

# Administration (11) Workbook

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**Note:** In some parts of the UK, Scout Counties are known as Areas or Islands – and 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 of Policy, Organisation & Rules.

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# Introduction

## 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 Administration: Module 11. 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 General Data Protection Regulations (GDPR), 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 discuss in more detail with other volunteer colleagues, your line manager or the person validating your learning to consider or explore further once you have completed the exercise.

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 [www.scouts.org.uk](http://www.scouts.org.uk).

## 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 one of the following:

1. accurate and appropriate maintenance of administrative and financial records relevant to your role, in accordance with Policy, Organisation & Rules, the General Data Protection Regulations (GDPR) 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 an 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, compliant with data protection laws and is 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 below.

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 an online membership database? What for? Does your Executive Committee know?

#### 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 'Compass'? What for?

#### Other Records

- How do you manage enquiries/complaints received by your group/section? Do you know who is responsible for dealing with these?
- How long should you store an enquiry received from a parent/carer?
- Do you know where to send/store records if you are leaving the movement or moving on to a different role?
- Can you think of examples of records you should store with your Executive Committee?

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 below.

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 and the General Data Protection Regulations (GDPR). The GDPR and Data Protection 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 and GDPR. 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!

- There are six data protection principles in the GDPR. The first two are included below. How many of the other six can you name or guess?

1.	Processed lawfully, fairly and in a transparent manner in relation to individuals
2.	Collected for specified, explicit and legitimate purposes and not further processed in a manner that is incompatible with those purposes
3.	
4.	
5.	
6.	

- Additional rules are in place for the handling of 'sensitive personal data'. Which of these is an example of sensitive personal data? (Choose as many as you believe are correct)

- a. Race
- b. Height
- c. Academic qualification
- d. Religious beliefs or other beliefs of a similar nature

  
  
  


- 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 GDPR?

- a. Store your personal data for the purposes it was obtained
- b. Pass your personal data onto third parties
- c. Grant you access to the personal data that they store on you
- d. Religious beliefs or other beliefs of a similar nature

  
  
  


5. Photographs can be taken at Scouting events and used for the purposes people consented to – true or false?

True

False

  


6. You receive the following email from a parent:

‘Please can you send me all of the personal information you hold in relation to my 9 year-old Son who attends your Cub Pack.’

What steps should you take next?

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

## Information



More information about the Data Protection Act and the GDPR can be found at [www.scouts.org.uk/volunteers/running-things-locally/data-protection-and-record-management](http://www.scouts.org.uk/volunteers/running-things-locally/data-protection-and-record-management) 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 the GDPR toolkit at [www.scouts.org.uk/gdpr](http://www.scouts.org.uk/gdpr)

# 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 cash 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 to make a note of any discussions you have with other adults in Scouting.

## Statement one

The 6th Dinton Scout Group is planning a camp for all three sections over the summer. They have sent each parent a letter with information about the camp and have asked for deposits of £15 to be paid to secure a place for their child. They have asked for cheques or internet transfers to be made payable to the relevant Leader for the section.

Good practice

Bad practice

## Statement two

Dinton Scout District have just started using internet banking after a review of their previous banking arrangements concluded that it was taking too long to make payments and withdrawals.

The Treasurer is the sole holder of the payment cards and authorisation details for the online account. The District Executive Committee has asked the Treasurer to ensure that a paper signature from another member of the Committee is collected before a transaction can be made.

Good practice

Bad practice

## Statement three

The 23rd Dinton Scout Group uses a budget and regular management accounts during each financial year, to help them control their expenditure. They also use budgeting to help them work out what income they need to raise, which means that they can plan their fundraising activities accordingly.

Good practice

Bad practice

## Statement four

Dinton Scout District regularly receives expense claims from its members for expenditure incurred from events and activities that they have been involved with. The District Treasurer regularly receives receipts from members with a request for prompt payment, as and when they see them. The Treasurer often has no prior knowledge of what these receipts are for.

Good practice

Bad practice

**Notes:**

When you are comfortable with your answers, check them against the answers and explanations in Workbook Appendix 4.

## 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. POR can be found on [www.scouts.org.uk/por](http://www.scouts.org.uk/por)

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.

## Statement one

Public liability insurance provides cover for Managers, Leaders and others authorised to be in charge of, or to assist with, Scout activities. It covers claims made against them for loss, injury or damage incurred while in charge of, or assisting with, any authorised Scout activities.

True

False

## Statement two

Non-members (and Occasional Helpers where used) are automatically covered under the Scouts' personal accident and medical expenses scheme.

True

False

## Statement three

Personal possessions, such as mobile phones and laptops, are covered for damage or loss while doing Scouting activities.

True

False

## Statement four

Motor insurance for transporting Scouts to and from events in your own vehicle is not covered by the Scouts' policies.

True

False

## Statement five

Overseas cover, for when taking Scouts abroad, is automatically provided by the Scouts' cover.

True

False

## Statement six

The Scouts' legal liability policy protects members who are organising local fireworks displays.

True

False

Notes:

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 0345 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!