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# Office Management & Administration for Local Governments

## ***MODULES 1-4***

## **PARTICIPANT BOOK**

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June 2019



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## Introduction

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### Aims and Objectives

This set of Office Management & Administration training modules aims to provide you, as local government staff, with skills and knowledge to improve the day to day conduct of office management and administration processes and procedures, so that the organisation can carry out efficient and effective service delivery for local 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 Training

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

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## Introductory Session

### 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.

! In this session you will get to know your trainer/s and the other participants. You will find out what the training involves and what you are expected to do.

Here are some topics your trainer is likely to cover in this session:

- Welcome, Introductions and 'Housekeeping'
- Aims and Objectives of the Training
- Expectations and Ground Rules
- Pre-test Assessment
- Introducing the Action Plan

#### Icebreaker Question

- How can good office management and administration practices help local governments deliver better services to the community?

#### Action Plan

- **What is an Action Plan?** An action plan is simply a way of putting down in writing what action you and your colleagues plan to take to achieve certain outcomes. Action plans can help clarify and commit us to **what** needs to be done, **who** is going to do it, by **when**, and what **support** might be needed.
- At the end of this training, you will be asked to make some entries in your action plan, of something that you can implement when you are back in your workplace, as a result of what you learn in this training. There is an action plan template at the end of this Participant Book.

## **Module 1**

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# ***Module 1: WRITTEN COMMUNICATION***

## Session 1.1

## 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.

### Questions for Discussion

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

**Table 1.1: Overview of Written Communication**

What is it?	Why do we use it?	Advantages/Disadvantages
<p><i>Letter</i></p> <p>Usually a formal means of communication, to inform or notify the recipient about something, or make a request for something.</p>	<p>For communicating something formally or officially.</p>	<p>A signed, formal letter is likely to be taken seriously, due to its official nature.</p> <p>It can be a long process to draft, check, sign, and send a formal letter.</p>
<p><i>Memos</i></p> <p>Similar to a letter, but used for internal communication and can be less formal than a letter.</p>	<p>Memos can be used for the following reasons:</p> <ul style="list-style-type: none"> <li>• Announcements</li> <li>• Confirmation/Record of conversation</li> <li>• Request for action</li> <li>• Instructions/Procedures</li> </ul>	<p>Memos can be quicker to write, send, read and respond to.</p> <p>Because memos are quicker to write than letters, there can be a tendency to send them without proper checking first.</p>
<p><i>Circulars</i></p> <p>A circular letter is a document or letter that is sent to a closed group of</p>	<p>Circular letters are used to inform the recipients of new policies or other important matters. For example, they</p>	<p>A good way of circulating important information to a wide group of people at the same time.</p>

people with the intention of being widely circulated.	might be sent to all of an organisation's employees or clients to notify them of new plans or a change of address.	Not tailored to a specific recipient, so the information must be kept general.
<i>Emails</i> An electronic means of written communication.	Can be very useful for communicating with people in another location.  Can be very useful for asking questions and sending information in a short time.	Too many emails being sent and received can be time-consuming and not enough attention is paid to the important ones.
<i>Social Media (e.g. What's App)</i> A way of communicating in real time by phone messages with a specific group of colleagues.	Can be very useful for sharing information and getting quick responses among a group.  Is very convenient, as most people use a cell phone.	With any social media, care must be taken about confidentiality of messages sent.  Abbreviated texts can sometime mean the message is not clear.

**Table 1.2: Letters and Memos—some different characteristics**

<b>Characteristic</b>	<b>Letters</b>	<b>Memos</b>
<i>Audience</i>	External	Internal
<i>Style</i>	More formal	Less formal
<i>Length</i>	Tend to be longer	Tend to be shorter
<i>Approach</i>	Can be direct or indirect	Usually direct
<i>Provides information or requests action?</i>	Usually both	Usually requests action
<i>Use of 'in-house jargon'</i>	Not suitable	Can be used
<i>Likely to enclose other documents?</i>	Yes	Not often
<i>Copies sent to others?</i>	Sometimes	Fairly often

**Table 1.3: Letters and Memos—some differences in formatting**

Format	Letters	Memos
Full name, title, address of reader given?	Yes	Not often
Subject identification line?	Yes	Yes
Salutation/Greeting	Yes	Not normally
Writer's name—position in document	At the end	At the beginning
Formal closing	Yes	Not usually
Writer's signature	Yes	Yes
Sealed in an envelope?	Yes	Sometimes—can also be circulated electronically or posted in a public place.
Copies sent to others? (CC)	Sometimes	Fairly often

Source: Above tables and information adapted from 'Writing at Work', B. Eunson (1996), John Wiley & Sons, Australia.

## Key Points: Letters

**Table 1.4: Writing a letter**

Section	Details to include
1. The Start This includes important details such as address, date, name/title of recipient and subject heading.	<p><i>Address of the writer</i> This usually goes in the top right hand corner of the letter and includes all details.</p> <p><i>Address of the recipient</i> This usually goes in the top left hand side of the letter and includes all details.</p> <p><i>Date</i> This goes under the address. Write in full, for example, 2 March 2019 or March 2, 2019. Try to avoid using numbers, for example, 2/3/2019, as there can be confusion between the British and American way of writing dates.</p> <p><i>Name/Title of recipient</i> Dear Sir or Madam/Dear Director/To whom it may concern</p>

This is used in a formal letter or if you don't know the name of the person you are writing to.

### *Subject Line*

Formal letters often include a subject line, which states the subject of the letter. For example:

**Re: Update on Annual Work Plan implementation**

## 2. Opening

### *Section*

*You need to explain why you are writing.*

*Sometimes you need to refer to previous communication.*

The purpose of the opening section is to:

- announce the topic of the letter
- give a reason for writing
- set the scene—put the letter into context and explain the background.

*For example:*

I am writing to inform you about....

I am writing to confirm our meeting...

I am writing regarding our meeting next week...

I refer to our conversation last week...

I refer to your email of 12 March 2019... (if replying)

As you may be aware, the Ministry of Health is conducting a workshop on 15 and 16 April 2019...

## 3. The Main Body

*Usually in the main body of the letter you will give more detail about your reason for writing.*

*Usually in the main body of the letter you will give more detail about your reason for writing.*

Only write as many paragraphs as you need to get your message across economically. This section of the letter should:

- explain the purpose, using logically organised paragraphs
- include evidence to back up statements, and/or give reasons for requests, if needed.

Some examples:

### *Making a request*

Could you kindly provide me with updated information about your project?

### *Accepting an invitation or offer*

I am pleased to accept the invitation to speak at your workshop next week.

### *Giving bad news*

I regret to inform you that your job application was unsuccessful.

**Enclosing/Attaching documents**

I am enclosing a report for your information.

**4. Conclusion**

*Usually a letter is finished with a courteous comment and often a reference to future contact.*

The conclusion can do one or more of the following:

- sum up what has been said in the letter so far
- emphasise the main point you want the reader to remember
- say what action you want the reader to take.

You should only need one paragraph to make your point and then finish on a pleasant note.

Some examples:

Please do not hesitate to contact me if you require any more information.

I look forward to hearing from you.

Yours faithfully/Yours sincerely...

**5. CC (if required)**

Steps for including 'CC' (Courtesy Copy) in a letter

**1. Write the letter**

Complete the entire letter first, from return address to signature and enclosure notation, if applicable. This ensures proper placement of the courtesy copy information.

**2. Place the initials**

Double space after the end of the letter. Left justify "cc," and follow it with a colon. Insert a space after the colon.

**3. Identify the recipients**

On the same line as "cc:," list the name of the person who is receiving the courtesy copy. There should be one space between the colon and the name. If more than one person is receiving the cc, put each name on a separate line in alphabetical order, making sure subsequent names are lined up with the first name.

Source: Above information adapted from 'Writing at Work', B. Eunson (1996), John Wiley & Sons, Australia, and 'Effective Writing—plain English at work', E.M. Murphy, (2014).

**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?

### Example 1.1: Formal Letter

Somalia Friends INGO  
24 Market St  
Mogadishu, Somalia

Mohamed A.  
District Commissioner, Abyan District  
33 Main Street Abyantown  
Mogadishu, Somalia

Thursday 11 April 2019

Dear Sir,

Somalia Friends INGO has been operating in Somalia since 2015. During that time, our INGO has implemented many successful projects in different parts of the Banadir Region. Examples include construction of primary schools and maternal health centres, as well as working with local communities to raise awareness on the importance of education for children.

Somalia Friends INGO would like to commence some project work in your District in 2020, and believes that the first step is to liaise with you as Commissioner of the District, to determine where our inputs can be most useful, and to ensure that any projects we propose will fit within your District's planning and prioritisation for the coming year.

As such, I respectfully request a meeting with you at your earliest convenience, in order to discuss your District's priorities and identify where our inputs can be of most benefit.

I look forward to your response.

Yours sincerely,

*J. Do-Good*

Mr John Do-Good  
Director, Somalia Friends INGO

Contact us:  
[director@somaliafriendsingo.com](mailto:director@somaliafriendsingo.com)  
[www.somaliafriendsingo.com](http://www.somaliafriendsingo.com)

## Key Points: Memos



Memos tend to be less formal in style, given that they are for an internal audience. They are also shorter than letters because:

- The conventions of memo writing allow the writer to dispense with some of the formalities of letter writing and use more succinct language.
- The memo writer and reader share a common background of understanding because they are part of the same organisation. Thus, there is less background explanation required.
- Memo readers can seek clarification from the writer more readily, for example, through a phone call or face-to-face discussion, given that they are in the same office environment.

### *Sending a Memo*

Official internal memos should be signed by the person who drafts them and circulated to the intended recipient, as well as the Director of the Department from where the memo came.

### *Checklist for sending a memo (official internal)*

1. If the memo is drafted on behalf of another person, get their approval on the draft before finalising it.
2. Check spelling and grammar.
3. Make sure the memo is signed by the person who drafted it.
4. Circulate to intended recipient.
5. Circulate to the Director of the Department from where the memo came.

### *Receiving a Memo*

When receiving an official internal memo, there are certain steps that should be followed, in order to ensure it is actioned correctly. See **Diagram 1.1** below.



## Important!

An **internal memorandum** should include:

- the main topic of discussion
- a brief summary (background information, etc.)
- may include graphics –but limited
- explain what information you are looking for and why
- conclusion, i.e. asking for a task to be completed
- if appropriate, reference any attachments
- sign and date the memorandum with your name and position title

## Types of Memos

### *Announcements*

These are usually for a wide audience, and can be circulated on paper or by email, or posted on a noticeboard. They include information only—no action is expected of the reader, for example, the announcement of a new Director.

### *Confirmation*

This type of memo acts as a written record of a phone or face-to-face conversation. It ensures that the reader and writer both agree on what was discussed and what action is to be taken. Such a memo would include details such as dates, places, roles, responsibilities and outcomes. This type of memo can also be sent as an email.

### *Request*

- The writer makes a request and expects the reader to take action and communicate back about what action has been taken.
- For example, a supervisor asks a staff member to set up a meeting between the supervisor and two external parties. The memo would give details about who the people are and what the purpose of the meeting would be. The staff member would be expected to act on this memo – to arrange the requested meeting and report back to the supervisor when some details about the meeting (such as time, date etc) have been confirmed.
- This is the kind of request that could also be communicated by email.

### *Instructions/Procedures*

This type of memo is a short, simple way of communicating to others how something should be done. Often these memos are general, or sent to a number of people and may also be publicly displayed. For example, instructions from the Human Resource Department to staff on the proper process for requesting leave.

Source: Above information adapted from 'Writing at Work', B. Eunson (1996), John Wiley & Sons, Australia.

**Example 1.2: Internal Memo****ABYAN DISTRICT COUNCIL  
INTERNAL MEMORANDUM**

TO: HR Officer  
 FROM: A. Hassan, Director, Public Works  
 DATE: 21 January 2019  
 SUBJECT: Short Course for Public Works Department Staff

In accordance with District Council Staff Training Programme for 2019, three staff of the Public Works Department have been funded to do short courses.

I am now requesting that you approve the release of funds from the Staff Training Programme budget to pay for this training and to advise the Finance Officer, Finance and Administration Department to approve this expenditure so the course fees can be paid. I have attached the invoice for the course from the University of Mogadishu.

Please advise me in writing of your approval so that enrolment of the Public Works Department staff can be completed and they can attend the course.

**A. Hassan**

Director, Public Works

1. Brief summary of the topic—one paragraph. You must mention any authority to do what you want to do.

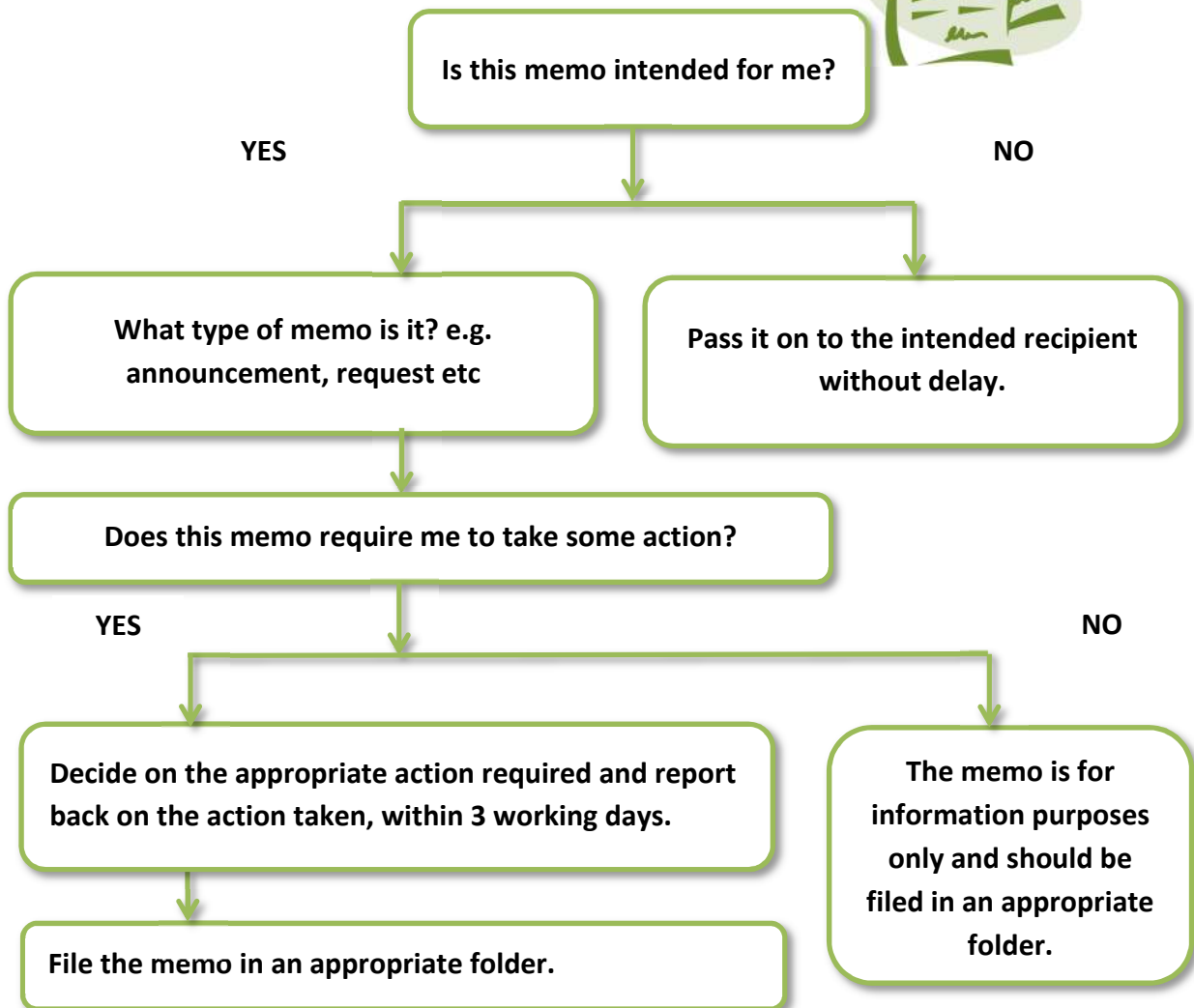
2. Explain what you want the person to do and why.

3. Conclusion, asking for a task to be completed. If appropriate, reference any attachments, and attach them to the memo.

**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)

**Diagram 1.1: Flow chart—action on memos received**



***Scenario: What would you do?***

You are a local government department officer and have received a memo which is actually intended for your supervisor (a department director). However, after reading the memo, you realise it contains some confidential information, in particular, details of your supervisor’s recent unsatisfactory performance assessment. Your supervisor calls you to his office and asks you if you have seen a memo that was intended for him, as it seems to have been misplaced. How do you respond?

*Discuss the above scenario and identify what might happen next....is the officer honest with the supervisor? Or does he/she pretend to know nothing about the memo?*

**Questions:**

- What are the possible consequences of not telling the truth when asked?
- What might happen to the officer if he/she is honest?

## Key Points: Circular letters

A circular letter is used to share the same information with a large audience. It differs in purpose from a personal letter, which sends particular information to one or a few recipients. Circular letters are often used to announce new information or to clarify policies. They are somewhat general in topic, since they are widely read. Writing a circular letter of any kind requires a few important steps.

- Know your audience. For circular letters, readership is diverse, so it can be difficult to gauge your audience's level of prior knowledge or familiarity with the content that you want to share. However, consider the majority of likely readers when you write, so that your letter is useful to the most people.
- Distinguish between internal and external circular letters. An internal circular letter, although circulated to a large group, is still restricted to a group. For instance, a business may circulate an internal letter to employees about a new company policy. In contrast, an external letter would be a letter circulated to all clients or to the public.
- Use the tone and voice appropriate for the kind of communication (internal or external) for which the circular letter will function. For instance, a stern tone would be appropriate for a circular letter to all employees addressing tardiness or absenteeism. However, a stern tone would not be appropriate to use for a letter to circulate to business clients, or members of the public.
- Share only authorised information. Since circular letters are intended for a large audience, they are not suited to disclose confidential information or details not intended for a widespread audience.

Source: *How to write any type of circular letter*, eHow, [www.ehow.com/how\\_8545982\\_write-type-circular-letter.html](http://www.ehow.com/how_8545982_write-type-circular-letter.html)

### Example 1.3: Circular

Dawladda Hoose ee Abyan

Xafiiska Gudoomiyaha Deegaanka

REF/DHD/ABY/34/04/2019

April-17-2019


Ku: Xoghayaha Fulinta D-Hoose Degmada

Ku: Agaasimeyaasha Waaxyaha D-Hoose Degmada

Ujeedo: Siyaasadd Cusub oo Tababarada Gudaha iyo Debedaba oo khuseeya Shaqaalaha O-Hoose

1. Waa in waraqada Codsiga ah ee lagu dalbanaayo Shaqaalaha la keeno Xafiiska Shaqaalaha si loogu File Gareeyo Xafiiskaa.
2. Waa in cidkasta oo loo diyaariyo tababar ama training loo Gudbiyo liiskooda Xafiiska Shaqalaaha D-Hoose
3. Waa in Shaqaalaha loo diray Training ay soo diyaariyaan warbixin kooban oo ku saabsan nooca uu yahay Training ay soo qaateen iyo wuxuu khuseeyey.
4. Waa in Shaqaalaha Training-ka soo qaatay ay soo diyaariyaan Qorshe hawleed-kooda ay ugu talo galeen Tababarka ay soo qaateen.
5. Waa in qofkasta oo shaqaale ah uu uga Faa'ideeyo Training-ka uu soo qaato shaqaalaha kale si looga wada faa'idaysto.
6. Waa in Cidkasta oo kaqayb qaadata Training lala Xisaabtamo marka uu soo dhamaysto.
7. Waxaa loobaahan yahay in qof kasta Training-ka uu qaato uu sifiican u darso.

Alla Mahad Leh

  
DHAB  
Mohamed A.  
Gudoomiyaha, Degmada Abyan

Contact: Abyan District  
[Best\\_Mayor\\_Abyan\\_91@gmail.com](mailto:Best_Mayor_Abyan_91@gmail.com)

## Key Points: Writing Emails

- Emails have taken over from printed letters in many ways. They are easy to send, cost very little and reach the recipient almost instantly.
- Although emails are less formal than letters, they should follow the same conventions of polite, respectful language.
- People generally read emails on screen, so keep them short to avoid scrolling.
- Make the subject line meaningful to the reader, and relevant to the folder it will be stored in. A clear subject line about the purpose of the email will help the recipient decide whether to read your email. If the subject line is missing, incomplete, vague or too long, the message may be deleted without being read.
- Your signature block at the bottom of the email should identify you, your position and contact details.

### *Using 'cc' and 'bcc' in emails*

- CC is the email abbreviation for courtesy copy and BCC stands for blind courtesy copy.
- It can be difficult to know who to 'CC' and 'BCC'. A good rule of thumb is to use 'To', for people who are required to take action. 'CC' lists those you want to keep informed but need take no action. For 'BCC', include those you want to receive the message without any of the other recipients knowing.
- CC is a good way to send your message to the main recipient, while also including others to be certain that everyone gets the identical message. However, be certain that the people being 'kept in the loop' actually need or want that information. Those on the CC list are usually not expected to reply; the message is for their information only.
- BCC is convenient when you wish to retain privacy of people's email addresses, as BCC recipients will not be visible to others. However, using the BCC field has its own set of concerns. For example, the BCC is sometimes used when the email sender has some possible ulterior motive for wanting the BCC recipient to see the message, but not wanting others to know. As such, always use CC and BCC cautiously and appropriately.

Source: 'Effective Writing—plain English at work', E.M. Murphy, (2014) and 'Writing email' course, [www.lynda.com](http://www.lynda.com)

## Exercise 1.1: Email, Memo, Letter writing

Using what you have learned in this session, work in a group to prepare an email, letter or memo (no more than 4 paragraphs) for the following situations below.

### **Group 1: Write an email**

Write an email to a colleague, informing your colleague about some upcoming training and suggesting that they apply to their supervisor so that they can attend (invent any details that you need, for example, what is the topic of training, when and where the training will take place, how long it will go for, and what the benefits will be as a result of the training).

### **Group 2: Write a memo**

Write a memo to your immediate supervisor at work (Department Director) to apply for permission to attend a training that is to be conducted in your organisation soon (invent any details that you need, for example, what is the topic of the training, when and where the training will take place, how long it will go for, and what the benefits will be as a result of the training).

### **Group 3: Write a letter**

You are a Department Director, and some of your staff have recently participated in some training. Draft a letter, addressed to the trainers who came to your organisation to deliver the training, thanking them for their efforts on behalf of the course participants (invent any details that you need, for example, when and where the training took place, how long it went for, and what benefits you expect to see as a result of the training).

### **Refer to the following places in your Participant Book for more information:**

*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*

## Session 1.2

## 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.

### Questions for Discussion

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

### Key Points: Written Reports

Reports are a useful means of communication because:

- It is important to have a written record of activities undertaken.
- Reports are an effective way of providing updates or advice without having to be in the same location as the reader.
- Written reports are important mechanisms for transparency and accountability.

A written report can also be used to:

- record routine or non-routine events
- make informed decisions
- describe, analyse or persuade
- make recommendations for further action.



### Important!

To be completely successful, a report which makes recommendations must ensure that the intended recipient:

- reads the report without delay
- understands everything in the report easily
- accepts the facts, conclusions and recommendations
- decides to take the recommended action.



### Table 1.5: Types of Reports

The types of reports local government officers are typically expected to produce include:

Type of Report	What is it?	What format to use?
Monthly Reports	<p>At the end of each month, each officer should write a report on their outputs and work activities for their supervisor. This should include a concise account of what has happened for that output that month.</p> <p>It should include:</p> <ul style="list-style-type: none"> <li>- activities undertaken and results achieved</li> <li>- any challenges met and recommendations to address</li> <li>- any follow up action needed.</li> </ul> <p>Staff can also report to their supervisors informally during the course of the month as needed.</p>	See <b>Annex 1</b>
Quarterly Reports	<p>These are produced by each department, outlining the activities carried out during the quarter. Such reports are for internal use.</p> <p>The Quarterly Report contains the following headings:</p> <ul style="list-style-type: none"> <li>- Summary</li> <li>- Background/Political Situation</li> <li>- Activities undertaken</li> <li>- Results achieved</li> <li>- Challenges and Recommendations</li> </ul>	See <b>Annex 2</b>
Annual Report	<p>These are produced by each department, outlining the activities carried out during the year.</p> <p>The Annual Report contains the following headings:</p> <ul style="list-style-type: none"> <li>- Executive Summary</li> <li>- Objectives</li> <li>- Progress</li> <li>- Resources and Budget Delivery</li> <li>- Work Plans for next year</li> </ul>	See <b>Annex 3</b>
Travel Activity / Back to Office Report	<p>Reports written by staff after returning from a work-related trip, which provide information about the outputs achieved and any issues to follow up as a result.</p>	See <b>Annex 4</b>

A travel activity report should include:

- Objectives of travel and outputs achieved
- Summary of activities
- Issues for follow up
- Challenges and solutions

### Key points: How to write a report

It can often be difficult to write the main body of a report—usually because it is hard to know what to include and what to leave out, and how to explain things in a concise way. This is a skill which does improve over time and with practice—in the meantime, the table below offers some guidance.

**Table 1.6: Steps in preparing a report**

<b>Starting off</b>	<p>Start by asking yourself some questions:</p> <ul style="list-style-type: none"> <li>• Why am I writing this?</li> <li>• What do I want to achieve?</li> <li>• Who will read this?</li> <li>• What does my reader want to know?</li> <li>• How will this be used?</li> <li>• When is this needed?</li> </ul>
<b>Plan scope, outline, tasks, scheduling</b>	<ul style="list-style-type: none"> <li>• The scope of the report should be defined - What is the report about? What is it <u>not</u> about?</li> <li>• Plan an outline of the report, showing sections and headings.</li> <li>• Write down your ideas in note form.</li> <li>• Work out how much time you have to prepare it – keep in mind that a report often takes longer to prepare than you think!</li> </ul>
<b>Use of data</b>	<ul style="list-style-type: none"> <li>• What information will you need? For example, books, journals etc. These are called <u>secondary</u> sources of data.</li> <li>• Do you also need to conduct some interviews or surveys? These are called <u>primary</u> sources of data.</li> </ul>
<b>Draft, set aside</b>	<ul style="list-style-type: none"> <li>• Brainstorm all your ideas and eliminate any that are not relevant.</li> <li>• Then write a draft report.</li> <li>• Put it away for a day or so and then look at it again.</li> </ul> <p>How to draft the main body of a report:</p>

	<ul style="list-style-type: none"> <li>• The aim of reporting is to be clear and concise. This does not mean to leave out important information, but rather to choose which information is the <i>most</i> relevant.</li> <li>• To ensure you do not include material which could safely be left out, you should ask: 'Is it <i>necessary</i> for this information to be included?' and 'What benefit does this information give the reader if I do include it?'</li> <li>• If you cannot clearly see how the information will benefit the reader, then it should be left out. This includes information that is 'nice to know', rather than 'need to know'.</li> <li>• Review the content of the draft document. Are all the ideas relevant? Is there anything you need to cut out?</li> <li>• Think about using attachments to cover detail that the reader may need at a later stage, but does not need in order to understand the main message.</li> <li>• Decide how to show the significance of your facts. Would some graphs or diagrams help the readers understand your message? What visual material will you use? How will you produce it?</li> </ul>
<b>Checklist (for individual reports)</b>	<ol style="list-style-type: none"> <li>1. Have I included progress on all outputs in my work plan?</li> <li>2. Have I flagged up any issues or challenges to my supervisor?</li> <li>3. Have I written it clearly so that anyone could understand it?</li> <li>4. Is all the information relevant?</li> <li>5. Is the style clear, concise and professional?</li> <li>6. Have I checked spelling, grammar and punctuation?</li> </ol>
<b>Edit, produce, deliver, evaluate</b>	<ul style="list-style-type: none"> <li>• Check your final draft for any grammar/spelling mistakes.</li> <li>• Produce your report in a neat and professional way.</li> <li>• Deliver your written report (in some cases you may have to deliver your report in a speaking presentation).</li> <li>• Evaluate—does your audience like it?</li> </ul>

Source: Above table adapted from 'Writing and Presenting Reports', B. Eunson (1994), John Wiley & Sons, Australia.

### 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?

**Example 1.4: Monthly Report**Name: ...*Mohamed Planwell, Planning Officer*.....Department:.....*Planning*..... Month: .....*March 2019*.....**Activities undertaken**

*This should outline all the activities carried out during the month and should identify the activities undertaken to achieve the results outlined below.*

- *Preparation for site visits*
- *Arrange schedule for site visits and liaison with relevant Village Committees*
- *Organisation of transport and accommodation*
- *Note taking during site visits*

**Results achieved**

*This summarises the results achieved by the staff member during the month.*

- *Site visits undertaken to 3 recently completed project sites.*

**Challenges and Recommendations**

*This looks at the issues that occurred during the month and how these were solved or recommendations on how to solve them.*

- *Difficult to make contact with Village Committees, we need to start liaising with them earlier.*
- *Difficulties in organising transport and accommodation due to communication with other members of the site visit party. People did not provide the necessary details, which caused problems.*

Prepared by: .....*M. Planwell* ....(Officer)Received by: ...*I. M. Watching*.  
(Supervisor)Position: .....*Planning Officer*.....Position: ...*Head of Section* .....Signature: ..... *MPlanwell*.....Signature: ... *IMWatching*.....Date: .....*31 March 2019*.....Date: .....*31 March 2019*.....

## Module 2

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# *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.

### 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?

### Key points: Effective meetings

**Effective meetings** are those which:

- achieve the meeting's objective/s
- take up a minimum amount of time
- leave participants feeling that a sensible process has been followed.

You need to keep these points in mind throughout the **planning, preparation, running** and **follow up** of your meeting.

#### **Checklist—should we hold a meeting?**

Do not hold a meeting if any of the following apply:

- Preparation cannot be done or information is incomplete.
- People who need to be there cannot attend. Only allow a substitute if that person is authorised to make decisions.
- Something could be communicated better by telephone, memo, or in a one-to-one discussion, for example, a sensitive matter like salaries.
- The subject matter is trivial OR is so confidential that it can't be shared with some group members.
- There is too much anger and hostility in the group and people need time to cool down.



## How to be an effective meeting participant

### 1. Understand why you have been asked to participate and who else is there

For example: 'Am I representing a department or section?' 'Am I here as the voice of experience?' 'Who else will be attending this meeting?'

### 2. Be prepared and punctual

Be prepared so you can contribute to the discussion and desired outcomes of the meeting, for example, by studying the agenda and/or any papers in advance. Plan in advance to make at least one specific contribution (but not just talking for the sake of it!). Make sure you arrive on time, so you can prepare yourself.

### 3. Speak up

Make your comments clearly, succinctly and positively, for example, bring solutions to meetings and not only problems. Avoid repetition. Do not introduce irrelevant issues to the meeting. Listen, observe and save your arguments until you can make a useful point. Be considerate not to dominate the discussion.

### 4. Be an active listener

Be respectful and courteous to all participants. Allow speakers to make their contributions without interruption. Ensure that all relevant views are listened to before a decision is made. Don't allow animosity between participants to get in the way of active listening.

### 5. Be willing to learn

Go into meetings with the attitude of being prepared to learn from others. Effective participation in meetings does not always mean getting your own way. Rather, it means learning from others and accepting feedback.

### 6. Adhere to the rules of meeting etiquette

For example:

- Avoid interrupting others when speaking
- Refrain from distracting or rude behaviour, such as pencil tapping, phone use, or side comments to a neighbour.
- Always be courteous and tactful. Disagree with an idea, not a person!

### 7. Ensure you follow up on your delegated responsibilities

Read your meeting minutes to ensure action items are followed up on time. If you have been assigned an action item, failure to deliver will cause inconvenient delays to other people and their own deadlines. Be considerate of your responsibilities.

*Source: Adapted from 'Snapshots: Effective Meetings, Participant Workbook', Australian Bureau of Statistics*

## Key points: Formal and Informal meetings

Meetings can vary in their level of formality and usually depends on the following:

- Whether the meeting is internal, or with external parties.
- Whether the meeting is for an official body, such as a committee, or is an informal discussion between colleagues.
- How well the participants know each other.
- The nature of the topic or topics to be discussed.

Regardless of whether the meeting is 'formal' or 'informal', all meetings should have **clear objectives**, an **agenda** and somebody recording **notes** or **minutes**. Some differences between formal and informal meetings are outlined below.

### Informal Meetings

#### 1. Agenda

The agenda can be agreed on at the beginning of the meeting to ensure that everyone knows what different topics will be discussed. These topics can be written on a whiteboard or flip chart.

#### 2. Minutes

Minutes or notes should be recorded for these meetings. This should include any action points decided on. These can be written up and sent to all participants if necessary, or they can be done individually.

### Formal Meetings

#### 1. Agenda

The agenda and meeting information should be circulated before the meeting—even up to 1 or 2 weeks in advance. Agendas are usually written in point form. In some cases it is possible to contribute topics to the agenda, but this must be done before the agenda is finalised and circulated.

#### 2. Invitation

Information that should be circulated by invitation to all the participants before the meeting includes: Location, Time and Date, List of Participants, Agenda.

#### 3. Timing

All meetings should start on time, but formal meetings in particular will have a start time identified on the agenda and this should be adhered to.

#### 4. Chair

The meeting should have a Chair or facilitator who ensures that the agenda is being followed and that all participants are involved.

### 5. Meeting Rules

Depending on the rules of the meeting, there may be a code of conduct or other restrictions on behaviour, to ensure that the meeting does not get out of hand. For example, in some meetings participants may only address the Chair. Such meeting rules are called 'standing orders'.

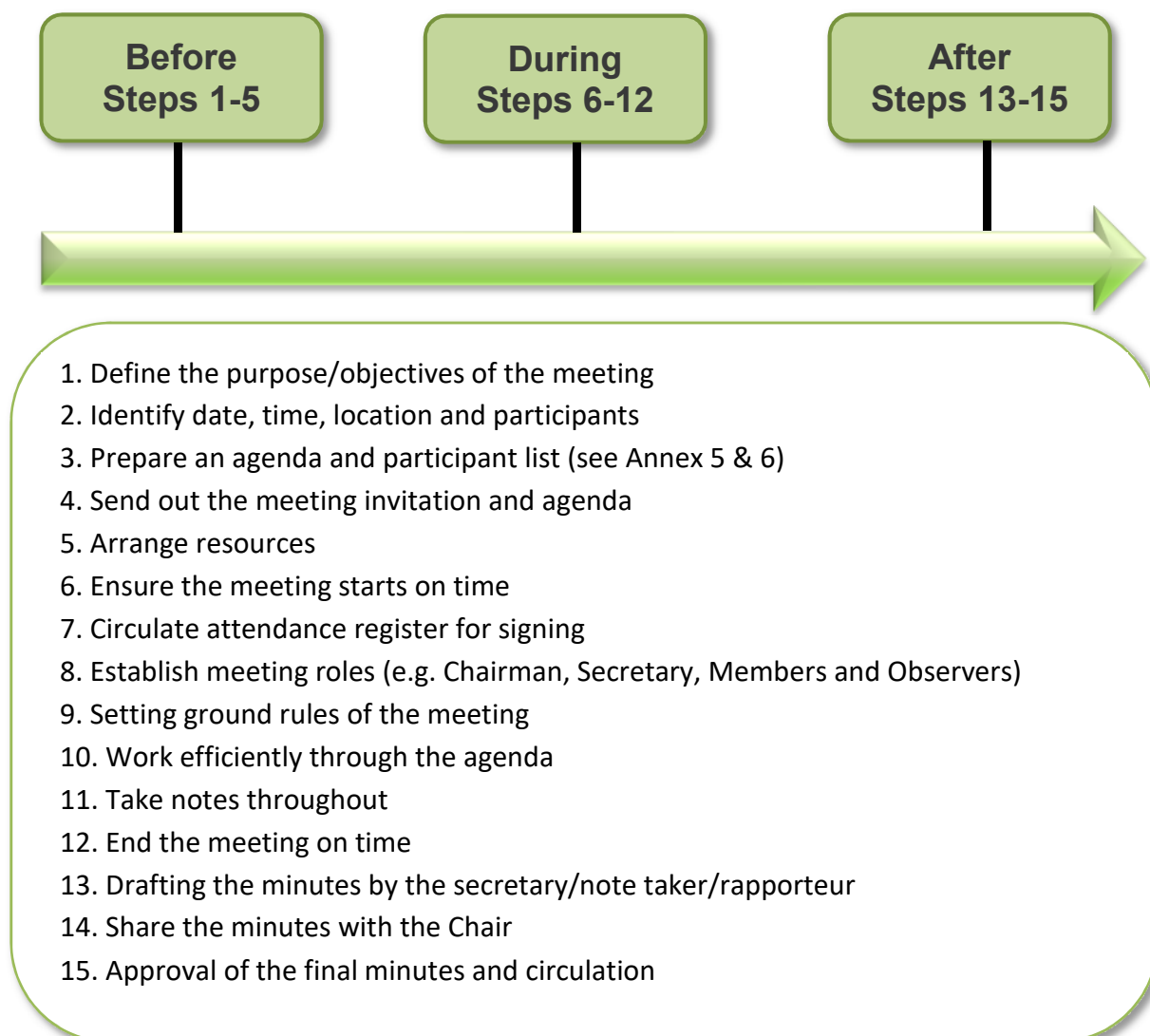
### 6. Meeting Secretary

The meeting should also have a secretary who is responsible for recording attendance and taking meeting minutes.

### 7. Meeting Minutes

Meeting minutes must be recorded which document all the decisions made at the meeting, as well as any actions that need to be taken and who will take them. Appropriate staff members should be appointed to follow-up on the completion of all action items.

**Diagram 2.1: Before, During and After a Meeting**



## Key points: Before the meeting

### 1. Define the purpose/objectives of the meeting

- Is it to gain input and ideas, make a decision, resolve a problem, share information? Or all of these?

### 2. Identify date, time, location and participants

- Invite those who can benefit enough for the meeting to be worth their time, and those who can contribute enough to justify their attendance.
- If someone is only needed for one topic it could be made to be the first topic for discussion, and they can exit the meeting after their item.
- Consider the quorum for the meeting (if needed).

### 3. Prepare an agenda

- A meeting agenda is a list of all the topics that need to be discussed at a meeting. It is an important tool, because it helps the meeting to stay focussed, rather than getting sidetracked on other issues.
- Agendas allow time to prepare for the meeting and encourage transparency of discussions and processes.
- Agendas can be formal or informal, short or long, specific or general. The rule is: If there is a meeting, there should be some kind of agenda.
- Ensure you prepare the agenda well in advance if it needs to be approved before sending out.

The agenda should include:

- all topics for discussion
- the presenter or discussion leader for each topic, if relevant
- the time allotment for each topic.

If possible, the agenda should be prepared in cooperation with some of the key participants.

See **Example 1** below for an example agenda.

### 4. Send out the meeting invitation

- Ask for RSVPs (this means a reply to say if you will attend or not).
- Include a copy of the agenda, any follow up action items or previous meeting minutes, and/or pre-reading material so that participants can come prepared.
- Give adequate time for material to be read.

### 5. Arrange resources

- Room set up, equipment and materials, for example, water for participants.
- If papers need to be prepared for the meeting or to attach to the agenda, remember to prepare these with the participants in mind.



## Important!

Don't confuse meeting 'agenda' with meeting 'objectives'. Objectives are outcomes to be accomplished. The agenda is the order in which subjects will be covered. An agenda focuses discussion on certain matters and provides a reason to cut discussion off on irrelevant topics, so that the meeting objectives can be met.

### Example 2.1: Meeting Agenda, Abyan District

Name of meeting: \_\_\_\_\_ *Planning Department monthly staff meeting* \_\_\_\_\_

Meeting Chair and contact: \_\_\_\_\_ *Department Director, Mr Mohamed A.* \_\_\_\_\_

Minutes Recorder: \_\_\_\_\_ *Hodan E., Planning Officer* \_\_\_\_\_

Date of meeting: \_\_\_\_\_ *11 March 2019* \_\_\_\_\_

Start and end time of meeting: \_\_\_\_\_ *9-10 am* \_\_\_\_\_

Location: \_\_\_\_\_ *Meeting room, Abyan District Office* \_\_\_\_\_

Brief Statement of Purpose of the meeting: \_\_\_\_\_ *Discuss plans for visit to Abyan District by the Mayor of Mogadishu/ (30 & 31 May 2019) and assign tasks and a timeframe for completion.*

Topics in the order to be discussed:

1. Welcome to the District and lunch for Day 1.
2. Transport and Accommodation for site visits.
3. Liaison with key stakeholders about timing of site visits.
4. Oversight and coordination of visit.

### Exercise 2.1: Writing a Meeting Agenda

Using the information provided above, 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

### **6. Ensure the meeting starts on time**

### **7. Prepare participant list/register of attendance**

### **8. Establish meeting roles (e.g. Chairman, Secretary, Members and Observers)**

- Note that this will vary depending on the formality of the meeting.

### **9. Setting and briefing ground rules of the meeting**

- Welcome the participants and thank them for taking the time to meet. If people do not know each other, allow time for introductions.
- Brief participants on roles or expectations from them for the meeting, for example, 'we would appreciate your input on these key issues...'
- Address housekeeping issues (if applicable).

### **10. Work efficiently through the agenda**

- Focus on the desired outcomes.
- Keep to the time schedule (if more time on an agenda item is needed, confer with the group to decide how to proceed. The group can decide to stop, postpone or continue the discussion).

### **11. Take notes throughout**

- Includes background of the topic, discussed topics, record all the decisions, action points, including dates of who, where and what should be done.

### **12. End the meeting on time**

- You may wish to announce the meeting is due to end soon to check if there is any business that must be concluded during the meeting that has not been addressed or cannot wait for the next meeting.
- Summarise what has been accomplished and what needs to be done, by whom and by when.
- Review any items that needed to be addressed that were unable to be covered during the meeting.
- Ask for participant feedback, is there anything further to add or clarify?
- Thank people for their time and participation.

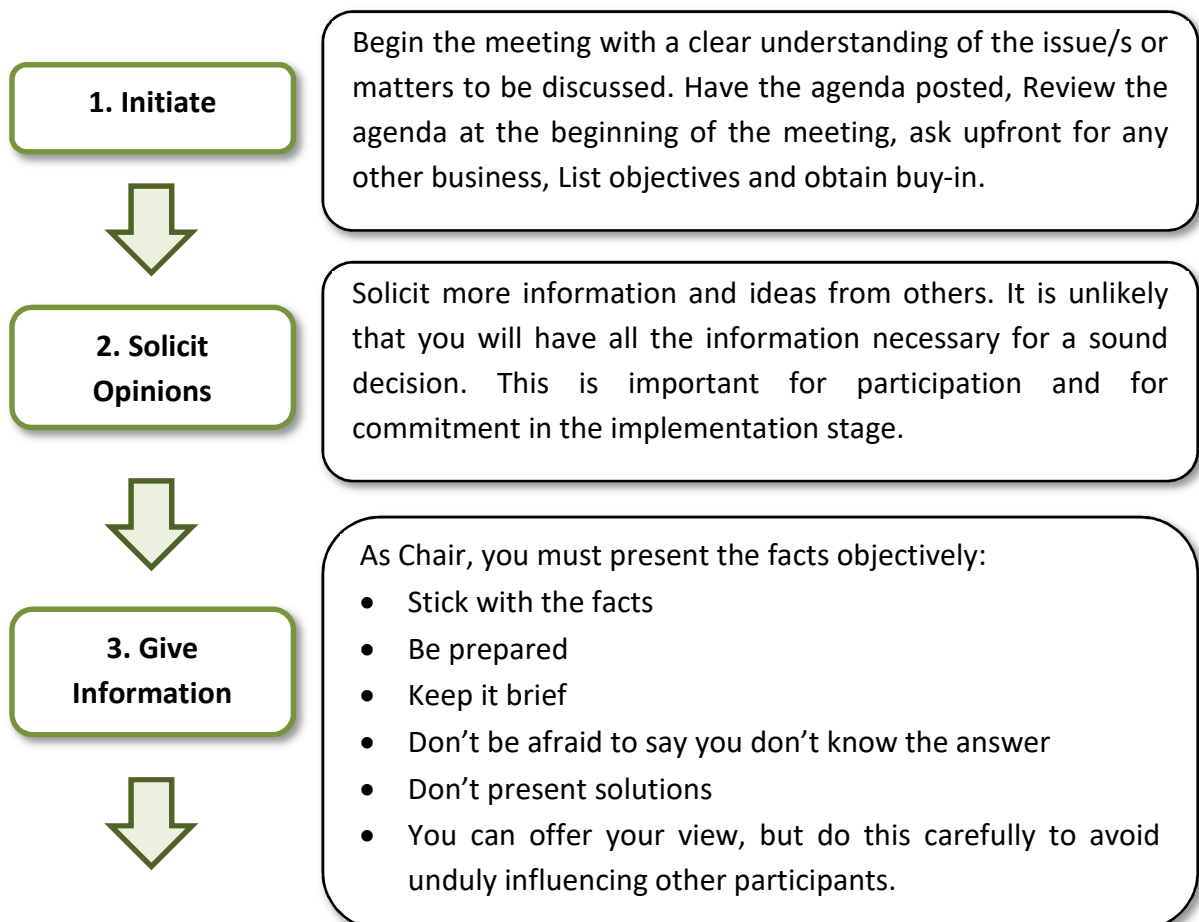
## Key points: Role of the Chair and participants during the meeting

### Responsibilities of Chairing During a Meeting

Once the preparing and planning for a meeting has been done, the chairperson has two functions.

1. The task function: To get the problem solved or the issue discussed. Remain on task.
  - Keep discussion on track and on time.
  - Summarise discussion and restate decisions as they are made. Where decisions are contentious, explain the reasons.
  - Summarise before the meeting ends the main outcomes and who is responsible for what follow-up action.
2. The group relations function: To help keep a group of diverse individuals working as a team.
  - Ensure participants' contributions are properly managed and that they relate to the matters at hand.

### Diagram 2.2: Decision Making Steps



#### 4. Clarify



#### 5. Summarise



#### 6. Consensus

As the meeting progresses, the chairperson must continually monitor the flow of information to ensure understanding. In exploring possible causes of the problem, a lot of ideas will surface. In such a situation, the tendency is for the group to prescribe a cure before the real cause is actually determined. This is a good time for the chairperson to step in and review the alternatives, so that the group can begin to see the issues before them more clearly.

Hidden agendas can block the progress of any problem-solving meeting. An effective chairperson will work to uncover these roadblocks and get them out in the open. Once they are in the open, the chairperson should take steps to remove the roadblocks and move the group toward the desired objectives.

Before making the final decision, the chairperson should ensure that group members have sufficient commitment to implement the decision. To do this, you must check out your impressions with the group to see if there is true consensus. You need to know how the group members actually feel about the decision: whether or not they are ready to commit themselves to carry it out successfully and accept the results. In other words, consensus is necessary, or the plan may fail.

Source: Adapted from 'Snapshots: Effective Meetings, Participant Workbook', Australian Bureau of Statistics.



#### When conflicts or arguments arise

- Listen. Show respect and empathy to reduce defensive behaviour.
- Clarify the outcome desired and the opinions of both sides. Positions may not be as different as originally thought.
- Determine the common ground between the two opinions.
- Do not permit blaming. Remain solution orientated, working towards a win-win resolution.
- If necessary, remind participants of the agenda to get back on track.



Discussions on agenda items should not be open ended. To be useful, they need to end in some kind of resolution or plan for action that includes a timeline, otherwise a lot of talking time can be wasted for no result. The meeting Chair has a key role to play:

- It is the role of the Chair to make sure that each agenda item has concluded with an outcome such as a resolution or plan for action, before moving on.
- It is the role of the Chair to guide participants in discussions of the agenda items. For example, if someone starts to talk about something unrelated to the agenda item, the Chair must bring him/her back to the topic.
- The Chair may need to enforce order during a meeting, for example, if people are speaking out of turn or interrupting each other, it is the job of the Chair to stop this and ensure that the person who was speaking first has a chance to finish their point before anyone else can comment.

### Key points: After the meeting

#### 13. Drafting the minutes by the secretary/note taker/rapporteur

- Write minutes in concise phrases and not full sentences. Link in any references cited in the meeting, and clearly list a summary of outcomes and action items.

#### 14. Share the minutes with the Chair

- Within 48 hours after the meeting (for Council meetings).

#### 15. Approval of the final minutes and circulation

- Circulate 72 hours after the meeting (for Council meetings).
- Quick action reinforces the importance of the meeting.
- Confirm with those responsible for action items to ensure clarity of responsibilities and timely progress.
- Follow up on items or unfinished business.

*Source: Information in Steps 1-15 above adapted from 'Snapshots: Effective Meetings, Participant Workbook', Australian Bureau of Statistics.*

## Checklist for organising and running meetings

**\*\*Note that the suggested timeframe may vary depending on the nature of the meeting (how formal or informal), how many people will attend and where they will come from.**

Activity	Suggested timeframe**
<b>Before the meeting</b>	
Identify the purpose and objectives of the meeting.	1-2 weeks before
Identify date, time, place and participants.	1-2 weeks before
Develop the agenda, and seek approval if needed.	1-2 weeks before
Send out a meeting invitation including the meeting agenda.	1-2 weeks before
Identify meeting venue and book if needed	1-2 weeks before
Follow up with participants to check if they will attend.	At least 2 days before
Make catering arrangements (if needed)	Confirm 2 days before
Prepare copies of the agenda and any other background documents (for example, reports) needed for the meeting.	At least 1 day before
Prepare 'Register of meeting attendees' form, for signing.	1 day before
Visit meeting venue to set up furniture and equipment.	1 day before (if possible)
<b>During the meeting</b>	
Record the time the meeting starts and finishes.	During the meeting
Record everything that happens, even if not in the order as listed in the agenda.	During the meeting
Record the name of the proposer and seconder of any formal motions during the meeting.	During the meeting
Check the timeframe and person responsible for any action points to be taken before the next meeting.	Before the end of the meeting
<b>After the meeting</b>	
Using your notes, prepare a draft of meeting minutes.	As soon as possible
Present draft to the Chair for comment and approval.	Within 1 or 2 days after the meeting
Prepare a final copy of the minutes and forward to Chair for distribution.	Within 1 week after the meeting
Follow up on progress of action points coming from the meeting	Ongoing

Source: The above checklist developed from information contained in 'How to take minutes of meetings', J. Hawthorne (1993), Kogan Page, London.

## Key points: Managing meeting behaviour

Some tips:

- Directly solicit Input (*wax ku dar*) from everyone.
- Ask open-ended questions (*su'alo furan oo an xannibnayn*).
- Actively listen to others, be attentive to body language (*xarakadda jidhka, gacamaha la iskala hadlo*).
- Reinforce (*xooji*) and acknowledge (*qir, caddy*) positive (*togan*) participation.
- Ask for concrete (*Waaqici*) examples.
- Be supportive (*caawin, Kalmi*)

Tip: Always maintain control (*maamulku yusan gacantaada ka bixin*). Don't forget you are the Leader. Don't allow another participant to take that role from you.

*Hadal horumar weeyaan Ama Hub la'eedo weeyaan*

*Hadalkaa hufnaan iyo Hanaan toosan loo oran*

*Himiladuu dilaa oo Hoog buuna keenaa*

Open questions are the most useful since they require members to think and create full answers. Open questions usually begin with:

- Why?
- What?
- When?
- Where?
- How?

Probing questions (using 'why') can also help to get more information:

- Why do you think that?

Behaviors (*dabeecaada*) that may cause problems in a meeting:

- Overly Talkative—*qof hadal badan*
- Definitely Wrong—*khaldan*
- Highly Argumentative—*muran badan*
- Obstinate—*dhega adag*
- Side Conversations—*qof ag fadhiya la shaikeesta*
- Won't Talk—*Aamusan*

## Key points: Managing meeting behaviour (continued)

How to handle these behaviours:

**Overly Talkative.** When they pause for a breath take that time to thank them for input, refocus (*Xog sarid, ahmiyad*) attention on subject (*mawdhuca*), and move on (*Marku in yar amuso u mahad naq hadlakiisi, marka topiga ku noqo oo hore u soco*)

**Highly Argumentative.** Stay calm! Try to find merit in point and then move on. May also seek group's opinion. If necessary ask to speak to them privately. (*Isdeji oo waxad hadlkiisa kala soo baxda in yar oo fiican. Dadka ra'ayigooda weyddii. Haddii loo caalwaayo gooni ula hadal*)

**Side Talkers.** Casually walk to and stand beside the side conversation. Ask one of the parties an easy question or restate your last point and ask for their opinion. Pause and wait for them to notice. (*Kudhowow oo is ag taag. Midkod weydi sua'shi. Sug xooga*)

**Definitely Wrong.** Never embarrass the individual. Say you may not have heard them correctly and ask them to rephrase the comment.

**Obstinate.** Throw out issues/ideas for open group discussion. Ask group if they 'agree or disagree'.

### Won't Talk.

- Bored: (*Caajisan*) arouse interest by asking their opinion.
- Uninvolved: (*ka qayb qaadasho la'an*) engage (*Mashqqoli ama la hadal*) person seated next to them, then gradually shift focus (*ahmiyad sarid*) to draw them in.
- Shy (*xishood, khajilaad*) or Insecure: (*kalsooni qabin*) support with sincere compliment (*bogaadin, amaan*) after first time opening up.

*Source: With thanks to Mohamed Jibrell for this information.*

## Key points: Effective Meeting Facilitation

In order to ensure an effective meeting, particularly with a large group of people such as a community group meeting, it is important to have some good facilitation skills. Some tips on facilitating a meeting are below:

1. When people are having input at a meeting, firstly ask them to clarify whether their contribution is a:
  - Comment?
  - Question for clarification?
  - Recommendation?
2. Listening is an important skill in a meeting. As a facilitator, how you listen can be even more important to a successful meeting than what you say.
  - Don't interrupt someone while they are telling you something.
  - Don't try to guess what someone is trying to tell you—they may have a different message for you than what you think.
  - Ask the speaker for more information, 'Tell me more about that'.
  - Repeat what you have heard from the speaker, to make sure you have the right message, 'So what I think you are saying is ...'
3. It is important at a meeting with a large number of participants, such as a community group meeting, to stay on the topic of the meeting as much as possible. Here are some ideas to help you if you think a participant is going too far off the topic:
  - Ask yourself 'Is everyone participating in this discussion, or only a few individuals?'
  - Look around the room. What is the body language of participants telling you? Are people listening carefully, or are they sitting back in their chairs looking bored, or looking at their watches?
  - Is this really related to a key issue, or are you getting sidetracked?
4. Even if the topic is interesting, if it is not related to the main issue of the meeting, it could be taking you away from what you really need to discuss. Possible strategies could be:
  - Acknowledge that this is an important issue and invite the individuals involved to discuss it further after the meeting.
  - Explain that you will be addressing this issue later in the meeting. Participants can save their contributions for that session.
  - If there is no time for further discussion of the issue, suggest that a separate meeting could be set up just to discuss that issue. If you do make this suggestion, ensure that you follow up on your word.

5. There needs to be space for all voices to be heard at a meeting, particularly those groups who are not always encouraged to contribute, such as women and youth. Some techniques for doing so include:

**Discussion tokens:** If you find you have people who dominate discussions and others who do not contribute much, you can try this technique:

- Before you start a discussion, give everybody in the group a few tokens (for example, sticks or stones).
- Say that every time a person speaks, he or she has to put one token into the middle of the circle.
- When a person has no more tokens left, he/she cannot contribute any more to the discussion.

**Microphone:** If you want to encourage quiet people to talk more in a discussion, you can try this technique:

- Find an object that is shaped like a microphone, for example, a spoon or a stick.
- Tell participants that this is the 'microphone' for the discussion. Only the person who has the microphone can speak.
- When someone wants to speak, they can ask for the microphone, or it can be passed around in the circle so that everyone has a chance to speak.
- The 'microphone' can help people to feel more confident when they are speaking in a group.

## 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** below, 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?

To help you prepare, refer back to the information in earlier sections of this Session:

- *Key points: Effective Meetings*
- *How to be an effective meeting participant*
- *Formal and Informal meetings*
- *Key points: Before, During and After the meeting*
- *How can the Chair ensure a successful meeting outcome?*

## Exercise Sheet 2.1

### Scenario 1: Ineffective Meeting

Role	Behaviour
Chair of meeting (Director of Planning Department)	This person is the Chair who tries to get everyone to participate in a productive discussion about the agenda items, but this is very difficult to achieve!
Officer 1 (Note taker)	Is supposed to be the note taker but doesn't take any notes during the meeting.
Officer 2	Disagrees with everything that anyone else says.
Officer 3	Makes jokes all the time and is not serious about anything.
Officer 4	Keeps bringing up discussion points which are completely irrelevant to what is being discussed.

### Scenario 2: Effective Meeting

Role	Behaviour
Chair of meeting (Director of Planning Department)	The Chair does a good job of keeping the meeting on track, ensuring that everyone has an opportunity to speak, and making sure that all comments are relevant to the topic.
Officer 1 (Note taker)	Does a good job of taking notes and asks for clarification if there is anything that he/she does not understand.
Officer 2	These three officers contribute well to the discussions, have good ideas and relevant comments, and listen to what others have to say.
Officer 3	
Officer 4	



## 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.

### 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?

### *Key points: Meeting Minutes—why important?*

Minutes are a permanent, formal record of what happened in a meeting. Their purpose is to provide members of a group with:

- A clear, objective summary of the meeting outcomes.
- A reference of future expected follow up actions.
- Information to people who were unable to attend the meeting.
- Background on the decisions of the group and the reasons for these decisions.

It is also important to have a written record such as minutes because:

- 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 local government.

### Key points: Meeting Minutes—what to include?

The style of meeting minutes will vary, depending on the nature of the meeting:

#### **Informal Minutes**

These are written in a narrative format in complete sentences. They include some background information, keeping in mind they are written solely for the benefit of people already familiar with the group and its activities.

**Action Minutes**

These are best suited for meetings that operate in a purely conversational manner. They can be written in point form. You need to identify the person or people responsible for future actions and set time limits.

**Formal Minutes**

In formal meetings, decisions are reached through motions. Motions are proposals placed before the members for debate and voting. These motions must be recorded verbatim.

Meeting minutes, particularly for formal meetings, need to include the following:

- The time, date, place and duration of the meeting.
- The name of the person who chaired the meeting, as well as the name of the meeting secretary/note taker.
- A register of all members and observers present at the meeting.
- A list of members absent from the meeting.
- A record of the discussions for each agenda item, including any reports received from any of the group’s officers or committees.
- Any unfinished business or business arising from the previous meeting.
- New business, which includes new information, as well as the assigning of specific tasks to individuals and timelines.
- A record of the voting and resolutions to come from each agenda item.
- A record of any action to be taken for each agenda item and the names of those who are responsible for taking this action.
- Record the time the meeting ends, and the date, time and location of the next meeting.

*Source: Adapted from ‘How to take minutes of meetings’, J. Hawthorne (1993), Kogan Page, London and ‘Snapshots: Effective Meetings, Participant Workbook’, Australian Bureau of Statistics*

**What do I record?**

In summary, use the following as a guide:

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



### Important!

The aim of meeting minutes is to give an accurate summary of what happened without recording ‘word for word’ what people said. Minutes need to be brief, accurate, clear and objective, showing no political or other bias. These characteristics are outlined in the table below.

**Table 2.1: Characteristics of good meeting minutes**

Desired Characteristic	How to achieve it?
How to be <b>brief</b>	<p>It is not necessary to record everything that is said at a meeting. Therefore, it is essential to distinguish between what information <i>is</i> important and what is not. This can take some practice and becomes easier with experience.</p>
How to be <b>accurate</b>	<ul style="list-style-type: none"> <li>Record what decisions are made, even those where a formal vote is not taken. For example, a decision which gets unanimous support should be have the discussion recorded and the consensus noted.</li> <li>Ask for a clarification of any point not clear to you, or about any aspect of a decision which you do not understand and record it immediately. Note down the names or initials of all the main speakers.</li> <li>You may need to include recommendations not adopted and the reasons for this.</li> <li>You may need to attach other documents such as background papers to the minutes for future reference.</li> </ul>
How to be <b>clear</b>	<ul style="list-style-type: none"> <li>Keep your writing factual and succinct. There is no need to use big words or long explanation—just keep it simple.</li> <li>There is also no need for fancy headings, borders or graphics in the minutes.</li> </ul>
How to be <b>objective</b>	<p>It is difficult to write accurate minutes which are balanced, but which also reflect the tone of the meeting. For example, if a point of discussion was contentious or disagreements occurred, you can record this, but without recording names. Keep your own personal opinions out of the minutes.</p>



## Examples of different formats used

(see also *Annex 7*)

### 1. Numbering Format

A numbering system can be useful to keep track of the different topics discussed.

**1. Name of Topic** as written in the agenda.

**1.1 Background information** about the topic—provides the reader with some contextual information about the matter to be discussed.

**1.2 Discussion** about the topic—gives a succinct account of the discussion that took place. It contains the key points, not everything that everyone said.

**1.3 Decision** made about the topic—gives details of any decisions made as a result of the meeting discussion.

**1.4 Action points**—gives details of any follow up action to be taken, by whom and by when.

### 2. Table Format

Some meeting Chairs and minute takers prefer to use a table format for their minutes.

Agenda item	Decision	Action	By Whom?	By When?
1.				
2.				
3.				
4.				

Source: The above information adapted from 'How to take minutes of meetings', J. Hawthorne (1993), Kogan Page, London.

## Key points: Steps for preparing minutes

To be a good minute taker, you should:

- Understand the organisation's 'jargon' (the terminology that is used by people working in the organisation).
- Have background knowledge of the topics being discussed.
- Know meeting participants or at least the spelling of their names.
- Be familiar with minutes of previous meetings.

### 1. Pre-planning

Here is a checklist of things to ask before the meeting:

- Are you taking notes for someone else to transcribe, or will you do it yourself?
- Are there previous minutes to examine?
- When are you expected to have the first draft prepared?
- What is the purpose of the meeting?
- Are you permitted to voice your own comments in the meeting, or is your function simply to take notes?
- Will you be expected to have certain information on hand?
- Has an agenda been sent out to all the participants?
- Are you also responsible for organising the meeting, booking the room, and room setup?
- Do you have enough time to capture what is being said in the meeting, or are you expected to play other roles during the meeting as well?
- Ideally the meeting minute taker will be a separate person from the person who is responsible for logistics during the meeting, for example, getting water for participants, fixing IT issues etc.

What is the role of the note taker?

- Take notes at the meeting and produce first draft of minutes.
- Ask for clarification if a point is unclear.
- Capture relevant ideas and don't record own opinions.
- Share draft minutes with meeting Chair for approval.
- Circulate/distribute minutes if assigned this function.
- Attach other relevant documents or information to the minutes.
- Work with meeting organiser before, during and after the meeting.
- Meeting organiser shouldn't be note taker, Chair shouldn't be note taker

## 2. Note taking and Preparing Draft Minutes

- In formal and semiformal minutes, always write in complete sentences using the past tense and the third person, and write out names in full.
- Use a straightforward writing style and simple words.
- Use subheadings for individual topics in the body of the minutes. Each item on the agenda can become a separate heading.
- Double check all figures, dates, and spelling of names.
- You may choose to circulate the minutes to the entire group or to ask for any amendments before finalising.

## 3. Finalising and sharing meeting minutes

It is a good idea to proofread your meeting minutes before they are circulated. Here are some principles to guide you:

- Use a dictionary or spell check, but don't rely on it totally.
- Ignore the content of the minutes and just focus on the spelling, grammar, etc. As soon as you start paying attention to what the text is saying, you'll start assuming and stop looking.
- Assume there's at least one typo or spelling error in the text.
- Forget what you meant when you wrote the notes. Read the minutes as though you have never seen them before, and from the perspective of someone who was not at the meeting.
- Don't try to do something else when you proofread. It takes a lot of focus to proofread properly.
- Take your time. When you hurry, you guess and skim, and that usually doesn't work.
- Proofread a second time, now paying attention to the content of the text.
- Read it out loud. It is more difficult, but still not impossible, for your eyes to skip over errors when you read aloud.
- Try to have someone else proofread your work, particularly if the document is important or going public.

## 4. Filing of meeting minutes for future reference

- The final set of minutes, once approved and circulated, should be kept on file, both electronically and in hard copy, if possible. Depending on the type of meeting, the minutes may also need to be made public (For example, appear on a public noticeboard or website).

*Source: The above information adapted from 'Snapshots: Effective Meetings, Participant Workbook', Australian Bureau of Statistics*

## 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.

## Further Reading

- The 5 Star Toolkit: Running Effective Meetings

<http://www.umdj.edu/uhnetweb/fivestartoolbox/toolkits/runningeffectivemeetings.pdf>

- Be an Effective Participant: Factoidz

<http://factoidz.com/how-to-be-an-effective-participant-in-a-meeting-and-not-just-a-passenger/>

- Running Effective Meetings: Communication Skills Training from MindTools

[www.mindtools.com](http://www.mindtools.com)

- Streibel, Barbara J. *The Manager's Guide to Effective Meetings*. McGraw-Hill, 2002.
- Streibel, Barbara. *Plan and Conduct Effective Meetings*. McGraw-Hill, 2007.

## **Module 3**

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# ***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 local government documents.
- Identify an appropriate filing system that can be used for their department's documents.
- Prepare a secure and organised filing system appropriate for their department's requirements.

### Questions for Discussion

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

### Key points: Why is a filing system important?

A secure and organised filing system is important for the following reasons:

- To organise documents so they can be easily retrieved when needed, by the appropriate people.
- When people can quickly find the information they need, they save time and energy.
- Easy retrieval of information can help staff conduct their day to day work more efficiently, and is also useful when it is time to report.
- Security of information is important, particularly where there is confidential information, such as staff records for example.
- An efficient filing system indicates a well organised office, which in turn is good for the overall image of the organisation.
- To improve accountability and transparency with regard to information and ensure that information is not lost with staff turnover (for example, when a staff member leaves the organisation, they should leave the documents behind).

1.



2.



### Key points: Steps in setting up a filing system

#### Steps to set up a filing system

1. Identify why it is important to have a secure and organised filing system
2. What information do we need to file?
3. What systems should we use eg alphabetical, number, date etc
4. What practical things do we need for our filing system?
5. Who will do it and when?

### Exercise 3.1: Types of Information to be filed

- This exercise allows you to spend some time thinking about *who* needs access to *what* types of information. This will help to determine *where* and *how* the information can be best organised.
- Add information to **Table 3.1** below, by identifying other types of information that requires proper filing and storage.
- Then, for each category and sub-categories, identify who needs access to that information, and where the information should be kept.
- Put an asterisk \* next to the sub-categories that contain confidential information. For confidential information, storage and access will be very important considerations.
- It should become clear *who* needs access to *what* information. This can help make decisions on how to group different kinds of information.

**Table 3.1: Administrative Documents**

Type of information	Who needs access? / Where to keep it?
Communication <ul style="list-style-type: none"> <li>• Memos, circulars, letters, emails, (both in and out)</li> </ul>	
Work Plans <ul style="list-style-type: none"> <li>• Individual, Department</li> </ul>	
Financial reports <ul style="list-style-type: none"> <li>• Cash Books, Bank slips</li> <li>• Ledgers</li> </ul>	
HR/Personnel Files <ul style="list-style-type: none"> <li>• Job descriptions</li> <li>• Recruitment documents</li> <li>• Employee Contracts</li> </ul>	
Land Ownership documents <ul style="list-style-type: none"> <li>• Land Titles</li> </ul>	
<i>Any other categories of information to add?</i>	

**Table 3.2: Systems of Filing**

<b>Method</b>	<b>Description</b>	<b>Why is it useful?</b>
Filing in alphabetical order	Items are filed in order by the first letter of their title. The documents starting with A go first, followed by those starting with B, and so on until Z. If two documents start with the same letter, then put them in order by the second letter. For example, AA would come before AB.	This system enables files to be accessed quickly and is also readily expandable.
Filing by number order	Documents or files are given a number and then filed in numerical order. Low numbers usually come before the high numbers. Numbers can be reference numbers on documents, or numbers of files. For example, 1.1, 1.2, 1.3 etc	This system offers a degree of confidentiality; however, in order for this system to be used an index has to be created. See Examples 2 and 3 below.
Filing by subject	This is the arranging of material by given subject. It is filing by descriptive feature instead of by name or number. Documents are grouped by their content, category or heading and subheading. For example, all correspondence is grouped together in one file and the financial receipts are placed in another file.	A subject folder may contain any combination of correspondence, pictures, statistics, and other printed information relating to the subject.
Filing by date	Documents are filed in date (or chronological) order. For example, October 1, 2019 would go before December 12, 2019. Documents from 2015 precede those from 2018.  It can often be preferable to put the oldest documents at the back and the newest in the front. This is called <i>reverse chronological</i> order.	This system is necessary to file items according to the day/date received, such as applications for permits or licenses.

### Example 3.1: Example of a filing system by number for HR documents

#### 100: HR GENERAL

1. HR Policy
2. HR Policy Amendments
3. HR Forms

Each three-digit number refers to a filing category. Numbers below refer to a sub-category. For example specific HR Policy documents could be filed as 101.01, 101.02, 101.03.

#### 200: JOB DESCRIPTION AND CLASSIFICATION

1. Job Descriptions
2. Classification Structure
3. Classification Instructions and Circulars from MOI
4. *New sub-categories can be added as needed...*

The benefit of this type of numeric system is that new sub-categories can be added as needed.

#### 300: STAFFING AND RECRUITMENT

1. Recruitment Requests and Approvals
2. Recruitment by Year Files (Create one file per year)
3. Recruitment by Position Files (Create one file for each recruitment then archive after finalised)
4. Staffing Profile (Annual summary of staff by position, grade, gender, salary)

#### 400: BENEFITS

1. Salary Scale
2. Allowances
3. Special Payments
4. Vehicle Allocations

#### 500: AWARDS AND RECOGNITION

1. Council Awards and Honours
2. Civil Awards to Staff
3. National Awards to Staff

#### 600: EMPLOYEE SUPERVISION AND DEVELOPMENT

1. Performance Management System
2. Annual Performance Management Panels
3. Employee Development Policy

#### 700: EMPLOYER-EMPLOYEE RELATIONS

1. Staff Association Meetings
2. Miscellaneous Staff Group Meetings

### **800: LEAVE AND TIME REPORTING**

1. National Holidays
2. Leave Advice Circulars from MOI

### **900: OCCUPATIONAL SAFETY, HEALTH, AND ACCIDENTS**

1. Accident Records
2. Health and Safety Appointments
3. Annual Health and Occupational Safety Reviews

### **STAFFING PROJECTIONS AND PLANNING**

1. Annual establishment reports
2. Annual Staffing Projections and Budget
3. Departmental Staffing Requests

### **TRAINING AND DEVELOPMENT**

1. Annual Staff Development Plan
2. Study Leave
3. District Training Programmes
4. External Training Providers

- It can be helpful to use different coloured folders for different categories, for ease of identification.
- The electronic filing system should correspond to the hard copy filing system.
- Each document should have its own unique reference number for filing purposes.
- There will also need to be a separate document that outlines the classification system in detail, for example, for new HR staff induction purposes.

## **Example 3.2: Example of a numerical filing system by heading for an NGO**

### **100—PERSONNEL**

- 110—Confidential individual staff files
- 120—Staff records (leave etc)
- 130—Payroll
- 140—Health and safety

### **200—FINANCE**

- 210—Budget
- 220—Procurement
- 230—Asset register
- 240—Travel expenses
- 250—Petty cash records
- 260—Financial returns
- 270—Bank accounts
- 280—Financial audits

### **300—CORRESPONDENCE**

- 310—Correspondence with government agencies
- 320—Correspondence with funding agencies
- 330—Correspondence with project partners
- 340—Correspondence with other NGOs

### **400—ORGANISATIONAL DOCUMENTS**

- 410—Governing body
- 420—Subcommittees
- 430—Strategic planning
- 440—Other documents

### **500—PROJECT DOCUMENTS**

- 510—Project proposals
- 520—Completed projects
- 530—Current projects
- 540—Future projects

### **600—OFFICE ADMINISTRATION**

- 610—Office meeting minutes
- 620—Internal correspondence
- 630—Staff tour reports

### Exercise 3.2: Choosing a Filing Method

- This exercise allows you to spend some time thinking about which type of filing system is best for the different kinds of documents that need filing.
- For all the different types of information identified in **Exercise 3.1**, work in groups to suggest what might be the most appropriate filing system to use—alphabetical, numeric, date, subject, or a combination of two systems.

For example, for financial records, the date is very important, so a filing by date system is likely to be used.

For personnel files, it may be appropriate to file by alphabetical order, using the surname of the employee.

Type of information	What type of filing system?
Communication <ul style="list-style-type: none"> <li>• Memos, circulars, letters, emails, (both in and out)</li> </ul>	
Work Plans <ul style="list-style-type: none"> <li>• Individual, Department</li> </ul>	
Financial reports <ul style="list-style-type: none"> <li>• Cash Books, Bank slips</li> <li>• Ledgers</li> </ul>	
HR/Personnel Files <ul style="list-style-type: none"> <li>• Job descriptions</li> <li>• Recruitment documents</li> <li>• Employee Contracts</li> </ul>	
Land Ownership documents <ul style="list-style-type: none"> <li>• Land Titles</li> </ul>	



### 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.

## Key points: How to set up an effective filing system

- A filing system can be set up in filing cabinets, using different drawers for different categories of document, or in box files kept on shelves. The important point is that they are all kept in one or two designated areas and that the files are updated regularly.
- Wherever possible, each member of staff should be encouraged to do their own routine filing. Hence, everyone needs to understand the system that is being used.

Some steps for setting up a filing system are outlined below:

1. Write up a list of all documents that need to be filed and identify relevant subject headings.
2. Once you have completed the list of all documents and subject headings, decide how each of them will be filed.
3. Specify the location where all documents will be filed. New, more recent documents should be filed in the relevant offices. Older files can be filed in an archive store in the building.
4. Sort out all the different documents into their categories. Documents should be arranged in sequence so they can be placed in the proper folders quickly, without moving back and forth.
5. Decide what types of files to use and ensure that the labels are clearly typewritten on the outside of the file.
6. Ensure all the papers are in order in the file and that each section is clearly marked with a different tab in order to assist in finding the information.
7. In many cases it will be important to store documents electronically and documents that are kept on computer as well as in hard copy should have the same filing system (for example, folders labelled the same) and the same reference number.



*Filing takes time, but by establishing and maintaining a good filing system you will save time!*

## Key points: Tips for an efficient filing system



**Space:** A file drawer or shelf should be filled to no more than 90% of its capacity. Tightly packed files are difficult to access.

**Index Guide:** All active files should have a guide every 10 to 15 folders. This helps you find folders.

**Folder Tabs:** Folder tabs should be visible immediately upon opening the file; therefore it is easier if they are all the same size.

**Folder Tab Identification:** Identification on the tabs should be typewritten so that everyone can read them.

**Cross Indexing:** Make a reference in one file of related or helpful/additional data held in another file.

**Safe storage of files:** The sections should ensure that the files are stored in a safe place. The department head may ensure that the sections have adequate storage space for files. The concerned dealing persons in section will be responsible for safe storage of the files.

### *Checklist: Filing System Set up and Maintenance*

- Make sure that files are located in the most logical place. For example, keep all files in the same shelf or cabinet, or keep all administrative records in the Administrator's office and project files with the project managers.
- Be sure to separate files from resources. For example, newspapers and training materials are resources, not files.
- If the files are overcrowded, look at their contents and throw away irrelevant, duplicate, or unimportant papers. Or keep the old files separate from the current ones. Every January, old files can be moved to the archive, starting with empty files for the year.
- If the names of the files do not clearly show what is inside them, check and either rename the file, move the papers that are not similar and start another file for them, or re-file the papers inside to the correct files.
- If the files are numbered, it is useful to prepare an index to hang on the wall or filing cabinet to make finding files faster.
- When redesigning a filing system, it may be a good time to look at the record keeping system and decide if the organisation should be keeping more records.
- An improved filing system will need maintenance. Be sure to show others in the office how the improved system is set up and how they can help maintain it. Invite others to give feedback on the filing system so that they can continue to improve it.

## Key Points: What is a Resource Centre?

- A resource centre is a place where reference materials are stored in an orderly way so that they are easy to find and use. Resource centres contain books, magazines, training materials, and newspapers, as well as other information that an organisation wants to make available. Most organisations have many reference materials, but most do not keep them in one place. If they are put together, grouped according to their topic, and labelled, they are much more accessible to a wider group of people.
- Resources include books, but also reports, videos, cassettes, newsletters, booklets and brochures. **Any information that may help people is a resource.**

### STEPS TO TAKE: CREATING A RESOURCE CENTRE

**1.** Make an inventory (list) of all of the resources by grouping the items together (for example, newspapers, training materials etc). The most common items to record are the title (name of the resource), author (the person who wrote it), publisher (the company, university or organisation that produced it), classification of the book (its subject matter: history, administration, health, etc), and the number of copies.

**2.** Once the inventory of resources is complete, they need to be organised so that they are easy to find. There are many ways to organise resources, including:

- By topic. Group all the resources on the same topic in the same place.
- By type of resource. Put all newspapers together, all training materials together, etc.
- By alphabetical order. Arrange resources by either their titles or the last name of their authors.

**3.** A standard way is to put the books in one place and arrange them by topic. Then, arrange all books in each topic in alphabetical order by the author's last name. Next, group the other resources (those that are not books) together and divide them by topic. Put them in magazine boxes and label the box with the subject, such as health, education, water, etc.

If there are many resources, a more advanced system of cataloguing might be needed, but this arrangement is good for most small resource centres.

Now, add to the inventory the classification that you have given each resource.

See **Examples 4 and 5** for an example inventory and example borrower's register.

**Example 3.3: Example of a Resource Centre Inventory**

<b>Title</b>	<b>Author</b>	<b>Publisher &amp; Year</b>	<b>Classification</b>	<b>Number of copies</b>
<i>HRM Manual</i>	<i>Ross Worthington</i>	<i>MOI, 2014</i>	<i>HRM</i>	<i>5</i>
<i>Office Management &amp; Administration Manual</i>	<i>Various contributors</i>	<i>MOI, 2016</i>	<i>Office Administration</i>	<i>3</i>

**Example 3.4: Example of a Resource Centre Loan Register**

<b>Title of Resource</b>	<b>Date Borrowed</b>	<b>Borrower's name</b>	<b>Borrower's contact details</b>	<b>Date due to return</b>	<b>Borrower's signature</b>
<i>Office Management &amp; Administration Manual (1 copy)</i>	<i>19 May 2019</i>	<i>M. Yusuf</i>	<i>0912 345 789</i>	<i>26 May 2019</i>	<i>M.Yusuf</i>

## Session 3.2

## 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.

### 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.

### Key Points: Managing Office Visitors

- The Local Government Office is the meeting place where citizens and local government officials come together. The office is often the first point of contact for the general public when seeking assistance from their local government, in relation to the wide range of services that the local government is responsible to deliver.
- As such, an important part of providing efficient service delivery is having organised and well-functioning office management and administration systems in place, to improve the day-to-day operations of the local government administration and Council, so that they can more effectively carry out their roles.
- In addition, having good visitor management systems in place at the office gives a message to the public that they are welcome, and also makes their visit to conduct their business a more positive and smooth experience.
- It is important to establish a formal system for managing visitors to the office for the following reasons:
  - ensuring the security of the office and its personnel
  - avoiding interruptions to work caused by unannounced visitors
  - creating a more orderly and professional workplace.

### *Some tips for managing office visitors*

- Install a signboard outside the office with the organisation's name, office hours and contact details.
- Make a sign giving directions to the main entrance and reception area, and label the department and section/unit titles, so that visitors can find the office that they are directed to.
- Make sure that the reception area is always clean and tidy, and if possible, set up the reception area with at least two chairs and a small table.
- Keep an appointments book that shows when visitors are expected (see below). Encourage visitors to make appointments in advance, in order to discourage unexpected visits.
- Put the organisation's brochure and annual report on the table for visitors to read while they are waiting.
- Design any noticeboards (vehicle control board, meeting board, etc.) nicely so that they make the office look more attractive.
- You may want to hang a display board showing the organisation's current activities. This could include photos (with captions) of staff or partners at work, workshops they have attended, and visitors to the office.
- Display the organisational structure chart, mission statement and strategic plan if you have them.
- Take any steps necessary to make the office accessible to disabled people.
- Ensure that proper security measures are in place, for example, visitors to park their cars outside the local government office and visitors must be willing to undergo any necessary security searches.

*Source: Adapted from the manual 'Capacity Building for local NGOs: a guidance manual for good practice', Chapter 7 (CIIR, 2005).*



## Key Points: Visitor Appointments System

- Ask visitors to make an appointment in advance so that the necessary people are available to meet with them (see **Example 3.5** below).
- There are two approaches to making appointments for visitors, one is the Secretary of the Mayor to make appointments for meetings with the Mayor, and the other is the reception staff, who will make appointments to see any of the department staff.
- Have some background information about the local government and its work available to give or show to the visitor, such as an organisational profile, the structure chart, annual report, and a list of completed projects.
- Ask the visitor to sign the visitor's book and state his or her name, job title and organisation, and phone number or email address. (see **Example 3.6** below)
- Collect any information that the visitor gives the organisation and file it for future reference.
- Prepare for an informal office tour and visit to project sites if requested.

**Example 3.5: Visitor Appointments Book**

Date: .....22 June 2019.....

Time	Name of visitor and Organisation	Appointment with	Place	Purpose of Visit
7.00-7.30am	<i>Mohamed A., MOIFAR Planning Department</i>	<i>Director, Planning Department.</i>	<i>Planning Department Office</i>	<i>Meeting with Director</i>
7.30-8.00am				
8.30-9.00am	<i>Halima C, UNICEF</i>	<i>Director, Social Affairs Department</i>	<i>Social Affairs Department and visit to nearby health post</i>	<i>Reviewing service delivery pilot</i>
9.00-9.30am				
9.30-10.00am	<i>John Do-Good, Director, Somalia Friends INGO</i>	<i>District Commissioner</i>	<i>District Commissioner Office</i>	<i>Discussion about district priorities for funding in 2020.</i>
10.00-10.30am				
10.30-11.00am				
11.00-11.30am				
11.30-12pm				

**Example 3.6: Visitor Sign in Book**

No.	Name of Visitor	Visitor Card No.	Time and Date visited			Institution or Organisation	Name of person visiting	Phone or email	Signature of Visitor
			Date:	Time In:	Time Out:				
1	Mohamed A.	#008	22/6	7am	7.30 am	MOIFAR Planning Department	Director, Planning Dept.	MohamedAAA@gmail.com	Mohamed A.
2	Halima C.	#013	22/6	8.30 am	9.30 am	UNICEF	Director, Soc. Aff. Dept.	halimac@unicef.org	Halima C
3	John Do-Good	#010	22/6	10 am	10.30 am	Director, Somalia Friends INGO	District Commissioner	director@somaliafriendsin go.com	J. Do-Good

### Exercise 3.3: Visitor Role Play

In this exercise we will look at some aspects of successfully managing office visitors. Your trainer will guide you through the steps in this activity, as follows.

There are two scenarios to act out as role plays—a disorganised system for managing visitors, and an organised system for managing visitors. One group (5 people) will act out a disorganised system and another group (5 people) will act out an organised system. The rest of the participants will act as observers.

Each group should devise a short role play where visitors are coming to the local government office to meet with staff members. The following points can be considered, as well as adding your own:

#### **Disorganised system**

- Reception area is untidy and there is nowhere for visitors to sit while they wait.
- The receptionist is not polite to the visitors when they arrive.
- There are no signs to direct people, so it is very confusing for visitors to know where to go.
- There is no system for booking appointments (e.g. appointments book), so visitors are arriving unannounced.
- There is no visitor sign in book, so nobody knows which visitors are on site.
- There is no attention paid to security precautions for people coming in and out of the office.

#### **Organised system**

- Reception area is neat and tidy and there is a seat for visitors to sit while they wait, as well as some reading material.
- The receptionist is polite and friendly to the visitors when they arrive.
- There are clear signs to direct visitors to the relevant department/unit, so it is easy to know where to go.
- There is a system for booking appointments in advance (appointments book), so the receptionist knows who is expected and when they are due.
- There is a visitor sign in book, which the visitors must fill in on arrival.
- Every person coming in and out of the office is subject to a relevant security check.

To help you prepare, refer back to the earlier sections in this Participant Book:

- *Key points: Managing Visitors*
- *Key points: Visitor Appointments System*



## 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.

### Key Points: What is an organisational chart?

An organisational chart is a diagram that represents an organisation, identifying its employees and departments and their relationships to each other. An example of a local government organisational chart can be seen below in **Diagram 1**.

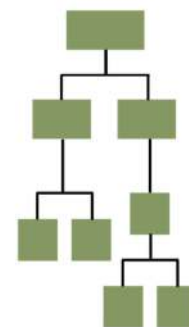
#### What is the purpose of an organisational chart?

- It clarifies lines of authority and how work is shared within an organisation.
- Employees feel more part of an organisation when they see themselves on the chart.
- It shows outsiders how an organisation is structured and its main areas of work.
- It shows the different departments and the number of staff.
- It makes the delegation of responsibilities easier.

#### Other points to consider...

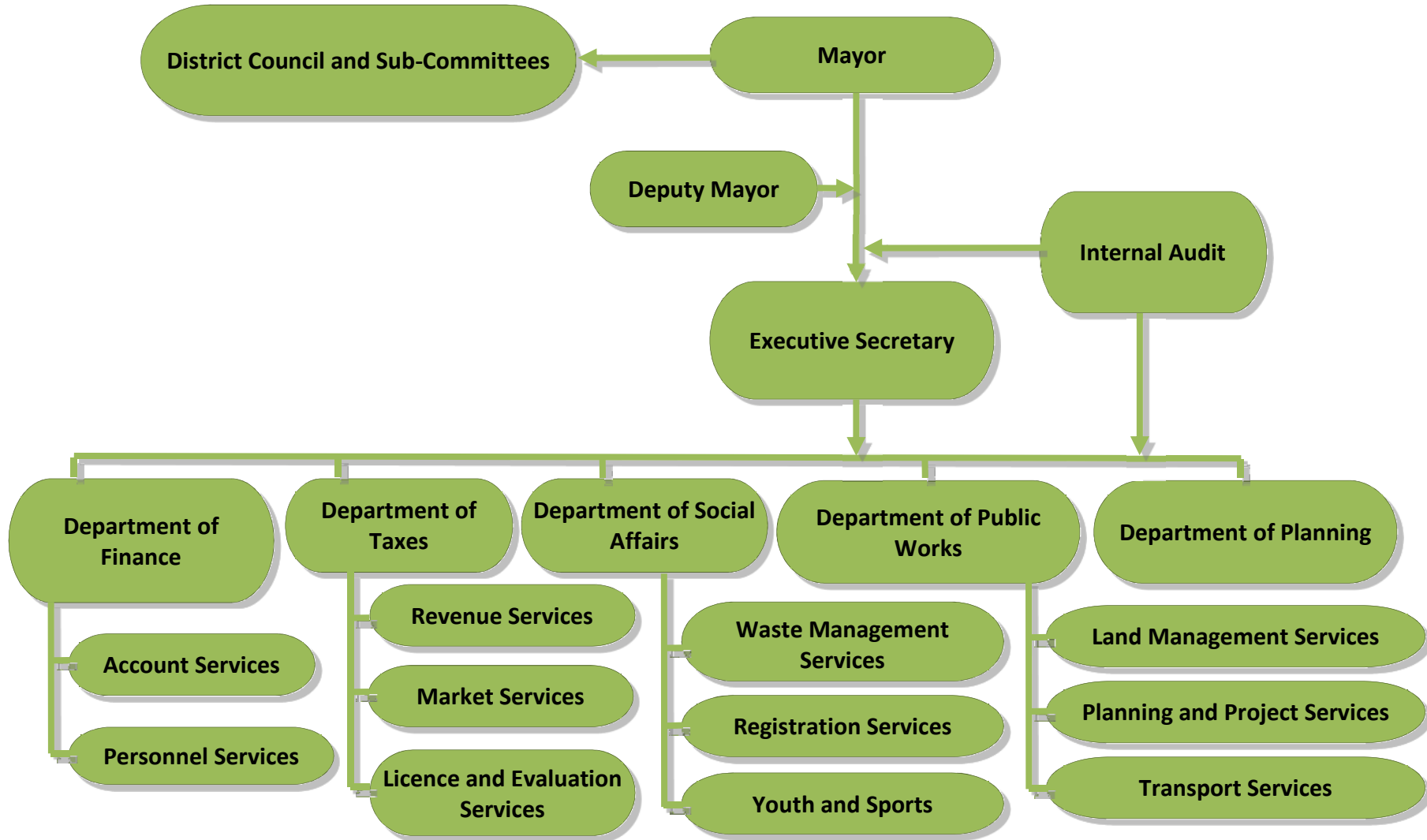
- It helps to involve staff when developing the chart so that they understand the organisation's lines of authority and decision making.
- Once a chart has been developed, the governing body should approve it.
- A good organisational structure chart is well defined so that work is delegated and shared and lines of authority, responsibility, and reporting relationships are clear.
- An organisational structure chart should be adapted to the context, particular goals, and habits of teamwork in the specific organisation.

Source: 'Capacity Building for local NGOs: a guidance manual for good practice' Chapter 7: Office Administration (CIIR, 2005).



### Diagram 3.1: Example Simplified Organisational Chart for Abyan District

Note: A more detailed organisational chart could also show names and positions within the sections/units of each department.



## Key Points: Preparing an organisational chart

Consider what information an organisational structure chart could contain. It may include some or all of the following:

- the name of the organisation
- the date the chart was compiled
- the lines of authority within the organisation
- the names of departments and sections/units
- the names of projects
- the names of employees, job titles and possibly photos.

### Checklist: Organisational chart

Once the chart has been drawn up, check for the following:

- ✓ Consistency: include all names and/or job titles.
- ✓ Clarity: distinguish job titles from departments or sub-teams clearly.
- ✓ Completeness: do not forget the organisation's members, volunteers, and part-time staff.
- ✓ Update: as and when necessary, and decide who should be responsible for doing this.
- ✓ Place: think about where to place the chart (eg as a poster in reception).

*Source: 'Capacity Building for local NGOs: a guidance manual for good practice' Chapter 7: Office Administration (CIIR, 2005).*

## Further Reading/Resources

### Notes on different filing systems:

<http://www.wikihow.com/File-Alphabetically>

<http://notes.tyrocity.com/methods-of-filing-alphabetical-numerical-geographical-chronological-and-subject-wise/>

[https://www.mindtools.com/pages/article/newHTE\\_85.htm](https://www.mindtools.com/pages/article/newHTE_85.htm)

### A short video on setting up a filing system:

<https://www.youtube.com/watch?v=mdK5EKAM8q4>

## Module 4

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

### Questions for Discussion

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

### Key points: Office Asset Management

In this session we are specifically referring to assets held within the local government administration office itself, including computers, desks, chairs and other equipment. This can include assets donated and assets purchased by the local government. We are not referring to broader assets, for example, land and buildings owned by the local government.

It is also important to distinguish between 'office assets' and 'office consumables' (such as stationery and cleaning supplies, for example). Consumable items are not considered assets, but instead are recorded as part of storekeeping duties and are recorded in storekeeper records.

It is important to register new office assets for ensuring their safeguarding, to make it easier to locate office assets, as well as to improve transparency and accountability within the local government. An example of an Office Asset Register can be found below in **Example 4.1**, which includes the following:

- **Asset ID Number**—a tag/sticker with a unique ID number.
- **Serial Number**—for example, if the asset is a computer.
- **Description of the asset**—including the brand name, where possible.

- **Purchase Price or Unit Value**—if the asset was donated and the cost price has not been indicated, estimate a ‘current fair value’ of the asset received.
- **Date of Receipt**—the asset may have been purchased, transferred or donated. In all cases it is necessary to record the date that the asset was received by the local government.
- **Method of Acquisition**—indicate whether the asset was purchased, transferred or donated, and if possible, record the **source** of the funds used, or the donor.
- **Condition of Asset on Receipt**—the condition of the asset when received should be recorded, for example, good, fair or poor. This will be a useful reference point for comparison when conducting the annual asset survey.
- **Physical Location of Asset**—this should describe where the asset is located, for example, in the Administration and Finance Department.
- **Person Responsible**—if the asset is only used by one person, such as a computer, that person is responsible for the asset. If it is being used by many people, such as a printer, then the District Commissioner, District Secretary, or the relevant Department Director should be responsible for the asset.
- **Date and method of disposal** (if applicable)—this category may become relevant if the asset is disposed of after a period of time has elapsed. The asset register should be updated to reflect this information, which will also be helpful when conducting the annual asset survey.

### **Annual Asset Survey**

The local government’s office assets should be included as part of an annual asset survey. The survey should determine:

- a. Any missing assets—for example, those that appear on the asset register but cannot be located for the survey.
- b. Excess assets—for example, any equipment or furniture that appears to be surplus to requirements.
- c. Condition of the assets—for example, whether safe or neglected.
- d. Assets to be auctioned or sold—following the correct manner of tendering and auctioning.
- e. Assets that can be diverted for public use or donated to another agency because of public interest.
- f. Assets for burning and disposal.

See **Example 4.2** below for an Asset Survey form, which is based on the Office Asset Register.

### What is a good asset numbering system?

A letter and number combination is important, for example office assets of 'Abyan' District Council can be coded as 'DHAB', followed by a numbering system:

Asset Number	Item	How to tag
1	Desktop computer	If there are 3 desktop computers they can be tagged as 'DHAB 1.1, DHAB 1.2, DHAB 1.3'
2	Laptop computer	If there are 3 laptops they can be tagged as 'DHAB 2.1, DHAB 2.2, DHAB 2.3'
3	Printer	If there are 3 printers they can be tagged as 'DHAB 3.1, DHAB 3.2, DHAB 3.3'
4	Photocopier	If there are 3 copiers they can be tagged as 'DHAB 4.1, DHAB 4.2, DHAB 4.3'
5	Scanner	If there are 3 scanners they can be tagged as 'DHAB 5.1, DHAB 5.2, DHAB 5.3'
6	Digital Projector	If there are 3 projectors they can be tagged as 'DHAB 6.1, DHAB 6.2, DHAB 6.3'

The above numbering can be applied to other office assets such as digital cameras, desks, tables, chairs, filing cabinets, cash boxes etc. From the above it is easy to see how many of a certain asset the local government has at any given time. For example, if wanting to know how many desktop computers there are, this can be traced from the tag of the last desktop acquired—if it's DHX 1.34, there should be 34 desktop computers.

### Example 4.1: Office Asset Register—Abyan District

Week/Month: .....July 2019.....

Asset ID No.	Serial No.	Description (including Brand)	Unit Value	Date of Receipt	Method of acquisition		Condition of asset on receipt	Physical Location of Asset	Person Responsible	Date and method of disposal (if applicable)
					P, T, D**	Source				
DHAB 6.1	BK-132608	HP digital projector	USD 500	10 July 2019	D	JPLG	Good	ES Office	Executive Secretary	
DHAB 3.1	DS-333091	HP printer	USD 100	20 July 2019	P	Dept funds	Good	Planning Department	Director, Planning Department	
DHAB 10.3	w/a	Office Table	USD 50	22 July 2019	T	Dept ASF	Fair	Planning Department	Director, Planning Department	

\*\* P = Purchase, T = Transfer, D = Donation

Prepared by:

Name .....

Signature .....

Date .....

Verified by:

Name .....

Signature .....

Date .....

Approved by: (District Commissioner)

Name .....

Signature .....

Date .....

**Example 4.2: Office Asset Survey—Abyan District**

Asset ID No.	Serial No.	Description (including Brand)	Physical Location of Asset	Person Responsible	Date of Asset Survey	Condition of Asset at time of Survey	Action Recommended
<i>DHAB 6.1</i>	<i>BK-132608</i>	<i>HP digital projector</i>	<i>ES Office</i>	<i>Executive Secretary</i>	<i>30 December 2019</i>	<i>Good</i>	<i>none</i>
<i>DHAB3.1</i>	<i>DS-333091</i>	<i>HP printer</i>	<i>Planning Department</i>	<i>Director, Planning Department</i>	<i>30 December 2019</i>	<i>Fair</i>	<i>Repairs needed</i>
<i>DHAB 10.3</i>	<i>n/a</i>	<i>Office Table</i>	<i>Planning Department</i>	<i>Director, Planning Department</i>	<i>30 December 2019</i>	<i>Poor</i>	<i>Disposal</i>

Prepared by:

Name .....

Signature .....

Date .....

Verified by:

Name .....

Signature .....

Date .....

Approved by: (District Commissioner)

Name .....

Signature .....

Date .....

### Exercise 4.1: Office Asset Analysis

This exercise aims to familiarise you with the Asset Register and Asset Survey forms which are presented in **Examples 4.1 and 4.2** above.

In groups of 3, review the information in the examples about Abyan District's Office Assets and answer the following questions:

1. How was the HP digital projector acquired by Abyan District (Purchase, Transfer, Donation) and what was the source?
2. From looking at the Asset ID number, how many 'Office Tables' did Abyan District have at the time of registering that asset?
3. The condition of the HP printer went from 'good' to 'fair' in a 6 month period. Why do you think this might be?
4. What action has the Asset Survey Board recommended be taken regarding Asset DHAB 10.3? Why do you think this is?

### Key points: Office Asset Transfer and Disposal

We saw in **Example 4.1** that Asset DHAB 10.3 (Office Table) was transferred to the Planning Department from the Department of Administration and Finance. In such cases, an 'Asset Transfer' form or similar is important for tracking where assets have been transferred to, and in which department they are now located.

See **Example 4.3** below to show you how the form was filled in for the transfer of the Office Table from the Department of Administration and Finance to the Department of Planning.

Office assets may be disposed of for various reasons. The decision for disposal of an asset usually comes from the annual asset survey, or a similar assessment and reporting process. The method of disposal of office assets can be:

1. Direct sale by the authorised local government office, either internally or externally.
2. Sale by auction.
3. Disposal by scrapping or dumping where the asset has little or no resale value.

The Annual Asset Survey recommended that Asset DHAB 10.3 be disposed of, because of its poor condition. Refer to **Example 4.4** below, which is an Asset Disposal Form.

**Example 4.3: Office Asset Transfer Form—Abyan District**

OFFICE ASSET TRANSFER FORM (internal/external)
<p><b>Transfer Information:</b></p> <p>Asset ID #: <u>DHAB 10.3</u> Description: <u>Office Table</u></p> <p>Transfer from location (Agency/Department, Building, Room): <u>Department of Administration and Finance, Room 2</u></p> <p>Transfer to Location (Agency/Department, Building, Room): <u>Department of Planning, Room 3</u></p> <p>Name of and position of responsible person receiving asset: <u>Mohamed A, Director, Department of Planning</u></p> <p>Date of Transfer: <u>22 July 2019</u> Condition of Asset: <u>Fair</u></p> <p>Reason for Transfer: <u>Request from Department of Planning as they require a table to stand their new printer</u></p> <p>Remarks: _____</p>
<p><b>Authorisation</b> (note: authorisation varies depending on internal/external transfer)</p> <p>Initiating Department/Section:</p> <p>Name: <u>Abdi B.</u> Position: <u>Director Admin &amp; Finance Department</u></p> <p>Signature: <u><b>Abdi B.</b></u> Date: <u>20 July 2019</u></p> <p>Verified by:</p> <p>Name: _____ Position: <u>Procurement Officer</u></p> <p>Signature: _____ Date: _____</p> <p>Approved by:</p> <p>Name: _____ Position: _____</p> <p>Signature: _____ Date: _____</p> <p>Asset Received by:</p> <p>Name: <u>Mohamed A</u> Position: <u>Director Planning Department</u></p> <p>Signature: <u><b>Mohamed A</b></u> Date: <u>22 July 2019</u></p>

### Example 4.4: Office Asset Disposal Form—Abyan District

Dept/Committee: ..... Local Government Code: .....DHAB..... Contact: .....

Asset ID & Description	Serial No.	Location	Condition	Reason for disposal	Method of disposal	Age of Asset	Expected date of disposal	Asset Office Only	
								Asset No.	Written Down Value
DHAB 10.3 Office Table	N/A	Department of Planning	Poor	No longer fit for use, not able to be repaired	Scrapping / Dumping	10 years	10 Jan 2020		
<b>Sold/Donated to</b> N/A	<b>Sale Price</b> N/A								

Recommended by:  
 Name ...*Mohamed A, ...Director Planning Department,* .....  
 Signature .....**Mohamed A** .....  
 Date .....*7 Jan 2020*.....

Processed/Filed by:  
 Name .....  
 Signature .....  
 Date .....

Approved by:  
 Name ...*Ahmed F, .....Contract Committee*.....  
 Signature .....**Ahmed F** .....  
 Date .....*7 Jan 2020*.....

### Example 4.5: Office Asset Maintenance Work Order Form—Abyan District

Order #: 00020/16

Date: 7 Jan 2020

To: Priority One Technical Repairs

From: Abyan District Local Government

The below Work/Service is requested (include details of asset/s and work required):

1. HP Printer, Serial No. DS-33309, requires maintenance/repairs due to constant paper jam problems.

2.

3.

4.

5.

#### Authorisation:

Requesting Officer:

Name: Mohamed A Position: Director Planning Department

Signature: **Mohamed A** Date: 7 Jan 2020

Approved by:

Name: Abdi B. Position: Director Admin & Finance Department

Signature: **Abdi B.** Date: 7 Jan 2020

## Session 4.2

## 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.

### 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?

### Key Points: Vehicle Management

The most important tools to assist with managing the vehicles owned and used by the local government include:

- Vehicle Movement Recording Sheet (also known as Vehicle Log Book)
- Vehicle Transport Request Form
- Vehicle Maintenance Work Order Form
- Vehicle Maintenance Log Book
- Fuel Order Form
- Fuel Consumption Analysis Sheet
- The driver is responsible for filling in the Vehicle Log Book (See **Example 4.6**) at the beginning and end of each trip. A new form should be used when the driver is changed, and completed forms should be signed by the driver's supervisor. The log book should be kept in the vehicle, and when completed should be submitted to the office for signing by supervisor.
- For coordinating the overall movement of local government vehicles, a whiteboard should be prepared, showing the proposed movements of vehicles for the coming week, so that personnel can see when there are vehicles available, and when there is limited availability, meaning that other arrangements need to be made. See the example below.

Week commencing: *22 May 2019*

<b>Vehicle Registration</b>	<i>Sun 22</i>	<i>Mon 23</i>	<i>Tues 24</i>	<i>Wed 25</i>	<i>Thu 26</i>	<i>Sat 28</i>
XXX-XXX	Meeting 11-1pm (Name)		Field trip	Field trip		
YYY-YYY	Maintenance	Maintenance				
ZZZ-ZZZ	Airport 9am					

- A **Vehicle Transport Request Form** needs to be completed and submitted prior to any movement by vehicle for work-related meetings or field trips.
- A **Vehicle Maintenance Work Order Form** should be completed in advance of a service, or in the case of any non-routine servicing or repairs being necessary. This form is usually prepared by the driver and approved by the Head of Public Works. This form should also be verified by the Chief Mechanic before submitting to the logistics officer.
- Each vehicle should have its maintenance work recorded in the **Vehicle Maintenance Log Book**, so that any maintenance or repairs carried out on a vehicle will be recorded in one place and therefore will be easy to locate.
- When fuel is needed a **Fuel Order Form** should be filled in by the driver and is approved, signed and stamped by the Director of Public Works or the Director of Administration and Finance. The Fuel Order forms for each vehicle should be kept together, for reference for fuel consumption tracking and analysis, and a monthly **Fuel Consumption Analysis Sheet** should be conducted for each vehicle.
- At least one day before the start of travel outside the immediate vicinity of the local government office (for example, a day or overnight field trip), the following check-ups should be done:
  - Adequate fuel, lubricants and water
  - Availability of spare tyres and air compressor
  - Validity of driver's driving licence, road tax and car book
  - Vehicle Log Book up to date and inside vehicle
  - Vehicle service/check-up should be done in advance if the vehicle is close to its next scheduled service.
  - The following items should also be checked: First Aid Kit, Fire Extinguishers, Vehicle Tools such Tool Box, Vehicle jack and wheel brace, Basic tools (screwdrivers, pliers, wrenches), Spare vehicle fuses and bulbs.

**Example 4.6: Vehicle Movement Recording Sheet (Vehicle Log Book)**

Vehicle Type and Plate No. Pajero XXX-XXX xx km/litre \_\_\_\_\_ Type of fuel: Diesel

Driver Name. Ali M.

No	Date	Passenger Name and Purpose	KM Reading			Fuel	Driver's Signature	Passenger's signature
			Start	End	Difference			
1.	22 August 2019	Mohamed A. - meeting at Friendly Village	71880	71999	119km		Ali M.	Mohamed A.
2.								
3.								
4.								
5.								
6.								
7.								
8.								
	<b>Total KM/SShI</b>							

Supervisor's Name: \_\_\_\_\_ Signature: \_\_\_\_\_

### Example 4.7: Vehicle Transport Request Form

Date 21 August 2019

To: Administration and Finance Department

Date of Travel: 22 August 2019

Place to be Visited: Friendly Village

Purpose: To discuss plans to build new primary school in the village

Date From: 22 August 2019 To: 22 August 2019

Time From: 8:00am To: 4:00pm

Requested By (Requesting Officer):

Name and position: Mohamed A., Director Planning Department

Date: 18 August 2019

Signature: Mohamed A.

Approved By: (Supervisor of Requesting Officer)

Name and position: \_\_\_\_\_

Date: \_\_\_\_\_

Signature: \_\_\_\_\_

Approved By: (Head of Transport/Logistics)

Name and position: \_\_\_\_\_

Date: \_\_\_\_\_

Signature: \_\_\_\_\_

*NB: The Requesting Officer must fill this form a day before for the next day morning trip, the same day in the morning for an afternoon trip. Please also note that for a field trip (duration of one full day or longer) the request should be submitted three days in advance. Depending on the circumstances, an exception can be made for an emergency situation, where the form can be submitted after the travel has taken place.*

**Example 4.8: Vehicle Maintenance Work Order Form**

To: Administration and Finance Department

From: Ali M.Date: 23 August 2019Vehicle Plate No: XXX-XXX**Work Requested**

Service	1. General Service	<input checked="" type="checkbox"/>
	2. Check Brakes	<input type="checkbox"/>
	3. Washing/Greasing	<input type="checkbox"/>
	4. Check Electric System/Light	<input checked="" type="checkbox"/>
	5. Check Body	<input type="checkbox"/>
Other	6. _____	<input type="checkbox"/>
	7. _____	<input type="checkbox"/>

**Requested by (Driver)**Name Ali M.Signature Ali M.Date 23 August 2019**Approved by:**

Name \_\_\_\_\_

Signature \_\_\_\_\_

Date \_\_\_\_\_

**Verification by (Chief Mechanic)**

Name \_\_\_\_\_

Signature \_\_\_\_\_

Date \_\_\_\_\_

Action taken: \_\_\_\_\_

## Key Points: Staff Travel

- From time to time, employees may be required to travel outside their workplace for work-related purposes.
- In these cases, it is important that the relevant forms are properly completed and the appropriate authorisation is sought.

### Staff Movement Register

If a staff member is leaving the office premises for a short period, for example, to attend a meeting in the vicinity of the local government office, they will need to sign the Staff Movement Register, on exit and entry from the premises (see **Example 4.9**). The Staff Movement Register should be kept at the main entry/exit gate, for easy signing by staff members coming and going.

### Travel Request and Authorisation Form

The steps in seeking authorisation for work travel include:

1. Traveler completes and submits a Travel Request and Authorisation Form to supervisor (see **Example 4.10**). This form should set out the objectives and activities of the travel, and the timeline.
2. Supervisor approves the request and submits to the relevant Department Director (unless the travel request is denied).
3. Traveler should complete the finance procedure for getting per diem advance if necessary.

These steps should be finalised at least one day before the commencement of the trip, which may require starting the process up to one week prior to the intended travel.

### Returning from Travel

On return from the trip, the traveler should submit a Travel Activity Report with their Per Diem Claim Form, to claim any outstanding per diem (if relevant). The report and the claim form should be submitted within a week following return from travel. See **Example 4.11**.





**Example 4.10: Travel Request and Authorisation Form**

Foomka Ogolaanshaha Socdaalka

**Name of Traveler:** ..... *Halíma C.* ..... **Date:** ..... *18 August 2019* .....  
 (Magaca Qofka Socdaalaya) (Taariikh)

Place/s of travel Goobta loo safrayo (domestic/abroad)	Mode of Transport (air, road)	Main Objectives Ujeedada Safarka	Activities to be undertaken Hawlaha lasoo qabanayo	Start Date Bilaw	Return Date Noqosho	Per diem advance? Yes/No Horumarin- Habeen dhax	Remarks Faallo
<i>Domestic – Friendly Village</i>	<i>Road</i>	<i>Discuss proposed school construction at Friendly Village</i>	<i>- Accompany Department Director - Meet Village Committee and other key representatives - Provide information about the new school</i>	<i>22 August 2019</i>	<i>22 August 2019</i>	<i>No</i>	<i>Will be accompanied by Mohamed A. Department Director</i>

**Shaqaafe Staff Member (Traveler)**Magaca **Name:** \_\_\_\_\_ *Halíma C.* \_\_\_\_\_Xilka **Position:** \_\_\_\_\_ *Planning Officer* \_\_\_\_\_Saxeexa **Sign:** \_\_\_\_\_ *Halima C.* \_\_\_\_\_**Korjooge Supervisor**Magaca **Name:** \_\_\_\_\_ *Mohamed A.* \_\_\_\_\_Xilka **Position:** \_\_\_\_\_ *Director, Planning Department* \_\_\_\_\_Saxeexa **Sign:** \_\_\_\_\_ *Mohamed A.* \_\_\_\_\_

**Example 4.11: Travel Activity Report**

This form is to be completed after field trips. It should be submitted with the Per Diem Claim Form (where required) not more than one week after returning from travel.

Name of Traveller: ..... *Halima C.*.....

Place of Travel: ..... *Friendly Village*.....

Date of Travel: ..... *22 August 2019.*.....

Date of Return: ..... *22 August 2019.*.....

**Objectives of Travel and Outputs achieved**

This should list all the objectives of the travel and the results of the field trip.

- Discuss proposed school construction at Friendly Village.
- Met with key village representatives and outlined the plan for the school. The village agreed with the proposal and will organise a Community Monitoring Group (CMG) to monitor the construction.

**Main activities undertaken**

This should list all the main activities undertaken, and what happened.

- Accompany Department Director
- Meet Village Committee and other key representatives
- Provide information about the new school

**Issues for follow up**

This should list any issues that arose on the field trip that need further attention.

It will be important to maintain contact with Friendly Village and members of the CMG throughout the project, to ensure that the group understands its role and that it is carrying out its role as intended.

**Challenges and Solutions**

This should list any challenges identified and what actions were taken to solve these.

There was some concern about the idea of a CMG. It was explained that the CMG is a temporary group set up for the duration of the project and that there is a requirement for some members of the CMG to be drawn from the Village Committee. After explaining these things, the Village Committee was more open to the idea of a CMG and helped with identifying some suitable people to be members of this group.

Prepared by: ..... *Halima C.*.....(Officer)

Position: ..... *Planning Officer*.....

Signature:..... **Halima C** ....

Date: ..... *23 August 2019.*.....

Received by:.... *Mohamed A.*.....(Supervisor)

Position: ... *Director, Planning Department*

Signature:.... **Mohamed A.** .....

Date: ..... *23 August 2019.*.....

## Exercise 4.2: Travel Request and Authorisation Form

This exercise aims to give you practise in preparing a Travel Request and Authorisation Form, as shown in **Example 4.10** above.

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.

### Exercise Sheet 4.1: Travel Request and Authorisation Form

Foomka Ogolaanshaha Socdaalka

**Name of Traveler:** ..... **Date:** .....

(Magaca Qofka Socdaalaya)

(Taariikh)

<b>Place/s of travel</b> Goobta loo safrayo (domestic/abroad)	<b>Mode of Transport</b> (air, road)	<b>Main Objectives</b> Ujeedada Safarka	<b>Activities to be undertaken</b> Hawlaha lasoo qabanayo	<b>Start Date</b> Bilaw	<b>Return Date</b> Noqosho	<b>Per diem advance? Yes/No</b> Horumarin- Habeen dhax	<b>Remarks</b> Faallo


**Shaqale Staff Member (Traveler)**

Magaca **Name:** \_\_\_\_\_

Xilka **Position:** \_\_\_\_\_

Saxeexa **Sign:** \_\_\_\_\_

**Korjooge Supervisor**

Magaca **Name:** \_\_\_\_\_

Xilka **Position:** \_\_\_\_\_

Saxeexa **Sign:** \_\_\_\_\_

## Action Plan – Modules 1-4

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Prepare an action plan for *at least one thing* that you will try to implement on your return to the workplace, based on what you have learned in this training. Some examples have been provided for you, which you may also wish to implement in your workplace.

<b>Activity</b>	<b>Who is responsible?</b>	<b>By when?</b>	<b>What do I need to help me achieve this goal?</b>
<i>Example 1: Prepare all memos, letters and circulars according to the examples provided in the training materials.</i>	<i>Me — encourage all other colleagues to use the same template.</i>	<i>Within 2 weeks of completing training.</i>	<i>Electronic copy of the training materials in order to set up the template for the memo.</i>
<i>Example 2: Prepare a meeting agenda according to the format provided in the training materials</i>	<i>Me — encourage other colleagues to use the same template.</i>	<i>Within 2 weeks of completing training.</i>	<i>Electronic copy of the training materials in order to set up the template for the memo.</i>
<i>Example 3: Review all types of documents in my section and discuss with supervisor about creating a filing system to properly organise and store these documents.</i>	<i>Me and other office colleagues.</i>	<i>Within 1 month of completing training.</i>	<i>Support from my supervisor  Small funds for setting up a proper system for example, folders, filing cabinet.</i>
<i>Example 4: On returning from my next work trip, prepare and submit a Travel Activity Report.</i>	<i>Me — encourage other colleagues to use the same template.</i>	<i>Within 2 weeks of next work trip.</i>	

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See next page...

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Activity	Who is responsible?	By when?	What do I need to help me achieve this?
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**Module 1: Written Communication**

*Put 1 idea here.....*

**Module 2: Effective Meetings**

*Put 1 idea here.....*

**Module 3: Office Organisation**

*Put 1 idea here.....*

**Module 4: Office Assets, Vehicles and Travel**

*Put 1 idea here.....*

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## Conclusion

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### Summary – All Modules

In this training you have learned about the following:

- 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.



### **Important!**

You have also been asked to make some entries in an Action Plan, which needs to be put into place back in your workplace, with specific responsibilities, timelines and mechanisms for follow up identified.

### Assessment and Evaluation

You will be asked to complete some post-test questions, to gauge how much you have learned in this training. Your trainer will ask you to provide some feedback on the training you have just participated in, through the conduct of an evaluation activity. Your feedback will be most helpful for the ongoing improvement of these training materials.

*Thank you!*

# ANNEX 1

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## Monthly Reporting Format

Name: \_\_\_\_\_ Department: \_\_\_\_\_ Month/Year \_\_\_\_\_

<b>Activities undertaken:</b>     
<b>Results achieved:</b>     
<b>Challenges and Recommendations:</b>       
<b>Annexes/Supporting Documents:</b>       

Prepared by: .....(Officer)	Received by:..... (Supervisor)
Position: .....	Position: .....
Signature:..... Date: .....	Signature:..... Date: .....

## ANNEX 2

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### Quarterly Report Format

Department: ..... Quarter/Year: .....

#### Summary: Programme Activities Target Vs Achievements (Quarterly review):

Act. No.	Activities planned	Progress made so far	Achievements	Justification if not completed	Action points / follow up plan (next quarter)

#### Summary: Key Learning

Specific activities	Problem faced	Key Learning	Recommendations

#### Detailed Report:

<p><b>Background/Political Situation:</b></p>
<p><b>Activities undertaken:</b></p>

**Results achieved:**

**Challenges and Recommendations:**

**Annexes/Supporting Documents:**

Prepared by:

..... (Officer)

Position/Department:

.....

.....

Signature:.....

Date: .....

Received by:

.....

Position/Department: .....

.....

Signature:..... Date: .....

# ANNEX 3

---

## Annual Report Format

Department: ..... Year: .....

<b>Executive Summary</b>
<b>Objectives</b>
<b>Progress</b>
<b>Resources and budget delivery</b>
<b>Work plans for next year</b>

Prepared by:  
.....(Officer)  
Position/Department:  
.....  
.....  
Signature:.....  
Date: .....

Received by:.....  
Position/Department: .....  
.....  
Signature:..... Date: .....

# ANNEX 4

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## Travel Activity Report

*This form is to be completed after field trips. It should be submitted with the Per Diem Claim Form not more than one week after returning from travel.*

**Name of Traveller:** .....

**Place of Travel:** .....

**Date of Travel:** .....

**Date of Return:** .....

<b>Objectives of Travel and Outputs achieved</b>
<i>This should list all the objectives of the travel and the results of the field trip.</i>
<b>Main activities undertaken</b>
<i>This should list all the main activities undertaken, and what happened.</i>
<b>Issues for follow up</b>
<i>This should list any issues that arose on the field trip that need further attention.</i>
<b>Challenges and Solutions</b>
<i>This should list any challenges identified and what actions were taken to solve these.</i>

Prepared by: .....(Officer)

Received by:.....(Supervisor)

Position: .....

Position: .....

Signature:..... Date: .....

Signature:..... Date: .....

## ANNEX 5

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### Letter of Invitation and Agenda

**Ref:** ..... **Date:**.....

**To:** .....

**Cc:** .....

**Subject:** Agenda for ..... meeting

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This is to inform you of ..... meeting on

**Date:** ..... **Time:** .....am/pm

**Chaired by:** .....

**Location:** .....

#### Meeting Agenda:

1. ....

2. ....

3. ....

4. ....

5. ....

**Signed:** .....

**Name and Title:** .....

# ANNEX 6

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## Meeting Participant List / Attendance Sheet

Name/Purpose of meeting: .....

Date of meeting: .....

Location: .....

NO	Name	Title	Contact	Signature
1				
2				
3				
4				
5				
6				
7				
8				
9				
10				
11				
12				
13				
14				
15				
16				
17				
18				
19				
20				
21				
22				
23				

## ANNEX 7

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### Meeting Minutes Format

Foomka Hadal Qoraaleedka Shirka Waaxaha Dawlada Hoose Ee Degmada

Taariikhda: \_\_\_\_\_

Maalinta: \_\_\_\_\_

Goobta: \_\_\_\_\_

#### Ajandayaasha Shirka.

1. \_\_\_\_\_
2. \_\_\_\_\_
3. \_\_\_\_\_
4. \_\_\_\_\_

#### Dooda Ajandayaasha

- A.
- B.
- C.
- D.

#### Go, aanka Shirka

- A.
- B.
- C.
- D.

#### Magaca

#### Xilka

#### Saxeex

- |          |       |       |
|----------|-------|-------|
| 1. _____ | _____ | _____ |
| 2. _____ | _____ | _____ |
| 3. _____ | _____ | _____ |
| 4. _____ | _____ | _____ |