



Humanism PMG

Initiative Leader Guidance

Version 20080221

1. Introduction

This guide:

- defines the role and responsibilities of an Initiative Leader
- explains how initiatives are to be managed by the Initiative Leader

Throughout the rest of this document the following terms are defined:

- “Initiative” means any promotion and/or marketing initiative
- “Leader” means the Initiative Leader for one or more Initiatives

2. Leader Roles and Responsibilities

The role of the Leader is to promote, co-ordinate and deliver the initiative. They are the single focal point for the initiative and responsible for ensuring the initiative is completed.

2.1 Summary of Activities

Key activities for the leader are:

1. Raise awareness of the initiative with group members and the wider humanist network
2. Consolidate feedback on the initiative from other group members
3. Create and update the initiative output (e.g. leaflet, survey, etc) based on initial and ongoing feedback
4. Engage with suppliers (e.g. printing companies, graphic designers, etc) to assist in the production of the initiative output
5. Manage the financials of the initiative – preparing estimates, requesting and receiving payments from volunteers, making payments to suppliers
6. Any other activities that are required to promote, co-ordinate and deliver the initiative

2.2 How do you become a Leader?

If you have a particular initiative that you want to make happen, then you need to do two things:

1. Find another group member who is willing to support you on the initiative
2. Inform the moderators that you wish to lead the initiative and the name of the person who will be providing the support

The reason for this approach is that it is important to have at least one other person who buys in to your initiative, and secondly it is important to have someone who can provide support should it be needed.

3. How Are Initiatives Managed?

Each initiative will be developed and managed within the Yahoo Group. As an initiative develops it is better to keep this within a private community than on the internet for all to see.

For the purpose of this section, an example initiative called “Leaflet Drop” will be used to demonstrate how initiatives are managed.

3.1 Starting an Initiative

To start an Initiative the following actions need to be taken:.

- Investigate the likely costs per person or per quantity of output, including any design, production and distribution costs (e.g. postage & packing). If the costs are not 100% clear then add a little bit of contingency on....it is better to set an expectation of £5 and then request £4.50 than request £5.50.
- Add the Initiative to the Initiatives List database on the Yahoo Group. This is a simple register so that members can see all current and closed initiatives, and some basic details to aid in their decision to get involved or not
- Create a message topic called “Initiative - Leaflet Drop” on the Yahoo Group. All comments, feedback and discussion on the initiative should be conducted under this topic.
- Create a folder in the “Initiatives” folder in the files section of the Yahoo Group called “Initiative – Leaflet Drop”. All files related to the initiative can then be stored within this folder. Sub folders can be used within the folder to separate files appropriately.
- Request a moderator to create a poll on the Yahoo Group where the question is “Volunteer for the Leaflet Drop Initiative?” The responses allowed are “Yes”, “No” and “Maybe”. This is used for volunteers to put their name forward as a volunteer for initiatives. All the time the initiative is open, a volunteer can change their vote – so it is possible for someone to say no and then change their position to yes at a later point.

Note: Before the poll is created the moderator will request an “Approval in Principle” from the British Humanist Association.

Once these actions are completed group members will be able to see documents relating to the initiative, discuss the initiative, and volunteer to get involved. However, it is now not just a case of sitting back and waiting for it to happen!

3.2 Progressing an Initiative

To progress an initiative it is necessary to:

- Check to see what already exists that can be re-used either directly or with modifications. Look at previous initiatives and raise the question if necessary under the topic of your initiative.

- Create a first draft of the output from the initiative (e.g. leaflet, survey, etc) to get the ball rolling. Any discussions/ideas leading up to starting the initiative should help to formalise a good starting point.
- Respond to people's comments and input and consolidate these so that each subsequent version of the output you create is an improvement on the last, and improves consensus amongst the group and especially those who have already volunteered.
- Remember that as the leader you want to engage and encourage as many volunteers to sign up as possible, so you need to 'go with the flow' and not be dogmatic if you don't agree with the majority of the group on particular aspects of the output, such as the wording. Having it your way with no volunteers signed up will not make your initiative a success.
- Encourage people to sign up or find out why people have not signed up and see if their reasons can be addressed.
- Keep volunteers and the group up to-date with the target closing date of the initiative....i.e. the date at which you will finalise volunteer numbers and prepare to carry out the initiative – e.g. printing and delivering leaflets.
- Keep a record of volunteers and the number of outputs (e.g. leaflets) they want. This could be kept in a spreadsheet in the files section under your particular initiative.

3.3 Completing and Closing an Initiative

To complete and close an initiative the following is necessary:

- Provide current volunteers with details on the likely financial costs and the likely final output (e.g. final leaflet), and give them an opportunity to change their volunteering status.
- After a reasonable time from the previous action request a moderator to close the Poll (the poll cannot be re-opened, so only request it to be closed if you are sure you no-longer want people to be able to volunteer or change their volunteering status).
- Request final approval of the output, quantities, delivery details and payment from each volunteer.
- Engage with any suppliers to produce the output once payment received
- Deliver the output to the volunteers, confirming receipt is ok.
- Ensure the final output is captured in the Files section under your initiative, so that it can be referenced and re-used in the future.

Note: Before the poll is closed the moderator will request "Final Approval" from the British Humanist Association, based on the finalised output of the initiative.

3.4 Post Initiative Activities

In the interest of understanding how successful the initiative has been it is useful to follow up with some of the volunteers to see how the initiative has gone from their perspective in terms of delivering the output.

Have there been any lessons to learn that will help future initiatives that you can share with the group?