

Guidance for volunteers  
in Wakefield's greenspaces

# Setting up a group



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## Setting up a group

### Introduction

Wakefield District has a unique range of public open spaces reflecting the area's history, ranging from formal Victorian parks and gardens to reclaimed colliery sites that have become havens for wildlife, and from ancient woodland to newly planted community spaces. Wakefield Council aims to encourage people to take a greater interest and play an active role in protecting and enhancing our greenspaces by working with us to improve these valued areas. Many volunteers already make a real difference to greenspaces, bringing with them additional skills, knowledge and experience.

Volunteering in Wakefield's parks, country parks, nature reserves and other natural areas can have lots of benefits, including the opportunity to meet new people, being involved in projects and decisions that affect the places you care about, learning new skills and increasing confidence, or as a stepping stone to returning to work. There are also lots of health benefits to working in the outdoors.

### Friends groups

Friends groups are made up of local people who all share a passion for a particular place, and who meet up regularly to improve that place. There are a wide variety of groups in the Wakefield area associated with many of our parks and nature reserves. Some meet every week, some monthly, and others might only meet occasionally. A list of existing community groups is available on the Council's website, or you can call us for information.

If there is a site that you would like to improve, but there is no existing friends group for that site, you might like to think about starting a new community group. This booklet aims to provide guidance on what to consider when setting up your own group. By following the guidelines set out in this booklet your group should be able to achieve your aims safely and effectively.

### Who to contact?

Each friends group will have a particular contact within the Council. For nature reserves and countryside sites, this will be the Countryside Officer for that area. For other parks and greenspaces, the contact will either be a Street Scene Engagement Officer or the Street Scene Supervisor for your local area. You can find out who the contact will be by getting in touch with Wakefield Council on **0345 8 506 506** or online at **[www.wakefield.gov.uk](http://www.wakefield.gov.uk)**.

If you have any questions after reading this booklet, please get in touch with us. We have helped many community groups to get started. There will also be other existing groups more than willing to share their experiences with you.



## 1 Getting started

Start by listing the reasons you want to form a group. Include what you would like the group to achieve. Developing a list of activities will help you to decide whether forming a group is the best option to achieve what you want to do. There are a number of questions it is useful to ask yourself before forming a new group.

- **Is there any public interest?**

It is important to talk to other local people to see if they are interested in your ideas. This can be done formally, at your first meeting, but can also be done informally just by speaking to people in your local area.

- **Is there already a group with a similar aim?**

It is important to talk to other groups in the area as they may have already thought of similar ideas and be working towards achieving them. Where there is a group with similar aims it may be better to join in with them rather than set up a new group. A list of community groups active on Wakefield's greenspaces is available on the Council's website.

- **Is a group the best way to achieve your aim?**

Look at your list and decide whether forming a group is the best way to achieve your ideas. Are there more appropriate ways to achieve your aim? For example, if your idea is to bring a specific problem to the attention of the Council, could this be more easily done in a personal capacity?

There are essentially four steps to setting up a community group:

- Step 1 Hold a public meeting to gauge interest and see what support there is for your ideas. Try to involve as many people as possible. You may want to invite others who have a local influence, e.g. councillors, appropriate council officers, local police officers, etc. Until you have a chairperson and secretary, you will need to nominate someone to chair the meeting and take minutes until these roles have been agreed.
- Step 2 Draw up a list of what you would like to achieve. Try to involve as many people as possible in this, recording all the ideas suggested but without getting carried away with the details.
- Step 3 Agree your aims and draw up a constitution. Decide what your group's aim will be and how you will work together to achieve it. This is a really important step in forming your group and is worth spending some time on.
- Step 4 Nominate and agree your committee. It is a requirement of being formally constituted as a group that you have an elected committee. When drawing up your constitution you will have agreed how many people can be on your committee. All groups must have at least a chairperson, secretary and treasurer.



## Setting up a group

### Why is a committee important?

An effective committee is essential to the success of your group. It is responsible for managing the running of your group and for any decisions or actions that your group takes. You cannot agree your constitution and formally set up your group without electing a committee.

### Why do we need a constitution?

Your constitution is essential for outlining your group's aim and providing the ground rules of how your group will work together to achieve your aim. The constitution is a legal document and establishes the legal status of your group.

It is important that any changes to your constitution are carried out and recorded correctly and that your group always follows the procedures as outlined in it. Potential funders and any other organisations that you work in partnership with may ask for copies of your constitution so keep it up to date and have copies available.

You might want to look at the constitutions of other groups to give you some ideas of format. The following box gives the basic details of what to include. If you discuss, and reach an agreement on the areas discussed, at your first meeting, you can nominate one or two people from your proposed committee to develop your constitution ready for your first Annual General Meeting (AGM).

## Developing a constitution

- 1 Name of group** Keep it short and simple, and try to ensure it reflects what you are about.
- 2 Aim** What is your group's fundamental reason for forming? This is usually only one or two sentences stating your aim, e.g. 'To improve / protect / support the area known as ...'
- 3 Objectives** Give more detail about how your group will achieve your aim, but keep it really general to allow flexibility as your group develops in the future. Your objectives may include things like conservation, fundraising, involving local people, etc.
- 4 Powers** What powers will your group have? Be clear about what you want your group to be able to do or not do.
- 5 Membership** Who can be a member and how will they join? Keep membership as broad as possible and do not exclude any groups within your community. How do people stop being a member?
- 6 Committee** Agree a maximum number of committee members but keep it manageable (e.g. 8, 12 or 15). You might decide to have deputy officers for key roles such as chair, etc. State how you will elect your committee (e.g. by annual vote at your AGM). Decide whether new committee members can be co-opted between AGMs.
- 7 Meetings** Where will you meet and how often? Agree the minimum number of meetings you need each year. What is the minimum number of people needed for a meeting to take place? How will you agree decisions? Will it be a majority vote? If the vote is tied, will the person chairing the meeting have a second vote?
- 8 Money** You will need to have a bank account in the name of your group with at least two signatories (but not more than three). One of them will need to be your treasurer.
- 9 Date of your first Annual General Meeting (AGM)** At your first AGM you will need to agree your constitution and elect your committee (by formal voting). You need to hold annual AGMs within 12-15 month intervals of this date. Decide on the minimum number of people (quorum) needed for an AGM.
- 10 Changing your constitution** Agree at the outset how you will change your constitution if required, and also how you will close your group when the time is right. For example, will it be by a majority vote? Who will be able to vote? Will it be at an AGM? What will happen to the group's assets?

## 2 Holding meetings

### When and where should we have a meeting?

Think about why you want the meeting and how soon you feel the meeting should be held. Consider your local area and people you want to attend. You may want to consider the following:

- Do we need to hold meetings at a particular time of day to make it easier for people to attend?
- Will the meeting clash with other events or days of religious significance?
- Is it best to vary the times of the meetings?
- Is the building we want to use accessible?
- Would using a particular building exclude any groups?

### Who will we invite?

Try to involve as many people as possible from your local community. You may want to invite others who have a local influence or who might be able to help your group, e.g. appropriate council officers, local councillors or local police officers.

### How will we let people know?

Look at how you will get people to come along to the meeting. You could advertise through posters, flyers, local newsletters or personal invitations. You could also visit groups and organisations in the area, combine a meeting with a small activity to draw people in, or visit other local events to let people know what you are doing.

### How will we run the meeting?

If you do not already have a chair and a secretary, you will need to nominate people to take on these roles for the first meeting, until you have elected people into these roles. If no one feels confident in managing these roles, approach the appropriate council officer to see if they can assist.

### How will we keep people updated?

Decide how you will distribute your minutes: can they be posted or emailed? Record who is at the meeting, and ask people to provide contact details so you can send them minutes and details of future meetings, etc.

### Top 10 tips for a successful meeting

- 1. Before the meeting:** circulate an agenda with start and finish times, and ensure that participants are provided with enough information.
- 2. Open the meeting:** your group's chairperson, or someone nominated to act as chair, should open the meeting by highlighting the agenda and objectives of the meeting.
- 3. During the meeting:** the chairperson should invite participation and eliminate any issues that are not on the agenda or that can be resolved elsewhere. The chairperson should stick to the agenda and ensure each item is covered in full, allowing participants enough time to comment, whilst keeping to the agreed timescale. Items should only be carried over to a following meeting if there is not enough time or information to agree. Avoid letting the meeting over-run to allow participants who may have other commitments a full opportunity to engage in all the agenda items.
- 4. Conclude the meeting:** the chairperson should summarise the highlights of the meeting, identify action points and assign them with timetables for completion, then set the date and venue of the next meeting.
- 5. After the meeting:** The secretary (or a person nominated to act as secretary) should provide written minutes to all participants. The minutes should highlight the main areas of discussion, action points and who will follow up the action points with appropriate timetables and the date and venue of the next meeting.

### The people attending the meeting should agree to:

- 6.** Listen actively and refrain from interrupting other speakers. Allow other participants and speakers time to answer any questions.
- 7.** Be prepared to contribute to the meeting but avoid raising issues that are not on the agenda unless under any other business (AOB).
- 8.** Issues that are not on the agenda but require further discussion should be proposed for the agenda of a follow up meeting.
- 9.** This is your opportunity to get involved and have your say - it is not appropriate to raise items of concern outside of the meeting.
- 10.** Be aware that issues cannot always be resolved by the end of a meeting and that follow up meetings may be required.

### 3 Committee roles and responsibilities

#### What officer roles do we need?

All committees must have a named chair, secretary and treasurer. As well as these three roles, there can be a number of other members on the committee. It is good to have more members, but you need to stick to the maximum number agreed in your constitution to ensure your group remains manageable. You can allocate agreed roles to all or some of the additional committee members, such as publicity officer, website officer, fundraising officer, etc., or they can be general committee members.

#### Agreeing a committee

All committee members should be nominated by your group members and then agreed through a majority vote at a general meeting. This is done at the same time as the adoption of your constitution, which is signed by the committee members.

#### The role of the committee

The roles and responsibilities of the committee include the following:

- Meeting regularly
- Working as a team to make decisions
- Having an overview of the group's activities
- Ensuring activities contribute towards your aim, as stated in your constitution
- Ensuring all activities are legal
- Getting appropriate permissions where required
- Ensuring members are involved and informed
- Consulting with members of the group
- Encouraging and enthusing members
- Managing finances and setting budgets
- Agreeing a fundraising plan and raising funds
- Making sure the group is appropriately insured
- Developing any policies or procedures as appropriate
- Monitoring and evaluating group activities and performance
- Managing volunteers (if appropriate)

### 4 Information for the chairperson

#### What does the chairperson do?

- Facilitate (chair) meetings
- Create agendas, including items raised by members at or since the previous meeting
- Have an overview of your group's activities
- Take a lead role in organising your group and its activities
- Monitor the progress of your group towards your aim
- Represent your group
- Write an annual report on your group's activities and achievements
- May also have a casting/deciding vote in situations of disagreement

#### What skills are required?

The chairperson may need certain skills in order to carry out the role effectively. Some of the key skills are listed below but don't worry if you don't have them all - it's good to learn new skills as you go along!

- Confidence in public speaking
- Ability to direct or lead others
- Ability to ensure meetings stick to the agenda and timescales
- A willingness to explain information simply
- Fairness and patience
- Good listening skills
- Ability to be decisive when required
- Negotiation and conflict resolution skills

#### Vice chairperson

You could also consider electing a vice chair to share the responsibility of the chairperson. A vice chair can also help out when the chairperson may not be available.

#### Creating an agenda

An agenda is circulated prior to a meeting to let people know what is going to be discussed. It is also used as a prompt during meetings and allows the chairperson to manage the meeting effectively. It gives structure to the meeting and helps the minute taker in writing up the minutes.

## Working with an agenda

The chairperson should allocate a specific length of time for each agenda item. Where possible, it is better to try and reach an agreement within a certain timescale rather than continually carrying items over to the next meeting. Voting can be a useful way of resolving any contentious issues.

Any items not on the agenda should only be discussed under any other business (AOB) or added as an agenda item for the next meeting. It can be really useful to agree agenda items for the following meeting at the end of your meeting, as it reassures people that anything they feel has not been discussed will be looked at in a follow-up meeting.

*A typical agenda might follow this format*

### AGENDA

1. List those present and apologies
2. Minutes from the previous meeting
3. Matters arising from the previous minutes
4. Reports from the committee if appropriate (e.g. treasurer's report)
5. Agenda item
6. Agenda item
7. Any other business
8. Date and time of next meeting
9. Proposed items for next agenda

## 5 Information for the secretary

### What does a secretary do?

- Take care of the group's correspondence
- Be a main point of contact
- Deal with all official or important documents
- Keep copies of the group's constitution and other important documents
- Maintain the group's membership list and ensure members are kept informed
- Organise meetings
- Prepare (with the chairperson), produce and circulate agendas and other information for groups
- Take minutes during meetings and circulate to them afterwards
- Ensure the group has appropriate and adequate insurance

### What skills are needed?

The role of secretary requires certain skills to carry out the role effectively. Some of the key skills might include the following:

- Organisational skills
- Ability to take minutes accurately
- Ability to keep on top of things
- Writing and form filling
- IT skills

### Taking minutes

Minutes are the official record of matters discussed and decisions taken at meetings. It is important that the minutes are as accurate as possible as they are one of the key ways that a group is accountable to its members. The secretary usually takes minutes but other members of your group can be allocated this job.



*Typical minutes might follow this format*

Friends of Horbury Wood

### MEETING MINUTES

26 May 2018, Horbury Community Centre

Present:

Apologies given:

1. Minutes of previous meeting (whether they were agreed and if amended, any amendments recorded)
2. In a numbered list, give a summary of each agenda item discussed, including:
  - Matters arising and any reports presented
  - Any decisions that were agreed
  - Who has agreed to do what (action points)
3. Date and time of next meeting
4. Proposed agenda items for next meeting

### How can we make sure we record the right information?

Feel free to ask for clarification from your group on any of the points discussed as they arise because it is important the minutes are recorded accurately. It is useful at the end of an agenda item, or at the end of the meeting, for the minute taker to summarise what they have recorded as the key points and action points. This can avoid future disputes but don't let this result in contentious discussions being held all over again - if agreements can't be reached, this should be recorded and the matter deferred as an agenda item for a future meeting.

## 6 Information for the treasurer

### What does a treasurer do?

- Have an overview of the group's finances
- Keep accounts up to date
- Keep account information for 7 years
- Check bank statements
- Pay bills and bank any income
- Manage petty cash
- Collect and store all receipts
- Ensure the group follows correct financial procedures
- Report regularly to the group
- Ensure funds are spent in accordance with the group's aim
- Produce end of year accounts and report
- Organise external examination of accounts by an independent auditor

While it is the treasurer's responsibility to manage the group's money on a day to day basis, the whole committee remain responsible for the group's finances. Any decisions regarding the setting of budgets, fundraising or allocation of money should always be agreed by the whole committee.

### What skills are needed?

To carry out the role effectively, the treasurer needs to have certain skills:

- Accuracy
- Numeracy
- Ability to keep on top of things
- Organisational skills
- Able to be a signatory for a bank account

### Rules about money

There are certain rules about money that every group should bear in mind.

- The group's finances are the responsibility of the whole committee, not just the treasurer.
- There should be a separate bank account in the name of the organisation - money should never be paid into a personal account.
- Cheque books, petty cash and account books should be kept in a secure place.

## Cheques

- All cheques should be signed by at least two people (signatories).
- Cheques should not be signed by the person to whom the cheque is payable. Avoid a situation where relatives, spouses or partners sign cheques together.
- When cheques are signed, the person signing should see the appropriate invoice.
- No one should ever sign blank or partly completed cheques. If possible, payments should be made by cheque rather than cash.
- There should be an agreed limit to the amount that can be signed for by the signatories. Larger amounts should be authorised by the committee.
- Get a receipt for payment, whether cash or cheque.
- Do not pay bills without an invoice. Each bill paid should be filed, with the date and cheque number written on it.

## Money received

- All cash and cheques received must be paid into the group's account.
- Keep a record of the date and the amount paid in, each time money is banked.
- Give a receipt for any money or cheque received.
- If cash is collected, at least two people should be there when the money is counted and they should sign a slip certifying the total amount.

## Recording

- Enter all the items into a cash book regularly. Make it clear whether payments and receipts are cash or cheques. You could use separate columns.
- Check the bank statement against the cash book entries every time it is received.
- Keep files of all bills and invoices sent out, all receipts, etc. Give them a number, and write that number in the books as well.
- Petty cash
- Agree on a maximum figure for the petty cash float. All cash payments should be made from this float, which should be regularly replenished from the bank account.
- No petty cash should be given out without a petty cash voucher being completed. Receipts should be produced where possible. The petty cash voucher should be signed by the person receiving the money and the person authorising payment.
- Petty cash should be handled by only one or two people from your group.



## Setting up a group

### 7 First steps

Once you have agreed your constitution and elected your committee, your group is up and running. You can now start to plan what your group is going to do.

#### Identifying and contacting partners

It is almost certain that you will need to involve other partners in order to achieve your group's aim. You will need to establish land ownership at an early stage and involve the landowner at all times. If the greenspace you are interested in is owned and/or managed by Wakefield Council's Countryside team, you will need to find out who the Countryside Officer responsible for that site is, and contact them. For other council-owned greenspaces, such as urban parks, you will need to talk to the Street Scene Engagement Officer for that area. We will work with you and, where necessary, give you advice and the appropriate approval or permission for you to carry out your group's activities on the greenspace.

To find out who you should talk to about getting involved in a greenspace, contact Wakefield Council on **0345 8 506 506** or contact us online via the website at **[www.wakefield.gov.uk](http://www.wakefield.gov.uk)**.

#### Opening a bank account

Most groups will have some costs associated with their activities (e.g. room hire, printing, insurance). If your group will be handling any finances, you must open a bank account. It is worth approaching a number of banks to see what they offer and whether the account is suitable for a community group. For some groups it may be appropriate to ask for subscriptions from members to cover basic costs, but most groups will need to look for funding from other organisations to help with costs. Small local funders may be your best chance of finding help with start-up costs.

#### Insurance

As a group you are responsible for all your members' actions when carrying out activities on behalf of your group. Your committee could be held jointly or personally liable if a claim was made against your group, so you will need to ensure you have insurance cover for your own protection.

#### Think about your activities

It is important that your insurance cover is appropriate for your activities. Make sure your insurer is fully aware of all the activities you would like to do so that they can provide the appropriate cover.

#### What insurance do we need?

When obtaining insurance cover for the group, Wakefield Council will require you to have public liability insurance with an indemnity of at least £5 million before we can approve your activities, such as a practical work day. You may also need other types of insurance depending on your group or activities (e.g. if you have tools, you may want to insure them against loss, theft or damage).

#### Does Wakefield Council provide insurance cover?

In some circumstances your group's activities may be covered by public liability insurance provided by Wakefield Council. For example, if your group is doing a practical task that is organised, managed and directly supervised by Wakefield Council staff, you will be covered by the Council's insurance. You will also be covered for some practical activities, provided you can fulfil the insurance company's criteria. For more information about when the Council is able to provide public liability insurance for your group, please refer to Guidance for Volunteering in Wakefield's Greenspaces - Practical Tasks.

If you are in any doubt as to whether an activity is covered by Wakefield Council's insurance you must assume it is not, or contact us for advice.

**It is the responsibility of your committee to ensure that you have the appropriate insurance cover.**



## Action planning

Once you have everything in place, you can start to look in detail at what you would like to do. Look at the list of activities drawn up at your first meeting. You might prioritise your activities by voting on them.

### Keep it simple

It's a good idea to start off with just one relatively simple activity (e.g. bulb planting or litter picking). If your group's main priority is not simple, try to agree on another project that you know your group can achieve easily.

Once you have identified your activity, you need to work through the questions provided here. You will then be able to decide how realistic your activity is, and break it down into all the steps needed to achieve it. This is the basis of your action plan. You need to repeat this process for every activity you do.

### Working together

Activities on Wakefield Council's greenspaces require our approval first. This includes development projects, practical work and events. Make sure you have contacted us before you start action planning to tell us what you would like to do. Some activities are subject to Wakefield Council approval processes and these processes need to be built into your action planning. In addition, some development projects have to meet with local priorities and other criteria, and you should be aware that approval will not always be granted. Council officers will be able to give you more information to help you plan your activity with realistic timescales and approval processes, and provide you with an indication of whether a particular project is likely to be approved.

**If you have any questions, please get in touch with the relevant officer for that site by calling Wakefield Council on 0345 8 506 506.**

### *Questions for your group to discuss when planning your activity*

- What is the activity?
- Is there a need for this activity?
- Who will benefit from this activity?
- Do we need permission from the Council?
- What resources will we need?
- What is our budget?
- Where will we secure the money/resources needed?
- When will we do the activity?
- How will we manage it?
- How will we record and demonstrate the success of the activity?

**Once you have discussed the above, draw up a realistic timetable of all the steps needed to achieve your activity.**