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Office Management & Administration for Local Governments

MODULES 1-4

TRAINER GUIDE

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Information for Trainers

This Trainer Guide has been designed to assist you the trainer in your delivery of the Office Management & Administration training for local governments, which aims to provide local government staff with skills and knowledge to improve the day to day conduct of their office management and administration processes and procedures, so that they can carry out efficient and effective service delivery for their communities.

By the end of this training, participants will be able to:

- Prepare different forms of written communication in their workplace such as letters, memos, emails and reports.
- Organise and participate in effective staff meetings, which include written agendas and minutes.
- Set up organisational systems in their workplace such as filing systems, visitor management systems, and organisational charts.
- Establish processes for the effective management of office assets, work vehicles and staff travel.

Overview of Office Management & Administration Modules

Module	Timing
Getting Started <ul style="list-style-type: none"> • Introductions, Aims and Objectives • Expectations and Ground Rules 	1 hour
Module 1: Written Communication <ul style="list-style-type: none"> • Session 1.1: Letters, Memos, Emails and Others • Session 1.2: Report Writing 	1 day (5-6 hours, including 'Getting Started')
Module 2: Effective Meetings <ul style="list-style-type: none"> • Session 2.1: Organising and running effective meetings • Session 2.2: Preparing effective meeting minutes 	1 day (5-6 hours)
Module 3: Office Organisation <ul style="list-style-type: none"> • Session 3.1: Filing and Record Keeping • Session 3.2: Managing Office Visitors • Session 3.3: Organisational Chart 	1 day (5-6 hours)
Module 4: Managing Office Assets, Vehicles and Travel <ul style="list-style-type: none"> • Session 4.1: Office Asset Management • Session 4.2: Vehicles and Travel 	1 day (5-6 hours, including 'Conclusion')
Conclusion <ul style="list-style-type: none"> • Action Plan • Assessment & Evaluation 	1 hour

How to use the Trainer Guide

Learning Objectives:

Each session has a set of objectives which outline what the participants should be able to do as a result of the learning in the session.

Duration:

Methods:

This tells you how long the session is designed to go for and what learning methods are involved.

Materials and Preparation Required:

This will tell you if there is anything you need to read or do before the session starts in order to prepare yourself fully.

Relevant PPT Slides:

Each session has a set of PowerPoint Slides that complement the material in the Participant Book. This section identifies the relevant slides for each session.

Pre-Training Checklist

Activity	By when?
Find out who the participants will be and likely numbers.	3 weeks before
Decide on appropriate venue and make a booking.	3 weeks before
Organise paper copies of the relevant Participant Book – 1 A4 book per participant (in Somali).	2 weeks before
Make copies of the relevant Evaluation Questionnaire and Assessment Task (in Somali) – 1 per participant.	2 weeks before
Make catering arrangements (if needed).	2 weeks before
Read through the Trainer Guide and Participant Book to make sure you are familiar with both.	1 week before
Think about what equipment and materials you will need and organise these.	1 week before
Arrange a time and location for a pre-training meeting (or phone call) to take place before training starts, with Mayor and/or Executive Secretary, to discuss the training and the participant list.	1 week before
Finalise Participant List for the training	1 week before
Create participant attendance lists for signing each day of the training.	2 days before
Prepare training timetable for each day of the training and allocate training responsibilities among training team.	2 days before
Insert the district and government logos and participant details and timetable into the relevant PPT slides.	1 day before
Visit venue to set up furniture and test a/v equipment (if possible).	1 day before
Make sure you have all the training materials, photocopies and equipment ready for the training.	1 day before
Confirm catering (if needed).	1 day before

Indicative Equipment Checklist

Item	Comment
Laptop and projector	Good if presenting PPT slides and/or other audio visuals (e.g. video), also input information into a document as an alternative to a flip chart.
Extension leads and powerboards	For laptop and projector.
PowerPoint slides on memory stick and on laptop	If using PPT slides, ensure you have a back-up copy on USB, as well as printed hard copies.
Camera/iPad to take photos of participants	Also, it is good to have someone designated to take photos during the training.
Participant Book	One copy per participant (in Somali)
Trainer Guide	One copy per trainer
Other relevant resource documents	Hard copy or electronic copy
Evaluation Sheets	One copy per participant (in Somali)
Assessment Task	One copy per participant (in Somali)
Whiteboard and pens	In addition to or instead of flip charts
Flip Charts stands, paper and pens	In addition to or instead of whiteboard
BluTac/Masking Tape	For sticking cards, sheets of paper to walls
Plenty of A4 paper	It may also be useful to set up a printer in the training room if possible.
Post it notes/stickers	For bookmarking important pages in the Participant Book and Trainer Guide
Name cards and/or badges or blank labels	For participants to identify themselves.
Notebooks and pens	For participants to take notes with.
Scissors, stapler and other misc. stationery items	You never know what you might need!
Video equipment, including power leads and connectors	If available, can be useful to record some sessions as a resource for others to use.

Getting Started

Session Objectives:

- Create a comfortable and encouraging learning environment.
- Provide an overview of the training, including aims and objectives.
- Understand participants' expectations of the training.
- Set some agreed ground rules for the training.

 **Duration:** 1 hour

 **Methods:** Icebreaker Question, Discussion, Pre-test Questions

Materials and Preparation Required:

- Prepare a copy of the Pre-Test Assessment for each participant.

Relevant PPT Slides:

PPT Slide 1: Title slide

PPT Slide 2: Overview of 'Getting Started' session

PPT Slide 3: Aim of the training

PPT Slide 4: Aim of the training (continued)

PPT Slide 5: Training Objectives

PPT Slide 6: Icebreaker Question

PPT Slide 7: Modules Overview

PPT Slide 8: Suggested Ground Rules

Welcome, Introduction and 'Housekeeping'

This can include the following:

- Prayer
- Welcome for any special guests and any introductory remarks or background information.
- Any 'housekeeping', for example, location of toilets, breaks or travel arrangements.
- Introductions of trainers and participants to each other.
- Aims and Objectives of the training.
- Icebreaker question for discussing.
- Pre-test questions and self-assessment.

Aims and Objectives of the Training

Present the aims and objectives of the training in the Participant Book. Then, go through the training overview in the Participant Book, to outline what will be covered. Explain some other important elements of the training including:

- Who the training is for.
- The assessment task to be done at the start and end of the training.
- Evaluation of the training at the end.
- Using the Participant Book — it should be referred to throughout the training and afterwards, back in the workplace.

Icebreaker question

The icebreaker question is designed to get participants to think about and make a connection between good office management and administration procedures and effective service delivery for the community. This is one of the key purposes of local government work and as such, local government staff have a duty to make their own systems run as smoothly as possible in order to:

- Respond to queries from the public about services as needed.
- Explain and account for decisions made by the local government that affect the public, for example, decisions made in meetings.
- Ensure that all relevant paperwork is easy to find, particularly that relating to services delivered to the public.
- Ensure that the public who visit the office can find where they need to go easily and are dealt with in a courteous manner.
- Ensure that money spent by the local government can be accounted for, such as on assets, vehicles and staff travel.

Action Plan

The action plan is an activity that participant will complete at the end of the training. However, it is useful to introduce the concept of an action plan at the beginning of the training, so that participants understand and will be ready to fill in their action plan at the end of the training. Introducing the action plan at the beginning can help participants as they work through the training materials to think about what aspects of the training they might be able to try and implement back in their own workplace.

Pre-test/Post-test questions

There is a set of 'Pre-test' questions and self-assessment checklist, which is a useful way to gauge participants' knowledge and skills levels before the training commences, and then compare with the results from the 'Post-test' questions and self-assessment checklist at the

end of the training, to get a feeling for what participants has learned as a result of the training. The 'Pre-test' and 'Post-test' questions for each module can be found in the Assessment and Evaluation Guide for the Office Management & Administration training materials.

Expectations and Ground Rules

1. Identifying participant expectations is an important part of understanding what people hope to achieve by attending training. It is useful to do this early on, in order to address any expectations that may be confused or unrealistic, and to ensure that everyone is clear about the purpose of the training and what participants should expect to achieve by the end of it. This exercise will depend on how much time you have available, as you will need about 30 minutes to conduct it properly.
2. Ask participants to work with the person they are sitting next to, and write down what they expect to gain from the training, as well as what they hope to be able to contribute to the training. Participants' expectations can be recorded on flip charts and then these flip charts can be posted up on the wall on the final day of training. As an exercise on the final day, participants can revisit their expectation from Day 1, to see how well it has been met, and indicate on the flip chart with a ✓ or a ✗ This exercise is also a good source of feedback for you as a trainer, to gauge how well the training has met participants' expectations.
3. It is also a good idea to identify 'ground rules' to guide the training, for example, no interrupting others when they are talking. Ask your participants for their ideas on ground rules for the training and make a list of these for all to see. Make sure that everyone agrees with the rules before continuing. Put this list somewhere visible for the duration of the training. These could include for example:
 - a. Taking part in activities and discussions.
 - b. Having mobile phones on silent and leaving the room if you need to take an important call.
 - c. Arrive on time each morning and after breaks.
4. The setting of ground rules is an important exercise for creating an environment of 'mutual respect', which includes:
 - Listening to other people's views, even if they are different from your own.
 - Not criticising other people's ideas just because you don't like them.
 - Giving everyone a chance to express themselves.

Module 1

Module 1: **WRITTEN COMMUNICATION**

Letters, Memos, Emails and Others

Learning Objectives:

By the end of this topic participants will be able to:

- Clearly distinguish between different forms of written communication.
- Write a clear and concise memo, letter or email.

 **Duration:** 2 hours

 **Methods:** Questions for Discussion,

Relevant PPT Slides:

PPT Slide 9: Module 1: Title Slide

PPT Slide 10: Session 1.1 Learning Objectives

PPT Slide 11: Questions for Discussion

PPT Slide 12: Group Discussion Tables 1.1-1.3

PPT Slide 13: Table 1.1 Overview of Written Communication

PPT Slide 14: Table 1.2 Letters and Memos

PPT Slide 15: Table 1.3 Letters and Memos

PPT Slide 16: Writing Emails – Some Key Points

Session Notes

Questions for Discussion

- What types of written communication are used in an office workplace?
- What are the benefits of using written forms of communication?

These questions are designed to highlight the importance of written communication in the workplace, as an entry point to the learning that is to follow. It is good to get participants' ideas of what forms of written communication they currently use in their workplace and then get their ideas of why it is useful.

Written communication is used extensively in the office environment. Some reasons for written communication include:

- To have a record of something, in case you need to refer back to it later, or need to prove that something has taken place, as in a memo or email.
- To give the receiver time to read, absorb and understand the information you are trying to get across, as in a report.
- To convey a sense of formality, as in a formal letter.
- To share information or instructions to more than one person at a time, for example, a group email or what's app chat group.

Communication is essential for the smooth management and administration of the district office. Good communication can:

- Create better understanding of the work of the district administration.
- Facilitate greater effectiveness in development activities within the district.
- Promote unity and cooperation between the district administration, the District Council and community.
- Foster transparency and accountability within the district administration.

Poor communication can lead to:

- Confusion and misunderstanding with the district administration.
- The failure of development programs.
- Conflict within the district administration and with other entities, such as the District Council and community.

Group Discussion

- Discuss different forms of written communication, such as letters, memos, emails and social media.
- Why do we use them? What are the advantages/disadvantages of each?
- You can refer to the information in Table 1.1, Table 1.2 and Table 1.3 to help guide your discussions.

PowerPoint Slide 12 gives some guidance for a group discussion to help participants absorb and understand the information presented in **Tables 1.1-1.3**.

- **Table 1.1** gives an overview on different types of written communication, including why it is used and the advantages/disadvantages of each.
- **Tables 1.2 and 1.3** outline some differences between letters and memos in terms of differences in their characteristics, and in the formatting of the different documents.

Give participants some time to work in groups to read through and discuss the information in the tables (15-20 minutes). Then invite each group to give their responses to the questions. Note that forms of social media such as what's app groups are becoming increasingly common in the workplace and are a good way of communicating quickly with groups of specific people.

Ask participants for their views on using what’s app and other forms of social media for work purposes, in particular the advantages and disadvantages.

Key Points: Letters

Ask participants to work in pairs to read through the information in **Tables 1. 4** and discuss together. Then they can go to **Example 1.1**, which is an example letter and try to identify the elements of the letter which are also referred to in **Table 1.4**. For example, the letter is from the head of an INGO to a Mayor, so it is formal in nature. It is formatted according to how a formal letter should be, and it is a clear request for a meeting with the District Commissioner. Ask participants if they think this is a good example of a formal letter and their reasons why or why not? Are there any improvements they would make if they were the author of this letter?

Questions for Discussion

Look at the information in **Table 1.4** above. Based on this information, do you think the letter below in **Example 1.1** is a good example of a Formal Letter? Why/Why not?

Key Points: Memos

Some information about memos is provided. You can firstly refer participants to **Example 1.2**, which is an example internal work memo, and then ask them to refer back to the information provided and identify elements of the example memo that are reflected in the information. For example, the example memo is a ‘request’ memo, asking the receiver (HR Officer) to approve a staff member attending some short course training.

Questions for Discussion

- Have a look at the memo in **Example 1.2** above. What type of memo is it— instructions, request, announcement or confirmation?
- What action should the HR Officer take and how should the HR Officer respond? (see **Diagram 1.1** below)

A suggested answer is that the HR Officer is the intended recipient, they should identify the type of memo it is (request) and that the memo is asking for some specific action (approving training for staff). According to the flow chart in **Diagram 1.1**, the HR Officer should carry out the appropriate action (assumed to be give their approval) and report back to the sender (Director, Public Works) within 3 working days. The original memo should then be filed.

The next activity is a short scenario which outlines a possible situation that might occur when a memo containing confidential information is received by the wrong person. Ask participants to work in pairs and read the scenario and discuss the questions that follow, including identifying what the officer should do next, and what might be the possible consequences of their actions.

Key Points: Circular letters

This section of the session is about circular letters, which are widely used in the district office environment. Some general information about circulars is provided, followed by **Example 1.3**, an example circular letter, which is based on a real circular from a real district.

Key Points: Writing Emails

There is some information provided about writing emails and you can refer to **PowerPoint Slide 16**. It might be particularly useful to go through the information on ‘cc’ and ‘bcc’ as it can often be confusing about what these two functions are for, and when it is appropriate to use them.

Exercise 1.1: Email, Letter, Memo Writing

Exercise 1.1 is a longer exercise (allow 45-60mins) and asks participants to use what they have learned so far to prepare a piece of written communication, either an email, memo or letter. Participants should work in small groups, following the instructions in their Participant Book, and make reference to the following places in their Participant Book to guide them:

Table 1.1: Overview of written communication

Table 1.2: Letters and memos—some different characteristics

Table 1.3: Letter and memos—some differences in formatting

Table 1.4: Writing a letter

Key points: Writing emails

As part of the debrief of this exercise, ask some groups to share what they have prepared with the rest of the participants and ask for any comments or feedback.

Report Writing

Learning Objectives:

By the end of this topic participants will be able to:

- Differentiate between the different types of reports they are expected to produce as part of their work role.
- Prepare an accurate and concise work report for their supervisor.

 **Duration:** 2 hours

 **Methods:** Questions for Discussion, Group Work, Examples

Relevant PPT Slides:

PPT Slide 17: Session 1.2 Learning Objectives

PPT Slide 18: Questions for Discussion

PPT Slide 19: Table 1.5: Types of Reports

PPT Slide 20: Group Work

PPT Slide 21: Written Communication Resources

Session Notes

Questions for Discussion

- What written reports are you expected to prepare as part of your work role?

The question aims to get an idea of what participants currently prepare in terms of work reports. Get their input quickly and make a list on a flip chart page, which you can refer back to during the session for comparison.

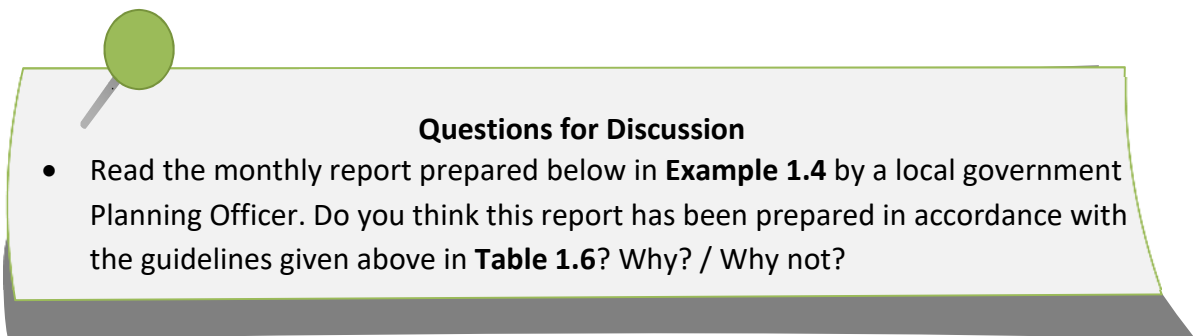
Key Points: Written Reports

The text box and **Table 1.5**, give some information about the different types of reports that staff are expected to produce as part of their work roles. The information in Table 1.5 is also summarised in **PowerPoint Slide 19**. Emphasise the points in the **Important!** text box – that

a report is not written for the sake of it, it should be an important way to convey information on which action can be taken.

Key points: How to write a report

This section includes **Table 1.6**, which gives some information on how to write a good report, which can be a difficult thing to achieve. **Example 1.4: Monthly Report** gives an example of a report that has been prepared by a local government Planning Officer, which participants can refer to and compare to the information in **Table 1.6**, to see how well the report has followed the guidance in the table. Ask participants for their impressions of the report – has it been written in accordance with the guidelines in **Table 1.6**? What suggestions would they make to improve the Example report? See **PowerPoint Slide 20**.



Questions for Discussion

- Read the monthly report prepared below in **Example 1.4** by a local government Planning Officer. Do you think this report has been prepared in accordance with the guidelines given above in **Table 1.6**? Why? / Why not?

Finish the session by sharing the resources on written communication that can be found online, as shown on **PowerPoint Slide 21**.

Module 2

Module 2: ***EFFECTIVE MEETINGS***

Session 2.1

Organising and Running Effective Meetings

Learning Objectives:

By the end of this session participants will be able to:

- Distinguish between effective and ineffective meetings.
- Organise and run an effective staff meeting.
- Engage more effectively as a participant in a meeting.

 **Duration:** 3 hours

 **Methods:** Questions for Discussion, Examples, Role Play Exercise

Relevant PPT Slides:

PPT Slide 22: Module 2 Title Slide

PPT Slide 23: Session 2.1 Learning Objectives

PPT Slide 24: Questions for Discussion

PPT Slide 25: Key points: Effective meetings

PPT Slide 26: How to be an effective meeting participant

PPT Slide 27: Diagram 2.1: Before, During and After a Meeting

PPT Slide 28: Key points: Before a Meeting

PPT Slide 29: Key points: During a Meeting

PPT Slide 30: Key points: After a Meeting

PPT Slides 31&32: Managing Meeting Behaviour

PPT Slide 33: Group Work—Effective and Ineffective Meeting

Session Notes

Questions for Discussion

- Can you describe an 'effective meeting' that you have attended? For example, how was it run, who attended, and what were the outcomes?

This module is about running effective meetings and this question aims to draw on participants' own ideas about and experience with effective meetings, in order to illustrate a picture of what an effective meeting might look like. Some possible responses might include:

- Effective meetings have a clear purpose.
- Effective meetings don't take up too much time.
- Effective meetings have action points.
- Effective meetings stick to the topics.
- Effective meetings have a note taker.
- Effective meetings have the right people attending (decision makers).
- Effective meetings have useful discussions in a respectful environment.

Key points: Effective meetings

The boxed text provides some important information about what makes a meeting 'effective'. This question should have already been addressed in the question for discussion, so some of the answers are likely to have come up already. Refer to the text and gap fill on any answers that were not raised in the discussion. Then refer to the checklist about whether a meeting should be held or not and go through the points. Have a brief discussion with participants if they can think of any instances from their own experience where a meeting was held when it should not have been. What happened and why? Also see **PowerPoint Slide 25**.

How to be an effective meeting participant

The information in this text box is very important, as often the focus is on how to lead or Chair a meeting effectively. However, every person at a meeting has a responsibility to participate effectively in that meeting, but this is often overlooked. As one way to explore the information in the text box, you could assign a point (eg 1,2,3...7) to each group of 3 participants. Ask each group to read the point and discuss among themselves, then report back in plenary about to what extent they agree with the point and whether they can illustrate the point with any examples from their own experience. Also see **PowerPoint Slide 26**.

Key points: Formal and Informal meetings

The information in this text box helps to explain some of the differences between formal and informal meetings. Follow this up with the questions for discussion:

Diagram 2.1 and **PowerPoint Slide 27** gives an overview of the 3 stages of a meeting – before, during and after. The key points presented in the diagram are outlined in more detail in the text to follow.

Key points: Before the meeting (Steps 1-5)

This text box and **PowerPoint Slide 28** includes steps such as confirming the date, time and venue of a meeting and preparing an agenda. There is a meeting agenda template in the **Annex 5** and an example meeting agenda is provided in **Example 2.1**.

Exercise 2.1: Writing a Meeting Agenda

Using the information provided, work in small groups to prepare a short meeting agenda for a meeting topic of your choice. Be sure to set it out in the same way as in **Example 2.1**

Key points: During the meeting (Steps 6-12)

This text box and **PowerPoint Slide 29** includes a number of points for consideration during the meeting, such as starting on time, ending on time and taking minutes throughout. These may seem like simple things, but it is surprising how often they are not done, with meetings starting late, ending much later than planned, and nobody taking any notes, so that there is no record of what decisions were made and what actions are to be taken next.

Another text box presents some detailed information on the role of the Chair during a meeting, and **Diagram 2.2** presents the decision making process for a meeting that a Chair should lead. This is followed by some information on what to do if conflict arises during a meeting.

Key points: After the meeting (Steps 13-15)

This text box and **PowerPoint Slide 30** focuses on what needs to be done after a meeting, such as preparing and circulating the minutes.

Checklist for organising and running meetings

This checklist is provided as a tool for participants to use in preparation for future meetings. It gives guidance on what activities are to be done in the before, during and after stages, and a suggested timeline. Ask participants to review the checklist and give their comments – are there any activities that should also be included? Are the timelines realistic?

Key points: Managing meeting behaviours

The text boxes here and **PowerPoint Slides 31-32** outline some difficult behaviours that can be encountered in meetings and what can be done to mitigate these. It is useful to reflect on these behaviours before moving into **Exercise 2.2**.

Key points: Effective Meeting Facilitation

This information aims to support the other information presented in the session, particularly where a meeting is held with a community group for example. The information gives some ideas on contributing, listening, being inclusive and some techniques for allowing all voices to be heard.

Exercise 2.2: Meeting practice—Role Play Scenarios

In this activity we will look at some aspects of running a meeting, including what meeting behaviour is needed for a successful meeting.

Your trainer will guide you through the steps in this activity, as follows. You will need to refer to **Exercise Sheet 2.1** and **Exercise Sheet 2.2**, which is an invitation letter for the meeting, including the topics for discussion.

There are two scenarios—an ineffective meeting, and an effective meeting. One group (5 people) will act out an ‘ineffective meeting’ and another group (5 people) will act out an ‘effective meeting’.

This meeting is a staff meeting within the Planning Department of Abyan District. The main issue for discussion is the preparation for a 2 day visit by the Mayor of Mogadishu/Governor of BRA, who is going to visit a number of the projects that Abyan District has implemented in the past year.

In the role play scenarios, each group will need to discuss the upcoming visit by the Mayor and develop action points by assigning people to the tasks in the meeting letter of invitation.

After the role play meeting, discuss the following questions in plenary:

- What were the good and bad aspects of this meeting?
- How did the Chair handle the meeting from start to end?
- How well did the different staff members contribute to the meeting?
- What are some suggestions for holding a successful meeting?

Session 2.2


Preparing Effective Meeting Minutes

Learning Objectives:

By the end of this topic participants will be able to:

- Prepare a set of meeting minutes in a style appropriate to the type of meeting being held.
- Prepare a set of meeting minutes that are brief, accurate, clear and objective.

 **Duration:** 2 hours

 **Methods:** Questions for Discussion, Examples, Analysis exercise

Relevant PPT Slides:

PPT Slide 34: Session Objectives

PPT Slide 35: Questions for Discussion

PPT Slide 36: What to record in the minutes?

PPT Slide 37: Characteristics of good meeting minutes

PPT Slide 38: Key points: Steps for preparing minutes

PPT Slide 39: Effective Meeting Resources

Session Notes

Questions for Discussion

Meeting minutes are a record of what was said at a meeting and what decisions or actions were taken.

- Why is it important to have such a record?

This question is designed to start the session by focusing participants on the reasons why it is important to keep a written record of a meeting. Suggested answers include:

- They provide a clear, objective summary of the meeting outcomes.
- They provide a reference of future expected follow up actions.
- They provide information to people who were unable to attend the meeting.

- They provide background on the decisions of the group and the reasons for these decisions.
 - They are useful to refer to at subsequent meetings, to ensure that no points are forgotten, repeated or remembered incorrectly.
 - They are available for use as evidence at legal proceedings.
 - They are useful for problem solving, for example, as evidence of what decisions were taken.
 - Good meeting minutes reflect the overall performance of a district local government.
- Note that these answers appear in the text box below the questions. However, try to get participants to answer using their own ideas first, before gap filling from the text provided.

Key points: Meeting Minutes—what to include?

The style of the meeting minutes will be determined by the type of meeting that has taken place (informal, action, formal), and this will determine to an extent what should be included in the meeting minutes. It can often be difficult to know exactly what to include in a set of meeting minutes. The information in the text box aims to give some guidance on this. Discuss the text box with participants and get their ideas on what is important to include and what should be left out. Refer to the small table in the Participant Book (and below) and **PowerPoint Slide 36**.

Record <input checked="" type="checkbox"/>	Don't Record <input type="checkbox"/>
All relevant discussion points, including the 'pros and cons' raised about an issue.	Anything not relevant to the discussion topic.
All motions and their results (both passed and defeated motions)	Personal comments (for example, comments that are critical of a person)
New information	Redundant information
Expected action	Your own opinions

Emphasise that minutes must be 'brief, accurate, clear and objective'. Ask participants what they think is meant by each of these terms and then refer to **Table 2.1** and **PowerPoint Slide 37**.

Examples of different formats used

You can also briefly look at the examples of different minute formats that are sometimes used—numbering format and table format. See also **Annex 7** for a sample format.

Key points: Steps for preparing minutes

The text box and **PowerPoint Slide 38** gives some information about preparing meeting minutes. However, you can skip ahead to the exercise for the session, **Exercise 2.3** which is

outlined below, and ask participants to refer back to the text in this section to help them conduct the exercise.

Exercise 2.3: Meeting minutes preparation

Using the template in **Annex 7** as a guide, work in groups to try to draft a short set of meeting minutes, based on the example meeting agenda presented in **Example 2.1** in **Session 2.1**. You will need to be creative about what discussions took place during that meeting, and what actions and decisions came out of the meeting.

Finish the session by sharing the Effective Meeting Resources in **PowerPoint Slide 39**, which are also in the Participant Book.

Module 3

Module 3: OFFICE ORGANISATION

Session 3.1


Filing and Record Keeping

Learning Objectives:

By the end of this topic participants will be able to:

- Discuss the importance of secure and organised filing systems for district documents.
- Identify an appropriate filing system that can be used for their district department's documents.
- Prepare a secure and organised filing system appropriate for their department's requirements.

 **Duration:** 2 hours

 **Methods:** Questions for Discussion, Examples, Group exercises

Relevant PPT Slides:

PPT Slide 40: Module 3 Title Slide

PPT Slide 41: Session 3.1 Learning Objectives

PPT Slide 42: Questions for Discussion

PPT Slides 43-46: Filing System ☒ and ☑

PPT Slide 47: Key Points: Steps for setting up a Filing System

PPT Slide 48: Group Work: Types of Information

PPT Slide 49: Table 3.1: Some Filing Systems

PPT Slide 50: Combination Filing – An Example

PPT Slide 51: Filing System Resources

Session Notes



Questions for Discussion

- Looking at the pictures below, which is an example of a secure and organised filing system, and which is not? Why?

Below the Questions for Discussion are two pictures, one which demonstrates a disorganised, unsecured filing system and the second picture shows an orderly, secure filing system. These are also available as **PowerPoint Slides 43-46**. Ask participants to comment on the differences between the two and their reasons why they think one is more organised than the other. For example, the first one has papers stacked up in no particular order, they are not secured and it would be very hard to find in the pile of papers. The second example has colour coded files in a drawer with dividers, so that everything is organised and it also looks as though the filing drawer could be secured.

You can brainstorm some ideas on why it is important to have a secure and organised filing system, and then go on to gap fill from the text below.

Key points: Why is a filing system important?

The boxed text gives some points about why it is important to have a filing system

Key points: Steps in setting up a filing system

The text box and **PowerPoint Slide 47** give some general steps to follow when setting up a filing system, which will be covered in more detail during the session.

Exercise 3.1: Types of Information to be filed

This exercise aims to get participants thinking about the types of information that requires filing, and who has access to the different types of information. Ask participants to work in small groups to study **Table 3.1** and fill in with details about access. See also **PowerPoint Slide 48**.

Table 3.2 and **PowerPoint Slide 49** outline some different methods of filing, and **Examples 3.1 and 3.2** illustrate this further by presenting some filing systems based on numerical method. **PowerPoint Slide 50** gives an example of a Combination Method of filing. Note that these different systems can be used for both hard copy and electronic filing.

Exercise 3.2: Choose a Filing Method

These examples are followed up with an exercise which asks participants to review the information from Exercise 3.1 and identify appropriate types of filing systems for each—alphabetical, numerical, date, subject or a combination.



Questions for Discussion

What are some of the practical considerations that are necessary for setting up an efficient filing system? Brainstorm a list of ideas.

Brainstorm ideas from the Questions for Discussion and then gap fill from some of the text boxes that follow. Some ideas to include are:

- hard copy, soft copy
- stationery
- hard drive, back up
- easy access
- shelf
- PC
- filing cabinet, folders
- lock for cabinet
- labels
- Person identified for the task and given time to do it

Key points: How to set up an effective filing system

Summarises the key steps on the ‘how to’ of setting up a filing system, in terms of the step by step process, and the materials needed, which may have already been raised during the discussion, but you can add to these ideas.

Key points: Tips for an efficient filing system

The text in these boxes gives some tips on a good filing system, as well as a Checklist for when setting up or maintaining a system. It is important that once a filing system has been set up that it is maintained at regular intervals, meaning that it should be checked to ensure that files are in the correct place and that the files have not become too full.

Key Points: What is a Resource Centre?

The text in this box and **Examples 3.3 and 3.4** that follow, offer some practical steps for a local government that may wish to set up a resource centre, for use by staff (and possibly, members of the public).

Finish the session by sharing **PowerPoint Slide 51**, which gives some additional online resources that can be useful to understand filing in more detail.

Managing Office Visitors

Learning Objectives:

By the end of this topic participants will be able to:

- Discuss the importance of a professional and organised system for managing visitors to the office.
- Identify the key requirements for managing office visitors.
- Prepare a visitor appointment book and visitor sign in sheet.

 **Duration:** 2 hours

 **Methods:** Questions for Discussion, Examples, Role Play Exercise

Relevant PPT Slides:

PPT Slide 52: Session 3.2 Learning Objectives

PPT Slide 53: Questions for Discussion

PPT Slide 54: Key Points

PPT Slide 55: Tips for Managing Office Visitors

Session Notes

Questions for Discussion

- Who is considered a 'visitor' in the context of your organisation?
- Does your organisation have a formal system for managing visitors to the office? If so, describe the system.

The questions for discussion aim to start a conversation about visitors to district local government offices. Many district offices are characterised by visitors coming and going, without a formal system for recording visitors or making appointments. It is good to think about 'who' is defined as a visitor, for example, is it only members of the public, what about a member of staff from one department who visits another department? It is also good to get an idea of what currently is in place, and whether participants believe it is adequate or not.

Key Points: Managing Office Visitors

This text box explains the importance of the local government office as a meeting place between local government officials and the public, and as such there is a need for the office to be welcoming and easy for the public to come and conduct their business at the office. This information is also summarised in **PowerPoint Slides 54-55**.

Key Points: Visitor Appointments System

Information is presented in the text boxes, which gives an overview of how to set up a formal system for making appointments with particular people working in the local government. The boxed text is followed by **Examples 3.5 and 3.6**, which present examples of a Visitor Appointment Book and a Visitor Record Book.

Exercise 3.3: Visitor Role Play

This exercise is designed to contrast a disorganised and organised role play about visitors. Form two groups and ask each group to act out its scenario according to the dot points. Groups can refer to the 'Key Points' text boxes to help guide them. Ensure that the role play activity is followed up with a discussion around the following questions:

**Questions for Discussion**

After the role play meeting, discuss the following questions in plenary:

- What were the main differences between the disorganised and organised system?
- What are some of the problems with not having an organised visitor system?
- What are some suggestions for establishing an organised system of managing office visitors?

Organisational Chart

Learning Objectives:

By the end of this topic participants will be able to:

- Discuss the purpose of an organisational chart.
- Prepare a clear and accurate organisational chart for their organisation.



Duration: 1 hour



Methods: Information and Discussion, Examples



Relevant PPT Slides:

PPT Slide 56: Session Objectives

PPT Slide 57: Diagram 3.1 Example Organisational Chart

Session Notes

This short session is designed to highlight the need for and importance of an organisational chart, which shows different departments and positions within departments. This is useful for people working in a local government, as well as those outside the organisation, such as the general public, and other stakeholders.

Key Points: What is an organisational chart?

The text in the box overviews the purpose of an organisational chart, as well as some other important aspects about its development and use. This is followed by **Diagram 3.1**, which gives an example organisational chart from 'Abyan District'.

Key Points: Preparing an organisational chart

The next text box gives some guidance on how to prepare an organisational chart, and a checklist.

Module 4

Module 4: OFFICE ASSETS, VEHICLES AND TRAVEL


Office Asset Management

Learning Objectives:

By the end of this topic participants will be able to:

- Distinguish between district 'Office Assets' and other types of assets that are managed by the local government.
- Prepare Office Assets Register and Office Assets Survey documents.

 **Duration:** 2 hours

 **Methods:** Questions for Discussion, Examples, Analysis exercise

Relevant PPT Slides:

PPT Slide 58: Module 4 Title Slide

PPT Slide 59: Session 4.1 Learning Objectives

PPT Slide 60: Questions for Discussion

PPT Slide 61: Some Office Assets

PPT Slide 62: Tools for Managing Office Assets

PPT Slide 63: Other forms for managing office assets

Session Notes

Questions for Discussion

- What are all the different types of assets that are held by your district? Who is responsible for their management? Give some examples.

The content of this module will emphasise the importance of systems and procedures for things like asset management, vehicle management, and work travel, so it is useful to start participants thinking about why this might be. Some reasons could include:

- Safeguarding of assets, and improving transparency and accountability.
- Tracking staff movement and managing the cost.

- Ensuring proper maintenance and usage of vehicles.

Key points: Office Asset Management

The Participant Book clearly outlines that the scope of the session is for ‘district office assets’ that is, assets held in the district office for use in the office environment, such as office furniture and IT equipment. It does not refer more broadly to other district assets, such as land, buildings, and heavy equipment.

Other important information in the boxed text includes information about an Asset Register, Asset Numbering and the Annual Asset Survey. **Examples 4.1 and 4.2** provides some detailed information about the Asset Register and Asset Survey, including asset numbering. See also **PowerPoint Slide 62**.

Exercise 4.1: Office Asset Analysis

This exercise aims to give participants an opportunity to analyse the information in **Examples 4.1 and 4.2**, to ensure they understand what is contained in the Asset Register and Asset Survey. Ask participants to work in small groups and then discuss answers in plenary.

Answers:

1. How was the HP digital projector acquired by Abyan District (Purchase, Transfer, Donation) and what was the source?

It was donated from JPLG.

2. From looking at the Asset ID number, how many ‘Office Tables’ did Abyan District have at the time of registering that asset?

3 Tables (Asset ID is 10.3)

3. The condition of the HP printer went from ‘good’ to ‘fair’ in a 6 month period. Why do you think this might be?

Repairs are needed (see Survey Sheet)

4. What action has the Asset Survey Board recommended be taken regarding Asset DHAB 10.3? Why do you think this is?

Disposal, because the asset (table) is in poor condition.

Key points: Office Asset Transfer and Disposal

This text box follows on from the previous in that it gives some information about what happens when an asset is transferred from one location to another, disposed of, or is in need of some maintenance. **Examples 4.3, 4.4 and 4.5** illustrate this further. See also **PowerPoint Slide 63**.

Vehicles and Travel

Learning Objectives:

By the end of this topic participants will be able to:

- Discuss the importance of having a system of vehicle movement and management.
- Prepare a basic Travel Request and Authorisation Form.
- Identify the main components of a Travel Activity Form.

 **Duration:** 2 hours

 **Methods:** Questions for Discussion, Examples, Written Exercises

Relevant PPT Slides:

PPT Slide 64: Session 4.2 Learning Objectives

PPT Slide 65: Questions for Discussion

PPT Slide 66: Tools for Managing Office Vehicles

PPT Slide 67: Tools for Managing Staff Travel

Session Notes

Questions for Discussion

Abyan District currently has no formal procedures in place for its staff who need to travel for work purposes.

- What might be some of the problems of not having procedures in place?
- What can you suggest as a good starting point for Abyan District, in order to put a system in place? What would be the main considerations?

The purpose of these questions is to ask participants to think about why it might be important to have formal procedures for staff travel, for example, so staff can be accountable for their movements, so that people can be contacted easily, even if they are out of the office, and for the purposes of coordinating activities that are taking place outside of the local government office.

Key Points: Vehicle Management

The boxed text outlines some of the key forms required for managing and maintaining the vehicles owned and used by the district local government. **Examples 4.6, 4.7 and 4.8**, provide examples of Vehicle Log Book, Vehicle Request and Vehicle Maintenance Forms. Also refer to **PowerPoint Slide 66**.

Key Points: Staff Travel

The key points and **Examples 4.9, 4.10 and 4.11** that follow give clear information about how to complete the relevant forms before and after travel, including a travel request form and a travel activity report. It is followed by the activity below, which gives participants some practice in completing a travel request form. See also **PowerPoint Slide 67**.

Exercise 2: Travel Request and Authorisation Form

This exercise aims to give participants practice in preparing a Travel Request and Authorisation Form, as shown in **Example 4.10**. Work in groups of 3 to complete the Travel Request and Authorisation Form, in **Exercise Sheet 4.1**, using details provided in the scenario below.

Scenario:

You are a Planning Officer who is planning a work trip to a number of places within Abyan District, for a series of meetings relating to the implementation of projects from the district's Annual Work Plan for 2020.

The travel involves site visits to the project locations which are to have a project implemented in 2020. The visits will involve a team of people including the Mayor, a District Councillor, the District Engineer and you, who has been asked to come on the trip as the note taker, to ensure that all conversations and decisions made are recorded accurately.

The site visits also provide an opportunity to meet with the Village Committees and have discussions about the projects that are going to occur in these locations and ensure that the Village Committees understand the requirement for, and the role of the Community Monitoring Group for the projects.

You will visit the following locations in this order: 1. Berket construction project in Friendly Village, 2. Borehole construction project in Seaside Town, 3. a rehabilitation of Borehole project in Shady Tree Town and 4. Berket construction project in White Sands Village.

The travel will be over 5 days and 4 nights from Sunday 15 January to Thursday 19 January 2020. It is anticipated that you will stay overnight at each project location, as there are long distances to travel between the projects and each meeting is likely to take some hours. You will need to request per diem in advance as there are likely to be accommodation costs.

Conclusion

Learning Objectives:

By the end of this session participants will be able to:

- Summarise the main topics covered in the OM&A modules.
- Fill in an Action Plan, by identifying some things they can try to put in place back in their own workplace.
- Demonstrate understanding of the content of the module, through a short assessment task.
- Evaluate the module, by providing feedback on their reaction to the training they have just completed, through a short questionnaire.



Duration: 1 hour



Methods: Action Plan, Assessment Task, Evaluation Questionnaire



Relevant PPT Slides:

PPT Slide 68: Conclusion Session Overview

PPT Slide 69: Action Plan Exercise

Summary

The conclusion of the module is an opportunity to summarise what has been achieved over the course of the training. Start by asking participants if they can recall some of the main points from the training. Ask people to share if there was anything in particular they found useful or interesting, or anything that might have been confusing. You can refer to the bullet points in the Participant Book for this session (also below) to guide you and the participants through this process:

- Some main forms of written communication in the office.
- Identifying the different types of reports to be prepared.
- Some steps in preparing and writing a report.
- The important steps to consider before, during and after a meeting.
- How to prepare so that you can be an effective meeting participant.
- How to Chair a meeting well for effective decision making.
- The importance of an efficient filing system and the types of information that are included as part of a filing system.
- The different ways to set up a filing system, for example, alphabetical, numerical.

- Some steps in setting up a resource centre.
- The purpose of an organisational chart and how to prepare one.
- How to manage visitors to your organisation.
- Procedures for the recording of office assets, including transfer and disposal.
- Some key tools for proper vehicle movement and management.
- Forms and procedures for when seeking approval to undertake staff travel.

Action Plan

Give participants some time to look at the Action Plan template in their Participant Book and try to identify 1 thing for each module that they feel they could try to implement in their own workplace, based on what they have learnt in the training. See also **PowerPoint Slide 69**. The first page shows an example from each Module, the second page is a blank template where they can share their own ideas. Invite participants to share some of their ideas with the rest of the group if they wish.

Assessment Task

Hand out the Assessment Task, give participants about 20 minutes to complete this. Collect the assessments for marking. Explain that certificates will be issued to those who have successfully completed the assessment (80% correct required to pass).

Evaluation

Finish by conducting an evaluation activity. This can be either the Evaluation Questionnaire or one of the activities outlined in the Evaluation and Assessment book. The main purpose of the evaluation activity will be to gauge participants' reactions to the training they have just done (Level 1 on the Kirkpatrick scale of evaluation). The responses from the evaluation will help you with planning and preparing for when you next run the training.