specific forum.

a) What is an office?

Just to make sure that we are talking about the same thing: an office is a place in which clerical and secretarial work is done. This work entails the paperwork of an organisation, such as records, reports, letters, minutes and lists. Offices can be large with several dozen workers or small with as few as one worker. The size does not make an office. A small office is not less of an office than a large one. The office is the heart of the organisation. As the blood in the body is always circulated through the heart, the functions and activities of an organisation go through the office.



An office is where clerical and secretarial work is done

The office is staffed by office workers who are usually appointed and paid personnel of the organisation, but who are sometimes unpaid volunteers. Usually, office staff forms a hierarchy with the manager at the top, assisted by more senior personnel, who in turn are assisted by more junior personnel. Larger offices are usually also divided laterally into sections doing specialised work. What these sections are depends entirely on the kind of organisation. The work and the interests of an organisation could be subdivided into sections and a specialised office department will then deal with each section.

The role of office workers is to do the organisation's paperwork. Some of this paperwork may be of a specialised nature and some may be of a general nature. The work of a typist, for example, was always a specialist task that only trained people could perform. With today's computers and word processing programmes, however, anyone can type. Consequently, this position no longer has much of a specialist nature. Another good example is that of the financial clerk who needed a solid training in bookkeeping.

Today, there are good computer programmes available that make it possible for someone not trained in bookkeeping to do this work. We can conclude by saying that the computer has made it possible for ordinary personnel to perform tasks previously carried out by specialists.

b) Office-related skills

What was said above does not imply that office workers do not need any skills. They do need writing and other communication skills, as well as organisational skills; they need to know how to manage time; and they need to have specific office skills such as diarising and filing.

Most of these skills and knowledge are acquired during on-the-job training and short training workshops. It is often necessary to undergo refresher training, either because the worker's knowledge has become a bit rusty or because new tasks require enhanced skills. If the organisation is involved with development issues, it is important that office workers should not become too set in their ways. Office workers of such an organisation are drivers of ever-changing situations and attitudes; they must therefore be willing and able to adapt as they go along.

An office worker needs an appropriate environment

It is true that office workers need certain skills. It is just as true, though, that they need certain human characteristics. The office is quite often like a pressure cooker. A lot of 'heat' and 'steam' and energy' are built up. The office can therefore become a very hectic place. Quite a few aspects contribute to the pressure-cooker effect. Office workers are often under pressure from management and jobs must be done in a relatively short period. There is therefore a time constraint. Office workers are also cooped up together for a considerable time every day. The chances for conflict between them are therefore good. Further, office workers are usually dependent on one another: the one cannot do his/her work before another has done his/hers. This interdependence regarding performance can also very easily lead to conflict. If, on top of all this there is uncertainty about how the job is supposed to be done, or if there is a procedural problem, the situation can only become worse!

Apart from these specific problems there are also a number of general constraints that you find in most offices and that will make life difficult for the office workers. For instance:

- There is quite often a **space constraint**. There are either too few offices, forcing workers to share offices, or else the offices are too small to create comfortable work situations or to house all the necessary furniture (e.g. filing cabinets) and equipment (e.g. computers).
- Sometimes the **communication infrastructure** is poor. There are too few telephones or telephone lines, or else the telephones are frequently out of order.
- There is a scarcity of other office equipment such as computers, or stationary such as letterheads, pens, file covers and envelopes.

- Offices are often noisy, draughty, dark and/or stuffy.
- There are often insufficient ablution facilities or facilities to enjoy a cup of tea and lunch.

The office worker must live with all these constraints, and must perform in spite of them. If the worker lets these constraints dictate his/her performance, the work is not going to be done and the worker is going to become unhappy and frustrated. The secret is to work within the constraints – to do your job in spite of them. In other words, you must accept the constraints and still try your best. The big warning here is to not let office constraints get the better of you.

An office worker must also be responsible, efficient, neat on his/her person, office and the work he/she does, dependable, enthusiastic, considerate, persevering, respectful, confident, interested in the work, trustworthy, thoughtful and helpful, attentive, adaptable, resourceful and friendly.

An office should not be disordered

6.2 NECESSARY SKILLS

a) Organisational skills

The purpose of an office is to organise an organisation; therefore the worker in the office must be able to organise. Quite often this includes organising events such as meetings or visits, organising the office itself, and organising the work done by the workers in the office. In the absence of organisational skills things happen haphazardly or by chance. In a modern organisation, that is just not good enough.

b) Good communication skills

We will see a bit later that an office's main function is receiving information, processing it and disseminating it again. The office is therefore an information channel through which information flows all the time. This can only happen if office workers have good communication skills. Communication among workers and between workers and management is also very important. We can say emphatically that the more skilled workers are at communicating, the fewer traumas you will have and the higher the quality of work done in the office will be.

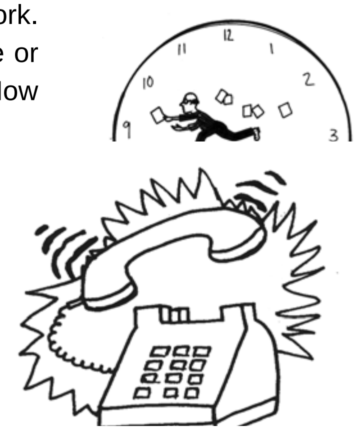
Good communication skills are important

c) Ability to get on with others

We have seen earlier that there is a real danger of conflict in the office because of the close proximity of workers for lengthy periods. The worker who can relate to the other workers and who can accommodate their frustrations, pressures and needs will be a successful one – a person whose work will be done properly and who will have a calming effect on others.

d) Time consciousness

One of the constraints always present in an office is time. We usually do not have enough time to do all the work. The question is whether we really do have too little time or are we just using the available time ineffectively. How much time is wasted in an office? How often do we spend a lot of time on a triviality and then we do not have enough time for the important stuff? It is necessary that each worker manage the available time. Correct time management begins with being conscious of the time, especially of the limited amount of it.



Telephone calls are important

e) Good memory

It will be a great help if we are not totally dependent on memory systems in the office, but can make use of our own memory system housed in our brains. We can improve our memory through concentration – which is something that the office worker must practise as much as possible.

6.3 OFFICE FUNCTIONS

The office has various functions all sorting within the ambit of doing the organisation's paperwork. These are:

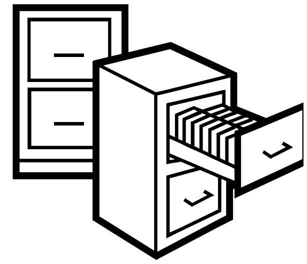
- **Information handling**, which includes receiving, arranging, safekeeping and disseminating information. Information comes into an office in the form of letters, telephone calls, orders, invoices, reports, minutes, schedules, and other material. It must then be processed, which entails analysing, explaining and interpreting it. Information is safely kept usually in files according to a filing system that is easily accessible. At a certain stage the information must be sent on to whoever needs it.
- **Arrangement of activities**. The office must carry out certain tasks to enable the organisation to perform its function or attain its goals. By arranging activities we also include doing the work around those activities like performing secretarial functions regarding the organisation's meetings.
- **Safeguarding of assets**. The office must keep stock records, make sure that contracts regarding the use of the organisation's property are up to date, keep the organisation's accounts and see to it that the organisation does not fall in arrears.

If the heart in a body does not work, the body dies. If the organisation's office does not work, the organisation will soon be dead. The smooth running of the office is critical and that is why the office workers are also very important. We can state emphatically that an organisation is as good as its office; therefore, the better the office, the better the organisation.

It is clear that the office has various tasks to fulfil in performing its functions. It uses various systems to ensure that the tasks are being done correctly and efficiently. One of the most important systems in an office is the filing system.

6.4 FILING

a) Storage of Documents



Some offices use steel filing cabinets

Filing refers to the storage of all documents in files in an orderly fashion so that they can be kept safely and be easily accessed and retrieved as and when they are needed.

Files are made of paper or cardboard and contain all documents of an office. These documents may be

- Letters to the organisation;
- Letters from the organisation;
- Records of activities of the organisation;
- Records of meetings of the organisation;
- Records of meetings which representatives of the organisation attend;
- Records of membership of the organisation;
- Reports compiled by the organisation;
- Reports from outside the organisation, but affecting it;
- Financial statements and all other financial documents;
- Lists; and
- All forms that are regularly completed in the office.

b) Filing Equipment

Filing equipment must meet certain standards:

- It must provide protection of documents against loss or damage through fire, dampness, dust, or careless and continuous handling;
- It must safeguard documents against theft or unauthorised use;
- It must enable office workers to retrieve documents effortlessly and quickly; and
- It must be suitable for the type of office/organisation it is supposed to serve.

In a well-established larger office one would make use of steel filing cabinets with suspension folders hanging between rails in each drawer and with flat files containing the documents in each suspension folder. These steel filing cabinets usually consist of two or four drawers that can be locked and which have rails along the sides of the drawer. The suspension folders are fitted with hooks on the sides so that they can hang from these rails. That is why they are also known as **hanging files**.

Flat files consist of cardboard or heavy paper folded so as to form a cover. The back cover of the folder usually protrudes about two centimetres behind the front cover, providing a visible strip on which the reference or category name (see below) is written. Documents are placed in the flat files in chronological order. That means that older documents will be at the back of the folder, as new documents are simply inserted in the front.

It is important to fix every document in the file with a tie or a file pin, which are cheap and easily obtainable. This prevents documents from dropping out of a file when the file is handled. It also prevents documents being removed from the flat files and not returned to their correct place. Each flat file is hung within a suspension folder and the name and number of the flat file is shown on the flat file as well as on the suspension folder housing that flat file.

A larger, more permanent office may also make use of **lever arch** files which are heavy-gauge cardboard covers in which documents are retained by means of stout arch-shaped wire loops which go through holes punched in the margin of documents. The wire loop is opened by means of a lever to permit the insertion and removal of documents. Lever arch files can easily be stored on shelves. They are broad enough to stand upright on a shelf without being propped up. One disadvantage of lever arch files is that, if an office has quite a number of these files, they can take up quite a lot of space.

Lever arch file

If an office only has a small activity sphere with only a few categories under which to do filing, one or two lever arch files may be sufficient because divisions can be made inside such a file so that one file can house a few categories. For very small often mobile offices such as those housed in a small caravan, trailer or combi bus, one or two **concertina files** may be sufficient. One concertina file consists of a number of pockets in which documents can be placed. An even better option is to use each pocket in a concertina file in the same way as a suspension folder – in other words, to let each pocket hold a flat file.

An office can open a file for every client or correspondent with whom it does business or communicates. This means that there may, for example, be a file for an engineering firm, a ratepayers' association, a provincial department, and a local member of parliament. Name filing is usually done in alphabetical order. In alphabetical filing the following rules must be followed:

- Use the alphabetical order to file items, i.e. A, B, C, D, E, F, G, H, I, J, K, L, M, N, O, P, Q, R, S, T, U, V, W, X, Y, Z.

Don’t	Do
Disregard ranks and titles (Mr, Cnl, Dr)	File together variants of the prefix Mac, therefore treat McDonald and MacDonald both as MacDonald
Ignore the article in front of names (e.g. “The”)	File names such as O’Brien under O
	File names starting with Van under V, e.g. “Van der Merwe”
	File names starting with De or Du under D

This type of filing system is fine only for the very small office. Most offices have a more complex work situation and it is then necessary to file according to category. This means that every aspect or subject an office deals with will be one category. Many of the categories can then be further sub-divided. This means that all documents pertaining to the same subject will be placed in the same file, even if they originate from various sources.

Filing is an important function!

Activity 14

Complete the following activity:

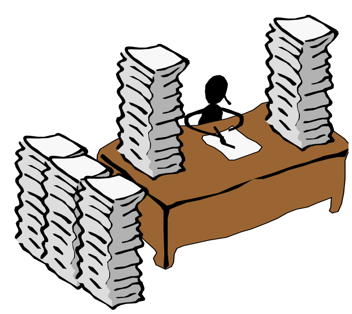
Assume that there is a file for the category *"Water Supply"*. If the office receives a letter from Comcor Engineering regarding water supply, has a meeting with officials of the Department of Housing regarding water supply to newly built houses, receives a fax from the member of parliament, Mr Masanga, regarding the supply of water, or receives a delegation from the Jabulani Rate Payers' Association on the problem of water supply, the documents emanating from these 'clients' will all be placed in the same file, i.e. "W*ater supply."*

If there are many aspects of water supply the office deals with, the subject or category can be sub-divided.

1. Subdivide the subjects.
2. Give each category a number and then a second number to every sub-category.

c) Do's and don'ts of filing

There are a few do's and don'ts regarding filing:



Filing should not be postponed

- Filing categories should not overlap. If you have a file for water supply and another one for complaints, where are you going to file a letter of complaint regarding the water supply? Be careful not to have categories that are too broad, because that increases the chances that they will overlap. Categories such as "Complaints" and "Meetings," for instance, are too broad and will cause overlap.
- Filing must be done regularly – if possible, every day. If a document is already a month old and still not in a file, it stands a good chance of getting lost.

- Once an item has been filed it should actually not be taken out of the file again. If you want to work with that document you should rather take the whole file with you. If you do remove a document from the file, be sure to replace it after you are done with it. It is best to put a system in place to ensure that everyone in the office knows where the document currently is and by whom it is being used.

d) Filing Systems

There are two forms that must be used to assist with filing.

- You must have a **filing index** so that people can see where a document should be filed.
- You must also have a **filing control system** so that you know immediately where a file is to be found if it is not in its suspension folder in the filing cabinet.

There are also other systems to assist in the daily work happening in an office. Some people like to install these systems. Remember, however, that every system costs money and requires work. It is therefore a good idea to consider the following before deciding to implement a new system:

- Don't start something new if it is not necessary.
- Don't start something and then fail to use it.
- Don't overdo it. Keep the system as small and as simple as would be appropriate for your office.
- Make sure that everyone working or frequenting the office knows how the systems work.
- Systems need regular evaluation and if need be, altering or updating.
- Systems should work for you, not you for them. They are there to serve the office and its organisation.

6.5 RECEIVING VISITORS AND CLIENTS

Another important task of office workers is that of interacting with visitors and clients. Visitors and clients can make contact with the office by visiting, telephoning and writing. Every office should have a code of conduct regarding visitors and clients. The basic rule is that the office should be courteous and civilised in its dealings with the public. This means that visitors and clients should never feel that they are unwelcome and should never be burdened by their dealings with the office.

It is necessary to have office hours known to the public and to stick to them. Office hours should be fair to the public. Office hours should not be scheduled only to serve the interests of the office workers, but should enable the public to visit the office when necessary.

When clients and visitors call on the office, some security measures must be taken. First, the safety of the public must be considered. Second, the security of office equipment and office records must receive attention.

If letters are received from the public they must be replied to as soon as possible. Replies to letters should preferably be in the same language as the original letter.

Make sure that there are no spelling mistakes or typing errors, as these make a very bad impression. Neat work, on the other hand, shows how professional the office workers are.

Incoming telephone calls must be answered promptly. Make sure that you know who is calling and what the nature of the call is. If the call must be transferred to someone else, do not let the caller wait for long periods before the other person comes on the line. Be sure to make a note of the telephone call and to put it on the appropriate file if the matter needs further attention. If so, remember to diarise the matter so that it can be followed up later.

Do not regard telephone calls, fax messages and e-mail as less important than letters and visits. They are part of your incoming source material and must be given the necessary serious and prompt attention.

Visitors should be made welcome