ProVol

Professional Volunteering

Volunteer Training Handbook

Module 1

Introduction to Volunteering

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Aim:

To gain insight into the field of volunteering and understand how volunteering has changed over time.

As an important part of active citizenship volunteering is closely linked to society. To be effective coordinators of volunteering it is of course important to have some basic knowledge of the changes in society and how it impacts upon volunteering.

The main questions of the first training unit are: *What is volunteering? Why is volunteering important? Why do people commit themselves voluntarily*?

1. Changes in society and changes in volunteering

1.1 Introduction

At the beginning, we would like to you to consider as a coordinator of volunteers the concept of "**social change**":

Our society is continuously changing because of this we not only see development but also new problems and demands arising that require innovative solutions. Although volunteering cannot fulfil all these demands and tackle these problems it is a key element to supporting this process.

Some of the reasons some people give for volunteering is to help the environment, help others less fortunate or to make a difference in the lives of others (NCVO). Often we see charities and volunteers being funded from the government to deliver vital public services. Volunteers are not just a resource but they can inform and influence services provided to communities and identify people's needs. An example of social change that has persistently hit headlines since austerity has kicked in are food banks New foodbanks are opening at the rate of two a week and numbers of people given three days' emergency food by Trussell Trust foodbanks rose from almost 350,000 in 2012/13 to over 900,000 in 2013/14. (http://www.trusselltrust.org/resources/documents/Press/TT-Foodbank-Information-Pack-2013-14.pdf). These banks are run almost exclusively by volunteers.

In many cases volunteering occurs at a point of injustice or need: where conventional and public services do not provide satisfying solutions or simply act too slowly, the voluntary commitment of individuals step in. Those people do not want to accept the social problems they are observing day by day – they want to solve these problems.

Exercise: Social Change and the role of volunteering

Divide the room into smaller groups with at least 3 people in each group. Each group is asked to generate social change or problems that have been addressed by volunteers and the third sector. Think of events that are happening in society at the moment.

Once each group has generated ideas and discussed have them nominate one person to present their ideas to the wider group.

Materials: flip board paper and marker pens

Time: 10 minutes generating ideas, 5 minutes per group to feedback/present

Another useful tool that can be used to look macro-environmental factors in any sector or part of society is **PEST**.

PEST stands for Political, Economical, Social and Technological. It is a tool that was originally developed for use in strategic management however it can be applied in a variety of contexts.

Political factors are basically to where the government (local, national, European) intervenes and impacts upon society and therefore volunteering. Political factors have a high impact on the health, education, and infrastructure of a nation.

Economic factors include economic growth, recessions, employment and availiablity of funding to name a few. Such economic factors can have a significant impact on the voluntary sector.

Social factors include cultural aspects and health consciousness, population growth rate, age distribution, career attitudes and emphasis on safety. Again all of these result in social change

Technological factors include technological aspects like automation, and the rate of technological change such as the internet and mobile phones.
By undertaking a PEST analysis we are able to see how the above factors have resulted in social change and more specfiically how this has impacted upon changes in volunteering.

Exercise: PEST Analysis of the voluntary sector

Divide the wider group into smaller groups and look at the copy of the below template.
Identify as many factors that impact on the voluntary sector. Do you see these factor as an opportunity or a threat?

Materials: Template of below on flip board paper
Time: 20 minutes

1.2 Clarification of terms

There is no uniform European definition on volunteering; therefore it remains an open question what activities can be considered to be volunteering activities. At the European level, the Council decision on the European Year of Voluntary Activities Promoting Active Citizenship (2011) offers the most recent definition of volunteering: “Having due regard to the particularities of the situation in each Member State and all forms of volunteering, the term "voluntary activities" refers to all types of voluntary activity, whether formal, non-formal or informal which are undertaken of a person’s own free will, choice and motivation, and is without concern for financial gain. They benefit the individual volunteer, communities and society as a whole. They are also a vehicle for individuals and associations to address human, social, intergenerational or
Environmental needs and concerns, and are often carried out in support of a non-profit organisation or community-based initiative. Voluntary activities do not replace professional, paid employment opportunities but add value to society.”

An unusual aspect of this definition is dividing volunteer work into formal, non-formal and informal categories. The current literature usually contrasts formal volunteering on the one hand to non-formal or informal volunteering on the other. Formal volunteering is the generic term for voluntary activities that take place in organised structures, e.g. the assumption of a volunteer position or participating as a youth group leader in a sport association. The terms non-formal or informal volunteering are usually used as synonyms. They relate to “unorganised” forms of volunteering such as e.g. helping neighbours . The text of the Council’s Decision does not make it clear how these three forms are differentiated from each other. The list of activity areas shows only some examples, thus, for instance, the cultural area is missing. In the daily discussion, a precise clarification of the definition is not always necessary, since terms such as civic participation and voluntary work can be understood in a very broad manner. In the concrete case, it is however necessary to ask whether assisting neighbours or political activities are included. This is even more relevant when a discussion takes place in the European / international context, since every country has its own volunteering tradition. There are, for instance, significant differences between the forms of volunteering and what is understood as volunteering in general.

Another difference in the understanding of volunteering is the question of whether or not informal volunteering such as helping a neighbour counts. In Austria, this is the case; in Switzerland, donating money or resources also counts. The term volunteering in the Netherlands includes political participation, voluntary work, helping small children and caring for dependants. Informal volunteering in Germany usually does not count as civic engagement, and in France, this is also not included in the term volunteering.

2. Volunteering in your country

Voluntary Sector Quiz

Voluntary Sector Quiz

1. **Question**: In which two European countries does the population volunteer the most and in which two European countries the least. Can you also guess the percentage?

2. **Question**: Rank the following countries from high to low in the amount of GDP voluntary activities produce: The UK, The Czech Republic, Germany, Romania.

3. **Question**: Answer with true or false. The number of volunteers has steadily declined since the new millennium.

4. **Question**: According to the European Commission, who out of men and women have volunteered the most in 2010?

   a. Men
   b. Women
   c. Same

5. **Question**: Answer with true or false. Across the EU older people are more likely to volunteer than younger people.

Answers

1. The "European Social Reality" survey (Eurobarometer) (European Commission 2007a), published in February 2007, came to the conclusion that Austria (60%) and the Netherlands (55%) are the countries where most people volunteer. The Lithuanians (11%) and Portuguese (12%) volunteer the least. The study SHARE (Survey on Health, Ageing and Retirement in Europe), which among others examines the volunteering behaviour of people over the age of 50 (Hank / Erlinghagen 2005), stresses that there are national differences in the volunteering figures. In a comparison of the two studies, it is important to remember that the Eurobarometer survey includes active membership in an organisation, while the SHARE study explicitly does not ask about membership, but rather only includes voluntary activities in the month before the survey. Furthermore, the age of the respondents differs: people above the age of 15 were questioned in the Eurobarometer survey, while SHARE concentrated on people over 50.
2. According to the Educational, Audiovisual & Culture Executive Agency the countries rank more or less as following. The UK (2.26%), Germany (1.95%), The Czech Republic (0.28%), Romania (0.15%).
3. Trends in the level of volunteering over the past decade vary between Member States, dependent on individual country context and situation. Overall however, there has been a general upward trend in the number of volunteers active in the EU in the last ten years.Ten countries have seen an increase in the number of volunteers over the past decade: Austria, Belgium, Czech Republic, Denmark, France, Greece, Italy, Luxembourg, Poland and Spain. A further six countries have seen modest increases in the number of volunteers: Estonia, Finland, Germany, Hungary, Romania and Slovenia. Several countries (seven) have reported that the number of volunteers has remained stable or has fluctuated mildly: Bulgaria, Ireland, Latvia, Lithuania, Malta, Netherlands and Sweden. Only Slovakia reported a decreasing trend over the past decade. In three countries information on the trends in the number of volunteers was either unclear or unavailable.
4. The gender balance of volunteers varies considerably across European countries. In general however, most countries tend to have either a greater number of male volunteers than female (11 countries) or an equal participation between men and women (nine countries). There are a greater number of female volunteers than male in five EU countries. A further three countries were not able to provide comparable data on the gender balance of volunteers. There do not appear to be any geographic tendencies as to whether a country is more likely to be dominated by volunteers of a specific gender. For example, countries with a greater number of male volunteers than female volunteers include northern, southern, western and eastern European Member States.
5. In a number of EU countries the highest levels of volunteering are detected among 'prime-age' adults aged 30 to 50 years, these include Belgium, Cyprus, Denmark, Estonia, Finland, Hungary, Portugal and Sweden. In Cyprus for example, half of all

volunteers fall into the age bracket 35 to 54 years. Several countries, such as Austria, France, Germany, Ireland, Italy, the Netherlands and the UK, have stated that there are no significant differences between the different age groups in terms of participation in volunteering. In a considerable number of countries young people and young adults have the highest level of volunteering. This trend is particularly common in Eastern European countries (such as, Bulgaria, Czech Republic, Latvia, Lithuania, Poland, Romania, Slovakia and Slovenia), as well as in Spain.

2.1 key data on volunteering

Most popular areas of volunteering:

The most commonly reported sectors in which volunteers are active are:

- Sport and exercise;
- Social, welfare and health activities;
- Religious organisations; Culture;
- Recreation and leisure;
- Education, training and research.

In a significant number of countries, most volunteers are active in the sport and exercise sector. This includes countries like, Austria, Belgium, the Czech Republic, Denmark, Finland, France, Germany, Hungary, Ireland, Latvia, Luxembourg, Malta, the Netherlands, Slovenia, Sweden and the UK. In some countries sport and exercise has been grouped with other activities, such as culture (i.e. in Belgium and in Spain) or recreation (i.e. in Germany). In Austria, the sport sector is the second most common sector for formal volunteering - 16% of Austrians are involved in formal volunteering in the sector. In Ireland, the sport sector is the second largest sector as 180,465 volunteers are involved in sport organisations. This equates to 5.4% of the population. In France, nearly every third volunteer is active in the sport sector (29% of all volunteers) and in Sweden the sector is also the most popular sector for volunteering as nearly every fifth adult is engaged in voluntary activity in the field.

A considerable number of volunteers are active in activities for the social, welfare and/or health sectors. This is the case for example, in countries like Belgium, Bulgaria, Finland, France, Hungary, Ireland, Lithuania, Malta, the Netherlands, Portugal, Slovakia, Slovenia, Sweden and the UK. Again it is important to note that, in some countries the health sector is seen as separate from social and welfare activities, in others health and social activities have been grouped together (i.e. in Finland and Hungary), while in others it has been labelled as care activities (see for example, the Netherlands). In France, the social and health sector is the third most common area for voluntary activity; 13% of volunteers are active in this area. In Sweden, the welfare

sector is the second most popular area in which individuals volunteer, although the popularity of the sector has gradually declined. Today 15% of Swedish adults volunteer in the sector. In Malta, social affairs are one of the most popular areas for voluntary activity. In Slovakia, social care sector is the second most common sector, followed by education and training.

Religious and church organisations have been recorded as another important domain in which individuals often volunteer. This is the case in countries like, Austria, the Czech Republic, Finland, Germany, Hungary, Ireland, Latvia, the Netherlands, Poland, Romania and the UK. There is also evidence to suggest that high participation levels in religious or church organisations are more common in countries with a strong religious tradition – for example in countries, where religious establishments (i.e. the church) are actively involved in the community. The participation of volunteers in this sector varies greatly between countries. For example, in Finland, 16% of individuals are active in religious associations or clubs. Similarly, in Germany, church and religious organisations are the third most common sector in which individuals volunteer. In contrast, in Ireland, 26% of all volunteers are involved in religious or church organisations (around 143,133 individuals and roughly 4.2% of the total population).

A large proportion of volunteers are involved in the culture sector – although it must be noted that in some countries culture is grouped with recreation (i.e. Portugal), while in others it has been grouped with education (i.e. Lithuania). Countries with a high proportion of volunteers in the culture sector include Austria, Finland, France, Germany, Hungary, Ireland, Latvia, Lithuania, Luxembourg, Portugal and Sweden. The sector can encompass a wide-range of different domains, such as art, music, literature, entertainment or other forms of media. For example, in France, 16% of volunteers are involved in voluntary activities in cultural organisations. The recreation and leisure sectors are also popular areas in several countries in which volunteers are active. This includes: Denmark, France, Germany, Luxembourg, Malta and Slovakia.

A similar number of countries have identified education, training and research as one the main sectors for voluntary activity: Estonia, Germany, the Netherlands, Poland, Slovakia and the UK. Slovakia has one of the highest levels of participation of volunteers in the education and training sector; 39%. High participations rates are also seen in countries like the UK (31%) and Estonia where nearly every fifth citizens has carried out voluntary work in this field. In contrast in Germany, schools are the second most popular area in which volunteers volunteer, as 7% of Germans are involved in voluntary activities in school and nursery schools, and the popularity of the sector has continued to increased among volunteers (one percentage point increase in the number of German adults volunteering in schools took place between 1999 and 2004).

These sectors are not the only sectors in which volunteers are active. Other popular sectors include charities, community activities, children and youth, emergency services and disaster relief, environment, animal protection, humanitarian pursuits and housing and development.

Main voluntary activities

The most commonly reported main activities carried out by volunteers are:

- Administrative and supporting tasks;
- Helping or working directly with people;
- Preparing and supporting voluntary activities;
- Managerial and coordination tasks;
- Campaigning and lobbying
- The organisation of events.

Administrative and supporting tasks were reported as common voluntary activities in nine of the 22 countries. In Denmark, for example, administrative and organisational tasks were the most common activities carried out by volunteers; 31% of individuals surveyed in a 2004 population survey stated that their activities fell into this category, which included committee work (18%) and secretarial and administrative tasks (13%). In Belgium, voluntary administrative or accountancy tasks are the third most common type of activities carried out by volunteers. In Sweden, according to the population survey carried out in 2009, 80% of the individuals surveyed were involved in activities relating to their membership of the board of a voluntary organisation/association (including administrative tasks) or were involved in administrative work in general. Although many countries have simply stated that volunteers carry out ‘administrative tasks’, this is likely to cover a range of different activities, such as clerical, secretarial and organisational-related assignments.

Activities that relate directly to helping or working with people (i.e. direct beneficiaries) were recorded as one of the main activities undertaken by volunteers in nine countries. This category covers a wide variety of tasks and many different target groups, depending on the volunteer and the voluntary organisation. For example, in the Czech Republic, France and Italy ‘helping or working with people’ can involve care of specific individuals (for example, those with significant health problems), visiting the elderly, supporting vulnerable groups in society or activities within the community.

Another common activity amongst volunteers is the preparation of and the provision of support for voluntary activities. Activities highlighted by countries under this category include, providing voluntary support for local clubs and groups (e.g. the Czech Republic), supervising voluntary activities (e.g. Luxembourg), and organising local voluntary activities (e.g. Poland).

Managerial and coordination activities were identified as common activities by eight countries, although in many cases managerial and co-ordinating activities are interlinked with volunteers’ administrative duties. The scope and frequency of these activities vary between different member states, as well as between the different sectors within individual countries. For example,

in Austria, almost a quarter of all volunteers active in the political and advocacy sectors took part in 'leadership' roles. In Latvia, a significant number of volunteers in NGOs are active on the boards of voluntary organisations and associations. In the Netherlands, 28% of voluntary work involved managerial activities, with the highest proportion observed in the housing sector, where 65% of tasks were management activities.

Campaigning and lobbying were the fifth most common activities (in equal place with the organisation of events, below) and was recorded by five different countries. In Belgium many volunteers attend manifestations organised by social organisations and in some cases campaigning is linked to fundraising activities.

Finally, the organisation of events was reported as one of the most important activities carried out by volunteers in five countries. The scale and scope of the events organised vary between countries and sectors, as well as between national, regional and local levels – for example, from large-scale Olympic competitions to local amateur theatre productions. In several countries, especially in the sport sector more and more individuals are becoming interested in taking part in voluntary activities that support the organisation and facilitation of large-scale flagship events.

These six types of activities are not the only tasks carried out by volunteers, but are only the main activities most commonly cited by studies from across European countries. Other important activities undertaken by volunteers include: coaching and training, mentoring, public relations, counselling and mediation, fundraising, maintenance activities and the provision of information, etc.

Sources:

'Volunteering in the European Union: An Overview. Working paper no. 2 of the Observatory for Sociopolitical Developments in Europe',Institut für Sozialarbeit und Sozialpädagogik e.V. http://www.sociopoliticalobservatory.eu/uploads/tx_aebgppublications/Working_Papier_no_2_Observatory_Volunteering_in_the_EU_Overview.pdf

'VOLUNTEERING IN THE EUROPEAN UNION', EAC-EA, 2010, http://ec.europa.eu/citizenship/pdf/doc1018_en.pdf.

Module 2

Definition of Goals, Roles, and Objectives

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Whether you would like to volunteer on an existing volunteer project or you have planned a volunteering project, before you start it should be clarified what you would like to achieve, what the final result should be or which effect you wish to achieve.

Questioning yourself is also important. Which role do I want to play? Which tasks and functions do I want / may I take? Do I have necessary competences and resources for all tasks? What are my expectations? What should I get out of it?

You cannot achieve a goal if you do not see it. For you as a coordinator of volunteers it is highly important to have an idea about the things you can really affect with your actions – otherwise you cannot be a good leader. And when you do not know what you personally want to achieve, in which role and which task area or function area you or your volunteers can operate, then dissatisfaction and disappointment are highly likely.

For planning and implementing successful projects, activities or events, you have to start with thinking about goals and roles. Both aspects have to be clear and transparent to those that are coordinating and those that are participating.

Part I: The idea becomes a project

1. Introduction

A project or event can only be successful if everybody agrees on what it should achieve. All participating people should be involved in the conception of the goal.

The use of defining your goals:

- Defining goals helps you to establish **clarity** and **transparency** – both within and outside your organisation or project team. Goals are the basis of a joint understanding and are needed for giving orientation.
- They establish effectiveness and make it easier for you to finally meet your goals. Additionally, they are necessary for evaluating the projects impact.
- They improve the efficiency and improve the relation between input and output: How to reach maximum efficiency?
- Orientation and differentiation can be established by making value judgements, what means, that a judgment is based upon a particular set of values. You have to think and decide about your priorities. What needs to be done first, what is less crucial and could be postponed?
- They emphasise on **finding a solution** instead of focusing on the causes of a problem: To reach my goal, I need to decide on the essential steps to take: what are my objectives or "milestones"?
- (Self-)Evaluation and require specific and measurable goals. If there is no goal, how can you check whether you have achieved the aspired effects/ results/ milestones or not
-

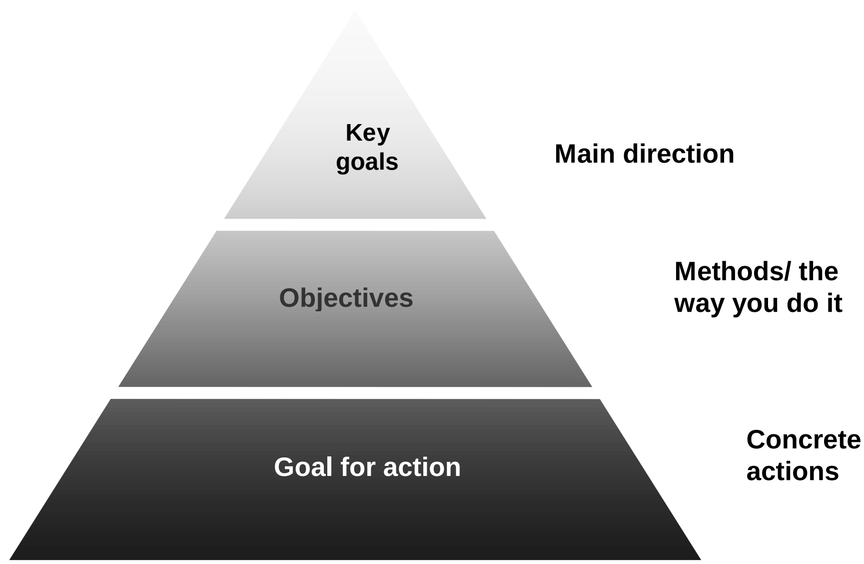
"Better think twice" when formulating your goals. To sensitise your participants for that, it is recommended to start introducing the "threefold system of the goal". This makes it a lot easier to understand that every goal can and should be divided into smaller goals, the objectives or milestones. It is important to emphasise the difference between a goal – the methods or the way you want to do it – and the concrete action. Otherwise you might get lost because your goal is too abstract and you have no idea how to set an action plan.

Goals should be short and effective! To help your participants to phrase their goals in a way that they are easy to understand and to communicate, teach them some criteria for a good definition of goals and the characteristics of a useful goal for action.

Make yourself a clear defined final goal which motivates you and you should support it with a controllable performance target which is underpinned with a systematic process.

2. The threefold system of the goal

The major goal has to be divided in smaller goals. This way a concrete path of action can be found. You have to differentiate between the key goal and the path of action.



Typical characteristics of:

Key goals

Long-term, steady

- Decisions about values are part of the principle goals. They define the vision, approach, mission and philosophy as well as purpose
- are believable, inspiring
- concise and easy to understand
- show a profile and focus
- Are permanent, attractive and inspire ideas

Function:

- Inwards: provide identity and orientation, enhance identification and motivation
- Outwards: create clarity and acceptance as well as an image

For example*: We want boys and girls in and around Passau to have the same opportunities when choosing their career path.*

Objectives

Middle-term

- realistic and conceivable
- define strategies, executions and impacts
- show a direction how concrete goals can look like
- are open enough to sum up different goals

Function:

- substantiation of the key goals and strategic focus
- intervention between key goal and goals for action
-

For example: *We want to create new possibilities outside of school for girls to learn more about male-dominated jobs and for boys to learn more about female-dominated jobs.*

Goal for action: the concrete actions

- are limited, time-bound
- are concrete (what should happen/have happened when) and refer to goals concerning the team, marketing, management etc.

For example: *Each year, we organise an event for boys over 13 years in and around Passau on the third Thursday in April. On this day they get to know female dominated jobs like primary school teaching, nursing or social work.*

Important: Define the goals with everybody who is affected by them or are interested in them.

→ You can define the goals "from top to the bottom" or the other way.
E. g. Losing weight:

End goal: I want to fit into my favourite pants again.
> But for that I weigh 15 kg too much.
Performance goal: In 1,25 years I will lose 15 kg, that is one kilo per month.
Process: I deny myself sweets three times a week and alcohol twice a week, also twice a week I work out for an extra hour.

Coach your short, middle and long term goals in terms:

- At the end of the year I will have archived that...
- In 3 years I will have archived that...
- In 5 years I will have archived that...

This means you must plan the way to achieve your goal. The following questions will guide you to a successful plan for reaching your goal:

How do I achieve this goal?
Which ways can I think of?
Which one seems to be the best?
Which step should be first taken?

There are four important steps to reach the goal:

Step 1 Write down your goals. This is a "must''!
Step 2 Put them in terms as precisely as possible!
Step 3 Write them down in positive terms!
Step 4 Get a clear idea of your goal! Picture it.

Characteristics of a good objective

To base a non-manageable end goal on a manageable performance goal, your goals need to be set in **SMART;**

a) **SMART**:

S = specific,
M = measurable,
A = attainable,
R = realistic,
T = Time phased

How do I know if the concrete actions are properly formulated?

Definition **what** (not how it) should be achieved	Which condition do I want to achieve?
the achievement is **measurable** and /or **noticeabl**	How much do I want to achieve? Whic do I want to take?
a **person in charge** is named	Who is responsible?
the goal is formulated in a **positive** statement	No “avoidance” goal
a **concrete date** is defined (possible intermediate	When do I want to achieve the goal?
Potential **circumstances** are named (e.g. **maxim investment, negative consequence that need avoided**)	Which circumstances do I have to cons

"Little grammar of phrasing goals"

Example:

LITTLE GRAMMAR OF PHRASING GOALS	
WHEN should the goal be achieved? **WHO** is the agent? **WHAT** is the intended condition?	I'm volunteering as a reading mentor at an elen school for 5 days a week by the beginning of scho 2015/16.
Positive statement in **present tense** **Active verbs**	

LITTLE GRAMMAR OF PHRASING GOALS	
WHEN should the goal be achieved? **WHO** is the agent? **WHAT** is the intended condition?	……………………………………………………………................... ……………………………………………………………...................
Positive statement in **present tense** **Active verbs**	……………………………………………………………................... ……………………………………………………………................... ……………………………………………………………...................

Possible outline:

What?	**How?**	**Who?**	**Accomplished when?**
	financial resources, s	Person in cha backup	

Part II: How to define volunteering: The roles and tasks of volunteers

This module should give you more detailed information what the term “voluntary work” and its characteristics. By means of practical exercises you should recognise by yourself whether you need volunteers or not and – in case of “Yes” – which tasks volunteers should undertake needs to be established

Furthermore, this section will provide a suggested “role” description. The exercises, tips and role-plays in this module should help you to define what you require from volunteers and how they can contribute in their voluntary work.

What is volunteering?

There is no official definition of volunteering that is accepted across the European Union. What is considered volunteering is dependent on the national context of the individual member states. However, we find the definition given by NCVO to be helpful: “any activity that involves spending time, unpaid, doing something that aims to benefit the environment or someone (individuals or groups) other than, or in addition to, close relatives. Central to this definition is the fact that volunteering must be a choice freely made by each individual“. Below other possible definitions on volunteering are given.

Definition 1:

“A volunteer is a person who performs or offers to perform voluntary service does some act or enters into a transaction without being under any legal obligation to do so and without being promised any remuneration for his services.”

Source: British Dictionary

Definition 2:

“*A volunteer “… choose to act in recognition of a need, with an attitude of social responsibility and without concern for monetary profit, going beyond one's basic obligations”*

“Someone who gives time, effort and talent to a need or cause without profiting monetarily”

From the perspective of the recipient of service**:**

Someone who contributes time, effort and talent to meet a need or further a mission, without going on the payroll

Source: Susan J. Ellis and Katherine H. Campbell: By the People: A History of Americans as Volunteers

Definition 3:

"*Volunteer … spends a part of his time, without any wage, by free choice, in a formal way, within an organisation, working for the benefit of others or of the entire community"*

Source: Paul Dekker (ed.): The Values of Volunteering, Cross-Cultural perspectives:

Exercise 1:
Do you feel like the definition suits your work or the activities of the volunteers you look after? What can you add to the definition? Find a definition for volunteers in your group that you can all agree on.

Learning goal:
Since there are many forms of volunteering, it is important to agree on a definition of what it means within the organisation. There are many ways of volunteering, for example:

Being appointed by a vote to a certain position (e.g. management of an association)
A (temporary) task which is limited by appointment or assignment (e.g. jury person)
Participate occasionally without obligation for regularity (e.g. selling cakes for fundraising)

Can I hold your hand?	Do you have any children?	What's your phone number?	Can I borrow some money to buy some dinner?
I have a headache – can I have a pain killer?	Are you pregnant?	Can we go to see an 18 cert movie?	Can you look at this lump on my leg?
Can I borrow your CD?	Can you buy me a football?	Can I tell you something?	Do you like me?
Can I bring my friend with me next time?	Can I add you on Facebook?	How old are you?	Can I see you twice a week?
Where do you live?	What are your children called?	Can I have another coke?	You won't tell, will you?
Can I have your email address?	Would you like to come to my birthday party?	Will you come up to my room?	Are you gay?

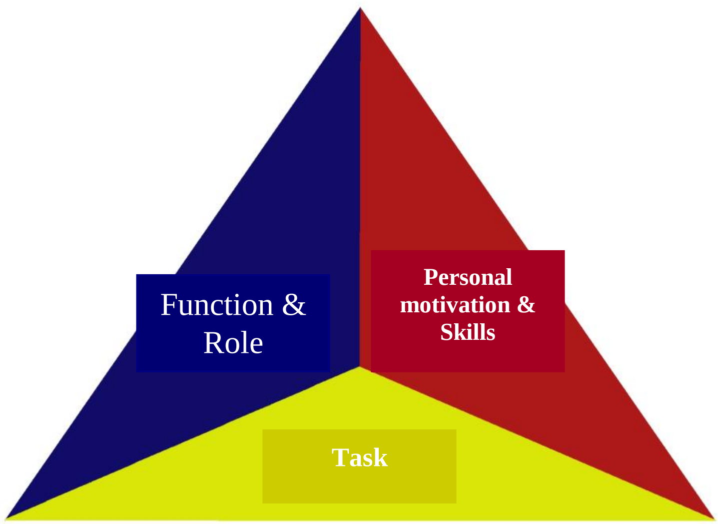
"Triangle of finding your part"

Each function and role in voluntary work is connected with specific tasks. To fulfil all tasks and justify appropriate roles and functions the affected person must possess certain abilities and competences as well as personally motivated.

A graphical display such as “triangle of finding your part” is one method to help learn about this part:

Function & Role | Personal motivation & skills | Tasks

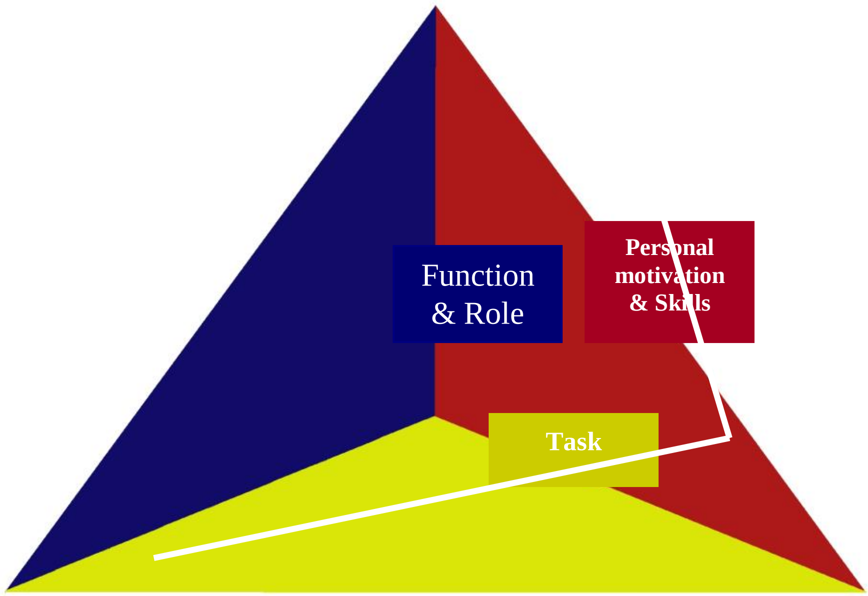
Triangle of Finding Your Part



Voluntary engagement can work well when these three areas are in balance.

Example:

1. Peter is the chairman of an organisation. His tasks involve overseeing finances. However he does not have any desire to be tied up with finances and he is not that comfortable with mathematics. Therefore, he lets all accounting and financial matters slip and does not have appropriate oversight. Due to this his cashier has issued incorrect donation receipts for many years which Peter has signed under the impression that they were accurate.



There are (at least) two solutions to the above:

- He can undertake additional training to make him more confident and competent in financial matters.

Or:

- He should search for another person with necessary competences and interests who will take over this area of work.

Volunteers – Which tasks do I want to assume?

Many people want to volunteer but don't know where and how. Thus, it can be helpful to outline a profile for volunteer work.

Exercise:

Profile for my volunteer work.

In what role do you see yourself volunteering? Are you a person who likes to coordinate and lead or "just to be" a team member, or someone who wants to initiate new ideas or to consult someone else? Read the following questions in order to clarify these doubts:

What do I want to do? What can be my offer?

Who could I offer it to?

What do I want to achieve?

Who should help and support me?

Why is this task interesting to me?

→These questions can be helpful for a conversation

Check list for volunteers

The following list can be very useful in the conversation with the responsible agency, especially, for those who are already volunteers or plan to be. It can also be very meaningful to write down the agreement. When there are problems, both sides can always resort to the appropriate protocol.

Range of tasks

- What are my **tasks**?
- For **how long** do I want to volunteer?
- How much **time** do **I spend** volunteering?
- Which authority do I have?
- Which qualifications do I need?
- How do I deal with confidential information?
- In which ways do I get supported during my projects?

Supervision

- Who trains me?
- How long do I get trained?
- For which tasks do I get trained?

Furtheeducation

- Can I receive further education/qualifications?
- Do I have to pay for them?

Refund

- Do I need a car?
- For what expenses do I get a refund? If so: how do I get the refund?
- Do I get a reward for my work?
- Do I get a donor receipt if I pass on the refund or reward?

Co-Deciding

- In which matters can I co-decide?

Certificate

- Can I get a certificate concerning my volunteer work?

Insurance

- Is there an accident insurance?
- Is there liability insurance?
- Are there other insurances?
- What do I need to know in case of damage?

Mediation

- Are there rules in case of conflict?
- How and when do they apply?

Input “The Nine Belbin Team Roles”

Dr. Meredith Belbin studied the consequences on the capacity of a team when various personality types are working together as a team. Later, he identified in his studies nine different team roles resulted from behaviour patterns of members.

According to Belbin, teams work effectively when they consist of several heterogeneous personality types and roles types. That means each role has its own important task and function in a team. For coordinators of a team it is a challenge to be able to recognise this pattern.

3 action-oriented roles: Shaper, Implementer, Completer, Finisher

3 communication-oriented roles: Co-ordinator, Team-worker, Resource Investigator

3 knowledge-oriented: Plant, Monitor Evaluator, Specialist

The NINE Belbin Team Roles

Team Role		**Contribution**	**Allowable Weaknesse**
Plant		Creative, imaginative, free-thinking. Generates ideas and solves difficult problems.	Ignores incidentals. Too preoccupied to communicate effectively.
Resource Investigator		Outgoing, enthusiastic, communicative. Explores opportunities a develops contacts.	Over-optimistic. Loses interest once initial enthusiasm has passed.
Co-ordinator		Mature, confident, identifies talent. Clarifies goals. Delegates effectively.	Can be seen as manipulative. Offloads own share of the work.
Shaper		Challenging, dynamic, thrives on pressure. Has the drive and courage to overcome obstacles.	Prone to provocation. Offends peoples' feelings.
Monitor Evaluator		Sober, strategic and discerning. Sees all options and judges accurately	Lacks drive and ability to inspire others. Can be overly critical.
Teamworker		Co-operative, perceptiv diplomatic. Listens and averts friction.	Indecisive in crunch situations. Avoids confrontation.
Implementer		Practical, reliable, efficient. Turns ideas into actions and organises work that needs to be done	Somewhat inflexible. Slow to respond to new possibilities.

Completer Finisher		Painstaking, conscientious, anxious. Searches out errors. Polishes and perfects.	Inclined to worry unduly. Reluctant to delegate.
Specialist		Single-minded, self-starting, dedicated. Provides knowledge and skills in rare supply.	Contributes only on a narrow front. Dwells on technicalities

Source: Belbin: http://www.belbin.com/rte.asp?id=3

The most successful teams tended to be those with a mix of different people, i.e. those with a range of different behaviours. Eight distinct clusters of behaviour turned out to be distinctive and useful. These were called “Team Roles,” and in fact, a ninth based on specialist knowledge was to emerge later.

There are many ways people can volunteer. For the project "***senior* trainer**" four ideal roles were constructed.

Role	**Consultant for initiatives**	**Developer of projects**	**Net-worker**	**Team coordinator**
Assignment	If needed	Temporary	Ongoing	Ongoing
Main focus	- Improvement of communication - Solving of conflicts - Information on special topics like finance or PR	- Founding of new initiatives/groups - Developing of new concepts - Search for new supporters	- Installing and improving the network - Sense for the existing diversity - Analysis of the existing structure	- Fostering communication and collaboration - Chair meetings - Improve self organisation
Goal	Support if needed	Realise projects with expertise	Good network	Good collaboration within group

Exercise: Role play – Profile of Projects' Developer

Topic: Launching a new initiative and suggestion from civil engagement, for example, "municipal senior committee''
(Role play for maximum 7 persons)

Situation and Task
There has been an ongoing discussion in groups and associations in your community about a senior committee. Some groups think it's very important that a board advocates the interest of seniors. So far, no one has truly fought for the execution. The constitution of the community has no obligation to implement a senior committee. If the elected council representatives do not want to implement the committee there is little chance that the committee will be accepted or heard in panels. Therefore,

political and administrative spheres have to be convinced. You as a coordinator for an agency of volunteers think the committee is important. You've informed yourself about goals and tasks for such a committee. Today, you have a meeting with the mayor, the party leader and a representative of the administration. Your task is to convince them. Good luck!

Course of action

Distribute the roles. You have 15 minutes to prepare for your role. There are the following roles:

- 2 coordinators who have asked for the meeting and support the senior committee
- 1 mayor who is cautiously open to the idea
- 1 chairman of the opposition party who has already spoken in a positive way about the committee
- 1 chairman of the majority party who is strictly against the committee
- 1 representative of the administration who fears the majority and is therefore against the idea
- 1 observer

Role of the coordinators (2 persons):

Prepare for the meeting. You know that there is resistance since not everyone is in favor of the committee. Think of good arguments why the committee is good for the city: seniors as potential voters, competent counseling of politicians in regards to problems and interests of seniors, participation, active participation of seniors to solve their problems, other cities made good experience with such committees. Furthermore: the senior committee is independent and bipartisan. The election can be affordable, and the state senior committee offers help and models.

Your goal is to implement the following message during the meeting: The idea of a senior committee is good. If we have enough information about the realisation, we can check if it is possible.

Role mayor (without party):

As mayor you are open to the idea since you want to be re-elected. However, you worry as the election has to be paid and there are other expenses. Furthermore, you would have to hear yet another committee. On the other hand, you have heard good things about such committees and you think that such a committee can care for the support of seniors in the community voluntarily since there is less money for this.

Role chairman (opposition):
As representative of the opposition you welcome the initiative for the senior committee. Elsewhere the committees have proven to be useful and the participation of citizens is welcomed. If it gets public that your party supports the idea, it can be useful for the next election.

Role chairman (majority party):
As representative of the majority party you think it's a good idea in general but unnecessary in your city. There are already many people in the council who care for seniors. Furthermore, the groups and associations give insight into the minds of the citizens. No one will be willing to participate. However, you want to be re-elected and know that the vote of seniors is important.

Role representative of the administration:
You have no say in the matter but you fear the majority. Since they would care for the senior committee they would need you to accompany the meetings and record the proceedings as well as pass on the documents.

Role observer: Watch out for the following:

- How do the *coordinators* put forward their arguments?
- Can they convince their opponents?
- How do the *coordinators* handle the conflict?

Sources:

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2. http://www.sachsen-anhalt.de/index.php?id=22834

3. Burmeister, Joachim und Ilona Stehr 2012: seniorTrainerinnen – Weiterbildung. Handbuch für Kursteilnehmerinnen und Kursteilnehmer. Hrsg. EFI Bayern e.V.

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Module 3

Project and Time Management

MODULE 3
Project and Time Management

"The secret to success is constancy of purpose"
Benjamin Disraeli (1804-1881)

This Project and Time Management Module will help you successfully plan and implement projects and manage your time more efficiently. It provides a general overview of Project Management as well as several possible methodical approaches. At the end of the module, you should be able to identify what steps to take to manage your project effectively and how to apply these to achieve your goal.

1. Project Management

1.1 What is a project?

A project is characterised by several elements. It is made up of a **precise defined task**, **a schedule** and a **predefined goal**. Additionally, the **participation of several agencies** and **individuals** is crucial in the successful implementation of a project.

1.2 What does project management mean?

Project management is the **leadership** and **implementation of a project**, often including the **initiation** of a project.

1.3 What are the benefits of project management?

Project Management allows us to take **flexible and innovative approaches** and to **respond quickly to** social needs/ requirements, community needs, unpredictable events, unexpected requirements, challenges, problems, emergencies, contingencies**.** Particularly in rural areas, projects are a great way to engage the community and recruit new volunteers. The **clear focus** and **defined goal** facilitates not only the **recruitment of volunteers** but can also **attract sponsors**. Moreover, working on projects can draw positive public and media **attention to the project**.

1.4 How does successful project management work?

There are 8 basic steps in successful project implementation:

Step 1: Vision & ideas
Step 2: Investigation and preparation
Step 3: Project description
Step 4: Discussion with project partners
Step 5: Implementation plan
Step 6: Start implementation
Step 7: Evaluation of project
Step 8: Actualisation of visions, goals and project planning

Step 1: Vision & ideas

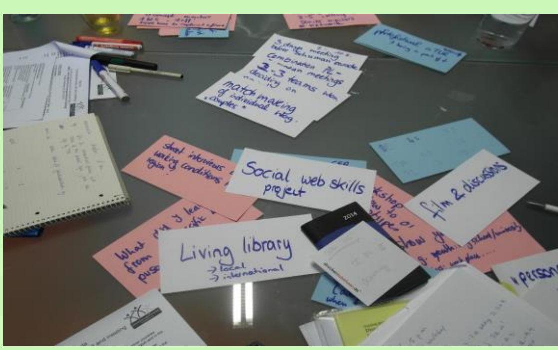
To begin your project, you need to gather ideas and build a vision of the future outcome. There are several **creative techniques** for collecting ideas.

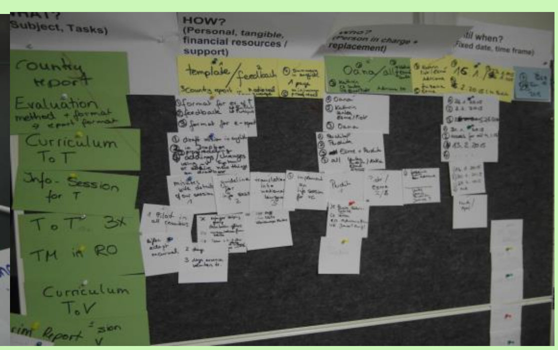
Brainstorming

Brainstorming is one of the most popular creative techniques for generating ideas and building a vision. This technique brings together a group of people to come up with ideas for a project. Every idea should be noted on a separate piece of paper. Once you have run out of and collected all new ideas, you can arrange them in themes.

As you order ideas in this way, different theme categories will emerge. By creating headings for each group, you will begin to recognise a structure and sequence. Additionally, you can capture ideas that do not really belong to any particular category and keep these as they may prove useful later on.

In this way, you include input from all participants to create the first project overview. (S.4)





Method 635

The intriguingly named Method 635 begins by bringing together a group of six people. Each member proposes 3 ideas which will be developed 5 times further. Then, another group of 6 members will propose 3 solutions for the defined problem and pass these solutions on to a neighbour. Thereafter, the

neighbour will revise these solutions and add their own ideas. This procedure will be done further until all members of the group finally contribute their own proposals. Ultimately, 5 persons will further develop these proposals together with other 3 suggested solutions. (S.9)

Mind-Map

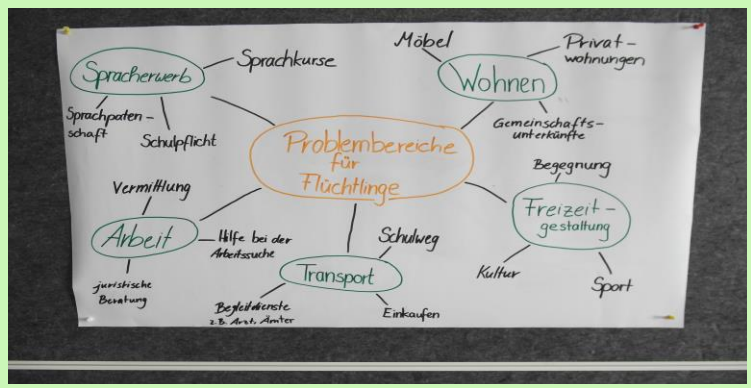
Another technique for gathering the ideas and inducements is to draw a mind-map.

How to Draw a Mind Map

Drawing a mind map is as simple as 1-2-3:

- **Start** in the middle of a blank page by writing or drawing the idea you intend to develop. I would suggest you use the page in landscape orientation.
- **Develop** related subtopics around this central idea, connecting each of them to the centre with a line.
- **Repeat** the same process for each subtopic. (S.18)

This will leave you with a visual and structural presentation of your thoughts.



Metaplan Method

The Metaplan method is also participative but makes use of a moderator to lead a group to come up with ideas and solutions.

The moderator uses visual materials such as flipcharts to help the group frame the problem. Then, problematic questions will be formulated and adhered together in the group. Afterwards, participants collect those inputs of specific problems in which they write their connotations one by one on the cards. – If possible, participants will be split into smaller groups to work on the problem. All inputs are then categorised under themes (see Brainstorming). Based on these collected inputs participants develop

results. Each group reports back and receives feedback from other participants. Finally, the small group work sets activity.

The role of moderator is a crucial one: He or she must cultivate a constructive atmosphere for the group and facilitate equal representation amongst participants. The moderator must guide the group to find and capture results. For tips on how to moderate successfully, see Module Four. (S.8)

Based on the above methods and results you can formulate your **Key Goals, Objectives and Goals for Action** as you have learnt in the module 2 earlier.

Step 2: Investigation and preparation

Research should be done before beginning the project and should be well prepared to avoid duplication of work later. Information can be collected using wide range of resources such as the **Internet**, collected **databases**, relevant **literature**, **various networks**.

Monitor relevant media coverage. Find out if others have developed and/or implemented similar ideas already. If there are similar projects, how were they implemented?

Ask yourself these questions BEFORE you begin your project:
Who could have interest in your idea on the ground?
Who might find your project useful in the futures?
What is the project scope and how will we target interests?
Where can I find advice and support?
Who is already active in this field?
With whom may I cooperate?
What is the predicted cost of the project?

Step 3: Project description

Before we create the project description, we should first establish why we want to run this project: for whom and what purpose do we want to achieve this? To answer all of these questions we can use methods such as **As-is Analysis** and **SMART** goals.

As-is Analysis

The **As-is Analysis'** purpose is to understand the current situation and any weaknesses within the processes, as well as to develop first solution ideas. Moreover, it serves as a neutral explanation of a problem. Very often project ideas simply come from feelings rather than objective decision making. As-is Analysis helps to organise and stabilise these changes. It's important not to be biased towards the opinion of a single person. It is better to pull a range of opinions together. For example, you may use questionnaires or surveys (this is the primary inquiry stage). However, when available data can be used immediately, you can skip these procedures (this is the secondary inquiry stage).

SMART Goals

The SMART goals will help you to effectively and precisely formulate your goals.

- **S**-specific (formulate precisely and clearly)
- **M**-measurable (qualitative and quantitative)
- **A**-achievable (positive and motivational)
- **R**-realistic (the goal must be achievable for me)
- **T**-time-bound (Deadline?)

Step 4: Discussion with project partners

When discussing the project with partners, the project leader should cover desires and concerns. In addition, the procedure and timetable should be broadly discussed.

Step 5: Implementation plan

To draw up the implementation plan, the following central questions should be answered:

- What do we want to achieve? Ideas
- What is important? Prioritise
- Who does what? Team
- When to start/end? Deadline and timetable
- What resources do we have? Budget and cost schedule
- What kind of participations? Partners

We should also ensure we do the following:

- The project plan should be well-structured
- The procedure and various activities should be structurally planed
- Marking out single tasks will save time
- Deadlines should be defined
- Assign responsibilities to help organise the work
- Specify expected results
- Planning time and expenses with a generous margin will prevent rushing and budget problems

What? (subject, tasks)	How?	Who?	Until when?
activity 1	phase 1		16.01.2015
	phase 2		23.05.2015
	phase 3		16.06.2015)
	phase 4		28.09.2015
activity 2	phase 1		end of june
	phase 2		02.05.2015
	phase 3		31.07.2015
activity 3	phase 1		october 2015

In chapter 2: Time Management you will learn further methods which are useful in the field of project planning.

See attachments 1, 2, and 3

Step 6: Start implementation

Laoste once said: “The journey of a thousand miles begins with the first step.”

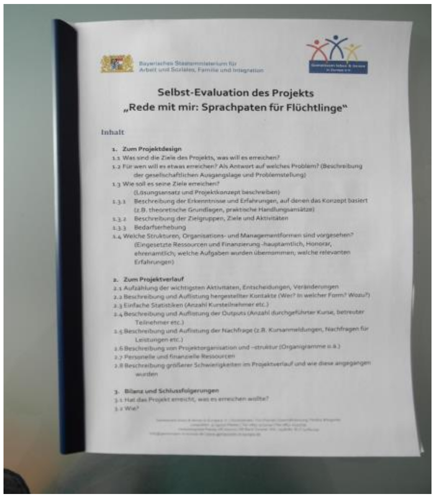
Goals are not reached merely through a precise plan but through the courage one possesses. So, do not hesitate to implement your projects practically. Your plan will never be completed and perfect – no matter how long you spend on it. A good plan is important, but by doing we can fine-tune and adapt plans to find the most appropriate solutions. The best way to ensure we act is to set a start date for the implementation of the project.

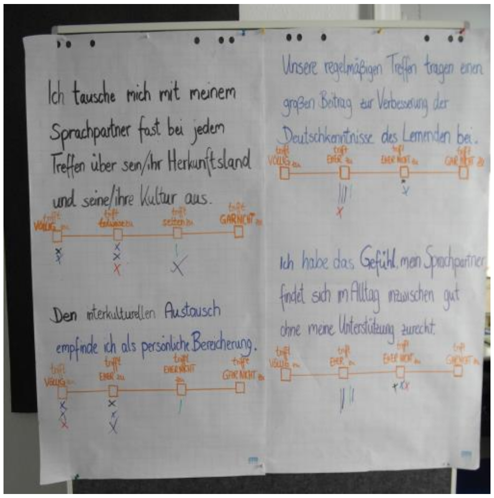
Step 7: Evaluation of project

After implementing the project, you should do a thorough evaluation so that you can see whether you have achieved your goals. Through evaluation you can identify the weak points in the project implementation.

For effective project evaluation, answer the following questions:

- How and when should the concept be reviewed?
- Which points should be considered for the evaluation?
- Are you satisfied with the project result?
- Have the objectives been reached?
- What has been done well and what has been done poorly?
- How did the team work together?
- What should be done differently/better in the future?


Selbst-Evaluation des Projekts
„Rede mit mir: Sprachpaten für Flüchtlinge"



Step 8: Actualisation of Visions, goals and project planning

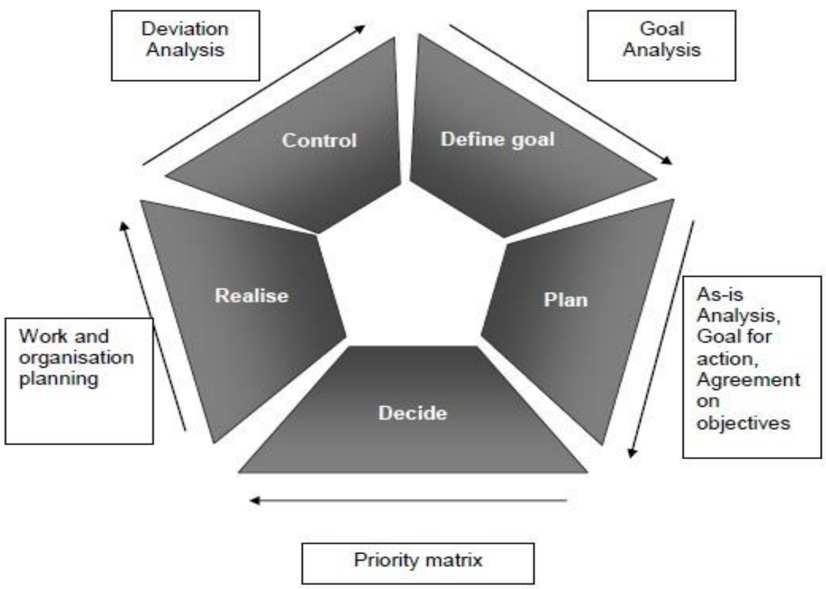
Regular critical reflection and progress monitoring can help keep a project on track. Project results depend on careful evaluation and monitoring. It could happen that you may:

- ➢ extend the project deadline
- ➢ complete the project early

It happens very often in the project that:

- Needs or target groups change
- There is a new or modified objective
- Changes, adaptations or modifications become necessary in planning and/or implementation

If you want your project to be successful, you must accept critical reflection, be ready to learn, and adapt to changes. You should confront variations from the beginning and take them into account. This is a continuous cycle as demonstrated in this image:



1. Five Steps in concept development

Concepts can be preparatory work for a written constitution, for continuing the work of an initiative, for a funding application or for management of public relations. The following steps help with, but do not replace, concept development:

Step 1 Our vision – Our mission

- What has brought this group together?
- What do we want to archive?
- What is our vision?
- What fundamental interests/values unite us?

Step 2: Situation analysis

a) In terms of the group:

- Which actions, tasks, projects have already been completed?
- Were we successful? Were there disappointments or failures?
- How is our group organised? Who is responsible? Who are the activists?

b) In terms of the environment/task:

- Are there similar groups in the community?
- How has the public reacted to our initiative?
- Is there demand for and/or interest in our working group?

Step 3 New ideas – Stage of imagination

- Who has ideas?
- How do we develop ideas for our work in the future?
- What ideas match our vision, our tasks?
- What ideas are the most interesting/most attractive to the group members?

Step 4 Definition of goals

- Which ideas do we choose for which action?
- What goals do we set for this action? (What should be achieved and when should it be achieved by?)

Step 5 Realisation of goals

- What are the necessary steps to accomplish the defined goals?
- Who does what? (set specific responsibilities)
- Should sub-division be established?
- Who is in charge and how do we ensure group cohesion?
- Networking: Is it possible to cooperate with other initiatives, groups or organisations? We want synergy, not competition

2. TIME AND STRESS MANAGEMENT

Introduction

Constantly growing time pressure, varying specifications and so on increase the pressure on the implementers. Decision-making and general communication becomes increasingly difficult. These issues mainly affect the instructors who have to meet heavy demands from upper-management levels. Additionally, they are often confronted with dissatisfaction of students' and employees'. Behaving with integrity, sincerity, competency and efficiency is a daily challenge.

ATTENTION: Time management is not a way of gaining time! It only allows you to improve your ability to manage time. This means that you use the time you have more efficiently to focus on the most important tasks and reduce stress. If, however, you fill "gained" time with stressful energy-consuming tasks, you will not at all increase your quality of life.

Time management, especially in hospitals, does not affect individuals in isolation. One can improve one's own time management while causing unintended disruptions or difficulties for others.

2.1 Unit objective

Before we go on, answer the following questions regarding time pressure and stress:

- Who or what increases time pressure for you?
- How can I relieve myself from pressure?
- How can students/employees and I work more efficiently to reach higher goals despite stress?
- How can better time management help to reduce workload and to avoid conflicts?

The aim of this seminar is to make you aware of your own behavioural patterns under pressure, to identify possibilities for counteraction, to learn more efficient time management methods and how to apply them.

You should keep your objective in view despite the many requirements, tasks and unscheduled events that arise in daily business. With this introduction to time-management you will learn to prioritise and to use available time more efficiently.

Successful time management means:

1. Better overview
2. More space for creativity
3. Less pressure
4. More spare time
5. Achievement of goals

2.2 Contents

- Stress factors and time thieves – what to do?
- Principles of time management
- Setting and pursuing goals
- Prioritisation (e. g. ABC priorities, Eisenhower concept, Value-Time-Analysis)
- Task-scheduling and deadline list
- Designing more efficient and optimised processes
- Successfully scheduling and allotting time
- Documentation and coordination
- Ways to reduce workload (e. g. office organisation, desk management, delegation, Saying No)
- Tools and check lists – choosing and using meaningfully
- Organisation, information, communication and overview within the team!
- Planning days and weeks successfully: schedules and boards

2.3 Schedule (I)

- Introduction to the topic
- Setting topics for participants
- Overview and principles of the topic
- Introduction of central models and check lists
- Concepts, schedules and tools
- Concentration of main topic
- Recognising patterns (e. g. motivators)
- Letting go
- Burn-out cycle
- Key tools in the field: Decision and action ability under deadline pressure
    - Creating breathing room
    - Setting limits
    - Possible ways to avoid the activity trap
    - Techniques to counteract pressure and workload
    - Creating trust for independent actions
    - My own programme
- Examples from practical experience
- Exercise examples, working with case examples

Side note: Stress management

How to deal with stress:

Good stress = “positive” stress, eustress (stimulating factor)
Bad stress = “negative” stress, distress

Reasons: Exterior stressors:
- Noise, heat, cold
- Unpleasant smells
- Humidity, bad lighting

Physical stressors:
- Physical or mental over/under-load
- Time pressure
- Night shift, overtime

Emotional – Social stressors:

• Conflict in group = bad working atmosphere
• Insecure job
• Inappropriate acknowledgement
• Unsatisfactory salary

Time management is one way to better handle stress. Good time management means mastering one's own work, instead of being mastered by it.

2.3 Time Management Methods

2.3.1 Setting targets

Target planning and target attainment

When tackling a project or challenge, you should consider your ideal outcome and best case scenario in detail because this vision has greater appeal than the mere desire to solve the problem.
Then, look for practical ways to reach your target. To do this, answer these questions: What means are needed and what measures must be taken to develop the planning project and reach the goal?
Also consider:

- Are you doing the most appropriate things?
- Are you doing things in the most appropriate way?
- How can you change things?

Why are goals so important?

- What does it mean to have personal goals?
- What does it mean to have professional goals?
- What do I want to achieve today, this week, this year?

Set yourself a clearly defined and motivating target that can be underpinned with systematic processes.

Forming goals effectively:

Well-formed goals should:

- Specify what should be achieved
- Be stated in positive terms
- Be measurable
- Include a deadline
- Include a list of responsibilities

2.3.2 Motivation

Undoubtedly, motivation is a crucial factor in planning and implementing a project. If the project leader and team maintain a positive attitude, they will work more efficiently. Consider the following:

- Positive attitude
- Success monitoring
- Sense of achievement
- Methods for handling lack of motivation

2.3.3 Gaining an overview

If you would like to have an overview of all areas of the project, it is helpful to draw up a mind-map covering the entire scope of activity so that you have this displayed visually. It is also useful to identify what resources are available to the project leader.

2.3.4 Setting priorities

There are several useful methods for setting project priorities within a project. We cover some of these below.

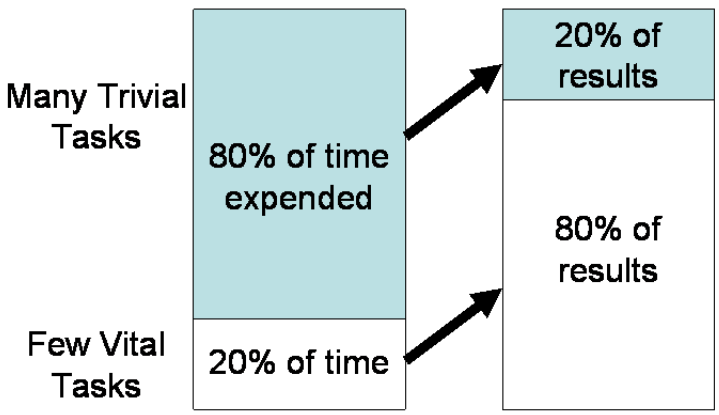
ABC-Analysis
The ABC-Analysis (Program structure analysis) is an analytical method. With this method, tasks or objects are divided into the categories of A, B and C which are ordered by descending levels of priority or importance. (S.2)

A-Tasks are crucial tasks that cannot be delegated
B-Tasks are of medium importance and delegable
C-Tasks are routine and time-consuming. They are of relatively lower importance and include things like storage, administration, paperwork and sorting.
See Attachment 5, 6

Pareto-Principle
The Pareto-Principle or Pareto-Effect, also known as the 80-20 Rule, states that 80% of results, outputs or effects come out of 20 % of the work, inputs or causes. The remaining 20% of the results require 80% of the total time and therefore require the most effort for the least gain. (S.11)

It is useful to take the Pareto-Principle into account when facing a critical situation in your project while under deadline pressure:

- Concentrate on tasks that are most crucial to overall success (e.g. gaining more participants and financial or personnel resources)
- Identify tasks that are heavily time and energy-consuming that have less impact on project goals. Complete these tasks only when you have time or they can be effectively delegated



Eisenhower Method

The Eisenhower Method is a popular method of time and self-management which orders tasks by importance and urgency. Tasks are categorised into one of the following four categories: important/ urgent, important/ not urgent, unimportant/ urgent, and unimportant/ not urgent. See the image below. (S.1)

	URGENT	NOT URGENT
CRITICAL	critical & urgent [do now]	critical but not urgent [do later]
NOT CRITICAL	not critical but urgent [delegate]	uncategorized [delete or move]

Noting down!

Learn to see the difference between urgent and important!

The important tasks are those that lead you to the achievement of your goals and contribute most to your long-term progress. These tasks are often not urgent and, in fact, many urgent tasks are actually not important. (S.17)

The following methods will help you learn the difference between important tasks and urgent tasks. Urgent tasks (e.g. “Could you get me this information quickly?”, “May I quickly ask you about something?”) will not help you reach your goal.

Important tasks will bring you closer to your goal. They are mostly strategic tasks and have extensive, long-term effects.

All tasks which need immediate attention and should be immediately managed are urgent tasks. They are usually quickly completed but can pile up. It is important to note that not every urgent task actually needs to be done. You can delegate them or even abandon them altogether. This is the only way not to be dictated by the urgent at the expense of the important.

3 Minute Rule

Everything you can complete within 3 minutes you must do immediately. Delegation or noting down or trying to constantly memorise tasks will take much more time!

Salami-Tactic
In a project plan, the broader project will be sub-divided into several smaller projects, each with their own timelines and goals. The broader project can become over-whelming so it helps to break it down into smaller steps to be completed one by one. (S.13)

Getting Things Done (GTD)
The Getting Things Done method aims to reduce stress by getting you to write down and organise all tasks for the day. This will allow you to keep your head free of stress so you can concentrate on the task at hand without being distracted. (S.6)

2.3.5 Planning

Time management operates according to the following principle: “work smarter, not harder!”

There are numerous methods and tactics for helping you plan a project which will, in turn, facilitate your project implementation. Generally, planning should always be done in written form so you can go back to it when you have results. Several methods will be described below.

Several time horizons
The strategic (long-term), tactical (middle-term) and operative (short-term) planning are all important and require a different lens. Strategic planning defines the fundamental goals of a company within a time horizon of more than 5 years. Tactical planning (also called middle-term planning) describes concrete operative goals in order to achieve the strategic goals within a time horizon of 2 to 5 years. Concrete resources are allocated and requirements are defined. Operative planning is conducted using the time scale of one year. (S.12)

A-L-P-E-N Method
The ALPEN Method is a comparably easy method for time management, but it is a very effective method that will help you prepare your daily routine. You simply need a few minutes per day to draw up your daily routine. (S.3)

The procedure is divided into five steps:

1. ALPEN – Write down assignments, activities and appointments

- Note down the tasks for the next day
- Add all the left over tasks from the previous day
- Note down and highlight the important appointments

- List planned telephone calls and emails
- Write down any relevant information you might require for these tasks

2. ALPEN – Estimate the length of activities

- Try make a realistic estimate of the time it will take to complete these tasks
- Do not calculate a time frame that is too tight
- Set time limits for tasks and schedule appointments
- Record how long it takes you to complete tasks. This helps you to know how much time you require for a specific task. Don't forget to maintain and revise your time record in case you take more or less time than planned. This will help you plan your time realistically

3. ALPEN – Reserve buffer time

- Allow time buffers for unexpected tasks and events in order to remain stress free. Schedule only 60% of your daily work time leaving 40% free as a buffer zone
- Eliminate disturbances! Divide your plan into do-not-disturb hours and hours where you can allow some distractions. Reserve the do-not-disturb hours for your important tasks
- Take breaks! Regular breaks are essential. Make sure you get enough oxygen, movement or exercise and decent meals throughout the day

4. ALPEN – Make decisions

- Set priorities (by using the ABC method, for example)

5. ALPEN – Recheck

- Add the left-over tasks to the following day or week's plan
- Reflect on your plans (To-do-Lists, Schedule book) and targets at the end of the day

Personal Performance Curve
Planning for the next day in advance is highly valuable. However, you should identify when it is best to do this. There are morning people and evening people – our performance curves run differently. While morning people reach the peak of their daily performance in the morning hours, evening people start to increase their performance slowly in the afternoon time and reach their performance peak in the evening hours. Identify your performance curve and factor this into your planning. (S.5)

Golden Hour
The golden hour is a period of time which is reserved solely for you and your important tasks. Treat it like an appointment with another person. Close off any and all distractions during this golden hour, so that you can concentrate on your work undisturbed. (S.16)

Relief Question
The following questions should be asked of all appointments so you can assess their importance:

- Why do I do this?
- Why must it be me?
- Why must it be now?
- Why is it like this?

Your answers should help you clarify what your priorities are and how to plan around them. (S. 10)

2.3.6 Keeping records

It is important to write things down. It's impossible for us to remember everything and create an effective plan without keeping a written record.
The following is a useful way to plot out actions:
Who? → does **What? (Person in charge/responsible) →** How**? (personnel engaged, material and financial resources used, support required) → Until when? (concrete deadline!) →** "**Completed?**"

It is important to be consistent and disciplined in keeping this record. Don't, however, allow this activity to add unnecessary pressure.

2.3.7 Schedule Preparation

Schedule preparation is a primary task which should be done in the early phase of project. The period covered in the schedule varies depending on the length of the project. A few tips for schedule preparation follow:

Annual To Do List:

Annual goals with deadlines should be listed and well organised at the start of a project. This will give you an overview of how the project will run and possible problems and progress markers.

Quarterly To Do List:
Annual goals should be further broke down into goals for each quarter year/ quarter of the total timeline of the project.

Monthly To Do List:
Goals for **each month** should be listed and organised according to their priority level and frequency. Tasks should be categorised as follows:

- **Have to**
- **Can**
- **Weekly**
- **Daily**

Weekly Level/ Weekly To-Do-List:
Weekly tasks should similarly be ordered by priority and frequency:

- **Have to**
- **Can**
- **Weekly**
- Daily

Daily level/ Daily To-Do-List:
Daily tasks should also be divided into categories of “Have to” and “Can”.

2.3.8 Delegation

You will never be able to do everything on your own in a project. You will need the support of a team. Before you assign project tasks to your team, you should decide which tasks you must do yourself and which tasks to delegate. This is not always an easy process but these questions should help you assess how to manage your tasks and team more effectively and ensure the project stays on track:

4 Relief Questions:

- "Must it be me?" – Can I delegate?
- "Must it be now? – Can I postpone this task?
- "Must it be like this?" – Can I complete this task in another way?

- "Must I do at all?" – Can I leave out some part of this task?

When delegating the work, bear the following steps in mind:

Step 1: Which tasks should you delegate?
To answer this question, first ask yourself: "What should I do myself? What can others do? What is important and urgent? What is less important and can it be finished another day?" Important tasks that you are directly responsible for should be completed by you. Tasks which do not need to be done immediately and are not crucial to the success of your project can be delegated.

Step 2: To whom should you delegate the task?
Volunteers/ team members should be chosen with the following in mind:
What are the abilities and interests of your team members? (competences)
Are they already working at full capacity? (time resources)
How much time will they need for induction?

Step 3: What should I prepare?
When you have found the right person for the job, you should prepare the handover process. Describe tasks clearly: what results do you expect and when do you expect them by? Consult your own to do list when deciding this. Consider what documents and support will be required and how progress will be monitored.

Step 4: Induction process
During induction, the timeframe must be clearly marked out: when do can you do the induction and how much time do you have for it? Who else is available as a contact person? When do you have time for answering questions from volunteers? What additional aids are available?

Step 5: How do you monitor performance?
This should be considered during the project planning as you must define monitoring criteria in advance. The principle of effective progress monitoring is that internal monitoring is better than external monitoring so ask your volunteers to report back as soon as things are done.

Step 6: Who else should be informed?
When you delegate tasks, you delegate responsibility. Other team members or partners working on the task should be notified about this shift so they know who to report to.

Step 7: Feedback
When the task is completed, you should express your appreciation and give some constructive feedback.

2.3.9 Personal Time Analysis

It is essential to have an understanding of your own patterns to be able to manage your time effectively.

1. Survey: How much time do I need and what do I need it for?
To improve your time management, you first should determine where your time goes.

2. How would you categorise the major components of your life?
Think about what you spend the most time on in your life. Is it work? With your family? On hobbies? How much time do you spend on each "component"?

3. Activity Log
To get an overview of how you spend your time, keep an activity log for one week:

- From the time you get up to the time you go to bed, write down exactly how much time you spend on each of your daily activities
- Be sure to pick a fairly average week and not one during a holiday or unusually busy period

Exercise: Fill in an activity log for the last working day

Analyse your activity log

Once you've completed your week's activity log, you can analyse your patterns. Identify which activities you spend most time on. For each activity, ask yourself if you want to spend so much time on it. You might even want to spend more time on certain activities in future. If so, how can you manage your time make up the extra time?
In this way you can use your activity log to create a personal time management plan. Try not to focus on pleasing others and don't judge yourself for how you have spent your time in the past, just focus on finding what works best for you and make the necessary changes.

Detect and reduce time-wasters and disruptive factors

Dealing with time-wasters is a challenge because they are often unexpected. Time-wasters can be divided into two types:

1. **Time wasters from outside**
   - Phone calls
   - Unexpected visitors
   - Time-consuming meetings

2. **Time wasters from inside**
   - Putting off unpleasant tasks
   - Prioritising ineffectively
   - Investing too much time in less significant details
   - Lack of self-discipline
   - Inability to say no
   - Inability to delegate

Here, the **As-is analysis** can be helpful:

As-is analysis:

- How do you set priorities?
- How long did it take you to get to the most important task for the day?
- How often have you been interrupted?
- What habits are stealing my time?
- Who is distracting me from my plans?
- What other time-wasters can I detect

Tips in dealing with timewasters and disruptive factors

- Put an end to the open door policy!
- Block off time for calls, emails and meetings
- Say no without getting frustrated
- Identify, analyse and reduce or eliminate disruptions
- Say no consistently
- Find out:
  - What exactly is expected from you?
  - How much time will you need for this task?
  - How often is this going to happen? Once? Regularly?
  - What consequences will it have for you?

2.4 Further practical tips for project planning

1. Take your time in writing down goals and expectations
2. Set priorities
3. Think through a project and estimate how much time it will take before you take it on
4. Try to limit time spent on unimportant things
5. Create a To Do List of all your tasks and prioritise them. Make sure you stick to it to your list
6. Create a daily schedule
7. Don't spend too much time planning. Aim for a happy medium of planning and fast, effective action
8. Think first, then act
9. Focus more on the results than on the workload
10. Focus on reaching your goals and not on getting it "perfect"
11. Set yourself realistic goals. Don't expect too much from yourself and try to see things in a more relaxed way
12. Change your perspective
13. Always remember: Good is better than perfect!
14. Keep an eye on the deadlines without putting pressure on yourself
15. Work consistently
16. Set a strict deadlines and time limits
17. Improve the efficiency of your timing
18. If it can be done in three minutes or under, do it immediately
19. Be less reactive and more proactive
20. You cannot avoid all the risks
21. Make decisions even if you have less information than you would like
22. Do not spend too much time analysing things
23. Just do it – do not always expect instructions
24. Be self-confident
25. Solve problems – even interpersonal ones. Usually, problems won't solve themselves
26. Listen actively and stay focused in conversations with others
27. Speak clearly, be assertive when making a request
28. Say no more often
29. Consult others when adjusting priorities and tasks
30. Be less competitive and more team-orientated
31. Be patient
32. Do not expect as much from others as from yourself
33. Do not overwhelm others with too much at once
34. Keep your desk tidy and your files well organised
35. Finish one task before you start another one
36. Do not let yourself be interrupted or distracted too often
37. Avoid personal interruptions and limit time on personal conversations during work hours
38. Be open to and actively look for new ways of doing things instead of staying in your comfort zone
39. Have a positive attitude to change, it enriches your life!
40. Relax. Take time for the good things in life

Attachments

1. Project, work and organisation planning
2. Guide to planning and implementing an event
3. To Do List (priorities)
4. Priority Matrix
5. The Priority Matrix (according to Eisenhower)
6. Week Plan
7. To Do List
8. The 10 W's
9. Daily schedule
10. To Do List (tasks)
11. Exercise: Purpose and aim in life

Attachment 1:

Project, work and organisation planning

Tasks	**Deadline?**	**Who?**	**How? or important additional info**	**Completed (Date)**
Fundamentals				
Primary and secondary goals determined				
Target group determined, number of participants defined				
Concept developed –strategies, assessments and responsibilities				
Internal and external expenses determined				
Budget plan set				
Finances planned, (if necessary) cooperative partner found, budget determined				
Dates/ schedule				

Tasks	**Deadline?**	**Who?**	**How? or important additional info**	**Completed (date)**
Process planning & administration				
Authorised by				

Tasks	Deadline?	Who?	How? or important additional info	Completed (date)
Task field 1				
Task field 2				
Task field 3				

Tasks	Deadline?	Who?	How? Or important additional info	Completed (date)
Task field 4				
Task field 5				
Task field 6				

Tasks	Deadline?	Who?	How? or important additional info	Completed (date)
Task field 7				
Task field 8				
Task field 9				

Attachment 2:

1. Summary: What is it about?
2. What will be achieved? (Key objective and Median objective)
3. Who is the target group/ audience?
4. Background: What is starting point/ status quo? (Analyse the actual situation)
5. Vision: What do various participants/ people concerned/ surroundings gain from the project? What are the benefits/ added value gained if the project runs successfully?
6. What goals will be followed up on? What practical steps will be taken to achieve goals (activity plan and work plan)

For example:

   a. What is the time frame for the project?
   b. Where will the activity take place?
   c. How many people should participate?
   d. How should these participants be reached?
   e. What steps will follow? (according to individual goals for action)
   f. How would the project me promoted? (e.g. should advertising material be printed?)

7. What resources will be required and/or are available? (personnel, material, financial, non-material)
   - Financial planning
   - Personnel planning
   - Inventory

8. Rules of Working together
   - Who will take which tasks/ responsibilities?
   - How will the team communicate?
   - Who is allowed to make decisions?

9. Evaluation: How will progress be monitored? What are the project milestones?

Attachment 3:

Guide to Planning and Implementing an Event

Pos.	Milestone	Documents/ aids
1.	**What is it about?** Rough outline of the event concept	
2.	**What is planned?**	
2.1.	**What do we want to achieve?** Define goal	
2.2.	**Who do we want to target?** Identify target group/ audience	
2.3.	**What form will the event take?** Style and content	
3.	**How do we want to implement it?** Project planning	
3.1.	**When and how often will the event take place?** **How long will it last?** Define a timeframe	
3.2.	**Where will it take place?** Possible locations for the event	
3.4.	**What is the budget? How do we fund the event?** **What do we have and what do we need?** Financial limits, available and missing resources	
3.5.	**Who can support us – content, budget, resources?** - Research existing suppliers - Contribution from partners or supporters - Contribution from financial and material resources - Coordinate a support network (what is the communication channel?)	
3.6.	**What tasks must be completed? Who will be responsible for what? Who will lead the project?** Work and organisation plan	
3.7.	**How will we communicate?** Define a communication process	
3.8.	**What regulations or possible risks should we keep in mind?** Legitimate scope, liability and safety	

3.9.	**How can we attract public and media attention?** **How do we advertise ourselves?** - Advertising materials (e.g. posters, flyers, Website etc.) - Images of the work (e.g. photos) - Development of existing networks (personal contacts, telephone acquisition) - Digital tools (E-Mail, Facebook etc.) - Regional Media (Online, Print, Radio, TV) - Other local public channels	For example: Flyers and posters
4.	**How will we evaluate our work?** Evaluation and Monitoring	
4.1.	**How do we document our work? How do we prove we achieved our goals?** Documenting work - Define what should be documented and how this will b done - Photos - Reports, documentation, records - Adapt documentation/ records to target group	
4.2.	**Have we achieved our goals?** Evaluate results - Define evaluation criteria - Develop evaluation tool - Who will take charge of evaluation/ feedback? - Monitoring (review results of evaluation and if necessary processes)	

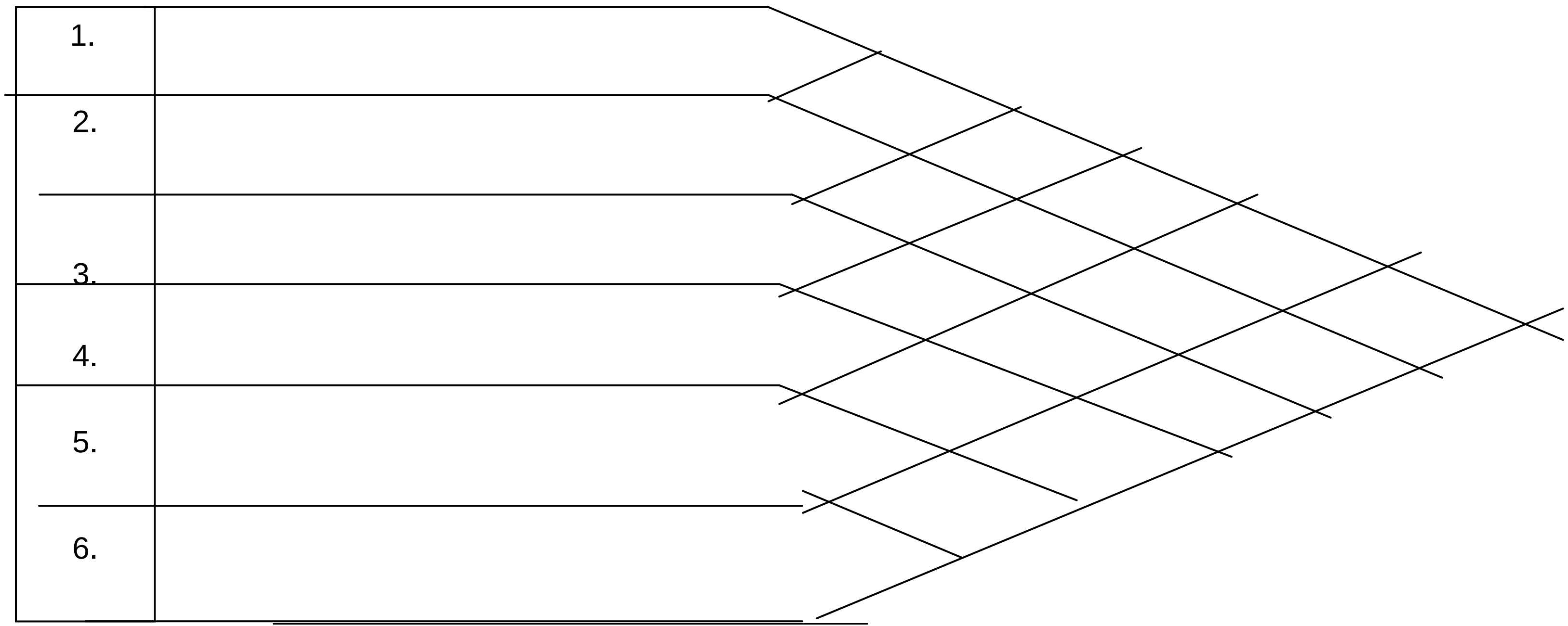
Attachment 4:

To-Do-List (according to priority) Name: ……………………………..

Priority A	Priority B	Priority C

Attachment 5:

Priority Matrix Method for Decision Making



Each suggestion will be numbered.
Each suggestion will be compared with another suggestion.
The number of the most popular suggestion will be written in the matrix.
The priority matrix can be extended.

Attachment 6:

Priority Matrix (according to Eisenhower)

	URGENT	NOT URGENT
CRITICAL	critical & urgent [do now]	critical but not urgent [do later]
NOT CRITICAL	not critical but urgent [delegate]	uncategorized [delete or move]

Attachment 7:

Weekly Schedule

Date: from______ till_______

	Time	Monday	Tuesday	Wednesd	Thursday	Friday	Saturday	Sunday
Fixed appointments								
Flexible appointments								
Urgent								
Miscellaneous								
Weekly goal:								

Attachment 8:

To Do List –

Meeting		
Participants		
Date:		
Time:	**From:**	**Until:**
Place:		

	Topic	Responsible pers	Appointme note
	1.		
	2.		
	3.		
	4.		
	5.		
	6.		

Attachment 9:

The 10 Questions for every Project

Topic and Need

1. Who are we? How do we meet? Which abilities, competencies and time resources do I/ we bring?

2. Why do we want to do something? What problems and grievances do we see? What needs do we want to address?

Goals and Goal Achievement

3. *For whom* or *with whom* do we want to do something? Who is our target group?

4. *Where* should our activities be directed? What is our goal? What do we want to achieve?

5. *What* do we want to do? Which services do we want to offer? What events do we want to run or what programs do we offer?

6. *How* do we want to work? What form of work, methods and procedures do we want to take on? Who do we want to partner with?

7. Where should our work take place? In what location? What are the surroundings like?

8. *When* should specific activities take place? How does our timetable look? What important dates, deadlines and appointments should be kept in mind?

9. *By whom* should the work be done? How many full-time workers/ volunteers do we need for our work? How do we allocate tasks?

10. *What* resources do we want to work with? What resources do we need?

Attachment 10:

Daily Schedule

Tasks		
☑		Prio
☐		
☐		
☐		
☐		
☐		
☐		
☐		
☐		
☐		
☐		
☐		
☐		
☐		
☐		

Appointments		
🕓		

☑ **Check list**
☐ **Noted down all tasks?**
☐ **Prioritised (A, B, C)?**
☐ **Estimated task duration**
☐ **Planned maximum 60% of time**
☐ **Listed all appointments?**
☐ **Prepared for appointments/tasks?**

☑	**Summary: this day was…**
☐	…just great
☐	…fair
☐	…bad
…and tomorrow will be a great day!	

ProVol Professional Volunteering

Attachment 11:

To Do List (tasks)

Date:______________

What to do?	**How is it important**	**Until when**	☑
|...	① ② ③ ④ ⑤	|....|....|....|	☐
|...	① ② ③ ④ ⑤	|....|....|....|	☐
|...	① ② ③ ④ ⑤	|....|....|....|	☐
|...	① ② ③ ④ ⑤	|....|....|....|	☐
|...	① ② ③ ④ ⑤	|....|....|....|	☐
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|...	① ② ③ ④ ⑤	|....|....|....|	☐
|...	① ② ③ ④ ⑤	|....|....|....|	☐
|...	① ② ③ ④ ⑤	|....|....|....|	☐

Note

Attachment 12:

Exercise: Life Content

You have around 100 hours per week (this excludes time for sleep) which you can use for your own purposes. How do you spend this time?

How often are you active in an area (e.g. Volunteering, culture, sport)?

AREA OF LIFE	Hours	
Work and daily routine (Household, food, hygiene)		
Civic involvement and volunteering		
Social life with family/ friends		
Hobbies/ culture/ intellectual/ spiritual		
Health/ exercise		
Other (anything not included that is important to you)		

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Module 4

Basics of Communication

Module 4
Basics of Communication

Without communication we would not be able to manage our daily life. Linguistic communication is an important part of our social relationships with which we influence transmission of knowledge and information and also actions of others. How we speak or in what situation we communicate can influence how we and what we have said is noticed by our listener and which effect we achieve.
Communication is a difficult process.
Usually we are not aware of this difficulty; we only notice it in certain situations - like if:

a) we fail to express what we want to tell
b) we don't understand our communication 'partner(s)' (e.g. he/she is speaking in a different language or accent, or he/she is not speaking clearly.

Exercise 1:

Warm up

The workshop begins by placing people into pairs either sitting or standing back-to-back. The pairs need to speak the same language so that they are able to understand the instructions given. One person will be given a picture and the other person will be given some paper, a pen/pencil and a clipboard.

•The exercise begins with the person holding the picture describing the picture. The person with the paper and pen/pencil then draws the picture based on the description. The person drawing is not allowed to see the picture or be influenced by anything (such as body language) other than the spoken instructions from the person holding the picture.

•Once the pairs have finished drawing and describing the picture they will then be allowed to compare the 2 pictures. Each pair will be given a few minutes to discuss the pictures and the process identifying what they found difficult and what they found easy.

•The pictures will then be put onto the wall to slowly form a collage of communication.

•This is then followed by a facilitated group discussion to reflect on the activity and communication more widely. This will then be linked into the importance of communication when either managing or undertaking activities alongside volunteers.

Exercise 2:

Feedback amongst participants concerning the topic "communication"

All participants are given a card with a typical 'problem' concerning communication. The problems are all different and could include, for example, mumbling, eye contact and using complex language.

Each person will then role play a short speech ensuring that the communication problem on the card is used within the speech.

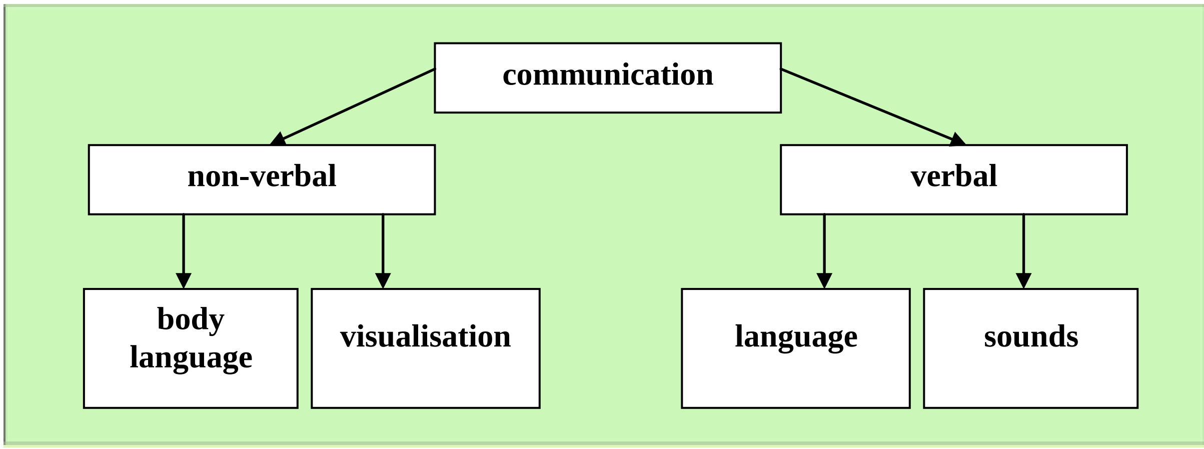
Once a person has delivered their speech other participants are asked to identify the problem.

The results of the feedback round could be as follows:

- **Voice:** mumbling, unclear, speaking too fast or too quiet
- **Body language:** too little eye contact, body language does not fit to spoken content
- **rhetoric:** no self-confidence or persuasiveness, stick too much to one's notes, no clear or illogical structure, too much foreign words, too long sentences, sounds like "ahh", "em"

1. Introduction

When talking about communication, most of us think about the content conveyed by spoken language. However, **body language** and the **sound of one's voice** (non-verbal communication) have consideralbe influence on situations. Body signals are convincing, although the speaker often does not realise that his or her body is talking as well. The general principle is: "Your body is never lying".

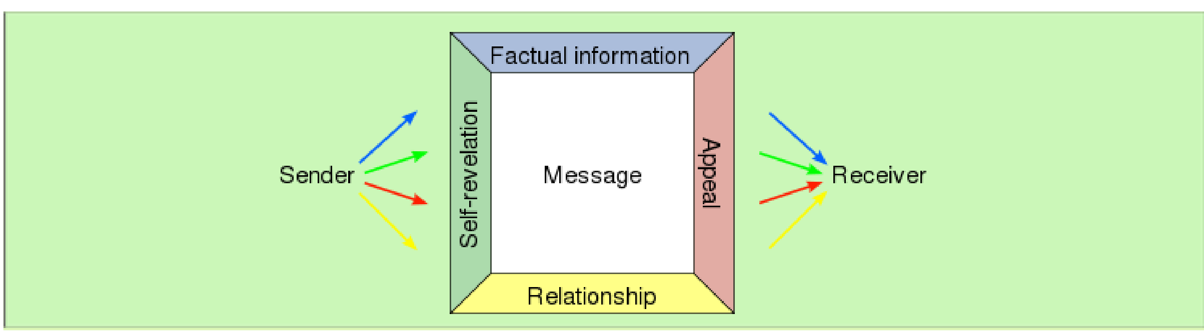


What makes an effective speech?

According to scientific research by the US psychologist Albert Mehrabian (1967), a successful speech takes 35% of its effectiveness from the sound of one's voice, 58% from one's body language and only 7% from the actual spoken content. These results show that an effective speech is not only determined by "what" is said but also "how" something is conveyed.

2. Four-sides model of communication – Schulz von Thun

The four-sides model is a communication model by Friedemann Schulz von Thun. According to this model every message has four facets though not the same emphasis might be put on each. The four sides of the message are fact, self-revealing, relationship, and appeal.



The communication square describes the multi-layered structure of human utterance. It combines the postulate (second axiom) of Paul Watzlawick, that every communication has content and a relationship aspect, with the three sides of the Organon model by Karl Bühler, that every information contains something about the matter, the sender and the receiver. Such models are familiar in the linguistic as models of the speech act.

- **The matter layer (Factual information) → What I inform about**
  On the matter layer the sender of the news gives data, fact and statements. It is the task of the sender to send this information clearly and understandably.
  The receiver proves with the Matter ear, whether the matter message fulfils the criteria of truth (true/untrue) or relevance (relevant/irrelevant) and the completeness (satisfying/ something has to be added).
  In a long-term team the matter layer is clear and needs only a few words.

- **The self-revealing layer → What I reveal about myself**
  In all news there is information about the sender. On the layer of the self-revealing or self-disclosure the sender reveals himself. This message consists of conscious intended self-expression as well as unintended self-revealing, which is not conscious to the sender. Thus, all news becomes information about the personality of the sender. The self-revealing ear of the receiver perceives which information about the sender is hidden in the message.

- **The relationship layer → What I think about you and how we get along**
  The relationship layer expresses how the sender gets along with the receiver and what he thinks about him. Depending on how he talks to him (way of formulation, body language, intonation ...) he expresses esteem, respect, friendliness, disinterest, contempt or something else.
  Depending which message the receiver hears with relationship ear he feels either depressed accepted or patronised. A good communication is distinguished by communication from mutual appreciation.

- **The appeal → What I want to make you do**
  Who states something, will also affect something. This appeal-message should make the receiver do something or leave something undone. The attempt to influence someone can be less or more open (advice) or hidden (manipulation).
  On the Appeal ear the receiver asks himself: "What should I do, think or feel now?"

Example:
Two people are eating a home-cooked meal together.
The one who did not cook says: "There is something green in the soup."

Sender:

Matter layer:	*There is something green.*
Self-revealing layer:	*I don't know what it is.*
Relationship layer:	*You should know what it is.*
Appeal layer:	*Tell me what it is!*

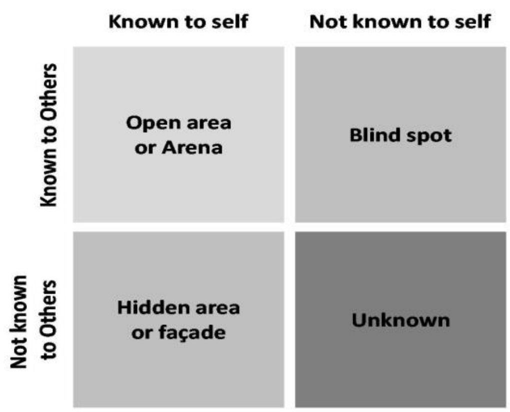
Receiver:

Matter layer:	*There is something green.*
Self-revealing layer:	*You do not know what the green item is, and that makes you feel uncomfortable.*
Relationship layer:	*You think my cooking is questionable.*
Appeal layer:	*I should only cook what you know in the future!*

The other answers: "If you don't like the taste, you can cook yourself."

3. Johari-Window

The Johari-window is a technique created in 1955 by two American psychologists, Joseph Luft and Harrington Ingham and is used to help people better understand their relationship with self and others.



The Johari Window Model

The description of the Johari-Window is as follows:

- **Open/self-area or arena**
  Here the information about the person their attitudes, behaviour, emotions, feelings, skills and views will be known by the person as well as by others. This is mainly the area where all communication occurs. The larger the arena becomes the more effectual and dynamic the relationship will be. 'Feedback solicitation' is a process which occurs by understanding and listening to the feedback from another person. Through this way the "open area" can be increased horizontally decreasing the blind spot. The size of "the area" can also be increased downwards and thus reduce the hidden and unknown areas through revealing one's feelings to another person.

- **Blind self or blind spot**

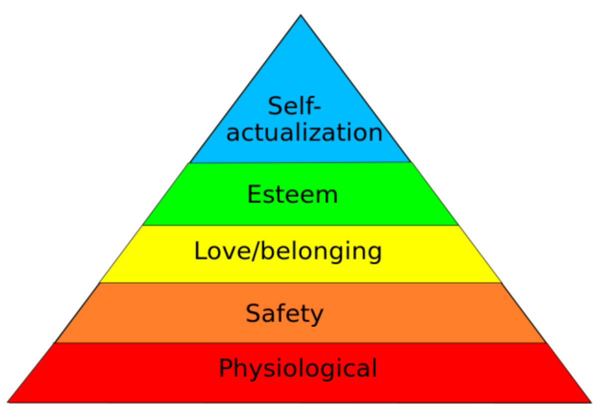
Information about yourselves that others know in a group but you will be unaware of. Others may interpret you differently than you expect. The blind spot is reduced through efficient communication through seeking feedback from others.

- **Hidden area or façade**
  The information that is known to you but unknown to others. This can be any personal information which you feel reluctant to reveal. This includes feelings, past experiences, fears, secrets etc. we keep some of our feelings and information private as it affects the relationships and thus the hidden area must be reduced by moving the information to the open areas.

- **Unknown area**
  The information which you and others are unaware of. This can be due to traumatic past experiences or events which can be unknown for a lifetime. The person will be unaware till they discover their hidden qualities and capabilities or through observation of others. Open communication is also an effective way to decrease the unknown area and thus to communicate effectively.

4. Maslow's hierarchy of needs

Maslow's hierarchy of needs is a theory in psychology proposed by Abraham Maslow in 1943. Maslow subsequently extended the idea to include his observations of humans' innate curiosity. His theories parallel many other theories of human developmental psychology, some of which focus on describing the stages of growth in humans. Maslow used the terms "physiological", "safety", "belongingness" and "love", "esteem", "self-actualization" and "self-transcendence" to describe the pattern that human motivations generally move through. Maslow's hierarchy of needs is often portrayed in the shape of a pyramid with the largest, most fundamental levels of needs at the bottom and the need for “self-actualization” at the top.



The most fundamental and basic four layers of the pyramid contain what Maslow called "deficiency needs" or "d-needs": esteem, friendship and love, security, and physical needs. If these "deficiency needs" are not met – with the exception of the most fundamental (physiological) need – there may not be a physical indication, but the individual will feel anxious and tense. Maslow's theory suggests that the most basic level of needs must be met before the individual will strongly desire the secondary or higher level needs.

- **Physiological needs**

  Physiological needs are the physical requirements for human survival. If these requirements are not met, the human body cannot function properly and will ultimately fail. Physiological needs are thought to be the most important; they should be met first. Air, water, and food are metabolic requirements for survival in all animals, including humans. Clothing and shelter provide necessary protection from the elements.

- **Safety needs**

  With their physical needs relatively satisfied, the individual's safety needs take precedence and dominate behaviour. In the absence of physical safety – due to war, natural disaster, family violence, childhood abuse, etc. – people may (re-)experience post-traumatic stress disorder or trans-generational trauma. In the absence of economic safety – due to economic crisis and lack of work opportunities – these safety needs manifest themselves in ways such as a preference for job security, grievance procedures for protecting the individual from unilateral authority, savings accounts, insurance policies, reasonable disability accommodations, etc. This level is more likely to be found in children because they generally have a greater need to feel safe.

Safety and Security needs include:

- Personal security
- Financial security
- Health and well-being
- Safety net against accidents/illness and their adverse impacts

- **Love and belonging**

  After physiological and safety needs are fulfilled, the third level of human needs is interpersonal and involves feelings of belongingness. This need is especially strong in childhood and can override the need for safety as witnessed in children who cling to abusive parents. Deficiencies within this level of Maslow's hierarchy – due to hospitalism, neglect, shunning, ostracism, etc. – can impact the individual's ability to form and maintain emotionally significant relationships in general, such as friendship, intimacy or family

According to Maslow, humans need to feel a sense of belonging and acceptance among their social groups, regardless whether these groups are large or small. For example, some large social groups may include clubs, co-workers, religious groups, professional organisations, sports teams, and gangs. Some examples of small social connections include family members, intimate partners, mentors, colleagues, and confidants. Humans need to love and be loved – both sexually and non-sexually – by others. Many people become susceptible to loneliness, social anxiety, and clinical depression in the absence of this love or belonging element.
This need for belonging may overcome the physiological and security needs, depending on the strength of the peer pressure.

- **Esteem**

All humans have a need for feeling respected; this includes the need to have self-esteem and self-respect. Esteem presents the typical human desire to be accepted and valued by others. People often engage in a profession or hobby to gain recognition. These activities give the person a sense of contribution or value. Low self-esteem or an inferiority complex may result from imbalances during this level in the hierarchy. People with low self-esteem often need respect from others; they may feel the need to seek fame or glory. However, fame or glory will not help the person to build their self-esteem until they accept who they are internally. Psychological imbalances such as depression can hinder the person from obtaining a higher level of self-esteem or self-respect.

Maslow states that while he originally thought the needs of humans had strict guidelines, the "hierarchies are interrelated rather than sharply separated". This means that esteem and the subsequent levels are not strictly separated; instead, the levels are closely related.

- **Self-actualisation**

"What a man can be, he must be." This quotation forms the basis of the perceived need for self-actualisation. This level of need refers to what a person's full potential is and the realisation of that potential. Maslow describes this level as the desire to accomplish everything that one can, to become the most that one can be Individuals may perceive or focus on this need very specifically. For example, one individual may have the strong desire to become an ideal parent. In another, the desire may be expressed athletically. For others, it may be expressed in paintings, pictures, or inventions.

5. Basic requirements for a good speech

5.1 Self-confidence

- **Say "YES" to yourself**
  Enter a talk or speech with a positive attitude.
  The keyword is: "self-fulfilling prophecy" – if you think that you will not convince your audience, you probably will not.

- **Develop mental strength and focus on your strengths**
  Imagine situations you easily managed to convince. Try to remember what made these situations successful. Think about things you are good at (i.e. arguing well, telling stories vividly, including the audience), and emphasise these.

- **Relax and enter a speech or a presentation with a good mood**
  Have a good time the evening before your speech, smile and breathe deeply.

- **Accept your restlessness and nervousness**
  But beware! Never state that you are excited, the audience will notice anyway. Otherwise you indicate the audience that you are not prepared and they will not listen to you before you have even started properly.

- **Everyone, also you, is allowed to make mistakes**
  But it is important to keep cool when making mistakes: "To err is human"

- **Relativise the real importance of the communication situation**
  "Learning to speak in front of people is like learning to swim. The best teacher is practice, the biggest obstacle is fear."

5.2 Human power of persuasion

- **Expertise**
  For more see "good preparation". It was repeatedly stressed that security regarding the content plays a very important role.
- **Enthusiasm for the subject**
  "*What you'd like to ignite in others must burn within yourself!"* (Augustine)
- **Rhetorical presentation - comprehensibility**
  Simplicity of language, short sentences, empathy (put yourself in the position of the listener), work with pictures / examples that fit the lives of the listeners
- **Naturalness, credibility and authenticity**

5.3 Self-representation

- **Appearance**
  Suitable for the situation and for yourself, but choose a style you still feel comfortable with (i.e.: avoid new shoes that don't really fit).

- **Good overall condition and secure standing**
  Be free and viewable for the audience. Don't focus on a particular object, person or piece of furniture. When talking to a person, show him or her both shoulders, speak frontally to him or her

- **Eye contact**
  "Circling eye contact"- If you have difficulties to look around the room, try to have eye contact with a person you know and who agrees with you – at least at the beginning. But try to look at all, only then will they feel addressed by your words.
- **Good accordance of form and content.** Shortness and conciseness, structure and order to adapt to the world of the audience

5.4 Good preparation

- Define your **interests** and **goals.**
- Analyse the actual and the desired situation.
- Think about the different aspects of the topic; distinguish between **optional, debit** and **discretionary content**.
- Prepare- which **target group** am I addressing? How can I reach them best? What interests do they have? Develop good arguments, design and weigh the contents so that they fit to the target group.
- Generally: **Less is more**! Have fewer arguments, but good and illustrative examples, which stress your points
- Think in advance about possible objections and difficult blockages and consider strategies how to deal with them
- Set your course of action (Organisational plan or meta-plan collage)

Structure your speech clearly and organise your thoughts in a logical way

A clear thread must run through your speech. At the beginning, mention the points you would like to treat during your speech (i.e. 1 .... 2... 3... 4...). Thus you provide a rough script of your speech. You can also structure your speech with time limits (i.e.: "Now I will talk five minutes about XYZ.”). But then absolutely stick to your set limits!

Make cheat sheets as reminders, even for short speeches!

As a result, you will be forced to restructure your thoughts and to reconsider your arguments. As a benefit is provides additional security. Two principles are to be kept in mind: Only note down keywords, not complete sentences! Only your final sentence should be written down completely.

Don’t hide your cheat sheet (this often leads to difficulties in finding and reading it!). Use enough paper and write your keyword big enough.

Do not try to hide or cover up uncertainties

This is "wasted energy"! Uncertainties often lead to fixations. Accept your fear and try to apply strategies to overcome these uncertainties. Focus on your strengths!

7. Questioning techniques

"The open question"

The question word is usually set at the beginning of the open question. The answer cannot be "Yes" or "No". It should mostly be answered in the entire sentence.

Examples: "Where are we going to have breakfast today morning?"
"How did you like the movie?"

"The closed question"

For the closed question, the verb (helping verb) is set at the beginning of the sentence. The answer can solely be "Yes", "No" or "Maybe".

Examples: "Would you like some ice cream?"
"Did you like the movie?"

It is very useful to ask an open question in order to receive a specific answer. Only at the end of the conversation you may choose to ask the closed question against the non-stop speakers and waverers.

Types of questions

Now you see the differences between the open question and the closed question. Beyond that, there are ten different types of questions which are differentiated from each other and those can help you to manage your communication in various situations.

1. "The information question"

. Such a question normally begins with "How", "When", "Where", "Who" or "How much".

Example: "When will your house be finished?"

2. „The alternative question"

By using alternative question, you give your conversational partner two positive options.

Examples: "Should I pick you up at 06.00 or 07.00 pm?"

"Would you like a cup of coffee with milk or with cream?"

3. „The suggestive question"

By using suggestive question, you as a questioner attempt to influence your conversational partner for your own interest. Commonly the key words for this kind of question are those words such as "but", "well", "too", "definitely" or "certainly".

Example: "Don't you agree…..?"

4. "The Yes-way-street"

You may use this question technique whenever you would like to receive the "Yes- answer". In order to reach that, you have to ask several Yes-questions until you ultimately receive a suggestive assessment. This technique is particularly recommendable to use at the end of the conversation.

Examples: "Do you like to watch movies?"

"Do you usually like to go to the cinema?"

"Do you prefer going out with another person instead of going out alone?"

This then sets up the conversation and inevitable question of going to the cinema together this evening.

5. "The rhetorical question"

"In the field of rhetorical questions, you must ask the question and answer this question right away yourself. This kind of question is often used in presentations because you can indirectly force the listeners to follow you. Your listeners cannot do differently than being inwardly occupied with your question."

6. "The counter question"

You use counter questions in order to answer your conversational partners' questions. The advantage of this technique is to save time through using the counter question. This is very advisable, especially, whenever you spontaneously do not know the answer or would like to ask a provocative question in return. Through this kind of question you can at least push the problem temporarily to your conversational partner instead of having it on your back.

Example: "What do you mean?"

"How should I understand your question?"

7. "The motivational question"

With a motivation question, you can persuade your conversational partner to come out of their shell and begin to participate in the conversation.

Example: "How have you managed to have such excellent results in your exam?"

8. „The provocative question"

Caution, you may attack your conversational partner with the provocative question directly. You should use this kind of question in specific circumstances. One thing you have to bear in mind: You make no new friends with this kind of question technique!

Example: " Why is your roommate much better than you in the exams?"

9. “The control question“

You can check an agreement between you and your conversational partner by asking a control question. This question technique is very important: The earlier it exposes, that things are not ultimately clarified, the better you can still handle the situation. Otherwise, the results will only come out unsatisfactorily.

Example: “Is there any question left unanswered?”

10. “The trick question”

You may learn something more which you cannot ask directly through the use of trick question because asking directly may not gain a response

Example: “When did you graduate?” (So you can discreetly find out how old someone is).

8. Feedback

“I did not know what I said before I heard the answer of the opposite person.”

*(*Paul Watzlawick)

8.1 Definition

Feedback is:

- a way of learning and not criticism,
- voluntary and for the benefit of the speaker
- less about "What?" than about "How?”
  (==> Conflict-Free Communication)

8.2 Aims

- a chance to assess one’s strengths and weaknesses better
- for better working environment

8.3 Rules for <u>giving</u> feedback

- Describing not rating
- Focusing on behaviour
- Formulating concrete observations
- acting promptly
- talking to the participant personally
- formulating I-messages
- criticising constructively

- formulate politely and appreciatively
- do not forget positive aspects
- balancing pros and cons

8.4 Rules for receiving feedback

- do not interrupt the person speaking
- do not justify your speech
- rethink your speech critically
- be thankful

Exercise 2:

Build tandems (groups of two) and let them train the feedback-rules by giving each other feedback.

9. Moderation

Self-confident moderation is key to a successful presentation, seminar or workshop.

9.1 The moderator

Role:

- Facilitator
- “midwife” for ideas
- Is in the area of tension in between methodical control and absolute neutrality

Task:

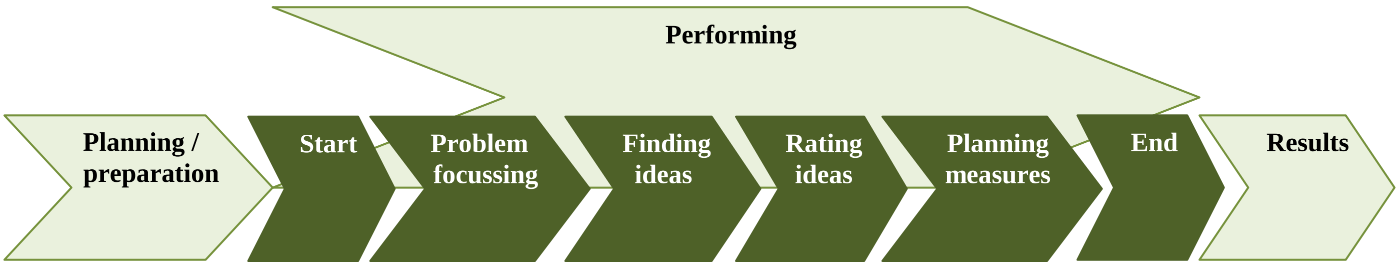
- Coaches the participants and the communicational process
- Is responsible for the improvement in inter-human communication
- Clear up formalities
- Get an overview (topics, action, methods)
- Arranges rules
- Time management
- Keeps an eye on the red thread
- Controls group-work
- Keeps asking and makes the results transparently
- Keeps the conversation going
- Summarises at the end

Precondition:

- Does not influence content development

- Needs acceptance of the whole group
- Needs method knowledge and is confident dealing with moderation techniques
- Flexibility: situations often require adaptations
- A moderator has to know when he/she has to be very strict in leading and sometimes even restricting others and when is the timing for letting more space

9.2 The presentation progress



Planning/preparation

- Aims and contents (roughly)
- Analysing the target group
- Clearing up the circumstances (incl. organisational frame)
- Choice of prospective methods and techniques
- Send agenda and needed material

Start

- Welcoming, introducing and presentation of topics
- Rules for workshop
- Role of presenter
- expectation query

Problem focussing

- introducing problems/topics and clear formulation of questions or aims
- presenting discussion and results up to now

Finding ideas

- generating ideas
- work on questions or aims

Rating ideas
- checking ideas trough rating techniques
- prioritise ideas

Planning measures
- create work breakdown structure with clear time schedule and clear responsibilities for each task

End
- review workshop/group work
- participants give feedback
- future prospects and next steps

Results
- protocol of results (minutes)
- resuming workshop, pointing out deadlines and responsibilities
- anything unclear?

9.3 Organisational planning

The organisational preparation of a team meeting also means preparing the space. The required materials and the technology should be provided, the seat arrangments should be planned, if necessary drinks and biscuits could be provided. As a seat order for teams the U-shape is often suitable, for example, the semicircle.

Material check list	
Needed materials	**Recommendation on quantity**
Wrapping paper/brown paper (125x150 common movable walls)	3 sheets (per participant/day)
cards in (at least) 4 colours and shapes	80 cards (per participant/day)
Thick black fibre-tip pens	1 for each participant
Fibre-tip pens in (at least) 3 colours, thin	3 for each participant
Glue stick	1 for each participant
Sticky dots in 2 colours (for rating)	about 30 for each participant
Movable walls	10-12
Scissors, pins, sticky tape	as required

9.4 Common types of communication in meetings/ discussions

According to Malorny/Langner, there are eight different categories of communication you can observe in meetings or discussions:

1. enthusiast
2. talkative
3. tough
4. argumentative
5. omniscient (the all knowing)
6. pessimist
7. superhuman
8. the inquirer (questioning everything)
9.

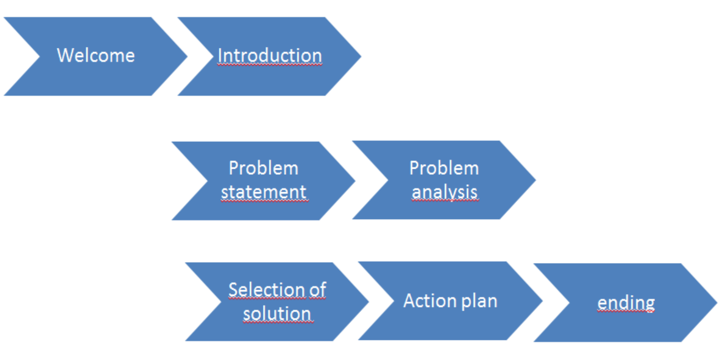
As a moderator it is your job to respond and handle each of them in an appropriate way: e.g. the enthusiast needs to be motivated in ways that he/ she is contributing effectively, stopping the talkative in the right moment demands a lot of skills and the tough one can be encouraged to contribute by provocative questions. It is even more difficult to adopt a neutral position when you are attacked by the argumentative or to demonstrate the omniscient that other people have a say as well. The pessimist should be encouraged to contribute in a positive way and the superhuman needs to be grounded and supported to think about current problems. The inquirer can be encouraged to share his/ her personal point of view.

9.5 Moderating meetings

Meetings can be useful, important or a waste of time because you didn't meet the point/ you got lost in a discussion/ there wasn't enough time to finish the topic or you leave the room without any results. The shared factor of a successful meeting is that all relevant information is shared and discussed immediately. Meetings are either informative or focused on solving a problem. The first ones are aimed at reducing shortcomings in knowledge. e.g. regular meetings of the project team, of team coordinators or bigger events like employees meeting. The second type (the problem solving meetings) demands more attention because all of the participants should contribute to the discussion

Phases of a meeting

In general you can follow this scheme (problem focused meeting):



Welcome

Welcome and – if necessary – short introduction of the participants, presentation of schedule and explanation of the procedure/ rules (when do we have breaks in between) etc.

Introduction

Clarify the goal of the meeting. If there are any ambiguities they have to be cleared immediately. Visualise the joint goal, e.g. on flipchart.

Problem statement

Open the discussion with an introductory question. Use methods of “brain storming” to develop the problem statement.
Example: “What are the key aspects of this topic we have to deal with?”

Problem analysis

Collect possible solutions. In the first phase there should be no judgement – every suggestion is welcomed. To discover correlations and cause-effect-relationships effectively, it is useful to apply „quality techniques“. Afterwards you collect all the alternatives of problem solving.

Selection of a solution

The alternatives should be discussed and rated. If possible the group decides on a rating scheme and starts to categorise the different suggestions.

Action plan

Once the group has decided on the goal you have to develop an action plan. E.g., a working plan differentiating the tasks, the responsible persons and deadlines.

Ending

As a moderator you should summarise all the results of the meeting in the end. Visualise them and explain the following steps to take. This includes agreeing on an additional date for a follow-up meeting and controlling the working plan.

At the end of the meeting you should get some feedback. The following questions could be helpful:

- Was the topic easy to understand?
- Was the schedule introduced and hold?
- Was the time-frame of the meeting hold?

- Was the moderator neutral?
- Did the moderator show a friendly and motivating attitude?
- Did the moderator contribute to the problem solving?
- Did every participant get the chance to say something?
- Did we achieve the aim of the meeting?

Appendix 1: talking in front of groups: strengths and weaknesses analysis

Imagine situations where you've talked in front of an audience:

What are or were your…	***How can you …***
…strengths?	***…boost your strengths?***
…weaknesses?	***…dull your weaknesses?***

Appendix 2: FEEDBACK questionnaire for a presentation

		very good	++	+	0	-	--	too be improved
content		objectively correct, adequate weighting of main and side points						objective mistakes, important points too short side points too detailed
structure		clearly recognisable, target-orientated, helpful for the audience, red thread						not understandable, unskillfully, confusing
rhetoric	language	understandable in sentence structure and choice of words, firm in expression						not understandable, inconvenient, insecure, inappropriate
	way of speakir	clearly, appropriated, vary in volume and emphasis						unclear, too quiet or too loud, monotone
	speech rate	balanced, dynamic, good with speaking breaks						too fast, no breaks, stumbling, blackouts
	stylistic device	effective, dramatic, exciting, thrilling						monotone, without highlights
body language	eye contact	everyone feels spoken to, presentation by heart						is missing, insecure, read off paper
	gestures/ attitude	emphasises the statement open and friendly, appeals to audience						blocked, locked, averted, stiff, exaggerated
	facial expression	friendly, relaxed						tensed
visualisation		significant charts, clear description, clear tables						no or overloaded charts, tables without statements, inappropriate use of media
use of media		right timing, experienced technology, preparation						unskilled, blurred settings, not readable
creativity		special idea, shrewdly transmission of content, focus on the core						fanciless, little surprising, causes little interest
effect		Do the observers get reached?						Regardless to the observers

Erasmus+
VOLUNTEERING MATTERS
dobrovolnické centrum
Voluntariat Centrul de Voluntariat Cluj-Napoca
Gemeinsam leben & lernen in Europa e.V.

Appendix 3: "roleplay convincing the public"

1) EXTERNAL and inspiring person

You are convinced that the grown-ups should get a voice and that they should contribute something to be an active part of the community. You are presenting your idea in front of a group of politicians, hoping for some support in the local council.

Instructions: Present your idea trying to convince the politicians and encourage them to become an active part in implementing the idea.

2) MODERATOR

Tell the group that you are going to moderate the discussion as an external expert: The meeting will be moderated effectively and goal orientated.

ATTENTION: Your role is neutral!

3) CONTACT PERSON – the enthusiastic

You are completely convinced that the participation of the youth in decision making is essential. You are very enthusiastic about the project plans and invited the external, inspiring person to this meeting. Maybe that is a way to attract new members for your party.

4) MEMBER 1 – supporter with limitations

In general you are always interested in new ideas and projects. However, you have family obligations and are uncertain about how to manage a new project with your restricted time resources.

5) MEMBER 2 – critical supporter

You are really not excited about getting a lot more work to do. In general you are open towards the new idea. But there is one thing annoying you: there are always the critics in the team, never listening to the idea but immediately starting to emphasise their criticism. That sucks!

6) MEMBER 3 – enthusiastic supporter

You love it when something new is happening and at the same time improving the reputation of your party. It is THE opportunity to attract the youth – no way that anyone is against the idea.

7) MEMBER 4 – the over-burdened hard-working one

They are expecting too much – when you started working for this party you wanted to contribute 10 hours a week, but recently it happens that you are working 20 hours at least! And you can clearly see that you will be the person doing all the crap – and the person initiating the project is going to enjoy his/ her 10 minutes of fame. No way!

8) MEMBER 5 – the worried one

You have so many worries and think that your party should not change anything, as it is doing a good job. It is better to focus on the traditional target groups – seniors and families. That is enough work. What would be YOUR benefit of supporting an external person? **Instructions**: Do not let the others speak out and interrupt the moderator

9) MEMBER 6 – the critical

You really can look through it: it's all about the public attention! It's all about the prestige of one particular person. The idea itself will lead to nothing.
Instructions: share your doubts and confront the inspiring person with your concerns.

10) MEMBER 7 – the troublemaker

The idea is nonsense. Maybe you should quit being a member of this party as you stop identifying yourself with it.
Instructions: Be talkative – talk whenever you want to, without being invited to speak. Talk about completely different issues. If someone is trying to stop you or not letting you speak out, start complaining: They are ALWAYS interrupting you! They are excluding you! Threaten them to go to the media and initiate a press scandal.

11) OBSERVER 1

You are observing the meeting and documenting it.
Some examples:

- Who starts talking?
- How is meeting started and closed?
- What different phases can you observe?
- In which ways do the participants present themselves?
- Who is dominating the discussion?
- is it a successful team meeting?

12) OBSERVER 2

You are observing the meeting and documenting it.
Some examples:

- Who starts talking?
- How is meeting started and closed?
- What different phases can you observe?
- In which ways do the participants present themselves?
- Who is dominating the discussion?
- is it a successful team meeting?

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Module 5

Teambuilding and conflict management

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Teambuilding and conflict management

Teambuilding

Phases of teambuilding

Most of the teams never reach their "performing" phase, because of getting exhausted in the "storming" and "norming" phases.

Please note that the phases are flexible and teams will constantly move between them. Analying which phase is dominant right now, could help to uncover disputes and find compromises. This will help to improve the factual level as well as the level of interaction.

PHASE	FORMING	STORMING	NORMING	PERFORMING
Cooperation between human beings = level of interaction	orientation	conflict	organisation	mutual trust
Organisation of work = factual level	improvisation	Strategy	Structure	Targeted working

a) Forming-Phase (Orientation)

People come together trying to present themselves in the best way possible. People have particular expectations and are looking for their unique role within the group. They start getting to know each other, share information, discover the common goals. **Conformity** is dominating this phase of orientation. Yet there is still no common understanding of the working tasks or the overall goal.

→ Achievement of trust and reliability

b) Storming-Phase (Conflict)

This is the **most important phase** in the process of teambuilding. Team members realise that they have different points of view, that they prefer different solutions for the same problems or that they do not agree on how to reach their goal. It is important to provide some space to express these issues. Personal disagreements show up and fights of position and power will arise.

Members should be encouraged to make personal statements. Focus on clarifying disagreements and then return to joint goals.

→ It is important to clarify and agree on goals and how to reach by the end of this phase.

c) Norming-Phase (Organisation)

As a reaction to disagreements, social rules will be established. Team members are willing to work together, as a feeling of belonging together develops. It's still important to address conflicts as they arise to prevent long-term troubles from occurring.

→Roles and tasks of the team members are clarified. A group culture arises as well as a feeling of belonging together.

d) Performing-Phase (Targeted working)

Team members identify with the group. A mood of mutual trust and appreciation prevails. Working tasks are done in a constructive way. The group shows a high level of self-organisation. Conflicts or problems can be discussed and solved in feedback meetings.

→ The group is highly productive. Members organise themselves and control each other

Exercise 11:
The right exercise for every phase

Orientation phase: This phase is about getting to know each other. Name games are recommendable at the beginning, but solving simple tasks in the team establishes contacts.

- **Name beating**: The players form a circle, one player stands in the middle of the circle. Everyone tells their name in turn. One player calls out the name of a fellow player. He has to react quickly and say someone else’s name. In the meantime, the player in the middle tries to touch the player whose name has been called out. If he does, these two have to swap places and the game continues.
- **Ball-throw-chain**: The players stand in a circle and the game leader gets a ball. He calls the name of a teammate and throws the ball to him. This one says another name and throws the ball to this person. This continues till everyone got the ball and the game leader is next again. Now a new round is started in which the ball has to be thrown in the same order as the first time. Add more balls with every round to increase the difficulty.
- **Thread-web:** The players sit on the floor. The game leader holds the end of a ball of wool and throws the ball to a teammate. This continues till a net connects all the players. You can say names or characteristics when it’s your turn.

Confrontation phase: This phase is about group dynamic games and exercises. These should speed up the team-building-process.

- **Floating stick**: The players line up in two lines opposite each other. Everyone raises an arm on breast level and points an index finger. Lay e.g. a broomstick over the players' arms. Every player. Must remain in contact with the stick as the team aims to place the stick on the floor. This may sound easy, but will take some time.

- **Spider web**: The game leaders prepare a spider web with ropes or tapes, e.g. between two trees. The wholes of the net have to be big enough for the players to fit through. The task is to get to the other side of the net without touching it. The players have to help each other and for instance lift someone through the wholes.

- **Turn the carpet around**: The team is standing on a carpet. The task is to turn it around without any of the players touching the ground. Any other tools are not allowed.

Cooperation phase: The team is on the way to becoming a cooperating unit. Now, trust games can help to strength the relationship.

- **Blindly leading:** The group is separated into pairs. One of the two gets blindfolded. The one without the blindfold leads the other through an area. You can create obstacles to make it harder.
- **Baking bread:** The players stand in two lines opposite each other and hold hands. This group represents the baker. One player (representing the bread) lies on "the baker's" hands and gets thrown in the air. Please be careful!
- **Tumbler:** Players stand in a tight circle, one in the middle. The one in the middle has to fall in a random direction with his eyes closed. The players in the circle must gently push the falling person in another direction.

Growing phase: The team is now attuned to one another. To keep this mood, relaxing games can be played.

- **Enumerating:** The principle is simple! Start from 1 and count in random order (of people) until everyone has said a number. Each player is only allowed to say one number out loud. A round is finished as soon as two players say the same number at the same time. Then you have to start again.
- **Yes No Black White:** The group gets separated in teams of two. Each couple assigns a moderator and interviewee and have to have a dialogue. The moderator is allowed to come up with three questions, which the interviewee has to answer grammatically and textually correctly. But he or she is not allowed to use the words yes, no, black and white. The duration can be limited in time or till the interviewee makes a mistake.

5.2.3 Needs of groups and preconditions for successful teambuilding

Basic needs of a group -
how do we fulfil them?

1. Having a joint objective

Absolutely — Not at all

2. Mutual recognition and appreciation

3. Cooperative leadership

4. Opportunities for the individual development

5. Mutual trust

6. Manageability of tasks

7. Shared success

8. Collective celebrations

9. Collective rules (reliability, liability)

10. Development

Preconditions necessary to well-functioning teams

Define a clear goal

For everyone to pull together a concrete goal is needed. What effect/result do we want to achieve as a team? This has to be clear for every member. The more the team members can identify themselves with the aim, the greater the chance of success.

- **Ensure the team have all necessary skills and abilities**

To finish a task successfully, different skills and abilities are needed. Make sure that you have people with these in your team.

- **Integrate different personalities**

It is important for a team to have different personalities: idealists, lateral thinkers, mediators, creatives and pragmatics. The team coach must bring these different personalities together and not allow them to clash.

- **Find a manager who is accepted by the whole team**

One person has to take over control and coordination of the team. This person must be able to lead, delegate and appreciate people. This person must be accepted by the whole team.

- **Find the right size team for the task**

Every team must be big enough and have enough time to solve the given tasks together. But the bigger the team, the more demanding it gets for management manager to lead it.

- **Effective communication**

An efficient team must maintain regular contact. One hand has to know what the other one is doing. Therefore it is important that team members know how they should communicate. The team should agree on that from the very beginning.

Motivated team: Tips for a good atmosphere

After the team is formed and works together, the next question already comes up: How can you keep them motivated? These eleven following tips will help you to a good working atmosphere:

1. **Weekly planning –**Create the weekly planning together as a team

2. **Project meeting** – Include the whole team in a meeting to introduce the project

3. **Coffee break** – Ensure you allow your team coffee breaks for social interactions and building a social atmosphere

4. **Delegation** – As far as possible you should give your staff members the option to delegate colleagues

5. **Coordination of the project** – Hand over the coordination of new projects to different team members every time. This will give each team member experience of leading

6. **Feedback –**Offer your team the chance to give feedback, listen to what they are saying and take their suggestions seriously. Take practical action

7. **Improvements** – If feedback leads to improvements, acknowledge the team member's contribution and show your appreciation

8. **Room designing** – If possible, offer your team the opportunity to design and/or organise their workplace

9. **Cooperation** – Ensure that you as a manager also take part in the work as much as possible

10. **Holiday schedule** – Plan the holiday schedule together as a team

11. **Work time –** If possible, give your team the opportunity to coordinate work timetables among themselves and make flexitime arrangements possible

1. 5.3.Conflict management

This section of the module provides useful information about conflict management with the purpose of showing you how conflicts occur and how best to handle them. At the end you should be able to recognise potential conflict early and use various strategies to de-escalate it.

5.3.1. Preconditions for a conflict

- At least **two parties** involved
- **Common area of conflict**
- **Differences in intended actions**

This conflict can be:

- *Conflict of objectives*
- *Conflict of means*
- *Conflict of division*
- *Personal conflict*

- Existence of **emotions**
- **Mutual** attempts of **manipulation**
- **Forgetting about connecting links**
- **emphasising separating issues**
- **avoiding each other**

5.3.2 Phases of a conflict

Phase / Beginning: annoyance

Getting annoyed over minor issues.

Hot phase: controversy

The conflict erupts:

- Both parties get into a fight, persisting in each ones point of view and ignoring the arguments of the other side.
- Both parties are acting as if the conflict never happened.

➔ The conflict could be ended or deescalated at this point. Isn't there any such solution, the next phase will follow.

Cold phase: breaking off the relationship

The tension between both parties is increasing. Talking about the problem is almost impossible. The relationship changes:

- forgetting about connecting links
- emphasising separating issues
- avoiding each other

First physical reactions (headache, hardening of neck/muscles) can occur.

➔ It is quite normal and recommended that both parties are avoiding each other at this phase of a conflict.

Cold phase: social expansion

Self-doubts are increasing, namely to the same extent as the tension increases.
Both parties are seeking allies to get psychological relief. Third parties get involved and participate in the conflict.

Cold phase: strategy

An increase of self-consciousness comes along with the new support. In fantasy, both parties are developing new strategies to increase the pressure and to protect themselves against attacks. To see through the others' strategy and to destroy it becomes the overall goal.

Hot phase: threat As the conflict becomes the main issue, it will dominate all the individual's perceptions, thoughts, emotions. Willingness to cooperate is vanishing, mutual pressure is increasing. The aim of all actions is to sabotage the other's objectives, whereas means and intensity are still limited at this stage of the conflict.

Cold phase: breaking the rules

Every action of the other party is perceived and interpreted as negative. One expects worse treatment by the other than is able to do by oneself. A new dimension of the conflict shows up: Every change for the worse is the others fault. Everything is the others fault in general.

Hot phase: ambushing

Conflict is changing into visible sabotage. To destroy the others' power, the overall goal is to spoil the others' objectives. Attacks against the other party and its allies are increasing.

Hot phase: war

This last phase is about "me" or "the other". It is aimed at destroying the enemy in mental, physical, social, professional terms, accepting your own harm (disease, reprisals).

5.3.3 Strategies for de-escalating conflicts

Active listening/ showing interest

Take time. Be a good listener and show your interest in the other person's explanations and in finding a solution.

Appreciation

Be grateful that the problem is being addressed: "I really want to thank you for talking to me!"

Understanding

Show your understanding for the other person's reaction.

Change of perspective: "I understand you. The situation does appear different from your point of view."

Responsibility/ apology

Apologise without taking sides. This does not mean you have to take the overall responsibility!

Clarity/ setting objectives

Discuss things openly. Ask for objectives that contribute to a better understanding: "What could we do to prevent this from happening again?" "What should we do differently?"

Next steps/ agreement

To reach the joint objective, set your next steps. Make sure that each party agrees: "Okay, I will do it this way ... whereas your responsibility is ... Is this acceptable to you?"

Final phase of a conflict

In the end it is about defending one's own power but conflict resolution is still possible. Every phase of a conflict contains lots of energy and creativity that can be used.

➔ The later the phase of the conflict, the more advisable it is to make use of **external consultants**. Neutral objectives must be developed, empathy for the others point of view must be improved. Mediating the conflict should persist until both parties find a way to neutral interaction.

If you do not successfully mediate the conflict, the only solution is to **separate** the disputants.

Exercise Fishbowl method

The "fishbowl" is a strategy that helps participants in being contributors and listeners in a discussion. Participants ask questions, present opinions, and share information when they sit in the "fishbowl" circle, while observers on the outside of the circle listen carefully to the ideas presented and pay attention to process. Then the roles reverse. This strategy is especially useful when you want to make sure all participants participate in the discussion, when you want a reflection on what a "good discussion" looks like, and when you need a structure for discussing controversial or difficult topics.

Setting up the room

A fishbowl requires a circle of chairs ("the fishbowl") and enough room around the circle for the remaining participants to observe what is happening in the "fishbowl." The observers stand around the fishbowl.

Select a conflict that needs to be discussed in group

Almost any topic is suitable for a fishbowl discussion. The most effective do not have one right answer, but rather allow for multiple perspectives and opinions. The fishbowl is an excellent strategy to use when discussing dilemmas.

Set discussion norms and rules of the discussion

There are many ways to structure a fishbowl discussion. Sometimes facilitators have half the participants sit in the fishbowl for 10-15 minutes and then say "switch," at which point the listeners enter the fishbowl and the speakers become the audience. Another common fishbowl format is the "tap" system, where observers gently tap a participant on the, indicating that they should switch roles.

Regardless of the particular rules you establish, you want to make sure these are explained beforehand. You also want to provide instructions to the observers. What should they be listening for? Should they be taking notes? Before beginning the fishbowl, you may wish to reflect on how to have a respectful conversation

Debriefing the fishbowl discussion

Take a moment to debrief with all participants on the way the discussions went.

Appendix

1. Exercise: “Task of the association chairman"
2. Questionnaire: ”How do we meet a group‘s basic needs?“
3. Role description “Team Coordinator”
4. Picture: Team Development Phases
5. Copy Templates
6. Checklist for Volunteers

Check list for volunteers (S.4)

The following list can be very useful for those who are already volunteers or plan to be. It Helps to take down any agreement made so that it can be returned to if necessary.

- Consider in advance what you actually want
- Be confident in expressing your wishes
- Ask for an explanation of the organisation’s philosophy.

Range of tasks

- What are my **tasks**?
- How long do I want to volunteer for?
- How much **time** do I spend volunteering?
- What authority do I have?
- Which qualifications do I need?
- How do I deal with confidential information?
- How will I be supported during my projects?

Supervision

- Who trains me?
- How long will training last?
- What is the training for?

Further education

- Will I receive further education/qualifications?
- Do I have to pay for them?

Refund

- Do I need a car?
- What expenses are covered? If so what is the process for reimbursement?
- Do I get a reward for my work?
- Do I get a donor receipt if I pass on the refund or reward?

Co-Deciding

- In which matters can I co-decide?

Certificate

- Will I get a certificate for my volunteer work?

Insurance

- Is there accident insurance?
- Is there liability insurance?
- Is there any other insurance?
- What do I need to know in case of damage?

Mediation

- Are there rules in case of conflict?
- How and when do they apply?

Exercise 10:

Participants form small groups and work out rules for orientation and training together:

Welcoming culture:
- Do you have any particular ways of welcoming volunteers?
- Have you planned an introduction?

Introduction
- Which ways of introduction are given?
- Who will conduct the introduction and how long will it take?
- Who is available for questions?

Process, if the location or volunteer is not suitable?
- Is there a procedure for withdrawal if the collaboration is not working?
- Who will tell the volunteer about this decision?
- Are there any alternative offers for the volunteer?

Qualification?
- Which organisation will deliver training?
- Are there any qualification measures within the organisation in which the volunteer could participate?
- Who finances the qualifications of volunteers?

Say
- Who lets volunteers participate in intern team meetings?
- Where can volunteers insert their interests?
- Which informal ways of exchange are given? (discussion groups, working groups)

Agreements in time
- Is the use limited in time?
- How long does it take in general?
- Are there fixed working times?
- How much time must be spent minimum per week/month?
- Who should be informed in case of prevention and who steps in?

Insurances
- Which insurances are concluded for volunteers?
- How should volunteers act in case of damage?

Reimbursement
- Which costs get reimburse? (travel costs etc.)
- How does the accounting work?

Module 6

Public Relations for nonprofit organisations

Module 6
Public Relations
for nonprofit organisations

1. Introduction

Distinction: internal – external PR

There are two different forms of public relations: **internal public relations** i.e. process of communication within your organisation; **external public relations i.e.** communication focused outside of your organisation.

- **Internal:**
  - Addresses members of the organisation
  - Members convey information about the organisation through their personal connections
  - It is most important to have effective and consistent ways of communicating

- **External:**
  - Addressing the general public
  - Well informed members are the most elegant “ambassadors” for the organisation
  - It is important that your members receive all the information before the press does

Exercise 1:

Question to all participants: Where have you heard about the training?
Capture answers.

Exercise 2:
Question to all participants: What do you know about the participating organisations?

Collect information / messages and reflect individually:
- ➢ Do we even get noticed?
- ➢ How do we get noticed and with what message?
- ➢ Do self- and public image match?

2. Guidelines for good PR

2.1 WHAT should you communicate to the public? – Your Message

1. What message do you want to communicate? What do you want to talk about?
2. What are the core principles of your institution? What is the image of your association?
3. What do you want to achieve?

Exercise: The Elevator Pitch

An elevator pitch is a conversation, or an ice breaker, that should lead into a deeper dialogue about your project or organisation. It should be as engaging as possible.

In practice you typically have just 60 seconds to leave an exciting, impactful and meaningful impression with whomever you come in contact with.

Task: Create an elevator for the project or organisation. Prepare to deliver this to the rest of a group in a short presentation.

Some tips to bear in mind:

- Be clear about what is unique about your project/organisation
- Practice- make sure the pitch rolls off the tongue
- Keep it short and sweet- remember you have 60 seconds, make them all count!
- Believe in what you are saying- show your passion
- Smile
- Leave them wanting a bit more, in this way they will engage with you or follow up with questions showing they are hooked.

Exercise: Depiction of a project

A volunteer is planning an event in his/ her town to prevent the local swimming pool from being closed.

► Get together in a team and define the main message you want to convey about this.

For example: Announcing the event, advertising all the activities, saving the swimming pool. Solution: Analyse your goals and decide if the event is the best way to save the swimming pool.

2.3 Main questions for specific PR

Who is our target audience? Who is being addressed?

Target audience and environment	WHO is responsible?	HOW do we want to proceed?	When? – Time frame	Which image do we want to create? – What should people remember?
Critical self-reflection: Who are we? What is our focus, strengths and weaknesses? What do I expect from the target audience /addressee? (expected reaction) What does the target group expect?	Who can inspire? What is the person in charge's personal approach to communication, PR, flyers, website, events? Only someone who appreciates good communication, can convey good feelings and communicate successfully There must be clear rules on how communication processes take place.	Method has to suit the target audience (you don't reach young people via local press but via social media) How is information currently conveyed? Find suitable language and style (How do you want to communicate?) Define methods, styles and forms of communication – adjust them to the given resources	Does your timeline take into consideration the schedule of the target audience (e.g. holidays)? What external factors should you consider?	Consistent design Consistency (visual and content) Be professional. Who could design a good flyer / website?

Exercise: Using a logo to convey your message

Hopefully by this point you have an idea about the organisation or project that you would like to set up, it does not matter if it is not a fully formed idea at this stage.

Design a logo that is based on your message/description or aims. Prepare to justify why you chose specific images and colours. A logo is important because:

- You become more memorable
- You differentiate yourself
- You explain your organisation's/project's name concisely

3. HOW: Media relations – Working with traditional media

There are different types of media and you should carefully consider which platform is best for your purposes. Here is a breakdown of some types of media:

Print media	TV and radio	Social media
Newspapers: local, regional, national, international daily, weekly and tabloids Advertising journals Official gazettes Periodicals and magazines e.g. specific trade other: Annual reports, newsletters, yearbooks, brochures	Public tv/ radio stations (regional, national, international) Private broadcasters (international, national, regional and local)	Online platforms of print publications / Online news outlets Online TV and radio programs Local web platforms and websites Organisational, institutional and company websites Facebook and other social networks, such as Linkedin, Google+ Twitter, Instagram, YouTube Online event calendars Blogs Newsletters

To choose the best platform, ask who your target group is and what types of media they use. Focus only on the media platforms actually used by your target group. Don't attempt to cover all media channels: this only works with huge personnel costs and appropriate media strategies. Focus on a limited set of communication channels.

Since a lot of associations and organisations operate on a local basis, traditional media channels are appropriate.

For example, in Germany, 75% of over 14-year-olds still read newspapers on a daily basis. Of this group, 90% regularly read free regional advertisement papers.

New social media is also effective as it is fast, simple and cheaper. It can be used to build on the main source of information and is a good way to target younger people.

3.1 Latest trends in media

Across Europe

- Local news gets more interesting due to globalisation
- Big changes for all media due to the internet
- Traditional news outlets lose value in face of "Infotainment"

3.2 What is interesting for the media?

Note by the publishers: the working of the media change from country to country across the EU. Whilst there are many similarities, differences do exist. It was not in the goal of this publication to provide a complete overview on the relationship with the media in every EU member state. Below, you can find an example from the United Kingdom, which you can use as a basis to anchor this training unit on.

- What interests the reader? What is more accessible? ("A carrier pigeon was shot" is more interesting than a general article about the topic)
- More human interest stories: people are in focus
- High entertainment / sensation value e.g. something new, topical (good: training will take place, bad: is already taking place), selective events: 1.000 members, something spectacular: management is skydiving, changes of staff, events, statements about controversial topics, visits from famous people, social engagement
- Something to show: present people (a participant of the training)
- Unique feature in the region (what is new?)
- Significance of the topic (Has to be seen in context: What is happening at the time?)
- Volunteering is generally supported by the media

Keep the following criteria in mind:

a) TIME
The information has to be up to date and have a "hook" in current events

b) RELEVANCE
The information has to be short, important, interesting and easy to understand or has to have a special, political, cultural meaning for the target audience

c) ADDED VALUE
The information has to be useful and provide benefits to the reader

d) IMPORTANCE/ STATUS
The information is important on a regional or national level or concerns somebody famous

e) IDENTIFICATION
The reader identifies with the issue/person described

What media representatives don't like:

- Feeling used to promote people or advertise something– especially if they survive on advertising fees
- Long confusing articles. Put the most important information at the beginning of the article, the end of an article is often simply cut out
- Out of date information
- Press conferences scheduled late in the day as final editing is done at this time – morning is always better.

Further information for cooperating with media

Editorial offices are often understaffed and work under a lot of pressure

⇨ the shorter the article, the less there is to be edited and the greater the chance of publication

⇨ long protocols are boring and are not screened

- Gather the contact information for the right editorial office
- It's okay to follow up on your article but stay polite and don't be annoying. It helps if you call one day after the release if they got your text and if everything is okay
- Don't get angry with journalists if the article did not turn out the way you expected. Talk to the journalist in a personal conversation and ask how the incorrect information came to be published and how this can be avoided in future. Ask if there is a away to set the record straight (mention negative consequences to the work of your organisation due to the wrong information)
- Send an MS Word file without any special formats – it's easier to edit this way
- Use pictures that fit the text and are high resolution (at least 300 dpi)
- Mention a particular contact person that can give more information quickly, clearly and accurately
- Apart from traditional media like newspapers, consider smaller papers (what do gas stations offer? What is free?)
- **Television needs more time – announce it weeks beforehand and contact them a few days beforehand -> the decision is made in a morning meeting**

3.4 Forms of journalistic writing

There are different forms of journalistic writing:

- Reports
- Interviews
- Features
- Editorial
- Commentary

[see attachment 1]

3.5 How to write for a newspaper

The text you write for your own publications, your website or for a funding application is usually inappropriate to send directly to the press.
Therefor it is important to adapt your content and message to suit the publication you're targeting.

Some practical tips:

- Tell a compelling story
- Focus on personal stories
- Build personal relationships
- Explain processes by describing individual experiences, give real examples
- State full names
- Focus on your success
- Consider different perspectives (competitors, participants, visitors)
- Keep it short!

10 criteria for a good title:

1. It has to grab attention
2. It has to be understood in one glance
3. It mustn't be cryptic
4. It has to fit to the content of the article
5. It should fit to the visual content (consider what context it will be shown in)
6. It should indicate if a news article or comment will follow
7. Verbs are better than nouns
8. Active verbs are better than passive
9. Nothing interests people more than people
10. Make it interesting but don't misrepresent

Tips for the content:

You must write an attention-grabbing title and an introduction covering the most important facts if you want the reader continue reading. Make your readers curious.

- State the most important information at the beginning
- Ensure you answer these six questions: Who? What? When? Where? How? Why?
- Keep the article up to date, newsworthy, significant and original
- Report objectively
- Pay attention to the structure, read your text as if you are the reader
- People, quotes and numbers are important
- It is possible to add complimentary information following the text: introduce the people mentioned, additional quotes, links or information about the events

Tips for the language

- Write comprehensibly: make sure sentences are short and complete
- Vivid description captures the reader
- Use verbs to make the text more dynamic and ensure you use the active tense
- Don't use set phrases, superlatives or clichés
- State the full name of the person
- If age mattes, state the age
- Don't use abbreviations
- We means the news outlet not the organisation

Attachment "Checklist for press release"

Exercise 8:
Write a press release about volunteering or an event your organisation is currently engaged in.

3.6 Copyright

"Image copyright" is a person's ownership of an image they have created.
For photos: there is a distinction between author and the person captured in the image.
The photographer decides on allowed usage.
The pictured person / people needs to give consent ideally in written form indicating that they know what the image is likely to be used for.

If the person is of public interest there is a distinction between public and private sphere. However: No commercial usage is permitted
Other people caught in the image can be used if they aren't in the foreground.

► If the picture is sent to the press, name the photographer!

Writing: Copyright is released 70 years after the death,
Photos, pictures: Copyright is released after 50 years
BUT the right of use can be transferred!

► Ask your contact at the newspaper how they handle republishing! Some newspapers will charge you additionally if you publish an article printed by them even if you have written the article yourself and sent the picture.

4. How: Methods of PR

There are ways of handling PR besides engaging the media. Of course, they depend on available resources and what will best suit the organisation.

Exercise 9: Visual communication, advertisement flyers

Participants discuss a variety of flyers provided by the trainer.

Discussion:
What kind of visual advertisement do, and can, we have?
What do others use?
What appeals to me, what doesn't and why?
Who could we appeal to? What are possible target groups?

4.1 Ways for PR (S: 1)

Exercise 10:
Participants think about the different forms of journalistic writing: when should each type be used for a piece of volunteer work or with regards to the organisation? Where could these pieces be published?

Channel of distribution
You should think not only about what you make public, but rather how you sell these "products or services".
Participants should consider:
How many banners etc. do we have?
How do we distribute them?
Which channels are successful and which aren't?
Which channels are work-intensive?
How does effort correspond to effect?

Exercise 12: Using social media
1. Participants present their website or Facebook page and explain how it was created and how it is maintained
2. Feedback from the others
3. Together, participants capture the advantages, disadvantages, and effort required for each social media platform and discusses which medium fits which target group.

[1] Source http://www.saarland.de/dokumente/thema_ehrenamt/Vereinshelfer_Gesamt.pdf

There are different forms and types of PR-work. The channel you use depends on your goals and your target group.

To help decide what channel is best, here is a breakdown of four examples of media channels:

What?	**Website**
Suitable for	All target groups Presentation of the company, image management, background information
Advantages	Relatively simple and cheap Control over what is published and how. All information such as press releases, publications and event information can be provided on the website.
Disadvantages	Users must be attracted to the site.

What?	**Press release**
Suitable for	Media and its readers Topics with high news value and topicality
Advantages	High volume of attention and credibility when report gets published in the media, communication focused on the target group is possible
Disadvantages	Not all the information will always be published, and what is published does not always match the press release

What?	**Own publications**
Suitable for	All target groups, especially customers/ clients/ members Specific information and
Advantages	Flyers, brochures and similar materials can be given out at events or sent to selected target groups
Disadvantages	More effort (because of the layout) Higher costs (e.g. due to printing and shipping) Does not have a wide reach

What?	**Event**
Suitable for	A particular target group Presentations and discussions
Advantages	Event can be adapted specifically to the need of the target group
Disadvantage	Relatively high personnel and other costs

Appendix 1: Forms of journalistic writings[2]

Report

- short articles – no more than 20 or 30 lines
- something unexpected, surprising, unusual
- aims at objective information – as precise and objective as possible
- structure resembles a reverted pyramid (most important facts at the beginning)
- Begins with the lead that sums up the six questions: Who? What? When? Where? How? Why?

News feature

- more elaborate than a report, focus on facts
- aims at extensive information about an event or subject and covers background information, consequences and interpretations
- suitable if content does not include new information or summarises and contextualises information
- hierarchical structure, lead contains the six important questions
- is more personal and creative; many quotes are used

Interview

- Conversation between interviewer and interviewee; description of behavior and context
- presented in an entertaining fashion: not only about factual information but also covers arguments and mindsets
- used in all areas

[2] Aus: Sport braucht dein Ehrenamt – Eine Kooperation von Deutscher Sportbund und Commerzbank, Quelle: http://www.breitensport.infonet-sport.de/index.php?id=1581

- distinction between interview around a specific topic and a personal interview

Feature

- based on facts, personal report, focus on processes and events
- aims to include the reader in authentic and unique events
- longer than a report
- suspense is created by changing perspective, atmosphere

Biography

- report on a person
- shows strengths and weaknesses, interprets attitude, motives and feelings

Commentary

- focus on opinion, interprets and evaluates a current topic or event
- explains the importance of a problem, interprets solutions, weighs opinions
- provides arguments for discussion

Editorial

- broad commentary – usually on the first page of the newspaper or a special segment
- length of the article shows the importance
- shows the opinion of the newspaper

Critical commentary

- focus on opinion
- ironic, subjective, exaggerates, ending with a punch line
- plays with language, original phrases
- wants to entertain the reader, to make him laugh

Appendix 2: THE LEAD[3]

Common possibilities

Starting with the news (including the six important questions)
When the farmer Hans Meier from Rümlang came home this Monday evening, his farm was on fire. An arsonist, probably seeking vengeance, had set his house and barn on fire using gasoline.

Who:	farmer / arsonist
What:	fire
Where:	in Rümlang
When:	Monday evening
How:	using gasoline
Why:	Vengeance

Starting with a quote
"My lifelong work has been for nothing. I don't know how to go on", farmer Hans Meier said this Monday evening in Rümlang in front of his burned down house. An arsonist – probably out of vengeance – had set his house and barn on fire using gasoline.

Starting with a question
How bold can an arsonist be? Although Hans Meier's wife and farm labourers had been working on the farm, an arsonist managed to start a fire.

Starting with a shock
The gruesome view farmer Hans Meier of Rümlang will never forget for the rest of his life…

Starting with a scene
On Monday evening, farmer Hans Meier of Rümlang was seen wandering around distressed. In two hours his life's work had been destroyed...

[3] von: Christine Fivian, Chefredaktorin "Zürcher Unterländer", Rotary Club Zürich-Glattal, Vorsitz Kommission Oeffentlichkeitsarbeit Distrikt 2000, Rotary International", Quelle:

Starting with "What now"
The children don't have a bed any more, the cows no barn. The harvest can not be collected because the farm of farmer Hans Meier was burned down on Monday evening in Rümlang...

Attachment 3: Checklist – Press Release

Press releases are the most common way of informing the press. See the following press release checklist:

Time

☐ Mail in plenty of time before the release
Consider the publication day and editorial deadline
Find contact information for the right editorial office

Law

☐ By mailing the release you allow publication

☐ Are personal rights affected? (copyright)

- groups in general are no problem; minors: consent of parents
- image rights

Form

☐ Consistent design

☐ Mark text as press release

☐ Consider the structure: headline, introduction, middle, and end

☐ Don't forget to attach all mentioned files

☐ Choose a readable font and be consistent

☐ Send as word-document, no PDFs

- ☐ 1.5 spacing for legibility
- ☐ Length: Report: a few lines, article: around 1.000 words, news story: max. 3.500 characters (1.5 pages)
- ☐ Text left-aligned
- ☐ Mark direct quotes, state full names

Accompanying letter

- ☐ Be concise, get to the point quickly! Mention your call if you've spoken to them by phone already
- ☐ Don't forget to include your contact details for questions

Overall document

- ☐ Put all the information in one document, not several. Include any necessary background information after the main text

Text

- ☐ Should be topical, newsworthy, important and original
- ☐ Interesting headline, perhaps a picture
- ☐ Answer the following questions at the beginning: Who? What? When? Where? How? Why?
- ☐ State the **most important facts** at the beginning
- ☐ Write **comprehensibly**
- ☐ Write **objectively**, use a **clear structure** and consider your text from an outsider's perspective
- ☐ People, quotes, numbers. Mark quotes, state names and titles. Journalists love numbers if they are relevant
- ☐ Possibly include additional information following the text: details about the persons, links, and events

Pictures and Illustrations

- ☐ **Attach** pictures separately – don't include them in the text document
- ☐ Take **enough pictures** so that you have many to choose from
- ☐ Send a picture in landscape and portrait **format**
- ☐ Use **pictures** that fit the text. Show details, be vivid not boring. Use a suitable subject matter
- ☐ Use a high **resolution** jpg. file, at least 300 dpi
- ☐ Send an **accompanying text** for the pictures as well as a detailed copyright notes
- ☐ Note the **publication rights**

After mailing

- ☐ **Be prepared for further requests** – make sure somebody knows about the topic so they can cover it if you're out of the office
- ☐ **Follow up** on your release – maybe the next day but don't be annoying
- ☐ Lay out further information and background information

After publication

- ❒ **Use it for your own PR**. Consider the copyright of the medium
- ❒ The contact details provided should be up to date and reliably accessible
- ❒ Keep a record that includes the date and notes the media channel used

Module 7

Event Management

Module 7
Event management

1. Introduction

It could be argued that every organised meeting of people is an event e.g. general meetings, open days, concerts, competitions, conferences, exhibitions or workshops. To reach your preferred results (e.g. improve the image or publicity of your organisation, ensure high attendance, sell products and/or services) it's necessary to plan in a goal-oriented and systematic way.

Exercise: Planning an event

Imagine you are planning an event for your project or organisation. The event can be for any reason such as the opening of the organisation, the finishing of a project or saying thank you to volunteers. Using the below information and the documentation in the appendix conduct a detailed plan for your event. Try and make it as realistic and feasible as possible so that this planning is not just theoretical but can be used in the future for a real life event.

2. Strategy

2.1 Define goals and target audience

Before you begin, you must define the goals and target audience of your planned event.

- What do you want to achieve with this event?
- What are the interests of your audience regarding your event?
- How do you satisfy all interested parties and reach your aims?

Once you've defined your goals and identified your target audience and their interests, you can move on to the conceptual phase and define the framework of your event.

2.2 Setting the framework of the event

What kind of event will allow me to reach my goals and appeal to my target audience? What would I like to achieve with the event? What do I want my audience to think? Why should participants take part in the event?

- Should it be an open or closed event?
- Should it be a festive, celebratory or more casual?
- Should it be a big event with many attendees or a small, more personal meeting?
- Will it be easier to reach your goals with a professional, informative approach or have a more emotional or entertaining tone?
- Do you need to put on a show with “wow factor” or would it be better to have a smaller show that will satisfy the needs of participants?
- Do you want to play games or have space to dance to get people to be active?
- Do you want to maintain traditions and known rituals or do you want to do something new?

Answering the following questions will help set the framework for the event:

Sort and Profile:	What kind of event are you organising? (Open or closed event, title of event)
Organiser:	Who is the event organiser? Will co-operating partners be involved? If yes: what are their responsibilities?
Participants:	Who do we want to invite? How many people will participate in the event? (Number and type of attendees)
Time management:	When will the event take place and how long will it take? Is this the best date? Will it clash with other important events? Are there external limitations? (e.g. public holiday, vacations)
Location:	Where will the event take place? (Area, Building, Room number). Is the room available? Is the room big enough? Is the required equipment available? (e.g. cooking facilities, stage, technical facilities)? Are there any conditions for using the room?

Resources: What resources are needed to conduct the event? (Finances, Staff, material expenses…)

Guidelines: What contracts etc. are needed? What are the legal constraints? (e.g. administrative regulations for fire safety, emergency routes, sanitary facilities, barriers, health …)

Risks: What are the potential risks (Finances, Weather, Number of visitors, security risks) and how should we handle them?

2.3 Organising the event

Once you've completed the conception, planning framework of the event, you must move on to the organisation and execution of the event:

a) Develop a timetable
b) Fix the budget
c) Coonfirm funding
d) Confirm staff resources
e) Outline responsibilities
f) Identify and confirm partners and third parties (e.g. deliveryman, external service provider etc.)
g) Plan communications (internal and external)
h) Develop a work and organisation plan
i) Conduct an analysis of potential hazards and develop a safety protocol
j) Address constraints
k) Confirm insurance for the event if needed

To make the event organisation as easy as possible we have included a checklist in appendix 1.

2.4 Risk analysis

A risk analysis identifies potential problem areas of an event. This should help you avoid problems before they arise.

You should consider the following when conducting your risk analysis:

a) Internal and external communication
b) Buildings and event location
c) Logistics
d) Traffic and parking
f) Emergency plans
g) Fire Protection
h) Medical care and rescue services
i) External disruptive factors
j) Security

3. Budgeting (S: 2)

The following list will give you an idea of possible event costs:

- Invitations
- Fees
- Per diems
- Accomodation for organisers, special guests etc
- Travel expenses
- Decoration
- Technical support or equipment
- Security
- Typists
- Assistants
- Labour costs
- Social costs
- Rent for the space
- Documentation
- Programmes
- Informative/ branding materials such as flyers, brochures, posters...
- List of attendees
- Advertising
- Press release
- Press kits
- Telephone and fax connection
- Postage
- Transparencies
- Stationery
- Electricity
- Heating
- Gas
- Water
- Cleaning

- Insurance
- Transport

4. A few more tips for event management (S: 3)

Plan in advance
The earlier you start planning, the better! Things can take longer than you may think - from finding suitable venues to getting all the required approvals – so including buffer time is a good idea.

Allocate clear responsibilities

Prepare a detailed budget plan
Calculating and controlling your from beginning to end is crucial for a successful event. It's a good idea to have a cost buffer so that you have some leeway in your budget.

Think of a suitable event programme

An entertaining and attractive programme is an important part of a successful event. Don't forget about supervision and entertainment for kids (especially during a longer event). That way, your event will appeal to the whole family.

Catering
Make sure that there is enough food and drink for all attendees.

Invite your target audience
What would the most exciting football game be without an audience? It's important to invite people well in advance, using targeted invitations, advertising and promotion.

Send personal invitations to important guests
This includes VIPs, sponsors and the media. Create an address list. Include an RSVP section so you can plan more efficiently.

Prepare a press kit including background information and good photos. This simplifies work for journalists and increases the chance of being published.

Publicise the event within your organisation
General meetings, newsletters or the website homepage of the organisation are good ways to inform your staff members about the event (which is best to do before you inform the public).

Inform the public
An open event e.g. an open day should be advertised in advance. Possible ways to advertise:

- Event advertising in the daily newspaper or other local journals
- Posters in shops, train stations, buses etc.
- Flyers and brochures

Manage the "breakdown" phase of your event

After the (hopefully satisfied) guests have left it, your team must clear the venue. Allocate clear up responsibilities before the event as this will speed up the process:

- Who is responsible for the each task? Who is part of the team?
  Make sure that there is communication between the cleaning team and overall coordinator – feedback and a short checklist will help.
- Do the technical facilities require special knowledge? If you rented the technology think about where to keep it until it can be returned.
- If you rented rooms, find out how you should leave them.
- If you collect any money during the event, you need a safe place to keep it.

Think about the next event!
Directly after the event you should evaluate your results. What can you improve on and what went well?

Good Timing
Set a schedule and stick to it. That's how you to avoid awkward situations like food getting cold guest of honour doesn't finish his speech on time.

It's impossible to consider everything. The following check lists won't cover everything but it will help you remember many of the essential aspects of an event.

Appendix 1: checklist for event management (page 1)

TASKS	***by when?***	***Who?***	***How? (important additional information)***	***DONE until***
General Tasks				
Determine main and secondary goals				
Determine the target audience and number of participants (open or closed event)				
Clarify what the interests of your audience are				
Identify what you need to reach the goals of the event				
Develop an event plan				
Clarify internal and external costs - including GEMA				
Clarify financial feasibility, find partners, define the budget				
Find an attractive title for the event				
Find a suitable date for the target audience				

Appendix 1: checklist for event management (page 2)

TASKS	by when?	Who?	How? (important additional information)	DONE until
Invitation / Advertising				
Send the invitations				
Provide information to the press (open event)				
Advertising (Newspaper advertisement, poster etc.)				
Location				
Fair and poor weather alternatives planned				
Location with required equipment/infrastructure (size, furniture, catering, stage, technical, sanitation, parking , accommodation etc.)				
House rules and other contractual conditions (standard business conditions) checked				

Administrative approval				
Extension of the closing time approved				
Neighbours notified				
Authorisation given by required authority				
Health and safety undertaken, e.g. risk assessment (if required)				

Appendix 1: checklist for event management (page 3)

TASKS	***by when?***	***Who?***	***How? (important additional information)***	***DONE until***
General programme				
Confirm internal and external schedule				
Technical facilities (Stage, acoustic irradiation etc.)				
Contracts with external artists confirmed and, if necessary, deposits are paid				
Determine moderator and speaker, confirm subject				
Changing rooms available				
Catering				
Appetisers				
Fixed Buffet; dietary restrictions accommodated				
Choose the drink selection				
Choose the table decoration				

Check the technical facilities e.g. cooker, grill, microwave, corkscrew, bottle opener, napkin, coffee machine, washing-up liquid, cleaning tissues, etc.				
Plan waste disposal				
Plan hotline with the deliveryman (in case of problems, subsequent delivery)				
Fix seating arrangements, prepare place cards				

Appendix 1: checklist for event management (page 4)

TASKS	*by when?*	*Who?*	*How? (important additional information)*	*DONE until*
Decoration				
Plan a standardised design theme (e.g. colours, recurrent elements) suitable for the event				
Think about attractive decorations for special areas (e.g. entrance, stage)				
Lighting system				
Safety				
Identify emergency exits and let them be surveyed by the fire brigade				
Note emergency numbers				
Organise medical services and first aid equipment				
Guarantee the safe storage of valuables (Cashbox, lockable room)				
Insurances				
Furnishing				
Room planning with tables, chairs and special areas (e.g.				

stage, dance floor)				
Catering requirements (e.g. bar, serve-over counter)				
Organise the wardrobe (Area, staff, coat rack, cloakroom and tickets)				
Are movable walls available?				

Appendix 1: checklist for event management (page 5)

TASKS	by when?	Who?	***How? (important additional information)***	***DONE until***
Schedule & Administration				
A plan of procedures and responsible staff members (with working time and replacements) is available				
Make guideposts leading to the event if necessary				
Draft name badges and display them at the entrance				
Prepare the press information (press kit)				
Determine a coordinator who has the telephone numbers of all persons in charge				
Design entrance cards				
Make a programme				
Determine who will coordinate the artists, media and VIPs				
Organise child care				
Organise wardrobe				
Determine a car-park attendant				
Prepare the staff briefing				

Make sure that the toilets are clean				
Engage a photographer (for photos and film)				

Appendix 1: checklist for event management (page 6)

TASKS	by when?	Who?	*How? (important additional information)*	*DONE until*
Technical				
Stage, platform, curtain, speaker etc.				
Screen				
Sound equipment				
Media (e.g. overhead projector, slide projector, screen etc.)				
Speaker`s desk				
Roller blind				
Check the capacity of the electrical facilities				
Electrical connections (if necessary for heavy current) available				
Outdoor lighting				
Technician at the event				
Toolbox				
Communication via mobile phone and radio set possible				

End of the event				
Plan a friendly goodbye to visitors				
Plan to have extra staff at main points of intersection e.g. wardrobe, car parking				
Organise transport facilities				
Plan waste disposal				
Appoint someone responsible for lost property				

Appendix 2: example for a schedule

Time	Programme aspect	Who and what	Material	To Dos	Room
10:00					

Appendix 3: Example for an invitation

Stadt Vilshofen

c/o Perdita Wingerter
Leopoldstraße 9
94032 Passau
info@iqm-wingerter.de

Do not hesitate to fax: **0851/2132739**

RSVP

(Date)
(venue)

Registration

Name of participant: ____

Name of additional participants: ____

____

____

Institution / company: ____

Address: ____

____

Telephone (private): ____________________ Tel. (comp): ____________________

E-mail: ____________________

Date / place: ______________________ signature: ______________________

Appendix 4: Example for a checklist (S: 4)

example: checklist regarding aspects of security[4]		
events and stages		
activity/ request	**anything else to do?**	**comments**
Responsibilities determined (organisational chart).	☐ yes ☐ no	
Event setup and breakdown is coordinated and monitored by professionals.	☐ yes ☐ no	
Rehearsals AFTER stage is authorised.	☐ yes ☐ no	
Stages with a height > 1metre require a clear marking and some protection against falling.	☐ yes ☐ no	
There is sufficient – but not dazzling! – e.g. light in the entrance areas of the stage.	☐ yes ☐ no	
Ensure that nobody could slide or fall or trip on something.	☐ yes ☐ no	
You need special fluorescent marks/ lights to ensure safe orientation in the dark.	☐ yes ☐ no	
…	☐ yes ☐ no	
…	☐ yes ☐ no	

4 source: VBG-Dokument: Quelle: http://www.vbg.de/SharedDocs/Medien-Center/DE/Faltblatt/Branchen/Bildungseinrichtungen/cl_veranstaltungen[6] As we are just giving you an example for the possible input of this module [because regulations differ a lot in the different countries], we copied a very good English description of German taxation rules for non-profit organisations from the following website:

Sources:

1. DOSB: Veranstaltungsmanagement, 1. STRATEGIE IN VIER SPIELZÜGEN, Quelle: http://www.breitensport.infonet-sport.de/index.php?id=8173

2. http://www.ehrenamt-im-sport.de/fileadmin/fm-ehrenamtimsport/cms_data/zip/5.4.01._welche_kosten_koennen_bei_veranstaltungen_entstehen.doc_6d258e03.zip

3. http://www.breitensport.infonet-sport.de/index.php?id=8174

4. VBG-Dokument: Quelle: http://www.vbg.de/SharedDocs/Medien-Center/DE/Faltblatt/Branchen/Bildungseinrichtungen/cl_veranstaltungen_buehnen_bildung.doc?__blob=publicationFile&v=4

Module 8

Networking

Module 8
Networking

1. Introduction to networking

NGOs and organisations that rely on volunteers often face a shortage of financial resources. Therefore it is important to have a good network to compensate the lack of money. When it comes to networking personal contacts are crucial. In the following module you will find some practical tips on how to start and maintain a network.

1.1 Definition of "networking"

The meaning of "networking" might not be completely clear, but it is something all of us do in our daily lives. To put it simply networking means to establish contacts, to maintain and to use them. Those contacts can be friends, acquaintances, business partners or other organisations.

It is important to keep in mind, that one person is not only active in one network, but generally in several. Contacts of one network can be of use for someone in or for another network, as well.

1.2 What characterises a network?

- common interests are the central component of networks
- there are no formal hierarchies
- in principle a general openness for new network partners
- the participation of partners in the network is voluntary
- there is only a temporary arrangement of responsibilities and duties

1.3 Differences between networks and organisations

network	organisation
- open borders - staff/regional defined entry - out of center brought structure of decisions and horizontal control - communication codes (campaigns, participation, deals) CAN – LIKE TO - WANT	- closed boarders - institutional defined entry - centered structure of decision and vertical control - task and function performance MUST - CAN - SHOULD

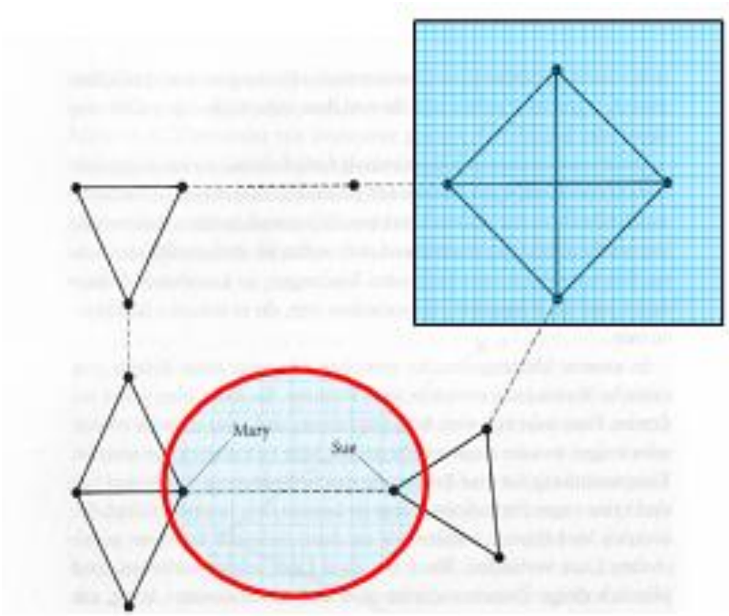
1.4 Networks and their strengths

- works across borders
- innovative and multifunctional (“market of possibilities”)
- decentralised structures and flat hierarchy
- together you can achieve more than alone
- better access to knowledge and information through network partners
- fast to establish but also to terminate, because there are no bureaucratic

1.5 networks and their weaknesses

- no fixed structures
- no legal entity (in most cases)
- not easy to coordinate a network
- insufficient coordination of network partners can lead to collection of same information or execution with contradictory opinions being represented
- no binding arrangements regarding tasks, roles, input and output
- the balance between taking and giving can be difficult to manage

1.6 How do networks work?



The ——— (solid lines) stand for **close**, **strong relations**, the ----------(dotted) for **loose**, **weak relations**.

The ● stand for persons. They belong to groups (triangles). In the square is a professional network. E. g. our association, as network association.

Mary and *Sue* belong to different groups and don't have contact points. In Mary's company a job is available, which suits Sue. This fact ought to be spoken to 8 persons, so that Sue finds out about the job. Over the network one person is enough, so that the one person will know about the job

→ **Information paths get shorter due to networks (e. g. Internet)**

→ **In Netzwerken können auch schwache Beziehungen von großer Bedeutung sein.**

Exercise 1

Imagine an asylum seeking family could leave the shared accommodation and get a flat of their own. On the one hand all participants should think about what each of them individually can make available for free to help the family to set up their flat. On the other hand they should think about people in their personal or professional environments who could also make things available.

2. Networking in practice

2.1 Basic principles of networking

A network is unable to establish and maintain itself without support from members and participants. You should take the following points about networks into account:

- establish a concrete cause or aim e. g. a joint project or the necessity to bundle resources (e. g. to improve the financial situation)
- develop an interesting platform (idea) or create a framework/occasion for a platform

- have common basic-intentions: common formulation of goals while simultaneously protection the autonomy of the individual
- close and lose relations have to be managed in an adequate way
- an exchange: all partners in the network should profit from the participation in the network
- people are just as important as organisations and institution
- establish trust between the partners
- create a sense of unity and a sense of belonging
- respect the different competences/ knowledge of the partners
- acknowledge and utilise the skills and experience of members or partners involved
- continuity and reliability is important
- clarification of mutual expectations is also important

2.2 Conditions for successful networking

- Exchange of competence is mutual
- Balance of giving and taking
- Be balanced, have patience but at the same time demand something in a suitable manner
- Time
- Be open to new things and innovative ways of working
- at the beginning have concrete actions, which are also easy to realise (easy wins as well as long term goals)
- don't idealise networks, be critical about them

2.3 How to initiate a network

1. goal or function of the network you want to establish

What do you want to achieve? Define your goal for the establishment clearly and transparent (e.g. a certain project goal, financial, ideal support of the project, attracting new volunteers).

2. Identify, address and obtain network partners/members

- Who has the resources/competences to support my goal?
- What could motivate my partners to participate?
- Which platform do I have to offer in order to realise an effective network?
- Who might be an interesting / useful partner for the network or has many contacts?

3. Determine goals, services, time horizon, public appearance:

- Find a mode for your collaboration: definition of tasks and competences, decide rules, acknowledgement, etc.
- Build trust by maintaining the network
- Clarify willingness to cooperate, especially if you are working on a project, enable partners to cooperate / work in the network

2.4 typical mistakes and pitfalls

- Burden of time and unequal distribution of work
- Unclear measurement of results
- Changing representation of the individual organisations and changing of personnel
- lengthy discussions
- problems finding dates

Exercise 2:

Possibilities for networking: the summer party

The coordinator divides the group into two smaller groups.

Both groups have the same task:

Your organisation is planning a huge summer party for all the volunteers and supporters (approximately 150 people). You have restricted financial resources, only 100 € in total, to organise an informal event.

Develop a concept for your summer party, plan different activities - using all the personal resources and contacts existing in your group! (As an example: maybe someone knows the local baker who could contribute some cakes for free; someone else is willing to loan his/ her BBQ or is a very enthusiastic DJ in his/ her leisure time…).

Provide a working plan and organisational checklist as well. Make a separate list for all the activities you still need some help with.

Exercise 3: role play „role profile networker“

Topic: How to build a network, the example of building a “school network” (role play for up to 6 people)

Background/situation

In a community, there are several volunteer groups, organisations which support the public educational institutions in different ways: tutoring in a primary school, a group of older residents which write a newspaper with pupils of the secondary school, a group of women which plays theatre with the pupils, a vocational preparation centre which takes care of small repairs in schools with a group of young people. The youth club with full-time employees also prepares a social project in schools which aims at supporting socially disadvantaged pupils.

As a *senior* trainer you think that these activities are all useful but not coordinated: everyone does his/her own thing and you are convinced that through connecting these groups, the pupils would benefit even more. You would like to bring all the different groups, which support the school, together. For this reason you want to establish a “round table”.

Approach

Distribute the different roles among the members of your group. Take 15 minutes to prepare yourself for the role. There are six different roles:

- 1 *senior* trainer, who invited the others to the “round table”
- 1 representative of the tutor group
- 1 representative of the older person group, which writes a newspaper with the pupils
- 1 representative of the theatre group
- 1 educationalist from the vocational preparation centre
- 1 observer

Role of the senior trainer as a networker: You invited the others to this meeting and will chair the event. Please explain your reasons to the other participants. To get to know each other, everyone introduces himself/herself. Think of a strategy to improve the networking with different meetings and actions.

Roles of the participants (tutor group, newspaper group, theatre group, vocational preparation centre): Think of how to present your activity and make suggestions how the network could be built.

Role of the observer: Observe the discussion and pay attention to the following aspects:

- Is the *senior* trainer able to convey his/her idea?
- Is he/she able to motivate the others and convey to them the necessity of a network?
- How does he/she react to critical questions?

Module 9

Finance, Taxation and Fundraising

Module 9
Finances, taxation and fundraising

Note by the publisher: The situation on the issues raised in this module varies between the different EU countries. It is not within the scope of the publishers to provide an overview of finances, taxation and fundraising applicable for all European Union member states in this module. Therefore, we encourage to research the situation in your country and use this module as an inspiration for providing your own nationally specific training. Below, follows an example from Germany.

Introduction

First, this chapter will give you an introduction to *"'fundraising' or 'fund raising' (also known as "development") [that] is the process of gathering voluntary contributions of money or other resources, by requesting donations from individuals, businesses, charitable foundations, or governmental agencies.*" (S: 2[5])

Secondly, it will cover the following aspects:

a) how to find the financial resources for your projects/ activities
b) an overview of the legal regulations for non-profit organisations (especially taxes in the German context)

Part 1: Finances and taxation[6]

Note by the publisher:All of the countries have their own distinct taxation systems. As this module is very country specific the publishers encourage you to look up the national reports regarding finances and taxation to be provided with the most accurate overview. Below will follow a general overview on the formal requirements for tax exemption status of non-profit entities and non-profit activities in the EU and a more detailed example from Germany.

Most Member States (like Spain, Italy, Germany, Portugal) adopt mixed systems both formal and material to confer the status of non profit entity. Sometimes National tax law, fixes a percentage of income to be invested in objectives of social benefit that must be achieved by the entities (50%

en/Bildungseinrichtungen/cl_veranstaltungen[6] As we are just giving you an example for the possible input of this module [because regulations differ a lot in the different countries], we copied a very good English description of German taxation rules for non-profit organisations from the following website:

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Attention – copyright by Bird & Bird (an international law firm): http://www.twobirds.com/en/news/articles/2014/global/tax/oct-14/germany-and-tax-exemption-rules-for-nonprofit-entities (16.1.2015) The overview of the European legislation can be found on: http://www.eatlp.org/uploads/public/Reports%20Rotterdam/Thematic%20report%20Amatucci%20(section%202a).pdf, 2012.

Portugal, 70% Spain and 90% The Netherlands). Thus the final destination of revenue for social benefit is both a formal and a material requirement.

Formal requirements (authorizations, registrations, legal forms) make it possible to define a prevailing purpose of a body as stated in its founding articles . The activity that is really undertaken is therefore of minor importance. For non profit tax status to be recognised it is sufficient for the Tax Authorities to verify the objective of the organization as formally laid down in its articles of association. Sometimes formal requirements can be used to guarantee the existence of material conditions. Examples of this are the prohibition of the payment dividends or other kind of profit distribution and the obligation to file accounts annually at the Government or at Chamber of Commerce.

Difficulties in assessment of formal requirements arise when socially beneficial activities are carried out in other Member States. This can result in the refusal of tax benefit . A fundamental principle that has to be respected by national legislators when creating and applying formal requirements is the principle of proportionality. Formal requirements should not exceed what is strictly necessary for the recognition of non profit tax status, taking in to consideration national interests and the fight against tax fraud. Conditions for the granting of tax advantages should always be appropriate.

To obtain tax exemption, based on the Machiavellian principle : The end justifies the means, it is necessary to have a strict link with public benefit 4 . Supporting activities in fact can be used just to obtain tax benefit (abuse of law) for normal business activities and this is not acceptable. The absence of common characteristics of business activities in different Member States makes it difficult to grant non profit tax status on the basis of material conditions. Furthermore it can be discriminatory for the cross-border activities. Moreover the concept of business activity at European level does not always coincide with national tax rules. Only some member states such as France, The Netherlands and Finland, consider the influence on free competition that is essential in EU law.

There is a difference between requirements and criteria used in national tax law for legitimacy of the tax advantages granted to non profit entities and the same conditions considered in EU law (prohibition of State aid).

Following the ECJ orientation generally two conditions are fundamental for compatibility with state aid rules:

2. The tax advantage cannot derogate from the ordinary tax regime without being justified by basic or guiding principles of that tax system.
3. The tradebetween Member States cannot be affected and the competition cannot be distorted by the national tax measures.

In Germany, upon application, public-purpose entities may be granted a tax-exempt status, exempting them from German corporate income tax and trade tax. Such tax-exempt status may also result in a VAT-exemption or reduced VAT rate for services provided by such entity, depending, however, on the specific type of service rendered.

Otherwise, if tax exemption is not granted, entities would be subject to a tax burden of roughly 30% on their taxable income. The same tax burden applies in general, if tax-exempt status is granted to the extent that the tax-exempted entity receives income in its taxable “business sphere” income category (discussed further below).

Recently, the German non-profit tax law regulations have been loosened to also cover cross-border activities.

1. Legal options

Traditionally, the European Union has adopted a laissez-faire approach towards the regulation and governance of charitable organizations. The legal enablement of these bodies occurs in the national legislation of Member States and thus stops at the borders of those countries, forcing nonprofit organizations that work across borders to grapple with different national legal and regulatory regimes. In areas, such as company law, the EU has legislative competence to harmonize national laws but has chosen to exclude nonprofit organizations from the scope of its regulatory efforts.[7] The European Convention on the Recognition of the Legal Personality of International Non-Governmental Organisation has been signed and ratified in the UK, but not in the other countries participating in the Provol project. However in Europe, the most common forms of legal entities include:

- Unincorporated and voluntary association
- Trusts, charities and foundations
- Companies not just for profit
- Entities formed or registered under special NGO or nonprofit laws

As there are many legal differences between the different European countries, the publsihers encourage additional research into your specific national context. Below, follows an example of the legal status in Germany.

The legal options for operating a non-profit organisation in Germany comprise of entities potentially in the scope of German corporate income taxation. Hence, tax-transparent partnerships are excluded.

Common types of non-profit entities in Germany are:

[7] BREEN, O., ‘EU Regulation of Charitable Organizations: The Politics of Legally Enabling Civil Society’ http://www.icnl.org/research/journal/vol10iss3/special_3.htm

- company (specifically gGmbH)
- foundation (Stiftung) and
- registered association (eingetragener Verein, “e.V”)

Resident or non-resident entities from other EU jurisdictions may also benefit from such tax privileges, provided they meet the requirements stipulated by German tax laws. This new option is due to case law from the European Court of Justice.

2. Costs and timing of establishing a relevant entity

2.1 The non-profit public limited company (gGmbH)

The costs and timing of setting up a relevant entity depends on the legal option to be pursued. The most straightforward approach, in comparison to a foundation and a registered association should be using a non-profit public limited company (gGmbH). Other than a foundation, a gGmbH is not subject to foundation supervision approval requirements from the respective local supervising authority. Further, provided the gGmbH’s statutes as well as the actual activity pursued by the gGmbH reflect the tax law requirements, company law may be applicable. Hence, a gGmbH structure is more flexible than a foundation or a registered association. A non-profit gGmbH may also use a trade name containing “foundation” or “Stiftung”. In that case, however, the gGmbH should be funded generously in order to achieve registration with the commercial register.

A downside of a gGmbH structure may be that such an entity would have to annually prepare and disclose financial statements.

A gGmbH can be set up and registered within less than a month and for moderate fees and costs, apart from the statutory share capital. However, this does not reflect the time and costs it takes to achieve a decision on the tax-exemption by the competent tax authority.

Overall, following legal changes, the gGmbH has become a popular type of operating non-profit activities.

2.2 Foundations

German regulations allow the creation of any foundation for public or private purposes in keeping with the concept of a gemeinwohlkonforme Allzweckstiftung ("general-purpose foundation compatible with the common good"). A foundation should not have commercial activities as its main purpose, but they are permitted if they serve the main purpose of the foundation. There is no minimum starting capital, although in practice at least €50,000 is considered necessary.

A German foundation can either be charitable or serve a private interest. Charitable foundations enjoy tax exemptions. If they engage in commercial activities, only the commercially active part of the entity is taxed. A family foundation serving private interests is taxed like any other legal entity. There is no central register for German foundations.

Only charitable foundations are subject to supervision by state authorities. Family foundations are not supervised after establishment. All forms of foundations can be dissolved, however, if they pursue anti-constitutional aims. Foundations are supervised by local authorities within each state (Bundesland) because each state has exclusive legislative power over the laws governing foundations.

In contrast to many other countries, German law allows a tax sheltered charitable foundation to distribute up to one third of its profit to the founder and his next of kin, if they are needy, or to maintain the founder's grave. These benefits are subject to taxation.

As of 2008, there are about 15,000 foundations in Germany, about 85% of them charitable foundations. More than 250 charitable German foundations have existed for more than 500 years; the oldest dates back to 1509. There are also large German corporations owned by foundations, including Bertelsmann, Bosch, Carl Zeiss AG and Lidl.

Foundations are the main providers of private scholarships to German students.

2.3 Registered non-profit association (eingetragener gemeinnütziger Verein, "e.V")

Eingetragener Verein (e. V.) ("registered association") is a legal status for a registered voluntary association in Germany. While any group may be called a Verein, registration as eingetragener Verein holds many legal benefits because a registered association may legally function as a corporate body (juristic person) rather than just a group of individuals. The Civil Code of Germany contains different regulations for registered non-profit and for-profit associations regarded as juristic persons ("Vereine", articles 21–79).

The founding of an association requires an informal memorandum of association (Gründungsvertrag) between at least two persons and the submission of written articles of the association and a minimum membership of seven persons. A board is required and may consist of one or more natural or legal persons. As the highest body of the association the general meeting of members has comprehensive powers. It appoints and approves the board. Liability of the association is limited to the association assets. There is NO minimum capital requirement, the association being typically dependent on levying membership contributions and voluntary contributions. Associations are under a duty to render accounts, pursuant to which the board has to present an ordered summary of income and expenditure and any records. Apart from official financial monitoring for taxation purposes, the association is free of state supervision in the conduct of its affairs. Only if there are less than 3 members, if it is contrary to the public interest or pursues commercial objects, violates the criminal law it can be prohibited.

"Generally speaking, by virtue of its flexible internal organisation, its relative ease of foundation and maintenance as well as the lack of legal minimum capital requirement, the association may be regarded as the basic legal form for civic engagement. It is a particularly appropriate legal form where the unremunerated (honorary) activity of people is more significant than the application of real resources."

3. Tax law requirements

Entities may be granted a tax-exempt status in advance if they pass a review of their founding documents in a specific procedure. One of the benefits of such advance exemption is that entities may start to collect tax-deductible donations. Nonetheless, they remain subject to full audits by tax inspectors.

The entity's founding documents (statutes, Articles of Association or similar) as well as the actual activity of the entity must reflect the following aspects in order to benefit from a tax-privileged status:

3.1 Purpose of the entity

The entity must directly and exclusively pursue **(i) charitable or (ii) public-benefit purposes** within the meaning of the chapter "Tax-Privileged Purposes" of the German Fiscal Code. While "charitable purposes" are limited to activities dedicated specifically to poor, dependent or disabled people, "public-benefit purposes" cover a wide range of activities.

Further, it needs to be described how this objective is supposed to be pursued.

3.2 Non-profit character and use of funds

The activities of the entity need to be of an altruistic nature. The entity must not have any economic purposes of its own.

The assets and financial means of the entity may only be used for the purposes as defined in the Statutes. No shareholder may receive any financial benefit from funds of the entity. No person may benefit from expenditures that are not related to the purpose of the entity or through inappropriately high allowances or payments. There may not be legal entitlements to receive benefits from the entity.

3.3 Dissolution of the entity

In case of the dissolution or annulment of the entity or in case tax-exempting purposes cease to apply, the entity's assets must be transferred to another tax-exempted entity, which has to directly and exclusively use it for charitable or other public-benefit purposes. In these events the shareholders may not receive more than the paid-up capital and the value of the assets contributed by them from the entity.

3.4 Tax treatment of income received by non-profit entity

Even if an entity is recognised as being tax-exempt by the tax authorities that entity may still be taxable with sources of income received.

Funds received by a tax-exempted non-profit entity are attributable to either the:

- *"ideal sphere"* of the entity (not taxable /e.g. donations)

- "*asset management*" (not taxable /e.g. renting out an asset)

- *"business sphere"* (taxable /e.g. operating a business), or

- *"special-purpose business sphere"* (not taxable/i.e. a business that serves and is required for the non-profit purpose of the entity)

Hence, even if an entity achieves tax-exemption it may still be partially taxable with its received funds, **unless** this can be regarded as (i) pure asset management, (ii) special-purpose business or (iii) donations and similar contributions provided by donors to serve the ideal purpose of the entity.

3.5 Tax-exempted asset management?

If existing assets are being used by the tax-exempted entity to derive income, without creating new assets in the process, this may be regarded as non-taxable asset management. This applies mainly on real properties owned and partly rented out by non-profit entities. However, if an existing intangible asset (IP) is being rented out this may be regarded as asset management as well. In general, the requirements for tax-exempted asset management are strict. For example, ancillary services to renting out an asset may not be provided.

3.6 Tax-exempted special-purpose business?

For a tax-exempted special purpose business, it would have to be demonstrated, that (i) this business serves the public-benefit purpose of the entity, (ii) fulfilling the entity's public-benefit purpose actually requires to exercise this business and (iii) that this business activity does not compete with similar activities of non-privileged taxpayers to a greater extent than necessary.

4. Final remarks

Today's tax-exemption rules in Germany have been broadened to also cover cross-border public-purpose activities. Hence, an entity may be recognised as tax-exempted (thus being able to issue certificates to donors for tax-deductible donations) even if a charitable purpose or other not-for-profit purpose is being pursued abroad. However, requirements to achieve a tax exemption in these scenarios are strict.

In a specific procedure available for potential not-for-profit entities the German tax authorities review draft documentation and grant/reject tax-exempt status in the process, subject to a retroactive review of the actual activities in the following. In the process, further requirements from a non-profit tax law perspective regarding (i) the exercise of the activity and the monitoring of the use of the funds and (ii) aiming at clearly separating a non-profit entity from any potential genuine business activity pursued by its shareholder would have to be considered.

Tax treatment of income received by non-profit entity:

Even if an entity is recognised as being tax-exempt by the tax authorities that entity may still be taxable with sources of income received.

Funds received by a tax-exempted non-profit entity are attributable to either the:

- “ideal sphere” of the entity (not taxable /e.g. donations)

- “asset management" (not taxable /e.g. renting out an asset)

- “business sphere” (taxable /e.g. operating a business), or

- “special-purpose business sphere” (not taxable/i.e. a business that serves and is required for the non-profit purpose of the entity)

Association: unincorporated/ registered			
	Statutory purpose?		
area	Example	Basis of taxation income	Sales
ideal sphere	Membership fees, donation	not taxable	-
asset management	renting out an asset	not taxable	reduction: 7%
special-purpose busine sphere	business that serves and is required for the non-profit p of the entity	not taxable	reduction: 7%
business sphere	operating a business	taxable < 35.000 €	19%

”small business“: 17.500 €

Taxation principles:

Value added tax (VAT): all services and products generated in Germany by a business

corporate income tax: Corporation tax is charged first and foremost on corporate enterprises, in particular public and private limited companies, as well as other corporations such as e.g. cooperatives, associations and foundations

trade tax: Entrepreneurs engaging in business operations are subject to trade tax as well as income tax/corporation tax. In contrast to the latter, trade tax is charged by the local authorities or municipalities, who are entitled to the entire amount.

tax on wages and social security contributions when organisation has any employees

Small businesses:

Entrepreneurs whose turnover (plus the value-added tax on it) has not exceeded EUR 17,500 in the preceding calendar year and is not expected to exceed EUR 50,000 in the current year (small enterprises), do not need to pay value-added tax. However, these small enterprises are not allowed to deduct the input tax they have been billed.

a) ideal sphere:

Area	Examples	Basis of taxation	
		income	sales
Ideal sphere	Membership fees, donations	not taxable	not taxable

Attention! As a non-profit association you are only allowed to spend the money on purposes according to the Statues of the organisation. The donations are only regarded legally as donations, if the donor/ sponsor/ etc. does NOT get any service in return (except tax receipts for charitable donations).

b) asset management:

= Income resulting from existing property/ assets of the organisation (e.g. long-term renting out an asset; dividends).

area	examples	Basis of taxation	
		profit	sales

asset manageme	renting out an asset	Not taxable	Reduction: 7% „small businesse < 17.500 € not taxable

c) special-purpose business sphere:

= business that serves and is required for the non-profit purpose of the entity

area	Examples	Basis of taxation	
		profit	sales
special-purp business sp	e.g. entrance for soccer games, exhib lottery, cultural events	not taxable (exceptional case club)	reduction 7% „small businesse < 17.500 € not taxable

d) Business sphere:

= operating a business/ any activity producing income or other advantages

Area	Example	Basis of taxation	
		Income	sales
Business sphere	e.g. advertisement, public events wi entrance, selling drinks & food, runn club house, selling publications	taxable ≥ 35.000 €	19 % „small businesses“: < 17.500 € not taxable!

Example: tax receipts for charitable donations (S: 2)

If you are German, then donations of up to 20% of your annual income can be claimed as tax-exempt (donations of over 20% can be carried into the next fiscal year). The money that can be claimed from a tax deductible donation may enable you to be more generous than you initially thought.

How do I claim tax reduction?

In order to claim a tax-deductible donation on your tax return, you will need a donation receipt from the charity you have given to and either a cash payment receipt or payment confirmation from the bank. Importantly, the charity's receipt must be issued using an official template.

Attention: Liability for charitable donations

What does it mean, to Work „non-profit"? (S: 3)

A corporation or an association that conducts business for the benefit of the general public without shareholders and without a profit motive. The funds acquired by non-profit corporations must stay within the corporate accounts to pay for reasonable salaries, expenses, and the activities of the corporation. Non-profit corporations are exempt from the income taxes that affect other corporations but only if they conduct business exclusively for the benefit of the general public.

In Germany we have special regulations on the membership fees, e.g. there is a limitation at 1023 € (p.a.) as it is not allowed to restrict the access of members by money.

Part 2: Fundraising

1. What is fundraising?

"It is the process of

- gathering contributions of money or other resources,
- requesting donations from individuals, businesses, charitable foundations, or governmental agencies (see also crowd funding)
- efforts to gather money for non-profit organisations" (S: 4)

Exercise 1:
Do you donate – for what purpose? Which organisations do you support – and in which way?
Collect and discuss all the answers in the group.

What are possible factors motivating someone to donate?

Exercise 2:
Divide the group into 4 smaller groups. Three of them plan an activity/ project for which they are going to request donations. It is their task to prepare a convincing presentation, providing an answer to the question: “Why should I contribute to your idea?”

Participants of the fourth group get some toy money (e.g. Monopoly), the amount can vary between 50 € and 5000 € per person. After having heard all the presentations they have to decide which of the 3 project(s) they are going to give how much money. (If they didn’t like any of them, they can keep all of their money.)

Afterwards they are asked to explain their choices. The group then discusses the results.

2. Motivations for Giving

include:
- affected personally
- interested in the topic
- rewarded personally
- public reputation
- service in return: e.g. gratitude, tax receipts for charitable donations, studies, public relations

3. Preconditions for supporting successful fundraising

- **on organisational level:**

- being a non-profit organisation
- have a specific bank account

- **human resources**:

It is important to have a clear distinction between different working tasks: who is doing what tasks and until when? The key to the success of any project is good communication among those involved.

How to initiate first contact?

Develop a consistent strategy, ensure that you have the appropriate kind of person doing this job: a fundraiser has to seek financial support, therefore you need a “people person,” someone with good social skills, adequate qualifications and high motivation.

The responsible person should be:

- outgoing and sociable
- enthusiastic
- sensitive, not asking for too much
- patient and resilient

- **Documentation**: It is important to use a clear system for your data management. You should record contact history and donation history of each supporter.

- **how you present:**

It is all about consistency! How you represent yourself/ your organisation affects how you are perceived. Put some effort in the development of consistent mottos and logos to develop a brand. A professional, easy to recognise brand is very important, not only for attracting donors but for other areas of project management.

- **Good communication:**

  - Outside the organisation: inform the public, investors, partners, employees, and other stakeholders continuously. Doing a good job isn't enough when no one notices it.

  - Within the organisation: Everyone working within your organisation should be able to summarize the key goals, your "mission".

4. Some practical aspects you should take into consideration (S: 5)

Communication:
The key to the success of any project is good communication among those involved. Make sure there are clear, open lines of communication between the campaign/project organiser and the group leaders, teachers, parent helpers, etc. and, most importantly, the participants. Effective two-way communication keeps everyone interested, informed and enthused.

Organisation:
As in most endeavors, the degree of organisation can make the difference between success and failure. Setting up a sequence of events for your fundraising project – what happens and who is responsible – will make your campaign run smoothly and without confusion, since everyone will know exactly what is expected of him/her.

Recruiting Help:
Recruiting the assistance of other stakeholders can be an extremely effective method for fundraising activities involving children. Such volunteers typically provide help with organising, coordinating, calculating total orders, and serving refreshments.

Motivation:
One of the biggest motivators for fundraising activities is making the participants aware of the purpose of your campaign. When they know why you are raising funds and why their participation is important if the campaign is to be successful, they are far more motivated to go out and get positive results. When younger children are involved, sending an informative note or newsletter home to parents is also very effective. Doing so may result in the parents providing assistance by reinforcing the importance of each and every participant and encouraging sales efforts. Children are typically very proud when they are able to say that they did their part in achieving the group's fundraising goal.

Set Individual Targets for Participants:
Let each participant know how many pieces of cheese he/she should try to sell in order to meet the group's total goal. Tell the participants what the total goal is and how, if each one of them meets his/her personal goal, the group will be successful. Each participant is then able to see the link between his/her contribution and the success of the campaign.

Rewards and Recognition:
Establish a system of rewards and/or recognition for achievement. For example, awarding prizes or mentioning successful achievers in group meetings establishes a sense of accomplishment and pride, and fosters friendly competition between participants. Also, recognising the assistance given by parents, business people, teachers, organisers, etc., makes a positive impression that will foster willingness to assist again in the future.

Exercise 3:
Is my organisation appealing enough for sponsors?
Small groups should prepare short presentations. Some of the participants take the role of a judging panel with the role to judge every presentation from the point of view of a sponsor. Once the presentations are complete and 'judged', judges will then explain their decisions.

5. Donations and sponsoring as two special types of fundraising:

	Donation	Sponsoring
Investor	Private persons/ entrepreneurs/ other NPOs	Entrepreneurs/ business
Who benefits most?	recipient	investor
motivation/ benefit	e.g. contributing to the common welfare, - „social conscience“ - gratitude = immaterial	advertisement = material

Level of obligation	Voluntary = low level of obligation	(written) agreement/possibly a contract = high level of obligation

Donations and sponsoring can be considered as two composing forms of fundraising, especially in terms of motivation and obligation. There are many other types of fundraising in between, e.g. membership fees or sponsoring without a contract. You have to be very careful with using the correct terms – e.g. call those that donate as "supporters" rather than "sponsors" in most cases.

Exercise 4:
The training you are participating in is financially supported by the European Commission. To implement the training courses, the provider has the obligation for co-finance 30% of the total amount of the projects' costs (7.500 €).

The group should discuss the following questions:
- How could we get the money?
- Which people or groups could we ask for support?
- Which methods would be useful?

Overall budget that is needed:

	Euro
professional staff	14.500
speakers/ consultants	4.500
travelling costs	1.500
material	2.000
facilities and logistics.	2.500
sum	25.000
required amount of money (30%):	**7.500**

Task:
Write a letter to a possible donor.

After 20 minutes the group presents their suggestions.

Appendix 1: To-do list Fundraising

1.	Why should someone give his/her money to us?	**rewards**: What can we offer?
2.	Why are we doing what for whom and how?	**Summarise** the projects‘ key goals and activities
3.	What do we need?	Money or other resources? **Budget**: prepare a systematic overview!
4.	People you already know that can open new opportunities? Who could be interested in our goals?	**Target group**: • individuals: members, customer/ beneficiaries, employees, interested public, … • businesses: mentors, supporters, … • foundations/ Service Clubs • public institutions
5.	What is our strategy?	**Choose a method**

Appendix 2: "step by step" instruction to attract sponsors (S: 6) [8]

1. Step: have realistic goals To attract new sponsors you developed realistic goals. In either case you want to attract more sponsors and keep them on a long-term basis.
2. Step: concrete projects Pick out some of your projects that need financial support and are really appealing. Alternatively you can think about presenting a particular area, if you have a convincing concept why financial support is needed.
3. Step: target groups You selected the target groups you are going to address. Focus on three groups at most.
4. Step: methods You selected adequate methods suiting your target groups. Most important: mailing, events, campaign on the media.
5. Step: a crucial message Phrase a crucial message for every project/ activity. Try it on your friends or colleges at first!
6. Step: estimate the costs Estimate the costs: do not choose the "cheap" but the low-priced!
7. Step: calculation Calculate from the beginning until the end. Effort and income are balanced and according to your goals.
8. Step: time planning You have a time plan to follow agreed upon the project managers and everyone involved.
9. Step: responsibilities Everyone knows what to do.
10. Step: Analyse After your activity you conducted an analysis to point out the weaknesses and strengths.

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Module 10

Legal Issues

Module 10
Legal Issues

Note by the publishers: The issues raised in this module are national context specific. It is not within the scope of this publication to provide a complete overview of the legal issues applicable in all of the EU member states. The example below describes the situation in Germany and in the United Kingdom.We encourage you to conduct research in the national context specific aspects of this module, and use the content below as an inspiration for your national specific training sessions.

1. How to form an NGO

Initial thoughts-

- is it necessary to have a formalised, legal structure? Maybe a working group is more suitable for your goals.
- Do you know the different legal entities and how they interact with the law and taxation? If not you should research this before making a decision.
- What are the most common legal entities in your country? What are their advantages/ disadvantages?

2. Non executive representatives and members of an association

- Board members/ – are consider important for governance. Ask yourself whether there will be any specific statutes and will board members undertake specific roles and functions? Can a staff member of your organisation also be a trustee of your organisation?

3. Insurance, finances and contracts

- Insurance-is the insurance covered by the state or the organisation itself? Do you need public liability insurance? If so is the cover high enough?
- Are volunteers insured to use the organisation's insured car? Are volunteers insured to use their own car when volunteering?
- Financial issues- are expenses covered for volunteers or not?

- c) contracts: is a volunteering contract mandatory or not? Is a formal application form necessary?
- What are the legal boundaries and differences between being a volunteer and a staff member?

- Is volunteering considered as professional experience (and does it count towards the volunteers pension or not?)

- Are you aware of data protection laws and do you have the correct systems and processes in place to comply with them

- When taking photos, videos and quoting volunteers do you have consent to use them? If you are using third party material are you in breach of copyright?

- Safeguarding- Is a police check required for volunteers when supporting children and/or vulnerable adults?

Safeguarding and Disclosures (Input by Volunteering Matters)

Who are vulnerable adults?

No Secrets (policy developed in 2000 to provide a multi-agency approach to adult protection) defines vulnerable adults as people aged 18 years and over, who may be unable to:

- Take care of themselves
- Speak out for themselves
- Protect themselves from abuse or exploitation

They may depend upon other people or a service to support and to care for them.

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The Vulnerable in Europe overs a compressive overview of the legal systems in place regarding vulnerable adults in Europe. This website excludes information from the UK, but includes information from Germany, Romania and the Czech Republic.[9]

What is abuse?

[9] The Vulnerable in Europe, 2016, http://www.the-vulnerable.eu/.

Abuse is any behaviour towards a person that deliberately or unknowingly causes him/her harm, endangers life or violates their rights. It can take many forms:

- **Physical** – forceful bodily contact
- **Sexual** – sexual activity the person does not want/understand
- **Psychological** – repeatedly being made to feel unhappy, humiliated, afraid or devalued by others
- **Financial** or material – stealing or denying access to money or possessions
- **Institutional** – where things are arranged to suit the carers and not the individual (poor care standards, rigid routines)
- **Discriminatory** – abuse motivated by discriminatory attitudes towards race, religion, gender, disability or cultural background
- **Neglect** and Acts of Omission – ignoring someone's needs or not providing something they need (health care, social care, withholding of essentials)

Who is an abuser and where can abuse happen?

Abuse can happen anywhere, for example:

- At home
- In car/nursing homes
- In day centres
- In hospitals or other health centres and surgeries
- In public places or the community

Any one can abuse. The abuser can be someone well known to the person such as a partner or family member, a friend, a neighbour, an acquaintance or a stranger. Abusers can also be people in positions of trust or power such as health or social care professionals or paid and voluntary care workers.

Things that could indicate abuse

- Someone may tell you about something that has happened to them
- You may see something that makes you feel uncomfortable or uneasy
- You may notice physical evidence that may indicate physical abuse
- You may notice unexplained changes in behaviour over a period of time e.g. becoming very quiet, withdrawn or displaying sudden outbursts of temper, self harming, mood swings, fear of certain people or places etc.
- Challenging behaviours may increase

The list is not exhaustive and the presence of one or more of the indicators is not proof that abuse is actually taking place.

Is it Abuse?

It is important to realise that it is not always straightforward to determine whether an act is abusive.

When defining abuse one must consider whether:

- The actions or behaviours were intended as abusive
- The actions or behaviours were experienced as abusive

Sometimes there is a lack of clarity between abuse and intention, experience, and consent.

When to disclose

Look at the following scenarios and think of the following?

- Would you disclose the information?
- When? (e.g. immediately, Monday morning)

1. Nasreem tells you that 2 other girls in the supported accommodation have been making her buy them food and cigarettes. She sometimes does not have enough money at the end of the week for this but she is scared of what they might do if she says no.

2. Sharon is 16 and tells you that she stayed out till 3am both nights last weekend in order to hang out with some friends that were a lot older than her.

3. You have been matched with Adele for 3 months and you know that she is prone to exaggerating. You are queuing for a coffee when she tells you that her old foster carer used to hit her with a strap.

4. Jimmy is 16 years old. For the last few visits he has seemed difficult to motivate. He tells you that he is feeling really low at the moment and just wants to spend all his time in bed.

5. When you first met Jo you knew that her key worker was worried about her as she always turned up to appointments wearing the same clothes however you have met her several times now and she always wears something different and the last time you met her she had a new iPhone.

GUIDELINES ON THE IMMEDIATE ACTION TO BE TAKEN FOLLOWING A REPORT OF ABUSE

Abuse may become apparent in a number of ways; through observation, a vulnerable person may tell you, a third party may have reported an incident or you may have a strong suspicion. If an allegation brought to your attention

STEP 1 LISTEN & REASSURE

DO	DO NOT
Stay calm - do not rush into inappropriate a	**Panic**.
Reassure the person - that they are not to blame and confirm that you know how difficult it must be to confide.	**Make promises you can't keep by** - explaining that you may have to tell other people in order to stop what is happening whilst maintaining maximum possible confidentiality.
Listen - to what they say and show that you take them seriously.	**Make the person repeat the story unnecessarily**.
Keep questions to a minimum - use open questions i.e. those where more than a yes/no response is required. The law is very strict and abuse cases have been dismissed if it appears that the person has been led or words and ideas have been suggested.	**Delay**.
Ensure that you clearly understand what they have said so that you can pass it on to the appropriate agencies.	
Report it to the Volunteering Matters project worker- ensuring that you communicate all the information accurately.	
Maintain confidentiality – complete incident form and diary sheet and wait for instruction before sending	

Physical Abuse - may involve hitting, shaking, throwing, poisoning, burning or scalding, drowning, suffocating or otherwise causing physical harm to a child. It may also be caused by the parent/carer fabricating or	**Emotional Abuse** -is the persistent emotional i treatment of a child causing severe and adverse effects on the child's emotional development. It may involve conveying to a child that s/he is worthless, unloved or

inducing illness in a child.	inadequate, or valued only insofar as they meet the needs of another person.
Possible Signs unexplained injuries or burns, particularly if they are recurrent bruising that cannot be explained satisfactorily bite marks improbable reasons given to explain injuries refusal to discuss injuries parents/carers frequently alleging illness in a child body covered in hot weather reluctance to undertake P.E or shower self-harm fear of returning home fear of medical help	**Possible Signs** physical, mental and emotional development lags over-reaction to mistakes continual self-deprecation extremes of passivity or aggression fear of new situations sudden speech disorders inappropriate emotional responses to painful situations neurotic behaviour (e.g. continual rocking) self harm compulsive stealing/scavenging drug/solvent abuse fear of parents being contacted
Sexual Abuse - involves forcing or enticing a child to take part in sexual activities, whether or not the child is aware of what is happening. Activities may involve physical contact, including penetrative (e.g. rape/buggery) or non-penetrative acts (e.g. touching/oral sex). Sexual abuse can include exposure of the child to sexual stimulation inappropriate to their age and development (e.g. pornography).	**Neglect** - is the persistent failure to meet a child's basic physical and/or psychological needs, likely to result in the serious impairment young person's health or development. It may involve a parent/carer failing to provide adequate food, shelter and clothing, access to medical care and protect a child from physical harm.
Possible Signs sexualised play sexualisation of relationships/ premature sexual awareness continual open masturbation sexual pre-occupation in talk, drawings, play etc. pregnancy when father is unknown avoidance of men reluctance to go home hints of possession of secrets unexplained gifts or money self harm, attempted suicide	**Possible Signs** constant hunger emaciation poor personal hygiene poor state of clothing frequent lateness or non-attendance at school untreated medical problems destructive tendencies neurotic behaviour compulsive scavenging or stealing low self-esteem no social relationships

sudden change of behaviour /school performance over compliant or watchful attitude eating/sleeping problems lack of trust depression	

LEGISLATION WHICH IS RELEVANT TO PROTECTION OF VULNERABLE PEOPLE

There is no uniform legal framework allowing for a proper protection of vulnerable adults in cross-border situations across the European Union (EU). In fact, all EU Member States have their own legal framework, with differing tools for the protection of vulnerable adults. This creates legal uncertainties when it comes to cross-border situations. Internationally**,** The Hague Adult Protection Convention designed to properly protectvulnerable adults when in cross-border situations. Only nine EU states, including The Czech Republic, Germany and the UK have ratified the convention.

UK:

1 **The Protection of Children (Scotland) Act 2003** allows a list of persons deemed unsuitable to work with children

2 **Rehabilitation of Offenders Act 1974** (ROA), Exceptions Order 1975

3 Care Standards 2000

4 **The Police Act 1997** set out the structure of the Criminal Records Bureau.

5 **The Sex Offenders Act 1997** set up the Sex Offenders Register

6 **The Data Protection Act 1998** extended the rights of individuals to have access to personal information held about them on computer or paper records. There are exceptions to these rights in limited circumstances, including where the information is held for the purposes of preventing or detecting crime.

7 **The Human Rights Act 1998** provides that UK legislation must be construed in accordance with the European Convention on Human Rights. The Convention includes rights to respect for private and family life and also a right not to be harmed or tortured.

8 **The Protection of Children Act 1999** re-structured the Department of Health Consultancy List, setting up the Protection of Children Act List (POCA List). It also amended the Police Act 1997 so that the CRB can use information from POCA List and the DfES' List 99 in CRB disclosures

9 **The Criminal Justice and Court Services Act 2000** allows courts to impose orders disqualifying people from working with children following certain convictions. It is an offence knowingly to seek work with children if disqualified, and also an offence knowingly to recruit or permit a disqualified person to work with children.

10 **The Children Act 2004** Aimed to improve and integrate children's services, promote early intervention, provide strong leadership and bring together different professionals in multi-disciplinary teams in order achieve positive outcomes for children and young people and their families, Focuses upon Every child matters outcomes:

- be healthy
- stay safe
- enjoy and achieve
- make a positive contribution
- achieve economic well-being

11 **Children and Families Act 2014** seeks to improve services for vulnerable children and support strong families. It underpins wider reforms to ensure that all children and young people can succeed, no matter what their background. The Act seeks to reform legislation relating to the following areas:

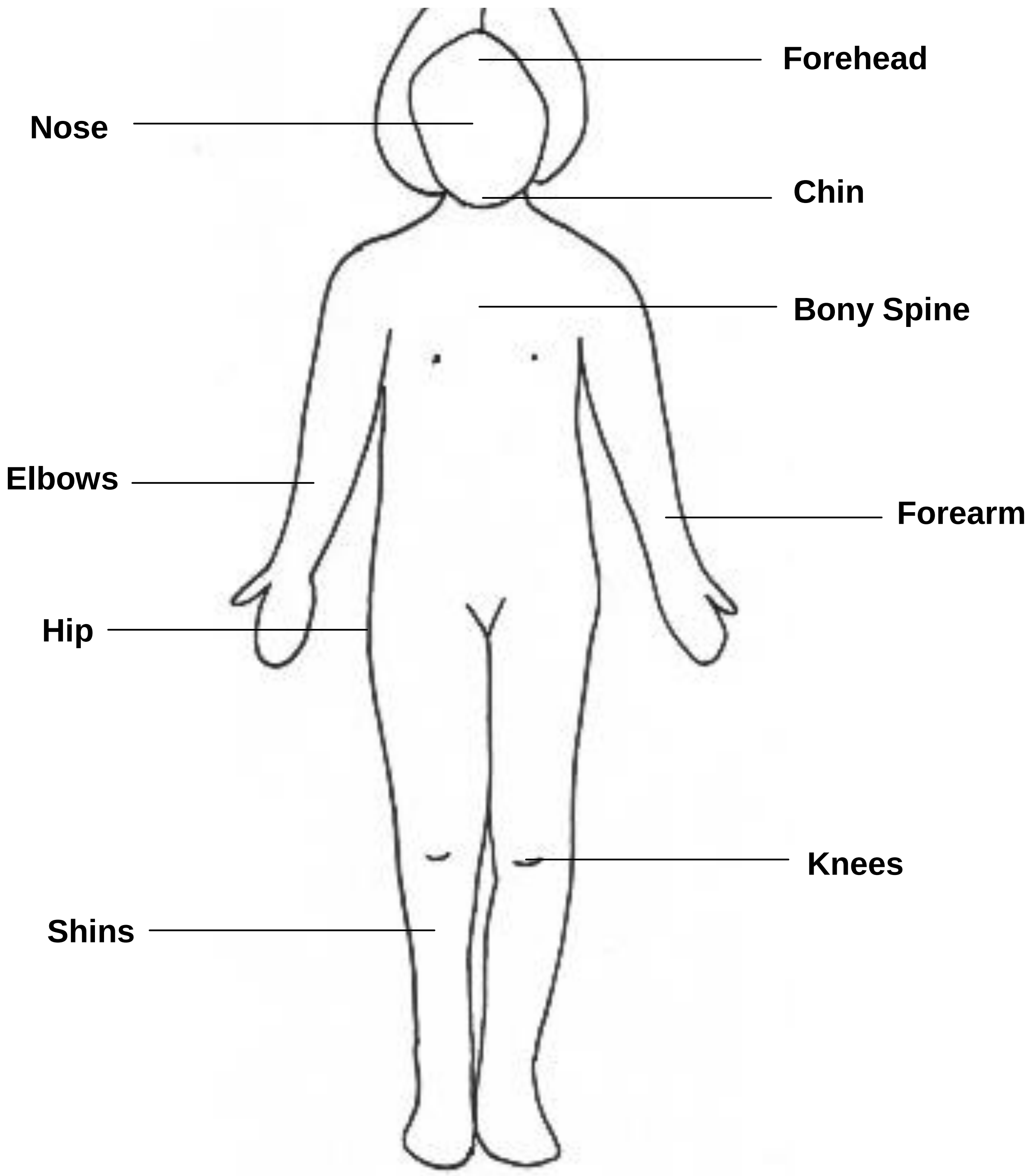
- adoption and children in care
- aspects of the family justice system
- children and young people with special educational needs
- the Office of the Children's Commissioner for England
- statutory rights to leave and pay for parents and adopters
- time off work for ante-natal care
- the right to request flexible working

Reports and guidance include:

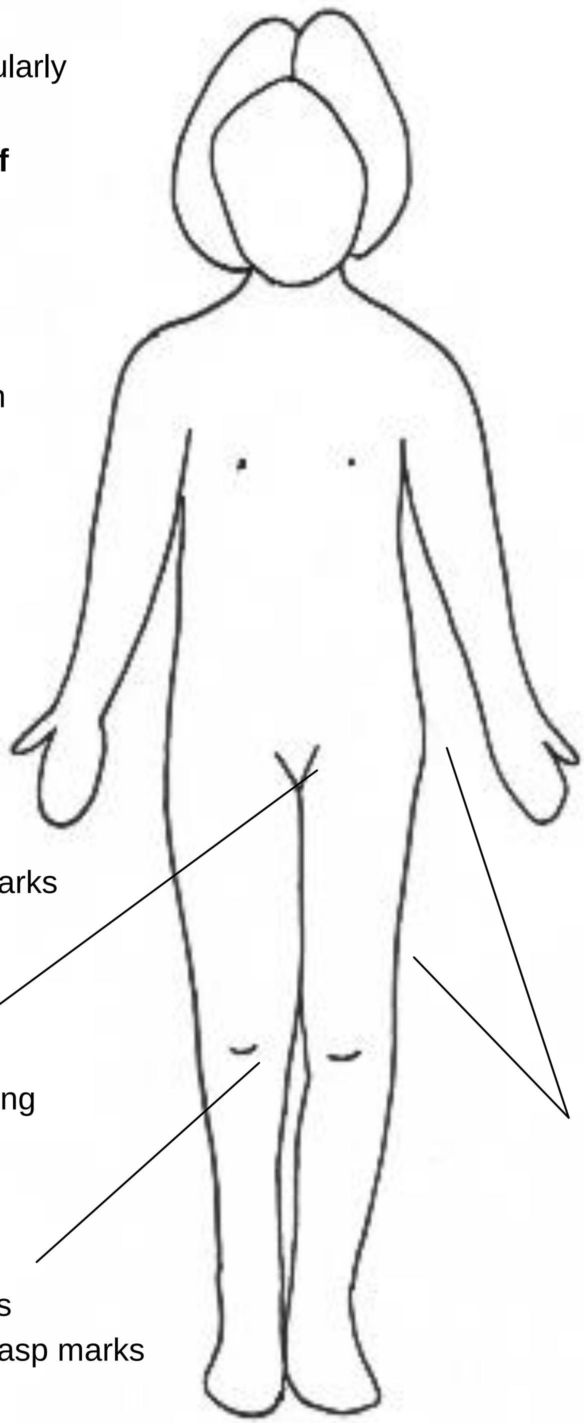
12 **Working Together to Safeguard Children 1999** - Department of Health/Home Office/Department of Education and Skills inter-agency guidance to safeguard and promote the welfare of children.

13 **Caring for Young People and the Vulnerable Adults 1999** - Home Office guidance for preventing the abuse of trust by people in positions of responsibility with 16 and 17 year olds and vulnerable adults.

Common Sites for Accidental Injury



Common Sites for Non-Accidental Injury



Eyes
- bruising
- black (particularly both eyes

Cheek/side of face
- bruising
- finger marks

Mouth
- torn frenulum

Shoulders
- bruising
- grasp marks

Chest
- bruising
- grasp marks

Genitals
- bruising

Knees
- grasp marks

Skull
- fracture
- bruising or bleeding under skull (from shaking)

Ears
- pinch or slap marks
- bruising

- **Neck**
- bruising
- grasp marks

Upper & inner arms
- bruising
- grasp marks

Back, buttocks & thighs
- linear bruising
- outline of belt/buckles
- scalds/burns