Administration covers all the systems and processes that work within your organisation to ensure things run smoothly. They ensure you meet all your reporting requirements and legal obligations.

Systems that are well thought out, documented and regularly reviewed, provide the following benefits:

Tasks are completed correctly and in a consistent way (the same each time):

- Records are maintained and accurate.
- Reporting to funders, the board and government agencies is on time and accurate.

- Training new staff is a straightforward process.
- Time is saved.

It is a good idea to document the systems for all aspects of your organisation. For example; Governance, Finance, People, Communication, Health and Safety and activities specific to your organisation.

Documented systems do not need to be complicated, or cover every minute detail. They can be documented by using text, diagrams or pictures. It is important that the systems are accurate and kept up to date, with regular (annual) reviews to determine effectiveness and accuracy to reflect any changes since the last review.

It is important that your systems reflect your organisation. You can use "borrowed" systems as a starting point, but must ensure they are customised to your organisation. They must have meaning for the staff to use them.

What should we document?

Document all the processes that are required by legislation, occur regularly and your organisation requires to be done a particular way.

Any process that must occur to keep your organisation operational e.g payments, HR, IT use etc

How do we get started?

The documentation of all your processes and systems will take time. It is recommended that you plan and prioritise the steps you will take. Sometimes the hardest part is taking the first step and it can feel like a very daunting task.

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To get started you can:

1. **List the basic processes involved in delivery of your core service/product.** For example:
   a. Customer phone call to make an appointment.
   b. Client meeting occurs.
   c. Billing process (to client or to agency).
   d. Payment received.

2. **List all the systems and standards which contribute to each.** For example customer phone call:
   a. Customer database.
   b. Customer service standards.
   c. Telephone systems.
   d. Booking system.
   e. Follow up/client feedback.

3. **Consider all legal/compliance obligations:**
   a. Client confidentiality/privacy.
   b. Trust deed or Society rules.
   c. Relevant legislation.
   d. Contractual requirements.

Determine a format for your documented system in terms of page layout and table of contents. Don't worry if this is not clear, as you begin to write things down it will fall into place. You may need to adjust your format and table of contents as you become more aware about what you need to include in the documented system.

Keeping things up to date

In addition to documenting your systems for administering all the functions of your organisation, you need to be diligent in keeping things up to date. A back log of administration functions causes bottle necks, results in incomplete information and late reporting and you may not be aware of problems until it is too late. To stay up to date there are a few things you need to do:

- Have a good filing system for both paper and electronic files
- Keep filing up to date
- Complete paperwork as activities are completed
- Maintain databases up to date on a timely basis
- Follow a system to manage your time (to-do lists, Outlook Task Manager, CRM systems or similar)
- Have a calendar of key reporting dates, compliance dates etc. and plan in advance to complete the task on time.

Technology

Technology can help you to maintain your administration functions. ICT systems that function well and are up to date are an important productivity tool. There are many cloud based systems that offer cost effective, reliable solutions for many organisational activities. For Not-For-Profits, these services can be very cheap or free if you register with Techsoup. It is worth seeking good advice from information communication technology specialists about what will work best for your organisation.

MORE INFO

CommunityNet Aotearoa	community.net.nz
NZ Association Resource Centre Trust	associations.org.nz
Techsoup	techsoup.net.nz

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