

Module 7

Managing NGOs

**Examples of useful records and
templates to keep in your
organization**

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Generic Document Template

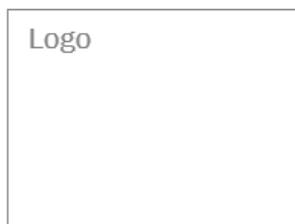
Having templates can help save a lot of time when managing an NGO on a daily basis since there's no need to prepare documents from scratch every time. Also, it will show partners, sponsors, governmental agencies and other entities a standardized and professional image for the NGO.

A generic document template can be helpful for different types of situations such as formal invitations, calls, proposals or declarations. There are several elements related to the NGO that should be included in the document to identify the NGO like the logo, name, address and contacts right at the top of the page. As an option, a small description of the NGO could also be included as a way to present the NGO in every document sent to other entities. Some may already know the NGO and the work they develop but maybe some won't, mainly if this document will serve as a first contact.

The document should explicitly say what it is about (declaration/proposal/invitation/etc.) and the text should explain clearly what's the purpose of the contact. The document should be signed and stamp by the responsible person for the NGO or whoever has the authority to do so.

To facilitate the document identification and organization in the NGO records, a personalized reference system could be put into place. For example: 2018_001; 2018_002; etc. This will allow the NGO to keep record of all the documents and save them all properly. In case someone needs to access one specific document it could also be helpful to keep a data base for these documents as seen in this example:

ID	Date	Person responsible	Entity/Recipient	Subject
2018_001	10/01/2018	Helen	Leave No Trace	Invitation for a conference
2018_002	27/02/2018	Peter	Association of Bio Living	Proposal to be partner in a project



NGO name

Address

Contact number

Email

VAT Number *(if necessary)*

Entity mission statement / activity summary.

INVITATION / PROPOSAL / CALL / DECLARATIO

N (choose according to
the purpose of the
document)

Example:

Associação BioLiving is an award-winning non-profit NGO which motto is "Nature and Education for All". Our objectives are, among others, to Promote sustainability; Encourage environmental citizenship and public participation in the defence of natural values; Boosting the social economy; Promote inclusion, peace and solidarity, using education, natural resources and the protection of nature as their trigger; Provide monitoring and scientific consultancy in the fields of forest, biodiversity and environmental education; but essentially to demonstrate that nature belongs to everyone and to all.

Our direct contact

Name

Contact number

Email

Date:

Our reference: (document number) ex_2018_001

Subject:

Dear _____

(...)

For further information, do not hesitate to contact us to the following email: xxxx@xxxx

Sincerely,

(signature and NGO stamp)

On behalf of (NGO name),

Name

President

Request for Quotation

If the NGO provides services to other entities or individuals as part of their funding strategy, it will need to answer to requests for quotations from them. In these quotation documents it's very important to be very specific about the services that are included in the price and what is not included to avoid mistakes and misunderstandings. If you present different proposals in the same quotation document make sure to identify correctly each proposal (ex: proposal 1, proposal 2, etc.), mention what is included and not included in each proposal and each price.

The document should be signed and stamped by the responsible person in the organization.

Similarly, to the generic document, it's recommended to keep a personalized reference system that would facilitate the document identification and organization in the NGO records. For example: 2019_001; 2019_002; etc. This will allow the NGO to keep record of all the quotation requests and save them all properly. In case someone needs to access one specific quotation it could also be helpful to keep a data base for these documents as seen in this example:

ID	Date	Responsible person	Entity/Recipient	Subject
2019_001	12/04/2019	Sofia	BioLiving Association	Delivery of a school activity
2019_002	23/07/2019	John	Leave No Trace	Organising a whole day field trip for a group of 20 people

Meeting's Minutes

In any entity and NGO's are no exception it's important to keep records of the team meetings. The level of detail in these minutes will depend on the meeting itself. If it's just a small team meeting to discuss a specific topic maybe there's not even a need for a minute. But in Board meetings or extended meetings where the topics discussed may be a bit more sensible or the decisions made may be important for the functioning of the organization, the information should be written down. Also, in some countries (Portugal for instance) NGOs must legally have a certain number of Board meetings and there must be proof of what was discussed – with the minutes – and it is also needed an attendance sheet.

First of all, there must be a meeting agenda so that everyone is aware of what will be discussed. One person in that meeting is responsible to write down in each topic of the agenda the following: what the topic is about, solutions that were proposed, voting process (if there is one), what was decided among everyone, who will do each task, deadlines and other information that may be helpful. This record will allow everyone in the meeting to check their tasks and deadlines any time or check a decision that was made for a certain topic.

If the legal framework for NGO demands it, the minutes should be approved and signed by all the people on the Board that were present in the meeting (for Board meetings).

Be sure to know what type of records the legal framework for your type of organization demands you to have.

Minute number

On the (...) day of (...) of the year (...), at (*time*), the Board meeting was held in (*place*). The meeting was chaired by (*name and title*) and the following members (*or guests*) were present (*name and title of all people present*), following this agenda: 1); 2); 3).....; (*topics to be addressed/discussed*)

(*In case there is an introduction by one of the members*) Before starting the meeting the president (*or another member*) mentioned/congratulated/announced/etc (*explain what*)

Example:

On the twenty-ninth day of November of the year two thousand and seventeen, the first meeting of the NGEurope project started at CESEFOR headquarters, following the agreed agenda. The meeting was chaired by Dr. Milene Matos from the Municipality of Lousada (Portugal) and hosted by Rodrigo Gomez from CESEFOR (Spain). The project staff members that were present signed an attendance list for each day.

1). (*subject in discussion*) was presented and after analysis and deliberation (specify votes against, in favour and abstaining) the majority decided to

2). (*subject in discussion*) was discussed and the following solutions were suggested: (specify all suggestions)

3). (...)

Example:

IO4 - Online platform and observatory

This IO is led by CESEFOR. Rodrigo showed some examples of websites and platforms developed by CESEFOR.

After discussing this IO's objectives and main functions, partners agreed on the following chronogram:

- Until January 5th 2018, CESEFOR will propose a draft structure for the website.
- Partners will give feedback until January 31st.
- The Platform must be functional and ready for final discussion/approval in the 2nd partners meeting.

With no more topics in the agenda the meeting was closed at (*time*).

These minutes were read and approved on the (*date*).

Other useful templates and records

Other useful records and templates to keep:

- **Inventory** – if in your organization you already have a lot of property maybe it's a good idea to keep a record of your belongings making sure you know what you have, where it is located and what you still need to buy. Keep this record updated.
- **Car log** – if your organization owns a car it's also good practice to keep a car log where every driver writes down the route they did and why, the number of km they drove, the date and then sign. This will allow to track the movements of the car and guarantee that it is only used in service of the organization. Also, if anything happens to the car it is possible to track the responsible person.
- **Reimbursement sheets** (*if allowed by the legal framework of your organization*) – Sometimes for logistics reasons it is easier for someone within the organization to buy some materials the NGO needs and pays with their own money. If that happens it is important to keep a record of who bought what, when and why for reimbursement purposes.
- **Mailing Lists** – keep your mailing list always updated with all the contacts on your network. If you don't register these contacts and keep them organized in an easy to access platform it will be more difficult to look for them when you need.
- **Members List** – keep the record of all your members' information updated and more importantly if they pay their membership fee or not. In many cases, not keeping the membership fee up to date means that those people won't be able to be an active voice in the organization (for instance won't be able to vote for the renovation of the Board members).
- **Templates for emails, power point presentations or evaluation forms** – keeping these kinds of templates will make daily management much easier and much less time consuming. Also, it guarantees standardized graphics and language. Make sure you adapt the language you use to the audience you are referring to.