

## VOLUME THREE – BEING AN EFFECTIVE OFFICER IN A CLUB OR SOCIETY

### SESSION 9 Managing a budget

#### Skills Covered

- Assertiveness
- Self awareness

#### Aim of the Session

This exercise is aimed at clubs and society treasurers. It should encourage them to think about their responsibilities, recognise the penalties imposed on clubs or societies which spend over their allocated budget and enable them to practice saying no.

#### Learning objectives

By the end of the session you will be able to:

- identify some of the skills necessary to be an effective club and societies treasurer
- state the benefits of good budgeting
- explain what is meant by assertive communication
- practice saying “No”.

#### Method

The exercise will involve a short introduction in plenary, a line up game, a brainstorm and then work in buzz groups. This is debrief and followed by a brainstorm, a trainer talk, some pairs work which is debriefed and a brief talk at the end. It is **B** rated.

#### Resources required

- One trainer per 16 participants
- Flipchart & pens
- OHP (if slides have been produced)
- 8 biros and blank pieces of A4 paper

#### Suggested timings

- |  |                       |
|--|-----------------------|
| • Introduction and explanation of exercise | 5 mins                |
| • Line up games                            | 5 mins                |
| • Brainstorm                               | 5 mins                |
| • Buzz groups                              | 10 mins               |
| • Debrief                                  | 10 mins               |
| • Brainstorm                               | 5 mins                |
| • Trainer talk                             | 10-15 mins            |
| • Pairs work/role play                     | 10 mins               |
| • Debrief                                  | 10-15 mins            |
| • Trainer talk (or handouts)               | 5 mins                |
| • Summary                                  | 5 mins                |
| • <b>TOTAL RUNNING TIME</b>                | <b>1 hour 25 mins</b> |

#### Running the session

- 1 Start the session by outlining the aims/objectives and talking through the way the session will run, ie the methods you will use and what skills you will be developing.
- 2 Tell the group you would like to learn a little about the budgets they are dealing with before you start. Ask them to line up in a spacious area of the room. Once they have done so, tell them you would like

them to re-arrange themselves in alphabetical order of their first name. Indicate which end of the line you want to be the 'A' (eg for Andrew) end.

Once they have done so, ask them to call out their first name and the club or society they are from.

Now tell them you would like every other participant to communicate non-verbally only for the next line up (ie half of the group will use hand signals) and indicate which are to remain silent. Now ask them to line up in order of the size of their club or society budget. Indicate that what was the 'A' end is not the smallest budget.

Once they have done so, ask them to call out the size of their budget.

Tell the group you would like them to do one last line up and that this time you would like those that were silent last time to be the talkers while the others remain silent. Now ask them to line up in order of personal money in the bank/debts and indicate that the 'A' end is now the money in the bank end, the other is the highest overdraft.

Once they have done so, ask a couple of (willing!) people at the highest debt end to tell the group roughly the size of their debts.

Try and inject a bit of humour at this point, if appropriate.

3 Thank the group and ask them to return to their seats.

4 Turn to the flipchart and run a brainstorm on the skills and attributes required of a good treasurer.

The list should be fairly long, and may include:

- Assertiveness
- Communication skills
- Financial management skills/budgeting skills
- Numeracy
- Organisational skills
- An eye for what is realistic in costings
- Fund-raising skills (some may disagree)

If they do not suggest assertiveness ask the group *"How about assertiveness?* If someone says yes, ask them why they think it should be included. (Essentially the answer is because treasurers occasionally have to say *"no"* to suggestions as to how money should be spent. Ideally the group should identify this.)

Once they have finished, debrief the brainstorm by saying:

*"You have come up with a good list. While you may not have all these skills and attributes yet, the year ahead will encourage the development of most of these. This should help you control the growth of your debts and provide experience which will benefit you after you leave college. Many of the skills you have identified are key transferable skills – ie they can be applied in many different situations. Even if your future job has little to do with money and budgets an employer will value your experience."*

Remind the group that they will be looking at assertiveness later. Stick the flipchart paper to the wall.

5 Write "2", "4" and "8" on the flipchart, and give half of the group a biro and a piece of A4 paper.

Tell the group that they will be working in groups of two, four and finally eight (or whatever half the total number of participants is). In their groups you would like them to generate a list of reasons why they should care about the money the students' union gives clubs and societies. Now write "3", "5" and "10" next to the "2", "4" and "8" on the flipchart and tell the group that they need to come up with three, five and finally ten reasons in their groups. They are not allowed repetitions and should seek to join other groups as soon as they are finished.

- 6 While the exercise is underway move quickly between the groups to check all is well, to encourage them and to keep them working quickly.
- 7 As soon as one of the large groups generates ten reasons to congratulate them and ask the other groups(s) to stop and for all to re-form in a semi-circle.

### **Debrief**

Ask the group with ten reasons to read them out to you while you put abbreviated versions on the flipchart. Some may be funny or facetious, but add these anyway. Then ask the others if they had other reasons and add these on to the chart.

At the end of the discussion highlight the following points:

- clubs and societies which are careful with the monies allocated to them and budget effectively are more likely to have their budgets increased next year;
- any deficits run up may be carried over to the next year (check if this applies in your union);
- students' union funds are obviously limited and there are a great many good causes they support. Some of these are bound by their nature to receive a subsidy (eg a welfare advisor). Clubs and societies can generate their own incomes and reduce their costs (through sponsorship for example). Failure to stay within budgets could therefore lead to higher prices in the bar and/or a reduction in service elsewhere.

Remove the flipchart paper and stick to a nearby wall.

- 8 Write the word '*assertive*' on the flipchart and ask the group to shout out what comes to mind when they see the word. Write their suggestions up below this.

### **Trainer talk**

- 9 Read through and use the key information to carry out the short talk on assertiveness:

#### **What is assertion?**

The word assert comes from the Latin verb "*assere*", which means "*to join to oneself*".

Finding out about yourself, your thoughts, feelings and behaviour is a central concept within assertion. This then enables you to identify what you truly want, rather than continue with behaviour you have learnt from others, which may be unsatisfactory to you.

However, assertiveness is not simply about self. Assertion allows us to look at those around us, and teaches us how to make our thoughts, feelings and behaviour clear; whilst respecting others, and respecting their rights to do the same. Assertion is therefore not about getting your own way, but is about being clear about what you want, listening to what others wants, and working towards a compromise that offers a mutual respect and value for both parties.

#### **Assertive rights and responsibilities**

In order to practise assertion, the belief in rights, (yours and other people's), and the acceptance of responsibilities is paramount.

The acceptance of assertive rights, for ourselves and others, is a central part of changing to more assertive behaviour.

Assertive rights are: (you may wish to write these on a pre-prepared piece of flipchart paper or put them onto an OHP slide)

- I have the right to express my feelings, needs and opinions and to have them respected by others
- I have the right to consider my own needs
- I have the right to ask
- I have the right to say no, without feeling guilty
- I have the right not to understand
- I have the right to be successful in my own right
- I have the right to make mistakes

- I have the right to change my mind
- I have the right to choose not to assert myself
- I have the right to be my own self

Responsibilities with assertion are:

- I will respect the personal rights of others as outlined above
- I will assert my rights in a reasonable and responsible manner
- I will not expect to get my own way

### **The benefits of assertion**

The effects of assertive behaviour usually manifest themselves in your ability to do things better than before. Assertive behaviour breeds assertive behaviour, so that you often find others working with you rather than against you. What you give out you invariably will receive back ... so aggression breeds aggression too! How many fights start with one person sending out aggressive messages? Pleasant, clear and honest behaviour allows others to behave in the same way, giving possibilities of high quality relationships; and in the work situation, high quality outcomes.

At the same time, because assertion is not about ignoring or dismissing the needs and wants of others, you will encourage them to make their needs known too.

Assertive people are often noted for being confident. This is because they are being true to themselves and are not having to constantly worry about what they have said to whom. Once a person uses assertive language and talks about their needs, wants and feelings, they have nothing to hide and can therefore be a lot more confident about themselves.

Being assertive means that you can take responsibility for yourself, properly. You can move away from blaming others and take full responsibility for your feelings, thoughts and actions instead.

Assertion gives you a chance to conserve nervous energy. As you are no longer preoccupied with not upsetting others, you can just live comfortably side by side with them.

So, being assertive is about having the belief that, in any situation:

- you have needs to be met
- other people have needs to be met
- you also have rights, and so do they
- you have something to contribute and so do they

But it's also about:

- being yourself

### **Other behaviour styles**

The other two behaviours which make up most people's behavioural options are: the aggressive and the passive.

It is traditional for most people to see women as passive and men as aggressive. In today society this is no longer the case.

It is important to understand the differences between these types of behaviour, and to ensure that in shifting to an assertive way of being, you don't also take some of these other behaviours with you.

### **Aggression**

People learn to be aggressive for a variety of reasons, and it usually starts at an early age. It refers to the learned behaviour of standing up for your rights, but in a way that violates the rights of others. It frequently includes ignoring and dismissing the needs of others, whilst expressing your feelings, thoughts and wants in an inappropriate way.

The aim of aggressive behaviour is normally to win at any cost, and rarely feels good once done.

The effect of behaving aggressively on others will depend on them. Some will admire you for it, and there is an element of strength that people take from these situations. Most people, however, particularly when on the receiving end of your aggression, will feel hurt, humiliated, and may want to find a way of getting you back either openly or behind the scenes.

It is fair to say that sometimes aggression does work, i.e. that you get what you want out of a situation, but you always pay a price, which is the negativity that goes along with it. It is therefore a limited option and a high risk strategy.

### **Passivity**

Non assertion or passivity is the learned behaviour which is seen as the traditional role for women. It usually involves failing to say what you think, need or want, in such a way, that others can easily disregard you. It may also involve saying things in such a way that you seem to be apologising for your thoughts, needs and feelings; leaving others confused or under confident about them.

The aim of non assertive behaviour is to avoid conflict at all costs, and often to please others.

One thing to bear in mind throughout this though, is that whilst it may be easier for us to be assertive in some areas of our life, it may not be as easy to be assertive in all other areas.

### **Non assertion**

- a. Stating your needs and feelings in an apologetic way.
- b. Avoiding stating your needs and feelings
- c. Giving others rights that you do not take for yourself

Non-assertive behaviour aims to please and avoid conflict

### **Aggression**

- a. Ignoring the needs and feelings of others ...  
... either by intent,  
or default.
- b. Encouraging others to do as you want through flattery  
(manipulation).
- c. Taking rights for yourself that you do not give others.

### **Assertion**

- b. Stating your needs and feelings in an honest way.
- c. Being clear and direct in what you are saying.
- d. Standing up for your rights without violating the rights of others.

### **IN ANY SITUATION**

You have needs

You have rights

You both have something to contribute

They have needs

They have rights

Assertiveness is a win-win approach and philosophy. To build and maintain win-win relationships each person must accept responsibility for his or her own feelings, thoughts and behaviour.

## **How to be more assertive**

### ***Saying yes and no***

Learning to say yes and no appropriately, and with care to both yourself and the person that you are addressing, is a powerful tool in assertive behaviour. Knowing which you want to say is also important. We can often be confused about situations, and may say yes, meaning no; or say no, when we mean yes. In a demanding society like ours, it is important to give ourselves the space to decide which we want and how we might say that, to avoid hurting others.

### ***'I' Statements***

If you want to get a message to someone clearly, you need to consider how they are receiving this message. All too often when you have something difficult to say, you will manipulate words so that it appears that this difficulty is coming from elsewhere i.e. that someone else is to blame. Sentences that begin with me, or 'I' are the best way of overcoming this problem. Owning our thoughts and feelings is crucial in assertiveness. Personalising our statements means that they can't be disregarded, they are ours, and as such are important.

### **Changing questions to statements**

It is important to use questioning statements, but don't be lulled into using them constantly so that you don't have to say what you think. Use affirmative statements that start with 'I feel' or 'I think' so that others are clear about where you stand.

### **Assertiveness and body language**

The most powerful self assertion according to statistical evidence is in our body language. How you look at someone conveys how you feel about yourself and what you are saying. People often give their power away by looking away, and defiant or aggressive people show their feelings by fixing straight at a person. When you look directly at another and your eye movements comfortably, then you also communicate that you are alert and present.

Your posture conveys how you feel about yourself. It is important to have both feet firmly on the ground when you are addressing others, or dealing with difficult situations, not least to give you the 'grounding' that you require to deal with that situation.

Your eye contact should be constant but natural – looking directly at a person for too long can be very uncomfortable.

The important thing is to think about how you look and modify it so that you look confident, but responsive and self assured but listening to others needs too.

### **Stop signs (You may wish to reproduce this as a handout)**

There are several signals that will indicate when you are heading down the wrong road. These signals can be non-assertive or aggressive. Read and learn the signals. Practise using what you learn. It's all right to stop and say something like "*Excuse me. Let me start over again*". Others will respect your efforts to be assertive.

STOP saying '*you should*', '*you must*', '*you have to*'. Restate as either a request or a directive.

STOP using exaggerated words – '*obviously*', '*absolutely*', '*always*', '*never*', '*impossible*'. Restate with more realistic and factual words.

STOP saying '*you know*', '*maybe*', '*rather*', '*only*' and '*just*'. Restate in a more direct, confident manner without the 'wishy-washy' qualifiers.

STOP asking 'can you?', 'could you?', 'would you?', 'why don't you?', 'would you mind?', 'do you think you might?'. Request by asking 'will you please?' – it is the only question that truly asks for action and a commitment!

STOP using 'it', 'that', 'one', 'we', instead of 'I'. State your thoughts with 'I think', your opinions with 'I believe', and your feelings with 'I feel (mad, sad, glad, scared)' or 'I am (mad, sad, glad, scared)'.

### **Green lights**

The following signals indicate that you are on the right road and communicating assertively. Keep going when you have green lights!

GO when you feel relaxed, comfortable and stress free. These are positive signs that you are being assertive.

GO when the person with whom you are interacting displays attentiveness, comfort, co-operation and respect. When you see no signals of bad feelings, rebellion, disregard or defensiveness, you are being assertive.

GO when another says 'all right', 'certainly', or 'I'll be glad to' in response to your request or directive. When others do what you wanted with no indication of resentment or discomfort, you have good evidence you were assertive.

GO when others are assertive with you. When they communicate their honest thoughts, feelings, opinions, wants and needs in a direct and respectful manner, they are affirming your assertive behaviour with them.

Explain that now you would like the group to practice a key part of being assertive – the art of saying 'no'. Many of us avoid saying 'no' directly as we fear it will offend. We tend to wrap it in apologies or excuses.

e.g. "Can you come to the cinema tonight?"

Typical answer, "I'm really sorry, but I've got too much coursework so I don't think I can come."

Assertive response "No. I've got a lot of coursework I need to finish."

Split the group into pairs (if there is an odd number you will have to participate yourself) and ask them to spend ten minutes alternating the practice of saying "no" at the start of their reply.

Ensure everyone is clear about the task and ask them to start.

If you are not participating check on how the groups are doing after a minute, remind them to swap after five minutes and then bring the group back together at the end. If you are participating ensure you don't run over the ten minutes!

### **Debrief/discussion**

Facilitate a discussion about assertiveness and saying "no" by asking the group how they got on.

Questions you may wish to ask:

How did it feel? (Strange, difficult?)

If it was difficult, why so?

Can they think where this will be useful?

### **Tutor talk/handouts**

Either research and speak for a few minutes only on the union's financial procedures and forms for clubs and societies. If a member of staff can do this for you then this will be an advantage, but ensure they keep it brief.

Alternatively, see if someone can produce a handout for you containing the relevant information.

**Summary**

Take five minutes at the end to re-cap on the main points made. You may also wish to encourage them to attend the training session on 'Attracting Sponsorship' if you have a date for this.

**Close the session**