

**Section 13**  
**Setting up an Admin System**

### **13.1 Setting up an Office: An Introduction**

As a community or voluntary group, there will possibly come a time when your growth and development means that you need to find a more permanent base – to locate premises and then set up an office.

As your resources will be stretched, you will need to ensure that you seek “best value” at all times.

It is likely that you will have to cut corners and ‘make do’ in some respects – but with imagination and being as resourceful as possible, you will surprise yourself on how far you can go with so little.

For example, businesses regularly update and change their computer systems and office furniture. Their existing computers and furniture are probably perfectly good, but for tax reasons and depreciation reasons, they may decide to change this equipment every four to five years.

Put a request in the local paper for donations of office equipment and furniture. Ask around – get your friends and family to ask around too.

Make a wish list of all the equipment and furniture you think you will need and list this in your local press appeal.

#### **Selecting Office Space**

It is important for your organisation to have a well-laid out office that is pleasant to working and easily used. People will be more productive if they are happy with their surroundings.

Ideally the office should be planned out before you open to the public. The following questions will help you plan your office:

## **13.2 Systems and Procedures**

A number of formal and informal systems help an office to run smoothly. The main procedures needed in an office include:

- Services user records
- Filing
- Accounts and petty cash
- Enquiry handling and recording
- Incoming and outgoing mail
- Stock control
- Typing, word-processing, and proofing

### **Office equipment and furniture**

If you can afford it, equipment and furniture are an important investment for your organisation. Care must be taken to select the right things. This may include desks, chairs, filing cabinets, telephones and faxes and copiers.

### **Supplies**

An office will need a large amount of supplies such as paper, headed notepaper, envelopes, paperclips, staples, files, etc. It pays to shop around for these items and often bulk buying can work out cheaper.

Supplies should be safely stored and a record of all stocks ordered and used should be kept. This will help you with re-ordering and to control wastage.

### **Legal Factors**

The main points covered by Acts and Regulations concern lighting, safety, noise and ventilation.

- Office lighting must be adequate for work that is being carried out
- The Acts and Regulations also detail the requirements for first aid provision, including that a first aid box must be available
- Passageways should be kept clear of obstructions and waste materials should always be cleared away
- Noisy work conditions should also be prevented
- Fresh air is essential for good working conditions but draughts should be avoided
- An employer also has a general duty to look after the health and safety of employees (Ref. Employers Liability Act, 1969). To comply, fire regulations, fire escapes, fire fighting equipment and fire alarms must be in place. Fire drills should be practised regularly
- If an employer employs more than five people a safety policy must be drawn up and shown to all employees. It should cover areas such as conduct, procedures and special dangers to be avoided.

## **13.3 Setting up a Filing System**

### **Introduction**

Establishing a filing system is an important consideration in running your organisation efficiently. It is important to keep your information in order and to be able to find what you are looking for quickly and easily. Certain legal documents must be kept safe and accessible for legal purposes. Often the management of paperwork plays a fundamental role in attaining such things as quality standards – and even funding – from certain bodies.

### **Rationale – Why File?**

Filing will bring order and structure to your systems. It is vital for storing and systematically sorting documentation and records.

You will need to keep good records and have all your documentation in place. This will be essential when seeking grants from potential funders and accessing money from other sources.

### **Planning the System**

No two filing systems will be alike – they will be as individual as your organisation is. You need to define exactly what you want your paperwork in good order, or you may want to be able to find information quickly.

The following questions will help you decide how to set up your filing system: Which information really needs to be kept?

## 13.4 Classification Systems

There are a number of ways for you to organise filing systems; you can combine any of these to suit your needs.

1. Alphabetical: each file is given a title and then arranged in a, b, c order.
2. Subject: items that contain the same sort of information are kept together in the same file. A useful way is to group them according to the main sections of your business plan.
3. Numerical: A number of standard file numbering systems exist. Use one that is simple to use and that suits your organisation's way of working. The system will need to be updated continually; otherwise information may become difficult to find.
4. Chronological: The files are arranged in date order with the most recent at the front. This is also used within a file.
5. Activity Rating: The most common files are stored in the most easy to reach place in your filing cabinet. If more than one person is using the files, this can become disordered quite quickly.
6. Colour: Files can be colour coded so that all files belonging to a particular area are stored together.

### Typical areas

Areas in which to organise your files may include the following:

1. Planning Files: These files will be related to your planning process, especially your business plan, and will include files covering your annual report, user base information etc.
2. Legal Documents: This area might include such documents as fire certificates, insurance details, articles of association, management committee minutes etc.
3. Correspondence: It can be useful to have a separate file for correspondence arranged in alphabetical order.
4. Funder Files: It can be useful to have a separate file for each of your funders which contains their correspondence, records of income and expenditure, the funding application and any other documents relating to the funding body.
5. Operational: This area will cover the various aspects of your organisation's procedures.
6. Personnel: Employee files are confidential and include information about performance and evidence that you as an employer have compiled with the law. Contents will include their application form, interview notes, CV, references and any other documents relating to the employee.
7. Accounts: Information on Wages/salary, invoices, bills, expenses etc.

### Management and Administration

The procedure for using the filing system should be written down so that everyone can see it. It should also be reviewed from time to time to see if it could be improved. Appoint one person to be responsible for keeping the system in order.

Different types of files will need to be kept for different lengths of time. Personnel files should be kept for at least seven years after the person has left – they may be required for tax or references. Files on tax records, invoices etc. should also be kept for seven years. Confidential files should be kept in a separate cabinet that is clearly

marked as confidential. You might want to have locking filing cabinets with designated staff as key holders. The files should be marked confidential and never left open on desks or in open areas.

### **Electronic Filing**

It is also essential to have a clear structure to your electronic filing. If you have more than one computer, will they be networked? This is preferable as staff can share information and documentation. A "shared" drive should be set up where documents and records which need to be accessed by all staff can be stored.

Individual staff should set up their own electronic filing systems, and keep these updated and regularly sorted out. Think of it in the same way as a normal filing system, with folders and files within folders.

## **13.5 Personal Time Management**

### **Introduction**

Ever said this? “I was busy all day, but when I walked out the door, I didn’t really remember what I did or feel like I accomplished anything”.

The absence of Personal Time Management is characterised by last minute rushes to meet deadlines, meetings which are either double booked or achieve nothing, days which seem somehow to slip unproductively by or crises which loom unexpectedly from nowhere. This sort of environment leads to inordinate stress and poor performance.

Poor time management is often a symptom of over-confidence: techniques, which used to work with small projects and workloads, are simply reused with large ones.

If you find yourself in a high-stress, high-activity, and low sense of accomplishment position Time Management techniques are available to help keep you on track. The essence of most techniques is simply teaching you to focus on the important things and to allow the less critical things to take a back seat.

The demands, the problems and the payoffs for increased performance are all larger as your responsibility grows; you must learn to apply proper techniques or be bettered by those who do.

### **Current Practice**

Start by keeping a log of how you spend your time in a week. Create a simple table, photocopy half a dozen copies and carry it around with you filling in a row every time you change activity. After one week, allocate time to review the log.

### **Waste Disposal**

The first step is a critical appraisal of how you spend your time and to question some of your habits. In your time log identify periods of time you might have used better.

There are various types of waste. The most common are social – telephone calls, friends dropping in, surfing the Internet, conversations around the coffee machine. Your time log will show you if this is a problem and you might wish to do something about it before someone else does.

Another common source of waste stems from delaying work that is unpleasant by finding distractions that are less important or unproductive.

In your time log, look at each work activity and decide objectively how much time spent was worth to you and compare that with the time you actually spent on it.

This type of activity will be reduced naturally by managing your own time since you will not allocate time to the trivial. If you have a task to do, decide beforehand how long it will take and work to that deadline – then move on to the next task.

### **Delegation**

Learning how to delegate is a skill in itself. It is tempting to do tasks yourself if you can do them more quickly, or that by the time you explain what you want done you

could have done it yourself! But this is not necessarily productive. The more you delegate, the more you learn to do it effectively.

### **External Appointments**

Keep an appointment diary and be ruthless and eliminate the unnecessary. Attempt to keep the majority of committee meetings to a maximum of one hour. The next stage is to add to your diary lists of other personal activity, which will enhance your use of available time. The single most important type of activity is that which will save you time. Allocate time to save time.

### **Scheduling Problems**

Deadlines!!! Do you leave things too late? Time manage by doing the following:

- Check the task – ensure you agree on what's expected.
- Break the task down into small manageable chunks.
- Schedule reviews of your progress

### **Long Term Objectives**

They are distant and for that reason it is very easy to lose sight of them. A balance must be struck. Try to leave one hour per week to plan ahead.

There are four ways to deal with impossible deadlines:

- Get the deadline extended
- Scream for more resources
- Keep your everyone informed of any problems

Of course, if a crisis arrives it must take priority.

### **In Summary**

Personal Time Management is a set of tools that allow you to:

- Eliminate wastage
- Be prepared for meetings
- Refuse excessive workloads
- Monitor progress
- Allocate resources (time) appropriate to a task's importance
- Ensure that long term projects are not neglected
- Plan each day efficiently
- Plan each week effectively.