



national **volunteer** skills centre

(BSXFMI402A)

Provide leadership in the workplace

Learning Guide for Volunteers
(40410SA) Certificate III in Active Volunteering

This learning guide is based on the national industry unit of competency (BSXFMI402A) Provide leadership in the workplace from (BSX97) Frontline Management.

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Published by Volunteering Australia
First Published November, 2004

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Contents

Section One: Introduction	1
What this guide is about	1
How the guide is organised	1
About this competency	2
Element 1: Model high standards of management performance	2
Element 2: Enhance the organisation's image	2
Element 3: Influence individuals and teams positively	2
Element 4: Make informed decisions	2
What topics are covered?	3
Planning your learning	5
Becoming a self-directed learner	5
Working out your current skills and knowledge	7
Using the learning materials	10
Selecting learning pathways	10
Setting up a learning system	10
Finding and using learning resources	10
Finding and using the resources of a not-for-profit volunteer involving organisation	11
Finding a coach	11
Finding a library	12
Using the resources of a training provider	12
Using case study data	13
Working with colleagues and friends	13
Observation and practice	13
About the learning model for this unit of study	14
Section Two: Learning materials	16
Glossary of terms	16
Volunteering terminology	16
Setting up a learning system	17
Assessing your current skills and knowledge about leadership in the workplace	20
Self-assessment: (BSXFMI402A) Provide leadership in the workplace	21
Topic 1: What is good leadership?	25
1.1 Principles of good leadership	25
Capabilities and Role Models	28
1.2 The legislative context for leadership in a not-for-profit organisation	29

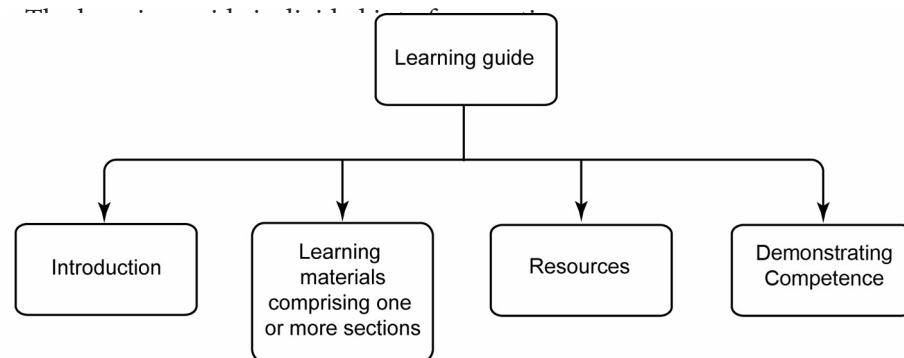
Topic 2: Modelling high standards of performance management	33
2.1 What is performance management?	33
2.2 Understanding and assessing your own performance	35
2.3 Establishing work or performance plans	37
Conducting a performance review	39
Topic 3: Enhancing the image of the organisation	42
3.1 Organisational values and standards	42
3.2 Organisational image	44
Topic 4: Communicating and influencing	49
Questioning	51
Topic 5: Decision making	56
Section Three: Resources	60
Web sites	60
Communication skills	60
Cultural diversity	60
Communications checklist	61
Organisations	61
Print publications	61
Section Four: Demonstrating competence	62
How to assess your current competency	62
Using the self-assessment exercise as part of a formal assessment process	62
Gaining formal recognition for competencies gained	63
How do I get a statement of attainment?	64
How do I contact a Registered Training Organisation (RTO)?	64
What counts as evidence of competency?	64
Building an evidence portfolio	65
What does an evidence portfolio look like?	66
What does an evidence portfolio contain and how is it organised?	66
Demonstrating competency in providing leadership in the workplace	67
Appendix One:	68
Example of a competed self-assessment activity: BSXFMI402A: Provide leadership in the workplace	68

Section One: Introduction

What this guide is about

This Learning Guide – (BSXFMI402A) Provide leadership in the workplace - is designed to assist you to develop the skills and knowledge for effective workplace leadership and management whether you are a leader or future leader in a small community organisation or a larger and more formal structure.

How the guide is organised



Section One - Introduction to the learning guide and to self-directed learning.

Section Two – Learning Materials covers the skills and knowledge involved in being an effective leader. It offers a range of learning activities you can choose to do to practice and further develop your skills and knowledge.

Section Three - Resources contains further references and other materials relevant to the topics covered. Whether and how you use these resources is up to you. You may have access to resources provided by the organisation you are working with and these will be more relevant to your situation. In this case you may choose to use such materials together with those provided here in order to compare and contrast different ways of working.

Section Four - Demonstrating Competence is a guide to collecting evidence of your competency. This makes up an evidence portfolio. Included is information on how this can then be used to gain formal recognition of your work and learning from a Registered Training Organisation (RTO). Information on how to enrol in a course of study and gain credit for what you

have learned in your volunteer work is also outlined.

About this competency

(BSXFMI402A) Provide leadership in the workplace

Element 1: Model high standards of management performance

Performance criteria

- Performance plans are developed and implemented in accordance with the organisation's goals and objectives.
- Key performance indicators are developed within the team's/ organisation's business plans
- Performance meets the organisation's requirements.
- Performance serves as positive role model for others.

Element 2: Enhance the organisation's image

Performance criteria

- The organisation's standards and values are used in conducting business.
- Standards and values considered to be damaging to organisation are questioned through established communication channels.
- Personal performance contributes to developing an organisation which has integrity and credibility.

Element 3: Influence individuals and teams positively

Performance criteria

- Expectations, roles and responsibilities are communicated in a way which encourages individuals/teams to take responsibility for their work.
- Individual's/team's efforts and contributions are encouraged, valued and rewarded.
- Ideas and information receive the acceptance and support of colleagues.

Element 4: Make informed decisions

Performance criteria

- Information relevant to the issue(s) under consideration is gathered and organised.
- Individuals/teams participate actively in the decision making processes.
- Options are examined and their associated risks assessed to determine preferred course(s) of action.

- Decisions are timely and communicated clearly to individuals/teams.
- Plans to implement decisions are prepared and agreed by relevant individuals/teams.
- Feedback processes are used effectively to monitor the implementation and impact of decisions.

What topics are covered?

There are five topics covered in the learning materials section.

1. What is good leadership?
2. Modelling high standards of management performance
3. Enhancing the image of the organisation
4. Influencing individuals and teams
5. Making informed decisions

Each topic comprises an introduction to the skill and knowledge area and one or more learning activities that you can use for a number of purposes:

- To learn and practice new skills
- Test your knowledge
- To reflect on what you have learned
- To check your progress as you work through the materials

The learning activities are varied so you can select those you feel are best suited to your learning style and work situation. You may choose to do one or all activities. You may do the activities on your own, or as part of a group; the choice is yours.

You do not have to work through the guide from beginning to end. You can start and finish wherever you wish. Any learning activities you complete can contribute to your collection of evidence of competence if you decide to apply for formal recognition.

Each learning activity is accompanied by the heading:



LEARNING ACTIVITY NO.

Learning activity name

All of the activities can be used towards assessment to gain formal recognition of your skills and knowledge about providing leadership in the workplace. How to achieve formal recognition is explained in detail in Section Four of this learning guide.

In some topics, in addition to learning activities that can be used for assessment purposes there are a number of shorter activities you can use to check progress and to note any areas you particularly want to follow up. These short activities are accompanied by the following heading style.



QUESTION

How you use the learning resources is up to you. You may have access to resources provided by the organisation you are working with and these will be more relevant to your situation. In this case, you may choose to use such materials together with those provided here in order to compare and contrast different ways of working.

Planning your learning Becoming a self-directed learner

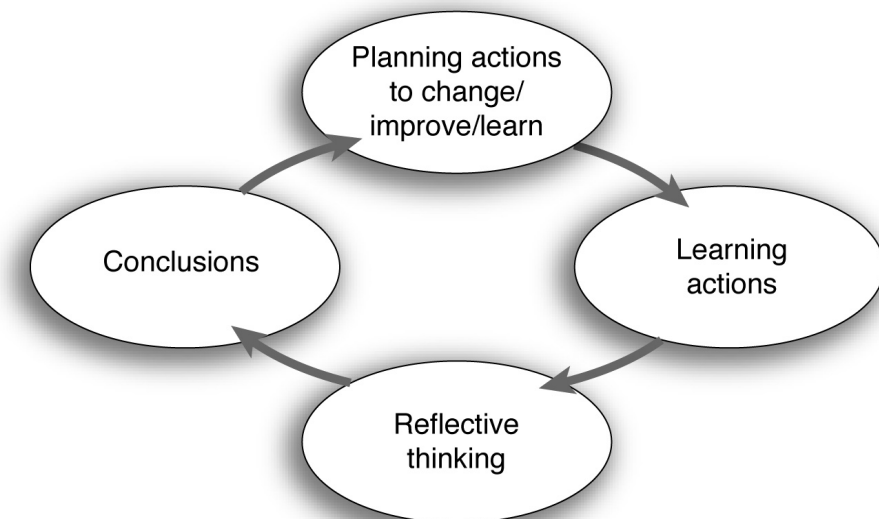
Learning happens most easily at the point when your situation necessitates that you know or learn how to do something for a specific reason. If your role as a volunteer:

- offers you the opportunity to play a leadership role
- you would like to further develop your skills, and
- perhaps gain some formal recognition for your work,

then you can use this learning guide to help you to do so.

The learning guide need not be followed in a linear way. You can choose when and how to learn and you can choose how to use the information and activities in the guide to develop new skills and check your progress against your own goals.

One way of explaining the process used by active learners is shown in the diagram below. The cycle can be started at any point.



You may have decided to work through this learning guide for a number of reasons so we have designed it to be as flexible as possible. For example:

- If you have not had any experience in a leadership role you may wish to work through all sections of the guide and all of the learning topics.
- If you already have experience in leadership and are hoping to pick up some extra tips and skills, you can scan through the learning topics and resources and use what you need.
- If you are enrolled in a training program at a TAFE Institute or other Registered Training Organisation, your teacher/trainer may use these materials as a source of information and to organise learning and assessment activities.

Whatever pathway you select, we hope you find it enjoyable and rewarding.

Working out your current skills and knowledge

The first activity in this learning guide (see Section Two) includes a self-assessment activity. This involves answering a set of questions about key aspects of providing leadership.

By making a personal judgment about what you can do and how well you can do it, you can select from the topics you want to study, rather than having to work through areas you already know.

The self-assessment activity is based on three questions:

1. What skills and knowledge do you have?
2. How well can you perform these skills?
3. What evidence can you provide to demonstrate what you know and what you can do i.e. your current skills and knowledge, or current competency?

If you can produce evidence of current skills and knowledge in an area covered in the learning topics, it will be useful if you want to apply for formal recognition of your skills and knowledge.

There is more information on collecting evidence in Section Four of the learning guide - Demonstrating competence

An important note about assessment and formal recognition of competence

This learning guide is not a set of instructions to be followed or a formal course of study. This means that learners who use the guide should not expect to automatically receive a formal award. To receive a national award you need to be enrolled in a course with a Registered Training Organisation (RTO). TAFE is one category of RTO found in most parts of Australia, but there are many others including adult education centres. Your own volunteer organisation may in fact be an RTO.

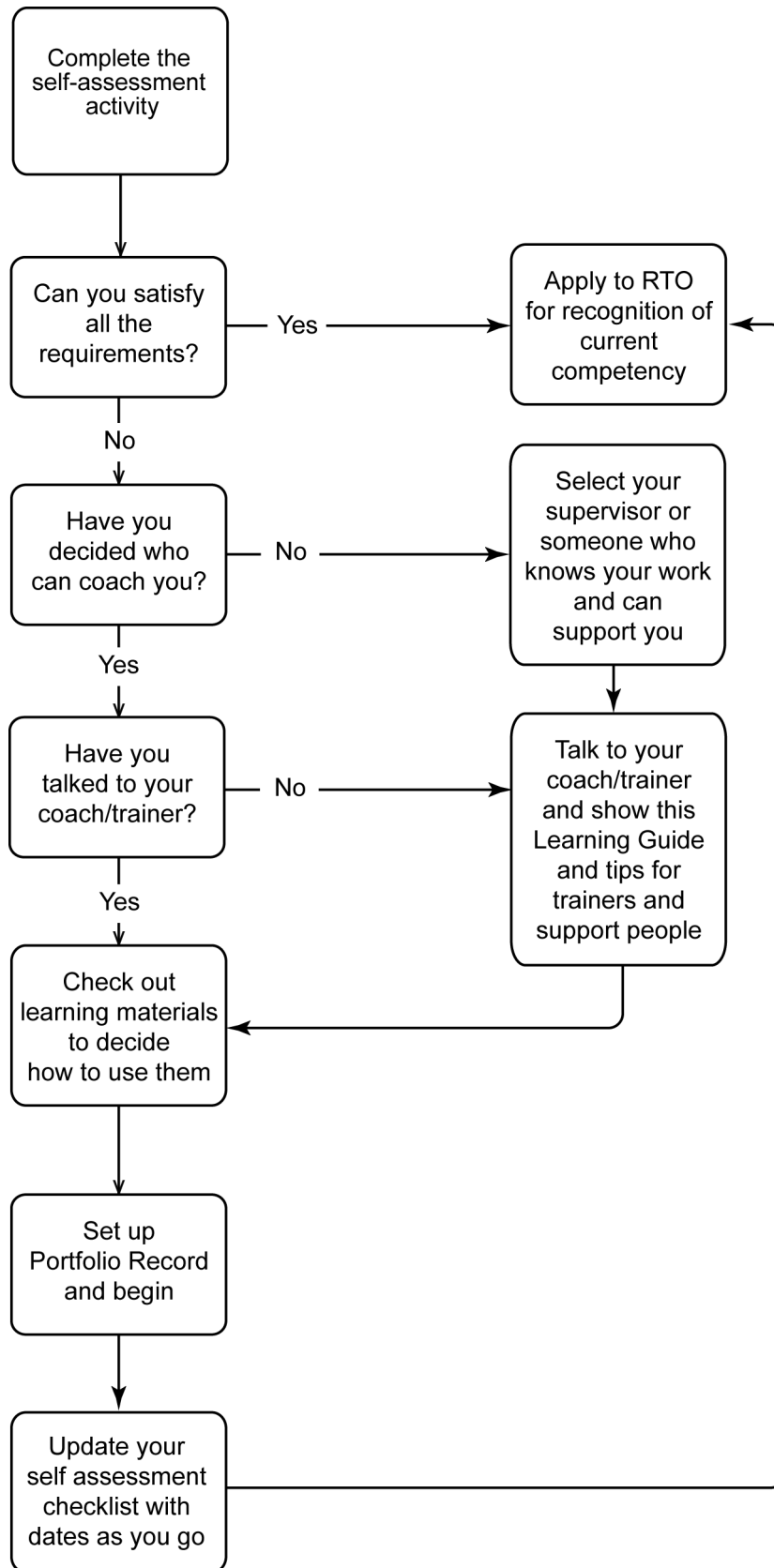
You can find out about RTOs in your region by contacting your state training authority, your local council or looking up training in a local phone directory. Your own organisation may also have an existing relationship with an RTO or be able to direct you to one.

Because this learning guide and the topics and learning activities it contains are based on national industry competency standards that are endorsed by the Australian National Training Authority, any training you complete can be recognised. Evidence of competence collected as a result of working through

the learning guide will be taken into account by the RTO in assessing your competence. If you have developed an evidence portfolio by completing a self-assessment activity, compiling evidence of competency from your previous work experience and/or by completing learning activities in this guide, then you will have evidence of your skills and knowledge that you can present to an RTO.

The RTO may accept your portfolio as sufficient and valid evidence of competence or they might ask you to provide some additional evidence. Further details about evidence of competence and how to negotiate with an RTO to receive formal recognition are included in Section Four of this guide.

If you would like to get a nationally recognised Statement of Attainment for the competencies you have gained through your work as a volunteer, and/or other work, you can use the flow chart on the following page as a guide to the process.



Using the learning materials

Selecting learning pathways

How you decide to use these learning materials depends on your own situation and needs. Once you have completed the self-assessment activity in Section Two, you can use the results to assist you to select the topics that you want to focus on.

If you have prior experience in providing leadership then you might just dip into the materials to refresh your memory. If this is a new experience, or you are planning to get involved in a volunteer capacity in the future, then you can use the materials as a self-paced guide and work through each topic step by step. You may be using the materials as part of a structured training program, in which case your teachers/instructors will guide your learning.

Setting up a learning system

When you turn to Activity 1 in Section Two of the learning guide, you will find a step by step guide to setting up a system to manage your learning. In completing the activity you will set up a record book and perhaps a journal, develop a template for collecting terminology, set up a contact list and work out where you can get access to additional learning resources.

Finding and using learning resources

In addition to this learning guide, there are three resources to help you develop your skills and knowledge about providing leadership in the workplace:

- The first and most important resource is access to a not-for-profit organisation that involves volunteers, otherwise known as a not-for-profit volunteer involving organisation. Here, you can talk to current personnel about how they provide leadership in their roles.
- Secondly, because you may need to be able to read and comprehend quite complex legal documents in order to provide leadership, we recommend that you find some one who can act as a coach to you in your learning.
- Thirdly, you may need occasional access to a library for further reference materials. A public library will also be able to provide you with access to the Internet if you do not have a home or work computer.

Finding and using the resources of a not-for-profit volunteer involving organisation

It is likely that you are already involved in volunteer work, in which case you should be able to talk to members of your own organisation for the resources you will need.

If you do not yet have an association with a volunteer involving organisation and wish to develop your skills before becoming involved, then you will need to approach an organisation. You might find the easiest way to start is through friends and your local community. You can also contact Volunteering Australia, or your state volunteering coordinating agency (contact addresses are provided in the further references list in Section Three of this guide).

It would also be useful if you can find one or two people able to act as your coach. Ideally this would involve someone on your own Organisation and someone involved in another organisation. This way you have more than one point of view to consider. If you do find someone from another organisation willing to help you and act as a coach, you will need to be careful to maintain confidentiality about any organisational matters discussed between the two of you.

What you should try to do is get feedback on your performance in your leadership role from colleagues. It is also valuable to reflect on your work in the context of the material in this guide and to ask yourself if there are ways you can improve your own performance.

Finding a coach

Anyone who has experience of working in a leadership position AND has the time to assist you, can be a coach – they do not need to be a qualified teacher.



NOTE TO COACH

There are notes to assist coaches included with some of the learning and assessment activities.

If you are enrolled to study this (and perhaps other) competencies with a Registered Training Authority, you may not need a coach as your teacher will guide you through the learning and assessment activities and help you to access resources.

Finding a library

You may need a library for reference materials or to access the Internet when completing activities.

The best place to go is to your local community library where you will be able to get hold of the references you need – either in print format or through the Internet.

Even if you live in a small community you should be able to access library facilities nearby. If the library itself has only a small permanent collection, the librarian can arrange to get hold of what you need through inter-library loans.

If you live or work near a TAFE college or university, you can also use the college or university library. The only restriction is that you cannot borrow books or use the special reserve sections of the library unless you are an enrolled student.

If you live in a remote area and do not have physical access to a library, but do have Internet access, you will be able to find most of what you need online. A lot of information is also available as a print resource through the mail. This is particularly the case with materials published by government departments that are almost always available free of charge. Lists of such materials are included in the further references section.

Using the resources of a training provider

If you are using this learning guide as part of a course of study in which you are enrolled, then your teacher will be able to direct you to a range of resources available. These will include books, journals and databases available in the college library. As an enrolled student you will also receive help to complete learning and assessment tasks and will be able to participate in discussions with teachers and fellow students.

If you are an enrolled student but do not yet have access to a suitable volunteer involving organisation, your teachers will be able to help you with this.

Using case study data

You can access material on many volunteer organisations via the Internet and by directly mailing/emailing organisations. A good place to start an Internet search is on the Volunteering Australia web site:
<http://www.volunteeringaustralia.org/index.html>

You can also use a search engine to find specific organisations, or to browse the sites that are available via a general search. For example, if you are using the Google search engine (<http://www.google.com.au/>) you can just type in 'volunteers' or 'volunteering associations' to receive a list of thousands of sites and references.

Working with colleagues and friends

This may include talking to fellow volunteers who have experience in leadership positions. Work colleagues, family members, friends, neighbours and other members of your community may also have ideas, experience and contacts that will be useful to you.

Often you will find that people who have reflected on their own experiences can provide you with valuable practical advice that might otherwise take some time to find in a written resource. It is however, always wise to check your sources and not to rely solely on one source of information and advice.

Observation and practice

One of the essential resources for using this learning guide is access to an organisation where you can observe how people in leadership positions operate. While you can learn a lot by reading authoritative sources, there is no substitute for seeing what happens in a real life situation.

And once you have had the experience of observing others in action, the best way to develop your own skills and knowledge is to put them into practice.

Make sure you keep a record of any activities you participate in and/or organise and of your own reflective comments

These notes will be a vital resource for you in the future in your work as a volunteer and perhaps in the paid work force.

About the learning model for this unit of study

This learning guide has been designed to support two broad study options:

First, the learner may choose to work through the materials at their own pace, with the support of a coach and/or associates with relevant experience in volunteer involving organisations.

Secondly the learner may choose to enrol as a student in a Registered Training Organisation, in which case this learning guide can be used by the learner as an additional resource, and by the teacher/trainer to support classroom based learning.

If you are a teacher or trainer, you will already be familiar with the options available to you in using this learning guide. If you have been asked by the learner to act as a coach you may find the following suggestions useful.

Tips for coaches

Being a coach to someone who is using this learning guide to develop their skills and knowledge about volunteering involves using your own experience to help the learner to work through learning activities. There are no hard and fast rules about being a coach; it all comes down to what suits you and the learner. The most important aspects of coaching involve establishing a positive and supportive relationship with the learner and being able to communicate freely about the relevant areas of skill and knowledge.

The most important attributes for a coach to possess are good listening skills, the capacity to ask questions, a positive and encouraging attitude and a general knowledge of the area of learning.

You do not need to be an expert! You may find that you are unable to answer a question posed by the learner you are working with. However, when/if this is the case, you will probably be able to help the learner find the answer, by referring them to someone else or to the relevant information in a library or on the Internet.

Below is a list of the sort of strategies a coach may use:

- Get to know about the learner's interest in the area they have chosen to study;
- Use a range of questioning techniques to guide the learner towards the ideas and answers they are searching for rather than directing the learning
- Put yourself in the learner's shoes; ask yourself what you would find helpful
- Be encouraging and non-judgmental; remember your role is to help – you do not have to assess the learner's capabilities
- Help the learner to plan their learning; you don't need to be a qualified teacher to do this – your own experience as a work based learner will have provided you with planning skills
- Avoid the temptation to step in and do it for the learner
- Encourage the learner to self-assess and to reflect on their learning

Where to start

If you have agreed to take on the role of coach, the best place to start is by talking to the learner and reaching an agreement on how the coaching/ learning relationship should work. This may include agreeing on times to meet, strategies for maintaining contact – for example by email or a catch up phone call. You may both decide that the best strategy is for the learner to make contact when they need help, in which case you will need to set some parameters as to how often is reasonable, when suits you best and how much time you can afford to commit to the project.

The next thing to do is familiarize yourself with this learning guide. You might decide to work through a topic with the learner to see that you share a general understanding of how you can work together.

Where to go for further help

There are numerous sites on the Internet that provide tips for coaches and mentors, a sample of which are listed below. You may also wish to contact an RTO in your area to see whether they offer workshops and training programs in coaching skills

<http://www.coachingnetwork.org.uk/> (Go to “Resource Centre” for further information about being a coach)

<http://www.veac.org.au/tchment.html>

<http://www.aimqld.com.au/career/coaching.htm>

<http://www.wit.org.au/projects/mentoring/mentorkit/Tips.html>

Section Two: Learning materials

Glossary of terms

Volunteering terminology

The following quote from Volunteering Australia explains what the term 'volunteering' means:

Formal volunteering is an activity which takes place through not-for-profit organisations or projects and is undertaken:

- *to be of benefit to the community and the volunteer;*
- *of the volunteer's own free will and without coercion;*
- *for no financial payment; and*
- *in designated volunteer positions only.*

<http://www.volunteeringaustralia.org/sheets/definition.html>

There are two key terms used to describe the organisations in which a volunteer may work:

- A volunteer involving organisation, or
- A not-for-profit organisation

These two terms essentially mean the same thing according to the definition of volunteering on the Volunteering Australia web site:

Volunteering is an activity performed in the not-for-profit sector only

The term volunteer involving organisation is used to differentiate between those not-for-profit organisations that involve volunteers in their activities from those which only employ paid staff.

In this learning guide we have used the term 'not-for-profit' organisation in most cases, because it is the more widely known term, but we do also refer to volunteer involving organisations when appropriate.



LEARNING ACTIVITY 1

Getting started

There are two parts to this learning activity

- Setting up a learning system
- Assessing your current skills in, and knowledge about, leadership.

Setting up a learning system

Organising a work book

A work book can be used to take notes as you collect information and to record the learning activities you complete.

It is a good idea to use a ring binder as a work book so that you can insert pages and other resources (plastic sleeves with punched holes can be useful for this purpose).

Your work book can also be your record keeping system (see below). If so it is a good idea to have a contents page that you update as you go. When you add completed activities to the work book, label the activity with the name and number in the learning guide.

Keeping a record of your work

In the introduction to this guide we talked about collecting evidence of competency in case you wish to apply for recognition. If you keep a record of the activities you complete in this learning guide they can be included in a portfolio of evidence.

The other reason for keeping a record of your learning is as resource for your volunteering work in the organisation.

You may decide to keep completed activities and resources including definitions of terminology, checklists and tables and contact lists.

You may set up a manual record-keeping system in a ring binder or series of manila folders. You could set up an electronic record system using the indexing system of your computer such as Windows Explorer, or a database management program such as Excel.

What about a journal?

You may also want to keep a reflective journal. This might include ideas, thoughts about issues you encounter or records of discussions with friends and others who support your learning. If you do decide to embark on a journal, get yourself a smallish notebook that you can carry about with you to meetings and other events.

Dedicated journal writers also emphasise that it is important to have a notebook you enjoy writing in such as a drawing pad or something that distinguishes it from other notes. The important thing is to choose whatever suits your own needs

The term volunteer involving organisation is used to differentiate between those not-for-profit organisations that involve volunteers in their activities from those which only employ paid staff.

In this learning guide we have used the term 'not-for-profit' organisation in most cases, because it is the more widely known term, but we do also refer to volunteer involving organisations when appropriate.

Setting up a contact list

In Section One we made the point that there are two essential resources for learning using this guide – access to a library and to a not-for-profit organisation. You may already have both of these in hand, but if not, now is the time to get organised.

First, locate your organisation. Using the suggestions in Section One, find the name and contact details for the president, chairperson or secretary and make contact in person or by phone, email or mail. Ask if they might be able to help you and/or that they suggest someone else who can. Activity 2 will help you to do this.

You may decide to ask more than one person and organisation to help. This way, you may get the opportunity to attend more than one Board meeting and see how different organisations interpret the rules of incorporation to suit their own needs.

If you are working with a small group of other volunteers to learn about providing leadership in the workplace, you may decide to pool your resources, including people who are willing to help.

As you find suitable sources of support, record their contact details and keep this as part of your record of learning.

Finding a library or other collection of resources

If you have a local library and have not been there, take a visit and check whether they have any resources that may be useful. If in doubt ask the librarian on duty – they will know where to look and how to go about getting books from other libraries.

Other possible collections of resources include the Internet, local not-for-profit organisations, Volunteering Australia and your state volunteering association – see Section Three for addresses.

When you have found one or more sources of resources put the details in your contact list.

When you have completed these activities you should have the following resources ready to go:

- A work book or folder;
- Somewhere to record and store resources, notes, completed learning activities and other forms of evidence of competency;
- A copy of the glossary;
- A template for adding terms to the glossary, and
- A contact list and template for adding contacts.

Now work through the self-assessment activity on the following page so you can decide on topics you wish to study.

2. Assessing your current skills and knowledge about leadership in the workplace

If you worked within not-for-profit organisations of one sort or another there is a good chance you already know something about leadership. You may have been in a leadership position in your current – or other - organisation. No doubt, you have at least experienced the leadership of others.

So first, check your current skills and knowledge. All you have to do is fill in the table by:

(i) Ticking either 1,2 or 3 in the column headed “How well can you do this?” using the following key:

- 1 = I feel quite confident that I can always do this
- 2 = I might sometimes need a small amount of help
- 3 = I have no experience in this area

(ii) If you have answered ‘1’ or ‘2’ to one or more questions, then think about whether you have any evidence that you can perform these tasks. If so, complete column 3 by making a note of the evidence you have collected.

NOTE 1

Evidence can be in the form of a document – you may have records from previous work, for example:

- Reports you have written
- Notes from phone conversations
- Logbooks or diary entries
- You may be able to get someone to write a report on your competency (this is called third party evidence).
- You can also collect evidence by showing someone what you can do.

You can also collect evidence by showing someone what you can do.

NOTE 2:

There is an example of a completed self-assessment exercise in appendix one of this guide.

Self-assessment: (BSXFMI402A) Provide leadership in the workplace

NAME	
DATE	
NAME OF ORGANISATION (if applicable)	

Key to completing columns 1,2 and 3:

1 = I feel quite confident that I can always do this

2 = I might sometimes need some help

3 = I have no experience in this area

Model high standards of management performance				
Can you/do you know how to ...?	How well can you do this?			What evidence do you have to demonstrate this?
	1	2	3	
Develop and implement performance plans according to organisational goals and objectives.				
Develop key performance indicators within team and organisation business plans.				
Perform to meet your organisation's requirements.				
Serve as a positive role model to others through your performance.				
Enhance the organisation's image				
Can you/do you know how to ...?	How well can you do this?			What evidence do you have to demonstrate this?
	1	2	3	
Apply the organisation's standards and values when conducting business.				
Question behaviour and values that damage the organisation's image and do this through established communication channels.				

Contribute to the organisation's integrity and credibility through your own performance.				
Influence individuals and teams positively				
Can you/do you know how to ...?	How well can you do this?			What evidence do you have to demonstrate this?
	1	2	3	
Communicate expectations, roles and responsibilities in such a way that encourages individuals to take responsibility for their work.				
Encourage, value and reward individual and team efforts.				
Ensure that ideas and information are accepted and supported by colleagues.				
Make informed decisions				
Can you/do you know how to ...?	How well can you do this?			4. What evidence do you have to demonstrate this?
	1	2	3	
Gather and organise information relevant to the issues.				
Facilitate active participation from individuals and teams in the decision making process..				
Examine options and assess risks to determine preferred courses of action.				
Plans to implement decisions are prepared and agreed by relevant individuals/teams				
Plan implementation of decisions and ensure agreement of the plan by relevant people.				
Use feedback processes to monitor the implementation and impact of decisions.				

How did you go?

- For questions where you have ticked column 1 AND have also been able to say what sort of evidence you could provide to demonstrate your skills and knowledge, you may wish to skip the associated topics in the learning guide – at least initially.
- Where you have ticked column 2, then you have some knowledge of and skills in the area so you might want to read over the topics to refresh your memory then see how you go on the assessment activities.
- If there are questions about the providing leadership in the workplace to which you have ticked column 3, then these are the topics you should concentrate on in the following learning materials.



LEARNING ACTIVITY 2

Finding out about a not-for-profit organisation

For this activity you will need to document some basic information about the not-for-profit organisation that you will use as a case study for this unit. Most of the activities in this unit ask you to apply what you have learned to an organisation.

You can choose an organisation from a number of options:

- Use the organisation you work with
- Find an organisation on the Internet or through a local community directory
- Ask a friend or colleague who is a volunteer and who can introduce you to the organisation they volunteer with

Answer the following questions and record your answers in your journal or record book

- What is the name of the organisation?
- What does the organisation do – what are its goals and objectives?
- How long has the organisation existed? Has its role stayed the same or has it taken on new functions over time as needs and interests have changed?
- What is the legal status of the organisation. For example, is it an incorporated association or a not-for-profit company?
- Where does the organisation get its funding from?
- How many Board members are there and how did they become members?
- How many office bearers are there?
- How many paid staff are there?
- How many volunteer staff are there?

If you get the information about an organisation from a web site or information booklet you might make contact with the nominated contact person to check that your answers are correct.

Topic 1: What is good leadership?



QUESTION 1

Before commencing this topic you should reflect on what makes a good leader from the point of view of an organisation and from that of an individual worker in the organisation. What good leader have you worked with. What bad leaders? What do you think is the essential quality(s) of a good leader?

1.1 Principles of good leadership

The National Council of Social Services provides the following guidelines for effective leadership in a not-for-profit organisation

Provides leadership, direction and guidance to the organisation by:

- Creating and conveying a clear vision on the future direction
- Initiating and driving through change and managing that process perceptively
- Taking final responsibility for the actions of the team
- Establishing and communicating clear standards and expectations
- Demonstrating resilience, stamina and reliability under heavy pressure
- Demonstrating the high standards of integrity, honesty and fairness
- Choosing between options, taking into account the long term consequences

Facilitates meetings and group discussions by:

- Choosing methods of communication most likely to secure effective results
- Encouraging creative thinking of others

Maintains effective networks by:

- Knowing how to find and use other sources of expertise
- Applying best practice in dealings with other organisations
- Effectively represents the organisation by:
- Taking a firm stance when circumstances warrant
- Effectively negotiating deals
- Communicating in a concise and persuasive manner

Manages risk and resolves conflict within the organisation and between the organisation and other parties by:

- Acting decisively after having assessed the situation

Understands and articulates the context in which the service operates by:

- Understanding parliamentary and political processes and how to operate within them
- Promotes the organisation by:
- Establishing a profile for the service and marketing that service
- Demonstrating presentational and media skills
- Designs and implements a promotional strategy by:
- Choosing the methods of communication most likely to secure effective results

Models organisational relationships based on trust and respect for all stakeholder groups by:

- Being visible, approachable and earning respect
- Inspiring and showing loyalty
- Taking steps to building trust, demonstrating high morals and being co-operative
- Communicating effectively with the Chair and Board members

Provides leadership that engenders a collective sense of identity and purpose of direction by:

- Carrying forward decisions of the Board and managing relationships between staff and Board.

Manages and improves the performance of individuals and teams by:

- Building a high performing team
- Addressing poor performance

Supports and develops staff by:

- Consulting staff/volunteers and identifying training needs in order to develop their full potential
- Seeking face to face contact and responding to feedback from staff

Develops effective leadership roles by:

- Delegating decisions appropriately, making best use of skills and resources within the team and outside the team.

(Adapted from NCOSS Management Support Unit Fact Sheet No 7 Qualities of Good Leadership Available at: <http://www.ncoss.org.au/projects/msu/downloads/factsheet07.pdf>)

The list of qualities produced by NCOSS may appear quite daunting, but many people with a broad range of life and work experiences will be able to demonstrate most of these to some degree. Everyone will be able to identify someone they know who can demonstrate one or more of these qualities to a high standard. Not all of these qualities are covered in this unit. Here we focus on five aspects of leadership:

1. Leading and managing from within the legal and regulatory environment of your organisation i.e. understanding and articulating the context in which the service operates
2. Performance management i.e. managing and improving the performance of individuals and teams
3. Communicating and influencing, skills that underpin all the capabilities listed above
4. Enhancing the image of the organisation
5. Facilitating decision making



LEARNING ACTIVITY 3

Assessing your leadership qualities and identifying organisational expectations

- 1) Consider the list of capabilities developed by NCOSS (see list on the following page) and for each capability, identify any experiences that you have had that contribute to your development of this capability. Then identify someone who is an appropriate role model for each capability. You may be able to use one of these role models as a coach for this unit.
- 2) Complete the table by listing your own experience in each area of capability and, where possible identifying a role model. (NOTE: The same person may be a role model for a number of capabilities)
- 3) When you have completed this activity review the table with a member of the Board or the whole Board and clarify with them what their expectations are of you as a leader. Use the capabilities as a checklist for this discussion and at the conclusion draw up a list of the organisation's expectations of you. As a consequence of this activity there may need to be amendments made to your position description.

Keeping a record of your work

Keep a copy of your work in your journal or record book as you may be able to use this work and feedback towards assessment and formal recognition of competency.



NOTE TO COACH

When assisting the learner with this activity it is important that each of the capabilities is properly understood and that you both have a common meanings appropriate to your organisation.

Capabilities and Role Models

Capability	My experience	Specific examples where I have demonstrated this capability	A role model for this capability
Provides leadership, direction and guidance to the organisation			
Facilitates meetings and group discussions			
Maintains effective networks			
Effectively represents the organisation			
Manages risk and resolves conflict within the organisation and between the organisation and other parties			
Understands and articulates the context in which the service operates			
Designs and implements a promotional strategy			
Models organisational relationships based on trust and respect for all stakeholder groups			
Provides leadership that engenders a collective sense of identity and purpose of direction			
Manages and improves the performance of individuals and teams			
Supports and develops staff			
Develops effective leadership roles			

1.2 The legislative context for leadership in a not-for-profit organisation

Federal and state laws

Your organization will be subject to both federal and state laws. Lots of organizations are subject to many of the same laws, but specific laws apply depending on the sector in which the organization works. Youth Sporting Clubs, for example, will be subject to laws about the protection of children and duty of care whereas emergency services organizations will have extremely strict guidelines that are associated with various occupational health and safety acts.

An organization such as the Salvation Army, for example, is subject to many areas of law and regulation because of the breadth of its programs. These include laws and regulations associated with:

- Aged care services
- Alcoholism and Drug Addiction Detoxification services
- Business regulations governing Family Stores
- Child and adolescent services
- Counselling services
- Crisis accommodation services
- Disability services
- Drug and alcohol programs
- Employment training programs
- Family Housing programs
- Fundraising
- Health information services
- Homeless shelters
- Intellectual disability services
- Migrant services
- Privacy
- Youth crisis and support services

(See <http://www.salvationarmy.org.au/students/society.asp>)

There are laws and regulations that apply to any organization no matter what its business is. These include:

- State occupational health and safety laws and regulations
- Laws and regulations on employment
- Human rights legislation
- The privacy acts of federal and state governments
- State laws on the legal entity of your organization whether it is an incorporated association or a company limited by liability.

GLD Inc: an example of the application of the legal framework to a not-for-profit organisation

Global Leadership Development (GLD Inc) has just recently incorporated as a not-for-profit organization in Queensland. They provide educational services to young Australian leaders, including an annual intensive training program, state based workshops, speakers to schools, advice to the commonwealth government and leadership training resources. They plan to hold the first international annual intensive training program in October 2005. They have a paying membership 57 (and growing) and a working Board of six. With membership fees, government grants and fees for national and state programs they have an annual turnover of \$4.2 million. Their investigations into the laws that affect them revealed that there was much work to be done to protect themselves. They sought out a solicitor who joined as a member and who took up a legal advisory role. They also realized how critical the services of an experienced accountant were.

Of immediate concern for them were the rules around the establishment and operation of an incorporated association. Although there are benefits to be gained from incorporation, there are also obligations and limitations. Incorporation required the payment of application fees, obliged the association to be audited annually and lodge annual financial returns, required that the association comply with the provisions of the Associations Incorporation Act regarding the running of the association and in the case of GDL, to hold a public liability insurance policy.

The Board of GDL was also interested in leasing a shop as their office and checked the Retail Leases Act which set out certain minimum requirements of the lessee. In the process of developing the training program they needed to ensure that they were not infringing copyright and wanted to claim copyright on some of the materials and ideas that they were developing themselves. In setting up the office they referred to the new state government strategy associated with the Workplace Health and Safety Act and developed their own OHS guidelines for the office. The Board decided it was wise to develop a dispute resolution procedure, to conform to a code of practice for dealing with clients and a guiding set of principles for the organization in general. In developing these they referred to a number of federal acts:

- Disability Discrimination Act 1992
- Equal Employment Opportunity Act 1987
- Equal Employment for Women in the Workplace 1989
- Sex Discrimination Act 1984
- Racial Discrimination Act 1975

Their accountant guided the Board through the complexities of taxation law, especially in regards to transactions that occur between the not-for-profit organization and their volunteers.



LEARNING ACTIVITY 4

From law to organisational policy and procedures

This activity is a small project which will be of benefit to the organization you volunteer for or are using as a case study. Before going ahead with the project discuss it with your supervisor, your contact in the organization or the Board and with them, amend it so that it suits the organisation's needs.

1. Use the case study as a guide for identifying the federal and state legislation that affects your organization. Consult with other members of the organization, colleagues, manager or Board members to draw up a full list of the legislation.
2. Then choose three pieces of legislation and draw up a table naming the relevant legislation, identifying its key elements, whether and how your organization is at risk in not meeting the legislative requirements and identify strategies to reduce risk. A sample has been provided. Given we focus more closely on the Privacy Act in a later section of this unit, leave that out for the purposes of this exercise.

You can find copies of the legislation or fact sheets about legislation on the Internet. If you don't have access to the Internet, your local library will have access.

Information on state laws at: <http://www.law4u.com.au/>

The law portal: http://www.lawportal.com.au/full_screen.asp also lists all acts including federal

Australia Law Online at: <http://law.gov.au/portal/auslawonline.nsf/Home?ReadForm> provides fact sheets as does Aussie Legal at: www.aussielegal.com.au

It may be useful to have some idea of what legislation looks like and what topics it covers. There is easy access to the actual legislation through "Law Map" at: <http://www.lawmap.com.au/> Click on law topics and scroll down to the area you are interested in, for example, Human Rights and then a page will open up with a list of Australian and international laws, for example, the Federal Disability Discrimination Act of 1992. Click on "act" and you are taken to the actual act itself.

Name and date of the Act or legislation	Key elements of the Act that affect us	How we are at risk	Strategies to address risk
1.			
2.			
3.			

3. Take one of the Acts that you analysed in part 1 of this activity.

a) Find the policies in your organization that relate to this Act.

b) Read the policies and review them by comparing the policies with the requirements of the Act.

c) Make recommendations for changes to the policies so that they fully comply with the requirements of the Act.

d) Review the procedures that are associated with these policies and make recommendations to improve them so that they also comply fully with the Act.

e) Finally, check that all instructional or procedural documents are clear and easily understood. Make any changes to address lack of clarity.

Keeping a record of your work

Keep a copy of your work in your journal or record book as you may be able to use this work and feedback towards assessment and formal recognition of competency.

Topic 2: Modelling high standards of performance management

As a leader in an organisation you are expected to demonstrate high standards of management performance to facilitate the achievement of the organisation's strategic goals and objectives (usually documented in a strategic plan or business plan). This will involve you in a systematic process called performance management.

2.1 What is performance management?

Performance management is a systematic process for planning, implementing and monitoring how well an organisation - and therefore its people - are performing in terms of achieving goals, outcomes and targets. Performance management applies to the organisation as a whole, to its teams, departments or units and the individual.

Key points about performance management are:

- It is a systematic process
- Everyone concerned should be involved in the process
- Results are measurable
- Information gathered when monitoring performance is used to make improvements
- Information gathered on performance is used to make decisions and future plans
- Communication is critical
- Communication of performance enables learning
- Personnel are recognised for excellence in performance

An individual's performance plan is derived from the organisation's strategic plan which will usually contain mission, vision, values, and goals for the next 3-5 years. The planning cycle begins with the strategic plan and out of this is developed a business plan or implementation plan that details the activities and priorities for the next year. On the basis of the business plan, organisational units or teams detail what they will be doing to achieve the business plan and develop a team or unit plan. In small organisations, the business plan will be sufficient on its own rather than being broken down further. Finally, individual staff will establish performance plans or work plans.

So, performance planning typically occurs within four plans:

1. Strategic plan. Performance requirements over the next 3-5 years
2. Business plan. Performance priorities for the next year
3. Division/department/team plan. The role of these entities in achieving

the goals in the business plan.

4. Individual performance plans. What each person (staff and manager and Board members) will achieve in the next year.



LEARNING ACTIVITY 5

Reviewing organisational strategic and business plans

To complete this activity you will need to have access to a not-for-profit organisation other than your own and also obtain a copy of your own organisation's business plan.

Your own organisation may be able to introduce you to other organisations. If not you can find examples on the Internet. A good place to start is the Volunteering Australia (VA) website or your own state site (there is a link from VA to each state site)

<http://www.volunteeringaustralia.org/>

You can also use Google or another search engine: Type in "Business Plans" and "not-for-profit organisations" in the advanced search facility to find lists of relevant sites (this is also a good way to practice your Internet research skills).

1. Ask your coach to help you to read and compare the two business plans and to answer the following questions
 - a) What information is provided in the plans?
 - b) Is the information provided clear and easy to understand?
 - c) Can you and your coach identify anything that should be in the plan that is missing?
 - d) What do think of the way the plans are formatted and presented?
2. Take notes of the two business plans in your workbook under the following headings:
 - Organisational goals and objectives
 - Major programs related to each goal/objective
 - Key performance criteria for each program
3. Do you think the business plans effectively express the organisations' goals

and objectives and the way these will be realised?

4. If you can think of more effective ways to realise goals and/or to present the plan, draft these as recommendations that could be provided to the organisations.

Reviewing your work

Ask your coach to check the conclusions you have drawn and to provide advice on any additional or alternative points you might make

Keeping a record of your work

Keep a copy of your work in your journal or record book as you may be able to use this work and feedback towards assessment and formal recognition of competency.

2.2 Understanding and assessing your own performance

In order to be able to manage the performance of others it is critical that your own performance sets the standard you want others to follow. As a manager you can be a role model for a high standard of work practice to your team and/or staff. You need to be very clear about what the organisation expects of you and how your success is measured.

In the following activity you will review your own performance, including your standard of performance and how you measure that standard using critical success factors, measures and targets.



LEARNING ACTIVITY 6

Establishing and assessing your own performance

To begin this activity, answer the following questions in your journal or notebook. Discuss your answers with a colleague.

- Who are my clients?
- Are my clients satisfied with my performance?
- Are my management and work practices good enough?
- Are the values and capabilities of my team or staff suitable for what I need to achieve?
- Am I assisting the organisation to perform sustainably?
- Who are the organisation's stakeholders?
- Are my stakeholders satisfied with my performance?

- Is my team or staff capable of improving their performance and innovating?

Having reflected on the elements of your performance you can now move on to a more analytical process that assists you to develop a performance standard for yourself.

You will take the following elements of your work/management performance:

- Client satisfaction
- Management and work practices
- Team and staff performance
- Organisational sustainability
- Stakeholder satisfaction
- Improvement and innovation.

For each of these you will identify what would show to you or provide evidence that you have been successful (critical success factors), how you would measure each of these and what improvement targets you actually have for each.

When you have completed these, show your work to a colleague or Board member and discuss your answers with them. Reach agreement about what is reasonable for your performance standard.

- What do your clients expect of you?
- What does your team expect of you?
- How does the organisation expect me to contribute to its sustainability?
- What do the organisation's stakeholders require of me?
- What does the organisation expect of me and my team with regards to improvement and innovation?

Arrange for someone to be a coach for you over the next three months.

Set regular meeting times. At the meetings review your performance against the standards you set yourself here. Discuss any issues you encounter and identify steps to resolving these.

2.3 Establishing work or performance plans

Managing the performance of others has three stages:

- Planning the performance requirements and documenting these as a work plan
- Monitoring their performance
- Providing support and where necessary, coaching for the individual to perform to the standard expected.

The two major inputs into the development of an individual work plan are the organisational (or unit/team) business plan and the individual's position or job description.

Checklist for developing a work or performance plan:

- Clarify the role of the individual person by referring to their job description
- Confirm that they have the skills and knowledge to perform this role. If not, discuss and arrange for skill development.
- Review the organisation's strategic or business plan with the individual and together identify those parts of the plan that the person can undertake within the parameters of their job role (this may be a team or unit activity)
- Identify opportunities for learning and development
- In a work or performance plan identify for each person:
 - Tasks or projects or results to be achieved and by when
 - The key performance standards and measures they are expected to maintain
 - The performance review process and dates
 - Learning and development plan required to achieve the results
 - How the manager or supervisor will specifically assist them
 - Space for comment by individual and/or manager of the person's achievements

'Performance standards' are particular values or characteristics used to measure output or outcome, for example, a team member may be expected to increase the number of ethnic groups who engage with the organisation. The performance indicator is 'increase in the number of ethnic groups who engage with the organisation' and the measure will be a particular number or percentage increase.



QUESTION 2

What are the range of available learning and development methods that you can encourage your team members or staff to undertake to improve their competence?



LEARNING ACTIVITY 7

Your organisation's work and performance plans

Review the template your organisation uses for negotiating and documenting work plans. Does it cover all the items in the checklist above? Are there additional items? Is it clearly formatted, easy to fill in and easy to read? Where are work plans stored? What privacy and confidentiality protocols cover work plans? Make any recommendations for improvement to the work plan and present these to the management and/or Board for feedback and amendment.

If your organisation does not have work plans, discuss the advantage of having them with the Board. Volunteers are entitled to have clearly written job descriptions and to know the scope of their accountability. Work planning will assist the individual and the organisation to achieve more effective performance.

Reviewing your work

Ask your coach to check your work and to provide advice on any additional or alternative points you might make

Keeping a record of your work

Keep a copy of your work in your journal or record book as you may be able to use this work and feedback towards assessment and formal recognition of competency.



NOTE TO COACH

As this activity may create change within the organisation, it is important that you guide the learner in a way that only reflects positively on the learner and is not disruptive to their progress.

Conducting a performance review

Performance reviews are scheduled in the individual work or performance plan. They are usually conducted one on one and in private although in some small not-for-profit organisations the review may be with all of those on staff and/or on the Board. As a guide, set aside one hour for a performance review. Create a positive and friendly environment for the meeting.

Checklist for conducting a performance review

Before the meeting

1. Read through the individual work plan and note what has been achieved and anything that has not
2. Re-read the business plan so that you are familiar with the context of the individual performance
3. Make a note of any issues or problems associated with this person's performance and identify strategies for dealing with these
4. Remind yourself of the critical communication skills of active listening, establishing rapport, open questioning and responding constructively. Think of yourself as a coach as much as a manager (see Topic 2).
5. Make sure that you have all the paperwork you need and make extra copies for the person just in case they have not brought theirs along.
6. Set an agenda.

At the meeting

1. Welcome the person, outline the purpose of the meeting, describe the process, identify what happens with any information, ideas or outcomes generated by the discussion and seek their agreement on the agenda.
2. Congratulate them on their work to date and find some specific achievements to acknowledge.
3. Ask them how they think they are performing against their workplan. Encourage them to identify positives and negatives and to be concrete. Go systematically through the plan. Clarify and question, but listen most of all.
4. Describe any evidence of non performance that you have and seek clarification and agreement from the individual that this is the case. Collect the facts.
5. Use problem solving to address any issues of non performance and document any agreements reached.
6. Document any changes and additions to the work plan and have them signed off.

After the meeting

1. Ensure that the individual has a copy of the amended plan.
2. File the plan according to privacy protocols.
3. Follow through on any actions you may have agreed to take.



LEARNING ACTIVITY 8

Skills for conducting a performance review

1. Read through the 15 items on the checklist for conducting a performance review on the previous page and work out the main areas of skill and knowledge you would need to conduct a review.

2. List the skills and knowledge in the table below

Area of performance review skill and knowledge	Self assessment of my own skill & knowledge base		
	High	Sufficient	Low
(e.g.) Planning skills including organising a meeting agenda and agenda papers (Before the meeting, items 1,2,5,6)			
(e.g.) Communication skills including active listening, coaching, establishing rapport (Before the meeting, item 5)			

3. Clarify and confirm your self-assessment with a colleague, coach or mentor.

4. For each skill that you judged as insufficient, identify a strategy for improvement, such as coaching, observation of an expert, training or reading resources or a combination of these. Identify when you will undertake the improvement strategy and seek support from a colleague who can act as a coach. You can set this up as an action plan.

Skill to be developed	Improvement strategies	When	Supported by	Nature of support

Keeping a record of your work

Keep a copy of your work in your journal or record book as you may be able to use this work and feedback towards assessment and formal recognition of competency.

Topic 3: Enhancing the image of the organisation



QUESTION 3

What do you think image means? How important is image to you, your associates and your organisation?

Can you think of any times when a bad image has had bad consequences for an individual or organisation?

3.1 Organisational values and standards

The organisation's image will be derived from its values and mission and will be enacted through the behaviour of the people who work for the organisation. Many organisations have a code of ethics or code of conduct that provides guidelines for the way its people are expected to behave.

Consider the following code of ethics for managers of volunteers from Volunteering Queensland and with your coach or colleagues, identify the values that underpin it.

A manager of volunteers will:

- Agree to the definition of volunteering.
- Uphold and work to the 'Principles of Volunteering'.
- Promote best practice volunteer management in their organisation.
- Ensure that their organisation has a written policy on volunteer involvement
- Ensure that the volunteer policy is implemented and adhered to.
- Ensure that the rights of volunteer staff are protected.
- Value the worth and work of volunteers in positive and tangible ways.
- Promote the broader volunteer movement.
- Not replace paid with volunteer staff.
- Not deploy volunteer staff in under resourced program areas.
- Not deploy volunteer staff in positions vacated through industrial dispute.
- Work in a manner that demonstrates that all staff are valued equally.
- Observe duty of care.
- Value and respect the role of manager of volunteers.
- Work to enhance and develop the role of managers of volunteers.
- Work to ensure that volunteer services are adequately resourced.
- Practice and observe high standards of confidentiality.



LEARNING ACTIVITY 9

Investigating organisational values and practice

Your organisation may already have a statement of values, documented standards, a code of ethics or code of conduct. If so you can go straight to the second part of this activity.

1. Get hold of a copy of your organisation's statement of values, documented standards or code of ethics/conduct and read them carefully. In your journal make a note of what they mean for your own work practice as a volunteer. Draw up a personal code of ethics for yourself as a volunteer and leader.

2. If your organisation does not have any of the above, arrange to spend some time with colleagues or Board members or suitable others in the organisation to identify:

- The values that your organisation stands for, and then
- The behaviour or work practices that would form a code of ethics or code of conduct (whichever is most appropriate)
- Seek agreement from the relevant constituents of your organisation for the values and code.

Check out the web site of the *St James Ethics Centre* for advice on developing codes of ethics (www.ethics.org.au).

3. There are going to be times when behaviour is not in accordance with the standards and values of the organisation. This part of the activity focuses on occurrences of unethical behaviour that may occur from time to time in your organisation.

Investigate the consequences of unethical behaviour in your organisation and how ethical dilemmas are dealt with. Draw up a table which lists each code of practice in the first column. Identify one example of behaviour that would constitute unethical behaviour against this particular code. Then identify the ways in which the organisation would deal with such unethical behaviour including the appropriate communication channels. Finally, suggest a strategy for ensuring ethical practice. This is a very good test of whether the code is expressed succinctly and whether the organisation is serious about its code of ethics. An example is provided below.

Code	Example of unethical practice	How to deal with the unethical practice for this code, including communication channels	Strategy to ensure ethical practice
The organisation upholds and respects a volunteer's right to privacy.	A volunteer's name, address and phone number are given to a marketing company over the phone without their permission.	Identify who gave the information over the phone and point out to them that this is not ethical practice. If possible, contact the marketing company and have the name and details removed from their data base. Apologise to the volunteer publicly.	Have an annual review at the December Board and staff meeting of the code of ethics. Discuss the types of behaviour that would constitute unethical work practice and the processes for reporting and addressing unethical behaviour.

What formal processes does your organisation have in place for reporting unethical practices? If there are no formal processes, it may be appropriate for you as a leader to facilitate the development of these in consultation with colleagues or Board members or suitable others in the organisation.

Keeping a record of your work

Keep a copy of your work in your journal or record book as you may be able to use this work and feedback towards assessment and formal recognition of competency.

3.2 Organisational image

All organisations will project an image of some sort even if they are not particularly concerned about image. Most organisations want to project an image of integrity and credibility. The espoused values of your organisation are reflected in all manner of ways. Image can be conveyed by:

- First impressions
- Logos and slogans
- The appearance and state of premise
- The décor
- The appearance of staff
- The reception area
- The welcome that visitors are given
- Brochures, flyers and posters
- Advertising
- Newsletters and other publications

- The web site
- Phone manner
- The way staff engage with each other
- The quality of client relationships
- The quality of products and services
- Your own performance.



LEARNING ACTIVITY 10

Your organisation's image

Take five of the ways in which image can be conveyed (listed above) and use the table to analyse the image being conveyed. An example has been provided. If it is appropriate, present this to your supervisor, colleagues or Board as a recommendation report. You may wish to discuss the presentation with your coach first.

Ways of conveying organisational image	Purpose	Format or presentation	Impression created – both good and bad	Suggestions to improve the way the information is presented
Profile of the organisation	Convey mission and goals of the organisation	Page on our web site	Shows that we know what we are on about, but it is rather long winded	Edit the information and use bullet points for each of the goals; consider including a photo of some of our activities with this

QUESTION 4



How does your own performance contributes to the overall performance of the organisation? Can you think of specific situations that illustrate your contribution to developing an organisation which has integrity and credibility?



ACTIVITY 11

This activity involves reviewing key elements of organisational values and image to staff and clients

(a) Client satisfaction

- List the most important success factors of client satisfaction (3-5)
- Specify how you will measure these
- Nominate the target you want to achieve

An example has been provided.

Critical success factors	Measures	Targets
Number of clients	Growth in client numbers overall	Growth of 15% per annum
Diversity of client groups	Growth in overall numbers in three target groups	15-19 year olds - 30% Girls – 15% Indigenous Australians – 4%
Client satisfaction	Level of satisfaction (gathered through survey)	80%

(b) Management and work practices

- What performance indicators will show me whether my management and work practices are effective?
- What does the organisation require of me?
- List the most important success factors (3-5)
- Specify how you will measure these
- Nominate the target you want to achieve.

Critical success factors	Measures	Targets

(c) Team performance

- List the most important success factors of team performance (3-5)
- Specify how you will measure these
- Nominate the target you want to achieve.

Critical success factors	Measures	Targets

(d) Organisational sustainability

- List the most important success factors of organisational sustainability (3-5)
- Specify how you will measure these
- Nominate the target you want to achieve.

Critical success factors	Measures	Targets

(e) Stakeholder satisfaction

- List the most important success factors of stakeholder satisfaction (3-5)
- Specify how you will measure these
- Nominate the target you want to achieve.

Critical success factors	Measures	Targets

(f) Improvement and innovation.

- List the most important success factors of improvement and satisfaction (3-5)
- Specify how you will measure these
- Nominate the target you want to achieve.

Critical success factors	Measures	Targets

When you have completed this activity discuss your answers with your coach, supervisor or director of the Board. Together you may make some changes to what you have developed.

Keeping a record of your work

Keep a copy of your work in your journal or record book as you may be able to use this work and feedback towards assessment and formal recognition of competency.

Topic 4: Communicating and influencing



QUESTION 5

Good communication and leadership go together. Before proceeding think about good leaders in your community or in the wider world. Think about sports leaders, politicians, civic leaders etc.. What are the qualities you most admire. What are these leaders most admired for by the general community?

Perhaps the primary capability for an influential leader is their ability to communicate effectively.

A good leader:

- Is able to build rapport
- Listens carefully and responds appropriately
- Provides constructive feedback
- Asks questions that encourage expansion and creativity

Building rapport

By 'rapport' we mean establishing a harmonious connection with someone over a period of time.

Strategies for building rapport.

- Check the other person's name and use it correctly
- Remember their name and use it next time you meet
- Take a genuine interest in the other person
- Listen for points of common interest
- Listen to their story
- Share stories of your own without dominating
- Be empathetic
- Take the opportunity to meet again informally
- Demonstrate trustworthiness through follow up
- Encourage humour and laughter as appropriate

Listening, responding and feedback

By listening, we do not mean simply hearing the words that someone says to you. Listening certainly involves hearing, but it is a far more active process than that. It involves the listener in participating — hearing the words, understanding the meaning and providing feedback. This is called active listening.

An active listener:

- Faces the speaker and maintains their full attention on what the speaker is saying
- Keeps regular eye contact with the speaker (looking away sometimes so as not to create discomfort by staring)
- Uses silence constructively, waiting until the speaker has completed their thought
- Does not constantly interrupt the speaker
- Notes the words used by the speaker and the feelings behind them
- Gives nonverbal cues — nods of encouragement, ‘Mm’ and ‘Uh-huh’
- Follows up with clarifying and expanding questions relevant to what has been said.

We do not always listen effectively. Sometimes we become distracted or our minds wander. We allow our own interests or concerns to get in the way of concentrating on what the other person is saying.

There are six typical blocks to effective listening. These are:

1. Rehearsing

Working out in your own mind what you are going to say next.

2. Anticipating

Anticipating what the other person is going to say next rather than focusing on what they are presently saying.

3. Day-dreaming

Allowing what you hear to trigger your own thoughts, imaginings or day dreams.

4. Pre-judging the person as not worth listening to

Filtering what the other person is saying through your own similar experience, sometimes comparing their experience with yours.

5. Derailing

Changing the subject so that you talk about what you are interested in (and sometimes interrupting to do this).

6. Interrupting

Listen to the first few sentences only, then cutting in with advice, solutions, your comparable experience or ‘yes, but...?’

There are a number of ways to respond to someone when in conversation or in a more structured situation such as basic counselling or interviewing.

- Clarify meaning when you do not understand
- Use a neutral response like ‘Uha...’ to encourage the speaker without leading them
- Simply remain silent and give the speaker time to think
- Build on a statement that the speaker makes
- Repeat a question if it is not being answered
- Query inconsistencies
- Confirm feelings

Constructive feedback is:

- Requested or suggested, not imposed
- Carefully thought through
- Appropriate to the situation
- Properly timed i.e. as soon as possible after the event
- Describes the behaviour (not the personality) quite specifically
- Focuses on behaviour that can be changed or modified
- Identifies strategies and support for change
- Reviews progress

Questioning

There are three types of questions that can be used depending on the type of information we require or the type of communication process we want to engage in.

(a) Closed questions

These are questions designed to obtain specific, factual information.

- Do you have a copy of our Privacy Policy?
- Have we finished the procedures we established for safety audits?
- What is the deadline for this project?

(b) Open questions

These are exploratory questions designed to give the person answering an opportunity to explain clearly and in detail about something that could be quite complex. ‘How’ and ‘what’ can be useful starting words for open questions?

- Bruce, what are the major steps the team will need to go through to understand how that process works?
- How are we going to deal with this issue?
- What does this mean for the team’s project?

Open questions could also be used to give people an opportunity to think out loud about ideas without getting too specific. Using only closed questions will result in an unproductive conversation. Open questions generate far more information.

(c) Hypothetical questions

These questions set a scene that could happen and give people an opportunity to answer as if it had happened. They can also be an excellent way of engaging people's imagination in developing creative solutions.

- If we take the example of... what would happen if...
- If you had a phone call from that client saying ... what action do you think would be appropriate?
- If you were asked to recommend a new system of recording referrals, what would you suggest that was the most effective?

(d) Useful triggers for discussion

- Could you explain what you mean by....
- Can you give an example of that?
- So, what would happen if....?
- Tell us more about why that wouldn't work?
- What's the difference between ...?
- How would you go about doing that?
- Why would it be important to do that first?



LEARNING ACTIVITY12

Influencing and communication to individuals and teams

Arrange to have a meeting with your team or colleagues to review roles and responsibilities. Establish an agenda for the meeting and send it out to participants with the notice of the meeting. This is an opportunity for you to practice the key communication techniques outlined above, to review the strategic directions of the organisation, to acknowledge and recognise the performance of others and to encourage the team members or your colleagues to take responsibility for their work.

On the agenda you may want to include:

- Review of the organisational mission, vision, values and goals and objectives and explain these as required
- Review of the strategy or business plan for the current year
- Specific and concrete acknowledgement individual and group performance

- Discussion and clarification of the group's roles and responsibilities in achieving the business plan
- Discussion and identification of the group's roles and responsibilities for improving performance
- Recognition and reward processes for individuals and the team
- Recommendations from the group about ways you can improve your role as leader
- An action plan to implement recommendations

When you have completed this activity spend some time reflecting on your own performance, especially your ability to influence the team positively. Make some notes in your journal and discuss with your coach what positive strategies you used at the meeting, what could have been done better and how you would conduct the meeting differently next time.

Influencing and persuasion

Influencing and persuasion have similar meanings, but 'persuasion' has a stronger connotation, although stronger still is 'coercion'. The words 'influence' and 'persuade' refer to the ability to affect another person or to induce in another person a behavioural or attitudinal change. You may also attempt to persuade someone to change their thinking, their beliefs or their values.

Your use of influencing and persuasion techniques needs to be done in the context of ethical practice. After all, propaganda and coercion are not too far removed from persuasion. If we define ethics as a code or standard of behaviour based on a shared understanding of what is right or wrong, then it is important to clarify what you regard as right and wrong before you set about attempting to influence or persuade someone to change their behaviour, attitudes, thinking or values. A quick search on the Internet under 'persuasion' generates sites about hypnosis, mind control and propaganda used by cults. As a leader or manager you are in a position of influence by the very fact of your position – often called positional power. Some people may do whatever you say simply because 'you're the boss'. Your instructions, guidance and persuasion comes from a values base.

You may want to take this opportunity to clarify your own values. Search the Internet under 'values clarification' and you will find several web sites that have values clarification exercises that you can undertake. Identify your top 10 values and then rank them in order of importance.

The section on communication techniques (above) provides you with an array of techniques for influencing and persuading others. We employ

both verbal and non-verbal techniques such as tone, volume and rhythm of speaking, our body language, our choice of words, our careful listening and constructive feedback. Add to this the techniques we use in the content of what we say (or write), the sequence of ideas, the logical (or illogical) structure, appeals to emotions, expertise or authority, the use of generalisations or stereotypes, repetition and the nature of our evidence (including often misused statistics).



LEARNING ACTIVITY 13

Using tools of influence and persuasion

Reflect on how you and others use a range of tools of persuasion by completing the table below. For each tool try to think of a specific example of its use e.g. for tone of voice it might be ‘the way Sally uses a whining tone to get around me’. In the third column you might record the way you use your ‘teacher’ tone (clear, crisp and confident) when a meeting gets out of hand and you have to call it back to order.

You may like to do this exercise with someone who knows you well!

Persuasion/influencing tool	Examples of how it can be used to persuade/influence	Where I would use this to persuade/influence
Tone of voice		
Stance		
Gesture		
Emotional appeal		
Choice of words (e.g. positive or negative connotations)		
Using evidence		
Repetition		
Stereotyping		
Using logical argument		

QUESTION 6



Reflecting on your communication skills

What do you understand to be the meaning of 'consultation'?

What constitutes 'consultative processes' in your organisation?

What are the key skills that underpin consultation? In what circumstances are consultative processes critical and why?

Can you think of situations where it is inappropriate to consult?

A simple, but effective way to reflect on your own communication skills is to make notes after a communication situation in response to the following questions or discuss them with an observer, colleague or coach.

- What was the purpose of the communication?
- What happened?
- How far did I go to achieving my purpose?
- What feelings and emotions were present for the other person and for me?
- How did I deal with these?
- What significant things happened during the process? Significant for the other person? For me?
- What decisions were made? Am I satisfied with these? Is the other person satisfied? How do I know?
- What do I need to follow up?
- How will I follow up and when?
- If I had the chance to do this over again, how would I do it differently?
- What skills do I need to improve and how will I go about this?

Topic 5: Decision making

The key steps in formal organisational decision making are:

1. Clarifying and confirming what must be decided
2. Gathering and organising information relevant to the issue or situation
3. Ensuring participation of individuals and/or team(s)
4. Examining options
5. Assessing risks
6. Making a timely decision or choosing the preferred course of action
7. Communicating the decision
8. Developing the implementation plan
9. Seeking agreement for the plan
10. Implementing the decision according to plan
11. Monitoring implementation and impact of the decision
12. Completing the process and acknowledging contributions and success.

There are a number of tools that can help you in the decision making process. A description and example of each of these tools is available at the Mind Tools website at: http://www.mindtools.com/pages/main/newMN_TED.htm.

They are briefly identified below.

- Pareto analysis or choosing what to change
- Pared comparison analysis to work out the relative importance of options
- Grid analysis which helps you to make a choice when you have to take many factors into account
- Decision trees where you place a value on different options
- PMI or weighing up the pros and cons
- Force field analysis in which you analyse the pressure for and against change
- Six thinking hats: De Bono's method of looking at an issue from a number of different viewpoints
- Cost benefit analysis in which you identify the financial benefits of possible decisions.



LEARNING ACTIVITY 14

Using decision making tools

Identify a problem, issue or change that needs to be decided upon. Establish a group of people for you to facilitate through the decision making process. Take the group through steps 1-6 in the list of key steps in formal decision making and use three of the decision making tools to assist you.

Write up the activity and then review the decision making processes with the group identifying the advantages and disadvantages of the processes and tools. Identify and document strategies for improving decision making processes.

Keeping a record of your work

Keep a copy of your work in your journal or record book as you may be able to use this work and feedback towards assessment and formal recognition of competency.



LEARNING ACTIVITY 15

Communicating and implementing the decision

You are now ready to facilitate a group through Steps 7-12:

- Communicating the decision
- Developing the implementation plan
- Seeking agreement for the plan
- Implementing the decision according to plan
- Monitoring implementation and impact of the decision
- Completing the process and acknowledging contributions and success.

1. Identify who needs to be informed about the decision, how they will be informed and when.
2. Implement the communication process.
3. Develop an action plan for implementing your decision using a table like the one below. Seek agreement for this plan from the appropriate people in your organisation.

Action	Who's responsible	Supported by	Completion date

1. Identify with the group the ways that the group will monitor the implementation, at what specific points in time and who will be involved in

this. This can include:

- Verbal reports (face to face or by phone)
- Written reports (e.g. by email)
- Status reports against the action plan like the one below
- Group meetings

Action	Who's responsible	Supported by	Completion date	Status

Arrange for a way to celebrate the completion of the process and acknowledgement of individual or team contribution.

When you have completed this entire activity spend sometime with your coach to review the process and your role as leader. Discuss and identify the key skills that are required of you to facilitate a group through this process and, if appropriate self improvement strategies.



NOTE TO COACH

When discussing the learner's answers to this activity, use 'prompt' questions to help the learner to think of a range of skills. A 'prompt' question may include an answer from your own experience.



QUESTION 7

As a leader you have probably also been involved in making decisions with minimal consultation and needed to do so with authority. What do you understand 'authority' to mean? What are you 'authorised' to make decisions on? How do you balance the need to be authoritative and consultative?

Information management refers to the various stages of gathering, processing, producing and storing information and the ways that information can be retrieved and disseminated. Information technologies assist in the management of information. As an organisational leader you will need to be able to manage information effectively and efficiently.



LEARNING ACTIVITY 16

Reviewing information management

Use the following questions to review and improve the ways in which you manage information.

- What categories of information do you handle on a day to day basis?
- What other categories of information do you deal with?
- For each of the categories:
 - What filing and storage system do you use?
 - What problems do you have in managing the information?
 - What products, systems and strategies could be implemented to improve your management of the information?
- What learning and development do you need to undertake to improve your information management capabilities?

Keeping a record of your work

Keep a copy of your work in your journal or record book as you may be able to use this work and feedback towards assessment and formal recognition of competency.

Section Three: Resources

Web sites

Volunteering Australia

<http://www.volunteeringaustralia.org/about/aboutus.html>

Volunteering Australia (VA) is the national peak body working to advance volunteering in the Australian community. VA has a number of information sheets for volunteers and volunteer-involving organisations available on its web site and in hard copy.

All state/territory volunteering centres can be accessed from the following VA page:

http://www.volunteeringaustralia.org/links/links_statevc.html

A list of VA publications is available on:

<http://www.volunteeringaustralia.org/publications.php>

The Non-profit Governance and Management Centre

<http://www.governance.com.au/ResourceGuide/ResourcesGuideHome.htm>

The web site of the Non-profit Governance and Management Centre offers information on a range of resources on governance, management, administration, legal and financial matters and other topics.

Communication skills

There are thousands of web sites that deal with communication skills so conduct a search under a specific method of communication like 'facilitation' or 'report writing' to find information that is relevant to you. You can make your search even more specific by adding words like 'checklist' or 'how to' or 'guidelines'. Remember that web sites that end in .com are businesses and are likely to be promoting their communication products and services rather than providing information relevant to your learning.

Tips for preparing a speech can be found at: <http://www.angelfire.com/ab/speakers/speechwrite.htm>

Guidelines for oral presentations: http://dtls.cqu.edu.au/clc/2_2.htm

Cultural diversity

A guide for health professionals

The article at this site is equally applicable to sectors other than the health sector.

<http://www.health.qld.gov.au/multicultural/cultdiv/default.asp>

Communications checklist

The checklist is a useful reference when conducting a cultural assessment of a client

<http://www.health.qld.gov.au/multicultural/checklists/communication.asp>

Organisations

Centre for Leadership for Women <http://www.leadershipforwomen.com.au/>

Australian Rural leadership Foundation <http://www.rural-leaders.com.au/>

Australian Indigenous Leadership Centre <http://www.aiatsis.gov.au/ailc/>

Print publications

Block, P. (1993) *Stewardship. Choosing service over self-interest*, San Francisco: Berrett-Koehler.

Diller, Jerry *Cultural Diversity: A Primer for Human Services*

Gardner, H. (1995) *Leading Minds. An anatomy of leadership*, London: Harper Collins

Hartley, P. (1997) *Group Communication*, London: Routledge

Heifetz, R. A. (1994) *Leadership Without Easy Answers*, Cambridge, Mass.: Belknap Press.

Rosignol, L.E. *Communication Skills for the Workplace*

Timm, P *Communication Skills for Business and Professions*

Section Four: Demonstrating competence

How to assess your current competency

When the word assessment is used, many people immediately think of a written examination that is set by a teacher and completed at the end of a course of study. This is not what is meant by assessment in this learning context. Assessment is part of being a self-directed learner and is done when, and if, you choose to demonstrate your competency in a range of work skills and knowledge

An important element of competency-based assessment is the assessment you do yourself. This may involve a quick reflection on how well you are doing, or a more structured exercise where you use a checklist to record your assessment of your skills and knowledge to plan and get recognition for your learning.

You can demonstrate competence in a range of ways. You may have records from previous work or be able to get someone to write a report on your competency (this is called third-party evidence). You may be able to show someone what you have learned or have someone observe you while working. In some areas of competency it may be difficult to produce documentary evidence because demonstration of competency is very context specific. In these cases direct observation or a third-party report are the most useful forms of evidence.

Using the self-assessment exercise as part of a formal assessment process

If you complete the self-assessment activity in this learning guide you have self-assessed your skills and knowledge related to the following national industry competency standard:

(BSXFMI402A) Provide leadership in the workplace

The fact that the learning guide and the self-assessment activity use this national industry competency standard can help you to receive a nationally recognised certificate called a Statement of Attainment for this unit. Because the unit is part of the Certificate III in Active Volunteering and is also used in a range of Business and Community Services qualifications you can use the statement of attainment towards receiving a full qualification.

Your assessor will be able to give you details of these qualifications if you are interested.

If you are doing the self-assessment as part of a formal competency

recognition exercise, you may find that the best way for competency to be demonstrated would be for someone to observe you at work as a volunteer. This could be a colleague or a supervisor or a qualified assessor. If you ask a colleague or supervisor to observe you, they will need to be able to report to the assessor on your performance. As well as or instead of being observed you could talk to an assessor yourself and explain how you go about your work (using the questions in the self-assessment exercise as a framework).

To be assessed as competent in managing a Board meeting you will need to be able to meet the elements of competency to the level expressed in the performance criteria (see Appendix One).

Gaining formal recognition for competencies gained

The topics and activities in this learning guide are based on national industry competency standards that are endorsed by the Australian National Training Authority. This means that if you can demonstrate that you are competent in the topics covered and can meet the performance standards described in the unit of competency you are eligible to receive formal national recognition of your competency. You can apply to a Registered Training Organisation (RTO) for recognition and receive a national certificate called a Statement of Attainment that counts towards a national qualification.

The name and national code of the competency standard is shown in the self-assessment exercise and on the title page of the learning materials. The questions in the sample self-assessment exercise are based on the performance standards for the unit titled (BSXFMI402A) Provide leadership in the workplace

You may not wish to gain any formal qualifications for your work as a volunteer. However, there may be advantages if you are applying for paid work as the Statement of Attainment can be used to demonstrate your capabilities. Also, because individual units of competency are part of national qualifications, if you enrol in a national qualification and have formal recognition for one or more units you can apply for credit which means that you do not have to complete that or those units again.

How do I get a statement of attainment?

You need to contact an RTO in your region and tell them that you want to apply for formal recognition of your voluntary work activities. Tell them the name and national code of the unit you are applying for and ask them whether this unit is within their Scope of Registration.

The name and national code of the competency standard is shown in the self-assessment exercise and on the title page of the learning materials. The questions in the sample self-assessment exercise are based on the performance standards for the unit titled UNIT (BSXFMI402A) Provide leadership in the workplace

Also find out how much they will charge you. TAFE is one well-known RTO found in most parts of Australia, but there are also many more.

Formal recognition is usually Recognition of Current Competency (RCC) or sometimes called RPL, which stands for Recognition of Prior Learning but often called just plain 'Recognition'.

How do I contact a Registered Training Organisation (RTO)?

You can find the contact details for the RTO in your region on the National Training Information Service web site: www.ntis.gov.au

You can also find out about RTOs in your region by contacting your state training authority, your local council or looking up training in a local phone directory. Also, your own organisation may already have a relationship with an RTO or be able to direct you to one.

What counts as evidence of competency?

If you wish to receive formal recognition for your work as a volunteer, you will need to be able to demonstrate that you are competent. There are a number of options for demonstrating competence. For example, you might:

- Present a portfolio of documentary evidence (how to do this is explained below)
- Arrange for an assessor to observe you carrying out a task or set of tasks. You may also have a brief discussion with the assessor to answer questions about the knowledge that underpins competently performing the task
-

- Arrange for a colleague or work supervisor to observe you at work and make a verbal or written report on your behalf to an assessor (this is called third-party evidence and is explained in more detail later in this section)
- Make a formal presentation on a work related topic (e.g. to demonstrate your communication skills or your knowledge of a new procedure)
- Manage and carry out a project and keep a record of the planning and outcomes
- Produce a written report or other documentation of relevance to the organisation and your role

This learning guide contains learning activities that you can use to gather evidence of competency for formal assessment purposes if you wish to gain a formal qualification.

The following workplace documents may be useful as evidence of competency in elements of communications:

- Reports you have written
- Notes from phone conversations
- Logbooks or diary entries
- Testimony from your supervisor
- Forms and short reports
- Processes you have designed

Building an evidence portfolio

An evidence portfolio is simply a collection of documents and other documentary evidence (such as film or photographs) that show what work you have done and the skills and knowledge you have developed. There are a number of reasons why you might put together an evidence portfolio:

- So that you can demonstrate competency to a qualified assessor and apply for formal recognition of competency
- For your own records and as part of your curriculum vitae
- As a resource to use in your role as a volunteer or in other work
- As a reference for your own further learning and as a resource to assist others you may train and mentor

What does an evidence portfolio look like?

What an evidence portfolio looks like depends on both the sort of evidence you are collecting and the purpose for collection.

You might start with a box into which you put any documents, photographs and/or things you have made to be sorted out later. You could use a concertina file or a set of document folders, a ring binder or perhaps (if you are collecting documents in a large format) an art folio.

The most common and flexible format for a portfolio is probably a ring binder containing clear plastic sleeves for holding collected documents and artifacts. This will enable you to collect and store evidence and, when presenting the portfolio, to write any explanations of what you are presenting.

What does an evidence portfolio contain and how is it organised?

Again this depends on the purpose of the portfolio. If you are building an evidence portfolio to apply for formal recognition against nationally endorsed units of competency, then the documentary evidence you collect should be organised according to the elements and performance criteria for the unit of competency.

All of the contents of this learning guide - including the self-assessment exercises and topics - are based on the elements and performance criteria for the relevant unit.

The sample self-assessment activity in Appendix One uses the elements as headings and has turned the performance criteria into questions about level of competency.

Demonstrating competency in providing leadership in the workplace

If you are building a portfolio to demonstrate competence as a leader, you can use the self-assessment exercise headings and/or those in the topics in section two as a framework for organising the evidence you collect.

If your Evidence Portfolio is to include evidence of what you have learned using this guide you should ensure that you keep copies of the learning and assessment exercises you have completed.

Examples of evidence you might collect from your previous experience might include:

- Statements from a work supervisor or colleague (third party reports)
- Sample documents – such as an agenda you have prepared, minutes of a meeting, an action plan, letters of invitation etc.
- A written report on how you dealt with an issue.

When you have completed the self assessment activity and noted down what evidence of competency you are able to provide, you should assemble this evidence and attach it to the completed self assessment activity. The information in the completed self assessment activity together with the supporting evidence can then be submitted to an assessor.

NOTE:

Appendix One contains a sample, completed self-assessment template that you can use as a guide in completing your own self-assessment.

Appendix One:

Example of a competed self-assessment activity:
(BSXFMI402A): Provide leadership in the workplace

The following self-assessment activity sample shows the way an experienced Board member may demonstrate competency in managing their role and responsibilities.

The following sample self-assessment activity has been completed by Janet Hall who has been a team leader in a local community support agency for several years. Occasionally when the manager is absent, Janet has taken on leadership responsibilities.

This is how Janet rates her skills and knowledge and what sort of evidence she can provide.

NAME	
DATE	
NAME OF ORGANISATION (if applicable)	

Key to completing columns 1, 2, 3:

1 = I feel quite confident that I can always do this

2 = I might sometimes need some help

3 = I have no experience in this area

Model high standards of management performance				
Can you/do you know how to ...?	How well can you do this?			What evidence do you have to demonstrate this?
	1	2	3	
Develop and implement performance plans according to organisational goals and objectives?		✓		I need to further develop the quality of my performance plans
Develop key performance indicators within team and organisation's business plans?	✓			I have documentation in my portfolio
Perform to meet your organisation's requirements?	✓			My supervisor would be able to attest to this
Serve as a positive role model to others through your performance?	✓			

Enhancing the organisation's image				
Can you/do you know ...?	How well can you do this?			What evidence do you have to demonstrate this?
	1	2	3	
Apply the organisation's standards and values when conducting business?	✓			I have produced a set of guidelines and poster for new worker which demonstrate my understanding of these matters. My supervisors will also be able to attest to my understanding and practice.
Question behaviour and values that damage the organisation's image and do this through established communication channels?	✓			
Contribute to the organisation's integrity and credibility through your own performance?	✓			
Influence individuals and teams positively				
Can you/do you know ...?	How well can you do this?			What evidence do you have to demonstrate this?
	1	2	3	
Communicate expectations, roles and responsibilities in such a way that encourages individuals to take responsibility for their work?	✓			Staff reviews of my leadership performance indicate that I have successfully provided leadership in this manner
Encourage, value and reward individual and team efforts	✓			
Ensure that ideas and information are accepted and supported by colleagues	✓			

Making informed decisions				
Can you/do you know how to ...?	How well can you do this?			What evidence do you have to demonstrate this?
	1	2	3	
Gather and organise information relevant to the issue?	✓			I have documentation to demonstrate my research and development of projects and policies as well as meeting minutes which demonstrate the consultative approach taken.
Facilitate active participation from individuals and teams in the decision making process?	✓			
Examine options and assess risks to determine preferred courses of action?	✓			
Plan implementation of decisions and ensure agreement of the plan by relevant people	✓			
Use feedback processes to monitor the implementation and impact of decisions?	✓			