

# MODULE 11

## Administration workbook



[scouts.org.uk/trainersresources](https://scouts.org.uk/trainersresources)

**Note:** In some parts of the UK, Scout Counties are known as Areas or Islands. In one case it is known as a Bailiwick. But for ease of reading this publication simply refers to Counties.

In Scotland there is no direct equivalent to a County or Area. Instead, Scouting is organised into Districts and Regions, each with distinct responsibilities. Some County functions are the responsibility of Scottish Regions, while others lie with Scottish Districts. The focus of responsibility is outlined in Scottish Variations from Policy, Organisation and Rules.

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### **Who is this workbook for?**

This module is for Section Leaders, Assistant Section Leaders, Managers and Supporters working towards their Wood Badge. It is also for Administrators who wish to undertake further training.

It provides information and an opportunity to find out about best practice in managing the administrative tasks required in your role.

### **What does this workbook include?**

This workbook is a method of completing the necessary learning for Module 11: Administration. By the end of the workbook you should be able to:

- state the importance and value of maintaining accurate records and accounts
- list the records that need to be maintained within your Section, Group, District or County and the ways in which they can be stored and managed
- keep records in accordance with the Data Protection Act, POR and other relevant legislation and regulations
- describe the various adult application forms and what they are used for

- explain the financial responsibilities and procedures relevant to your role in your Section, Group, District or County
- outline the insurance arrangements for activities, events, property and equipment, as relevant to your role.

While working through this workbook you will see these symbols and terms:



**Information** - these sections give you the background knowledge required for the exercises or an introduction to the discussion points.



**Exercise** - these sections are for you to complete and discuss with the person validating your learning.



**Discussion point** - the discussion points highlight areas you may wish to consider or explore further once you have completed the exercise, or discuss in more detail with other volunteer colleagues, your line manager or the person validating your learning.

Throughout this workbook you will be encouraged to discuss things with other adults, undertake practical exercises, make notes and consider questions relevant to the role you have taken on.

The workbook will provide a structure for the validation discussions you will have later with a Training Adviser. Therefore, we would encourage you to make notes throughout this workbook and record your thoughts and ideas fully. We hope that the workbook, and the notes you make, provide you with a useful reference guide for any future activities you undertake as part of your role.

Some exercises and discussion points are supported by additional information that can be found in the workbook appendices, available in the Module 11 Learner's Resources area of [www.scouts.org.uk](http://www.scouts.org.uk). You can use these to support your learning after you have completed the exercises and discussions.

### **How to complete this workbook**

This workbook is a self-contained learning method and can be completed either on your own or as part of a small group. However, we would

encourage you to discuss what you have learned with other volunteers to share good practice and ideas. This will help support your learning and understanding of your role.

Read through the workbook before you begin completing the activities. Start at the front and complete as many sessions as you can. If you are unsure of a session or activity, leave it and arrange to discuss the content with another person who is familiar with the training material, such as your line manager or a Training Adviser. Then come back and complete the workbook.

### **What resources do I need to accompany this workbook?**

Links to most of the resources you need are included within this workbook. You will find others on the learner's resources area of [scouts.org.uk](https://scouts.org.uk) or through Scout Shops.

### **What happens once I have completed this workbook?**

You will need to validate your learning once you have completed this workbook. Validation is the process of demonstrating that you can put what you have learned into practice within your role. A Training Adviser will carry out validation with you.

### **Validation**

To validate this module you will need to demonstrate:

1. accurate and appropriate maintenance of administrative and financial records relevant to your role, in accordance with policy, organisation and rules and the Data Protection Act
2. any other ideas, subject to agreement with a Training Adviser.

For further information about validation and the next steps, contact your Training Adviser or Training Manager.

# Session 1

## Administrative tasks in Scouting

### Information



This initial session will get you thinking about the various administrative tasks that you may need to carry out in your role and why it is important to maintain accurate records and accounts. The majority of administrative tasks in Scouting fall into one of the following three categories:

- Member records
- finance
- insurance

### Discussion point one



Thinking about these three areas, what do you feel are the key administrative tasks that you need to complete in your role, or that you could be asked to support others to complete?

Make notes and write these down in the space provided below, then discuss your answers with another adult in Scouting.

If you talk to someone in the same or a similar role to your own, what similarities do you notice in the answers that you produce?

If you speak to someone in a different role to your own, what differences do you notice in their answers?

Once you have discussed this with another adult, take a look at the information on Administration in Scouting that can be found on Member Resources at [www.scouts.org.uk](http://www.scouts.org.uk)

Check your answers and explore some of the other administrative tasks that fit into these three areas.

## Information



In order to do carry these out these administrative tasks effectively, a range of information or data will need to be kept. This includes, but is not limited to:

**Member data** –personal details, contact information and relevant information about their involvement in Scouting (ie roles, attendance, progress towards badges, training and additional needs)

**financial information** –receipts, invoices and records of income and expenditure

**information for insurance purposes** –inventories of equipment owned and loaned out

There are also a number of ways this information can be stored, from using the online membership database, to paper and electronic based records. It doesn't really matter what method you use, so long as it's efficient, accurate and fit for purpose.

## Discussion point two



Think about your experience of administration in Scouting, at college, at work or in your personal life. Why do you think it is so important to maintain accurate records and accounts?

Can you think of any examples where records have not been accurate? What were the consequences?

Make notes and write these down in the space provided over the page.

You might find it useful to discuss your thoughts with someone in a similar role to you. When you have made a note of your thoughts, check Workbook Appendix 1 to see what others have said and compare this with your own ideas.

The rest of this workbook will look at how to carry out administrative tasks effectively and in line with relevant rules and legislation.

## Session 2

# Member records and data protection

### Discussion point three

Have a look at the questions below on Member record management. Choose a couple from either or both sections that are relevant to your role. Discuss these questions with other adults in a similar role to you or with your Training Adviser. Reflect on your approach to these administrative tasks and make a note of any ways you think you could carry them out more effectively.

#### Youth Member Records

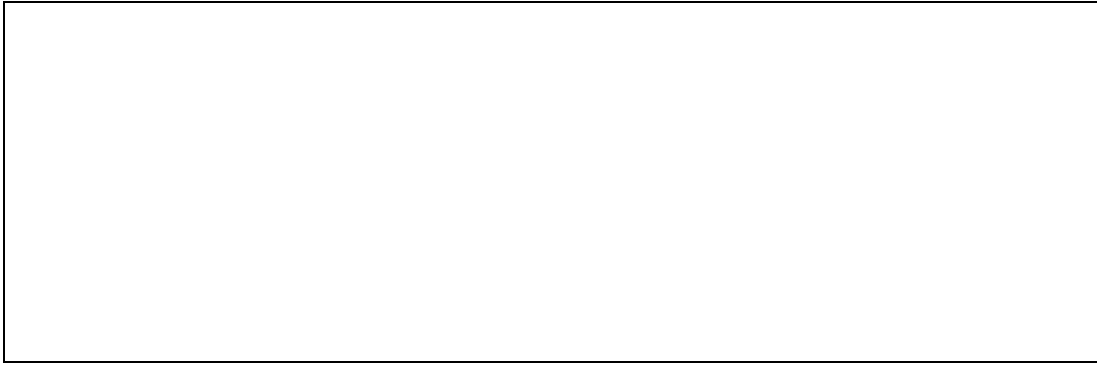
- Do you have joining lists and registers of interest? How do you manage them? What works well and what doesn't work so well?
- How do you maintain your youth records and ensure they are up to date?
- How do you manage attendance and record progress towards achieving badges and awards?
- Do you use the online membership database? What for?

#### Adult Member Records

- Do you manage enquiries from adults wishing to volunteer? How do you do this? What works well and what doesn't work so well?
- Do you know about the various adult application forms and who should complete them? What is your role in ensuring that that they are completed correctly?
- How do you maintain your adult records and ensure they are up to date?
- Do you use the online membership database? What for?

As part of your discussions, you may find that you are already carrying these tasks out in the most effective way. If this is the case, share your ideas and thoughts with other adults – you could help make their lives easier!

Make notes of your discussions and reflections and write these down in the space provided over the page.



Once you have done this, check Workbook Appendix 2 for more information on particular questions.

## Data protection

### Information



Whenever we talk about Member records, one of the terms that always comes up is data protection.

Anyone handling personal data, regardless of their role, should be aware of and abiding by the Data Protection Act. The Act controls the way that information is handled and helps to protect individuals' interests. It puts an obligation on organisations to manage the information that they hold on people in a proper way.

People often think that they know a lot about the Data Protection Act and it is regularly quoted. This can make people wary when answering questions on it. This next exercise is designed to outline the principles of the Data Protection Act. This will enable you to feel more confident when responding to queries on it and to ensure that you are doing things in line with it.

### Exercise one: Data protection quiz



Take a look at the questions below and see how many you can answer. It's OK if you are not sure of the answers – make as good a guess as you can!

1. There are eight data protection principles. The first two are included below. How many of the other six can you name or guess

1. Processed fairly and lawfully



2. Obtained for a specified and lawful purpose

3.

4.

5.

6.

7.

8.

2. Additional rules are in place for the handling of 'sensitive personal data'. Which of these is an example of sensitive personal data?

A. Race

B. Height

C. Academic qualification

3. How long can personal data be stored?

A. Five years

B. There is no time limit

C. Only as long as it is necessary

4. Which of the following does an organisation not have the automatic right to do under the Data Protection Act?

A. Store your personal data

B. Pass your personal data onto third parties

C. Grant you access to the personal data that they store on you

5. Photographs can be taken at Scouting events and used for appropriate purposes afterwards – true or false?

When you are comfortable with your answers, check them against those in Workbook Appendix 3.

### **Information**



More information about the Data Protection Act can be found on Member Resources at [www.scouts.org.uk](http://www.scouts.org.uk) or from the Information Commissioner's website:

[www.ico.gov.uk/for\\_organisations/data\\_protection/the\\_guide.aspx](http://www.ico.gov.uk/for_organisations/data_protection/the_guide.aspx)

If you handle adult application forms, you might want to look at information on storing and destroying forms from Member Resources at [www.scouts.org.uk](http://www.scouts.org.uk)

# Session 3

## Finance



### Information



Each Scout group, district and county in England, Wales and Northern Ireland is an independent charity\*, operating under the umbrella organisation of The Scout Association. They are all required to take responsibility for their own finances.

Finance is not just the responsibility of the Treasurer or the Executive Committee. The need to manage and keep track of money occurs at every level, from a County budget to a float for a Section.

\*In Scotland, each Scout Group, District and Region must be registered with the Office of the Scottish Charity Regulator to be recognised as a charity. Regardless of whether or not they are a registered charity, they are still required to take responsibility for their own finances.

### Exercise two



Take a look at the statements contained in the table over the page and decide whether you think they show good practice or bad practice. If you are unsure, you might find it helpful to discuss the statement with your Treasurer, a member of the Executive Committee or your Training Adviser. Use the box below the statements to make a note of any discussions you have with other adults in Scouting.



## Discussion point five



If you discussed the above statements with other adults you may have discovered other examples of best practice when it comes to financial record keeping and management. If you didn't, take the time to speak to someone in the same role as you and find out how they stay on top of financial records.

What records do they keep and how do they keep them organised? What do they find is important when it comes to keeping a clear record of what is happening financially?

Make notes of your discussions and write these down in the space provided below.

Once you have done this, check Workbook Appendix 5 to see what others have said.

## Information



POR Rules 3.48, 4.59 and 5.47 (if in Scotland, please refer to the Scottish variations of these) deal specifically with finance in the Scout Group, District and County. POR rules 3.50, 4.61 and 5.49 deal specifically with bank accounts. You may want to take a little time to look at these rules and familiarise yourself with them.

If you feel uncomfortable around figures or cannot make sense of financial information that you have been given, it is absolutely fine to ask for help from other adults or a suitable person from outside of Scouting. There is no need to be embarrassed if this is the case – numbers are not everyone's thing!

More information on financial administration can be found on Member Resources at [www.scouts.org.uk](http://www.scouts.org.uk).

# Session 4

## Insurance

### Information



Although insuring people, property and equipment is the responsibility of the Executive Committee at Group, District or County level, it is still important for everyone to have a general overview and understanding of insurance. This session will cover the basics that everyone needs to know. If you have any more specific questions, you may need to contact your Executive Committee, Unity (Scout Insurance Services) or your own insurance broker.

The Scout Association, through Unity (Scout Insurance Services), provides insurance to protect what is most important to Scouting: its Members.

There are three kinds of insurance arranged by Unity for The Scout Association. They are paid for out of the annual membership subscriptions paid by Groups, Districts and Counties. These are:

- public liability for people running Scout events – this provides protection for Members against claims made against them for loss, injury or damage incurred by others during Scouting activities
- personal accident and medical expenses – this provides benefits in the event of an injury incurred during a Scout activity
- trustee indemnity – this provides protection for Executive Committee Members against legal action being taken against them, on the provision that they have fulfilled the responsibilities of their roles and not taken undue risks.

In addition to this, you need to ensure that you have adequate cover for:

- Buildings owned or occupied by Scout Groups, Districts or Counties – including loss or damage caused by fire, break in, storm and vandals and cover when you hire your building out to others.
- Contents of your premises and equipment – including cover for loss or damage to items in transit, camping equipment in use within the UK and accidental damage cover.

### Exercise three



Take a look at the statements over the page and decide whether you think they are true or false. If you are unsure, you might find it useful to discuss the statements with a member of the Executive Committee or your Training Adviser. Use the box below the statements to make a note of any discussions you have with other adults in Scouting.

	True	False
<p><b>Statement one</b></p> <p>Public liability insurance provides cover for Managers, Leaders and others authorised to be in charge of or to assist with Scout activities, against claims made against them for loss, injury or damage incurred while in charge of or assisting with any authorised Scout activities.</p>		
<p><b>Statement two</b></p> <p>Non-members (and Occasional Helpers) are automatically covered under the Association's personal accident and medical expenses scheme.</p>		
<p><b>Statement three</b></p> <p>Personal possessions, such as mobile phones and laptops, are covered for damage or loss while doing Scouting activities.</p>		
<p><b>Statement four</b></p> <p>Motor insurance for transporting Scouts to and from events in your own vehicle is not covered by The Scouts Association's policies.</p>		
<p><b>Statement five</b></p> <p>Overseas cover, for when taking Scouts abroad, is automatically provided by The Scout Association's cover.</p>		
<p><b>Statement six</b></p> <p>The Scout Association's legal liability policy protects members who are organising local fireworks displays.</p>		

<p><b>Notes:</b></p>          
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When you are comfortable with your answers, check them against Workbook Appendix 6.

## Information



Hopefully this session has given you a better understanding of insurance and the different types of cover that are available. If you have any further questions, discuss them with another adult locally or a member of your Executive Committee.

Insurance: Where do I Start? summarises the cover provided by Unity (Scout Insurance Services) and the suggested steps that Members should go through when arranging cover.

There is support available to you in your role to reinforce and expand upon all of the information covered in this module. This includes:

- talking to your line manager, Assistant District, County Commissioners or others in a similar role in your Group, District or County
- talking to people doing the same or similar roles in other Groups, Districts or Counties to share best practice or solve problems
- making use of the information available in the Member Resources areas of [www.scouts.org.uk](http://www.scouts.org.uk)
- contacting the Scout Information Centre on 0845 300 1818 or at [info.centre@scouts.org.uk](mailto:info.centre@scouts.org.uk)

Other websites that you might find useful to visit are:

Information Commissioner's Office [www.ico.org.uk](http://www.ico.org.uk)

Unity (Scout Insurance Services) [www.scoutinsurance.co.uk](http://www.scoutinsurance.co.uk)

You have now completed this workbook. The next step is to validate your learning with your Training Adviser. Look back to the beginning of the document for a reminder of the validation criteria.

Thank you!