

Guide to setting up and running a Residents' Association



This guide is an introduction to Residents' Associations. It includes useful advice on forming a Residents' Association and making it successful.

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What is a Residents' Association?

A Residents' Association (RA) is a group of people who live in a neighbourhood and decide that they want to get together to deal with concerns that affect their local community. The group can include rental customers, shared owners, leaseholders and homeowners.

Why start a Residents' Association?

It's great that you are considering setting up a Residents' Association. With some careful planning you can help ensure your group will be a success. Take some time to think about the group and how it will be run. You may have already done a lot of work around setting yourself up, but it's good to check that your plans are well thought out. Look at the stages below which may help your planning process.

Groups of residents might start an RA for the following reasons:

- To fundraise for something positive that would benefit your community
- To create a better sense of community in your area
- To keep residents informed of what's happening in your neighbourhood

Where do I start?

Step 1: Get in contact with the Community Investment Team

Email getinvolved@coastlinehousing.co.uk or call **01209 200200** and ask to speak to the Involvement & Engagement Co-Ordinators. Lines are open 8:30am to 5pm, Monday to Friday.

Step 2: Talk to your neighbours

What are the main issues and concerns in your area?

Do they think an RA could make a difference?

What homes and area will the RA cover?

Don't be disappointed if people don't agree or aren't engaging with you at first. Sometimes people will become more involved once they see groups evolving.

Step 3: Arrange an initial meeting

Your Involvement & Engagement Coordinator can advise you about where to hold your meetings. Don't forget to be aware of cultural differences when planning your meeting and make provision for people with additional needs. Make sure that everyone knows about the meeting. Coastline can give you a template to create a simple letter or leaflet to let people know about the date, time and place of the meeting. Make sure that the leaflet mentions the issues that concern people the most in your area and that these will be discussed at the meeting. Leaflets need to be delivered in the area at least ten days before the meeting.

Step 4: Hold the first meeting

Your Involvement & Engagement Coordinator can attend your first meeting and can help you draw up an agenda using the template (Appendix A). The first meeting is a chance to talk about the issues which everyone is concerned about and give Coastline colleagues the opportunity to explain what setting up a RA involves.

After your first meeting you will know if customers want to set up a RA. If you do decide to set up a RA, there are a number of things that you need to do. At the next few meetings, you will all need to:

- Choose a name for your group
- Nominate committee members including a Chair, Secretary and Treasurer
- Agree and sign the constitution for the group
- Be representative of the neighbourhood or community you live in. Choose 2 or 3 key aims for your RA – if you can make visible changes quickly in the area you live, then other people will see that you are effective and will want to join
- It may take a couple of months or longer for your group to get organised. Don't worry if it takes a long time. Don't rush to launch your RA before you're ready.

Writing a constitution

A constitution is a list of rules for your RA. It sets out the aims of your group and how your group will work towards those aims.

Examples of constitutions can be supplied by the Community Investment Team, but here are examples of what it should include.

The name of the organisation

Here you state the name of your RA e.g. *'The name of the association shall be ***** Residents' Association'*

Aims

Here you list what you want your group to do, for example:

1. To promote the interests of all Coastline customers in the area and maintain good relations within the community.
2. To promote all customers' rights and the maintenance and improvement of housing conditions.
3. To work towards eliminating all forms of discrimination within the community by encouraging all members to join the RA.
4. To work with Coastline and other organisations for the benefit of all residents.
5. The RA shall be non-political.

Membership

Here you state who can join the group:

1. Membership shall be open to all Coastline customers in the community.
2. All members will have an equal vote.
3. All members should actively seek to represent the various needs of the area and must not discriminate on the grounds of nationality, political opinion, race, religious opinion, gender, age, sexuality or disability.
4. Members shall always conduct themselves in a reasonable manner when attending meetings or any functions linked to the RA.
5. Only one member per household shall have a right to vote. This would need to be clearly stated.

The Committee

1. A Committee shall be elected to carry out the business of the RA.
2. The Committee shall be made up of a Chair, Secretary, Treasurer and general members.
3. The Committee shall be elected at the Annual General Meeting (AGM)
4. Committee members shall carry out the duties given to them at the general meetings.
5. The Committee shall meet once a month and no less than 10 times per year.

6. Minutes of all meetings shall be made available to all customers.
7. Vacancies arising during the year can be filled by an election at the next general meeting. The Committee may fill any vacancies arising in the Committee until the next general meeting.

Finance

Finance is very important to groups and can also cause the most concern. If detailed clauses are included in the constitution this will help the group run smoothly and help the treasurer in their role.

1. All money raised by or on behalf of the RA is to be used only to further the aims of the RA and be of benefit to all residents.
2. The treasurer shall open a bank account in the name of the RA with the support of Coastline.
3. Cheque signatories will be nominated by the Committee (one must be the Treasurer). There shall be three signatories. These should not be from the same household or the same family.
4. All cheques and instructions to the RA's bankers shall require two of the agreed signatures.
5. The Treasurer shall have the accounts checked by an independent person with adequate financial experience, for example, a representative of the community organisation, law centre or council for voluntary service, at the end of each financial year. Coastline will audit RA accounts set up by Coastline Customers.
6. The accounts shall be available to all members at the AGM.

Coastline requires that a recognised group should be able to demonstrate responsible accounting methods.

Annual General Meetings

This is an important meeting as it is the meeting where the Committee reports on the activities of the RA over the previous year. At this meeting all members of the Committee stand down and new members are elected. Your constitution should state when and how this meeting will be held and how members will be informed of it.

- There shall be an AGM held every June at which the committee shall report on its work, present a statement of accounts and resign from their posts.
- The Committee for the next year shall be elected at the AGM.
- At the AGM, members shall vote on recommendations and any amendments to the constitution.
- The Secretary will notify all members of the date of the meeting not less than 21 days before the AGM.

Quorum

This is the number of members required for a meeting to go ahead. You can decide what the quorum will be for your group.

- The quorum for committee meetings of the association shall be one third of its elected membership, or six members, whichever is the greater. The quorum for all general meetings shall be one third of the membership.

Changes to the constitution

Your constitution should develop along with your group, so it would be sensible to have a section on how to alter it.

- The constitution can only be altered at an AGM or at a Special General Meeting called for that purpose.
- Any suggested changes to the constitution must be handed to the Secretary at least 14 days before the AGM.
- Changes to the constitution must be agreed by two thirds of the members present at the meeting.

Voting

This sets out how you will make your decisions.

- Any member can make a proposal, but for it to be voted on by other members it must be seconded or supported by another member.
- Before voting any member may propose an amendment which must also be seconded.
- No member shall exercise more than one vote.
- In the event of an equal vote, the chair shall have the casting vote.

Dissolution

Here you must state how your group can be wound up and what will happen with any funds that remain.

- The RA may only be dissolved at a Special General Meeting called for that purpose, which must be advertised before the meeting.
- A proposal to dissolve the association shall take effect only if agreed by two thirds of the members present at the meeting.
- Any assets (financial or otherwise) remaining, after the payment of all debts and liabilities, shall be given to registered charitable organisations, according to the wishes of the membership of the association.

Where funding has been received from Coastline this would be required to be returned and should be stated in the constitution.

Committee members and their roles

The Committee runs the RA on a day-to-day basis on behalf of the members. The members of the RA are the residents in the defined neighbourhood. The Committee will organise General Meetings and the AGMs and will carry out any decisions made at these meetings. The membership of the Committee should reflect the people it represents regarding age, tenure, sex, ethnicity and disability whenever possible.

Chair

A Chair is elected to provide leadership, plan, call and chair meetings, and ensure that the Committee works well together. A Chair should ensure that the RA keeps to its aims.

Secretary

A Secretary is responsible for administration and communication. They set the agenda with the Chair, take minutes of meetings, distribute previous minutes and agendas for meetings coming up, and occasionally write letters on behalf of the RA. Members of the RA can assist the Secretary with their allotted tasks.

Treasurer

A Treasurer oversees the management of any money collected. They pay bills and keep accurate records of money received and spent. The Treasurer works with the committee to carry out financial planning for the year. They ensure that all expenditure is agreed at a minuted meeting. They should prepare a financial report and bank statement to the committee at every meeting. At the end of the year, they prepare the final account.

The Community Investment Team can help to provide training for all officer roles.

Contact your Involvement & Engagement Coordinator for more details. It is important that committee members do the following:

- Go to meetings regularly or send apologies if they are not able to
- Contribute to meetings
- Volunteer if they can see a job needs doing
- Put items on the agenda
- Report back when they have completed a task or gone to a meeting on behalf of the RA
- Claim back any expenses from the treasurer
- Respect confidentiality of individuals
- Don't let differences of opinion disrupt the workings of the group
- Support the Committee and accept majority decisions
- Make sure they represent the views of members
- Ask members for their views on important issues

Setting the agenda

The Secretary and the Chair should set the agenda for each meeting, with Committee members being given the opportunity to put forward items for discussion. Agendas mean that meetings are effective and structured.

A copy of the agenda with minutes of the previous meeting should be sent out at least ten days before meetings and should include the following:

- The name of the group
- Date, time and place of the meeting
- A brief description of each item (with time limits if needed)
- Any other business
- Minutes of the last meeting
- Matters arising from the minutes of the last meeting
- Date time and venue of the next meeting

An example agenda is included in this guide under Appendix 3.

Minutes of meetings

It is important that minutes are kept of each meeting as a record of the decisions that are made and actions that have been taken.

The Secretary is responsible for taking the minutes, but someone else can take them if necessary.

- If you're not sure what has been decided, ask the Chair to summarise.
- There is no need to say who said what and when, just what decisions have been made and who will carry out the actions.
- Write up the minutes as soon as possible after the meeting whilst details are still fresh in the memory.
- Keep notes until the minutes have been checked by the Chair.
- Circulate the minutes to all customers as soon as possible after the meeting.

Finances

Although the Treasurer keeps the accounts in order, the group's finances are the responsibility of the whole Committee.

There are a few basic rules when it comes to money – you must:

- Keep one clear book-keeping system.
- Check the book-keeping on a regular basis. It's much easier to spot a mistake after a month than after a year.
- Keep everything in a safe place. Receipts, cheque books and records of transactions are just as important as cash.
- Open a suitable bank account in the name of the RA with three signatories. Your Involvement & Engagement Coordinator will help with this.
- Only deal in bank transfers, no cash or cheques.
- Keep receipts for every amount spent, however small. If a receipt is lost or not provided, the person claiming the money back must sign a petty cash slip, which authorises the spending.
- The accounts should be open and available to all members.
- Make sure you receive and keep bank statements regularly (ideally monthly).

Training

Coastline provides training sessions which RA Members must organise when setting up. We are always willing to give advice, but there are also a number of places to go for independent advice, such as the Tenant Participation Advice Service:

www.tpas.org.uk

0161 868 3500

info@tpas.org.uk

Frequently asked questions

Is there a limit to the number of members a group can have?

A group size will depend on the size of your area and how many people want to be involved. For example, it could cover a small sheltered housing scheme, one street or the whole of an estate. It is up to the residents to decide the area they want the group to cover.

Should leaseholders or other residents in the area be members of the association?

If the group is going to deal with social and environmental issues as well as housing management issues, then it is best that everyone living in the area covered by the group is allowed to be a member.

Can a person who works for the landlord, but who is also a customer be a member of the association?

This is similar to the question above and it is up to your group to decide. We advise that they should be allowed to be members of the group, but not a member of the Committee (because of potential conflict of interest) and that they be made aware that they attend meetings as a customer and not on behalf of the landlord. There is nothing stopping you from stating in your rules that anyone employed by your landlord cannot be elected to the Committee.

Can a councillor who is also a customer be a member of the group?

That will be the choice of the group. We advise that they should be allowed to be members of the group, but not a member of the Committee and that they are made aware that they attend meetings as a customer and not as the landlord. There is nothing stopping you from stating in your rules that councillors cannot be elected to the Committee.

Will we need insurance?

Your group is not required to have insurance. However, you will need public liability insurance for any formal outings or events you organise. If you are given premises or equipment, you will also need to insure them.

How can I get more help and information regarding setting up an RA?

You can speak to your Involvement & Engagement Coordinator or contact the Community Investment Team by email getinvolved@coastlinehousing.co.uk or phone 01209 200200.

Other ways to get involved

Setting up or joining a RA is just one way that Coastline's residents can get involved. There are lots of different ways from completing a quick survey, to being an Involved Customer and joining a Customer Group, to becoming a Customer Voice member.

Please speak to your Involvement & Engagement Co-Ordinator for more information or go to [Have your say - Coastline Housing](#).

Appendix 1

Resident Association Code of Excellence

1. Community Committees and resident groups providing an excellent service will:

- 1.1 Be courteous at all times in their dealings with staff, contractors, agencies, other residents and members of the public and never use sexist, racist, abusive or other inappropriate language.
- 1.2 Represent the best interests of residents in their area/estate and try to reflect and understand the views of the community.
- 1.3 Raise issues with Coastline colleagues but not give colleagues instructions on the day-to-day performance of their duties. Residents wishing to comment on the performance of a colleague, should do so through an appropriate manager.
- 1.4 Give Coastline colleagues at least two weeks' notice of all meetings. A resident group demonstrating best practice will, if possible, provide the Involvement & Engagement Co-Ordinator dates of meetings annually from the AGM.
- 1.5 Consult members and send Coastline colleagues details about the reason for attendance, the agenda and list of questions at should be sent to colleagues at least a week before the meeting to enable preparedness. Be clear about why the colleague is required at the meeting and whether they need to be at all or part of the meeting.
- 1.6 Agree a key contact (normally the Chair or Secretary) to liaise with Coastline colleagues on resident group business.
- 1.7 Adhere to protocols for corresponding with Coastline colleagues on behalf of the committee. When liaising with Coastline, Committee members should be clear about whether they are expressing a personal view of representing the views of the Committee. If a member of the Committee is sending out correspondence or acting on behalf of the group, the approach should be agreed in advance by the Committee, and copies of any correspondence should be provided to all Committee members.
- 1.8 Provide feedback to members about discussions at forums.
- 1.9 Not disclose information deemed confidential. From time to time, residents will acquire and have access to confidential information and information that has not yet been made public. When residents are advised that information is confidential it must not be disclosed to other people under any circumstances. Residents may be asked to sign an agreement that such information will not be disclosed. Such information must not be used for personal gain.
- 1.10 Produce minutes of all meetings, making them available to all in attendance. All residents can receive copies upon request. The Involvement & Engagement Coordinator can also request a copy of minutes.
- 1.11 Produce annually, at least one newsletter to update members and residents regarding activities. Newsletters should subscribe to the guidance attached as Appendix A.
- 1.12 Hold an open and accessible AGM and at least one more Open Meeting for residents during the committee year. Adequate notice should be provided, and every effort should be made to encourage and promote attendance. This may include for example, use of notice boards, letters and or flyers.

- 1.13 Run meetings in a professional and welcoming manner with Committee members seated at the front of Open Meetings and Annual General Meetings with members and guests introduced to delegates.
 - 1.14 Hold and observe written financial procedures and have three bank signatories who should be unrelated and from different households. Two signatures will be required on each cheque. Written updates of income and expenditure should be presented at each meeting, and a comprehensive list of the income and expenditure of the year should be given to all members attending the AGM for scrutiny.
 - 1.15 Have a clear and effective policy for dealing with breaches and disputes.
 - 1.16 Demonstrate how the group has developed committee skills and encouraged new members.
 - 1.17 Hold meetings in accessible and appropriate venues for all residents and colleagues.
 - 1.18 Consult members appropriately and adequately and feedback outcomes of consultation small, sheltered housing scheme, one street or the whole of an estate.
2. Coastline colleagues providing an excellent service will:
- 2.1 Adhere to Coastline policies and procedures for involvement and engagement, the Trust Charter and Pledges.
 - 2.2 Inform customers about Resident Groups in the locality and other involvement opportunities.
 - 2.3 Use the most appropriate range of methods to inform and engage with customers.
 - 2.4 Provide specific feedback on what we have done in response to customers' involvement.
 - 2.5 Use a range of ways to make meetings easier to get to and more effective, including plenty of notice and suitable times and platforms.
 - 2.6 Make consultation exercises more effective by explaining what the consultation can and cannot change, keeping people informed of outcomes, and giving enough time to respond.
 - 2.7 Support people's participation through relevant training, opportunities for personal development, valuing diversity and providing involvement opportunities that meet specific individual as well as communities' needs.
 - 2.8 Attend all relevant meetings when requested, bearing in mind the that such availability will sometimes be restricted by personal or operational commitments.
 - 2.9 Attend as guests of resident groups for part or all the meeting as agreed in advance.
 - 2.10 Arrive punctually for meetings and events and provide notice of cancellation where possible.
 - 2.11 Aim to find a replacement staff member if unable to attend.
 - 2.12 Provide contact details to Residents' Association Chairs and Secretaries.
 - 2.13 Colleagues will observe and respect the rules of confidentiality at all times when handling and processing information as per Coastline policies.
 - 2.14 Wear a visible name badge at all meetings.
 - 2.15 Behave in a professional and business-like manner at all times.
 - 2.16 Explain things in clear jargon-free language.

- 2.17 Develop a plan of agreed actions after each meeting attended and report back, verbally or in writing, to the committee at the following meeting the status or outcome of those actions.

3. Conflicts of Interest

- 3.1 Individual members should disclose any interest whether personal or on behalf of any group they represent, that may affect or influence their approach to the matter under discussion.
- 3.2 Members should not expect to receive favourable treatment by Coastline colleagues because of their membership of the Residents' Association.
- 3.3 Members must use Coastline's normal procedures for reporting repairs, complaints etc.

4. Confidentiality

- 4.1 Members should respect the confidentiality of all individual residents, whether present or not and not mention specific individual cases which may cause embarrassment or identification of an individual.
- 4.2 Any information or items shared that is of a confidential nature must not be disclosed to anyone else apart from members of the RA.

5. Breach of the Code of Excellence

- 5.1 If a member of the RA, Committee, or member of the public does not abide by the Code of Excellence the Chair will warn that if they break the Code again, they will be asked to leave the meeting. This will be dealt with independently by the RA.
- 5.2 The Chair may give the member of the RA, Committee, or member of the public two further warnings (a maximum of three warnings in any new meeting and/or three consecutive meetings).
- 5.3 If the member of the RA, Committee or member of the public continues to ignore the Code then the Chair will ask the meeting to vote on whether the member should be asked to leave.

Appendix 2

Residents' Association financial guidelines

1. A bank account is to be opened with a financial institution.
2. Two signatories are required to withdraw any money. These should be Chair, Secretary and Treasurer of the association.
3. Signatories should not be from the same family.
4. Under no circumstances will the RA use an open or pre-signed cheque.
5. The procurement of equipment or any other expenditure in excess of £50 must be subject to committee resolution.
6. An inventory of all items purchased, including purchase price, together with full details of all other expenses and expenditure must be maintained by the Treasurer.
7. The inventory must be made available for inspection upon request at any time.
8. No monies are to be paid to Committee members other than out of pocket expenses (e.g. travel, telephone, stationary etc).
9. Where monies are claimed for travel expenses (e.g. attending regional forums, training, conferences etc.) the following details are required: reason for attendance, date of attendance, destination to and from, total mileage claimed.
10. Where monies are claimed for telephone calls an itemised bill is required which identifies all calls to which the claim refers.
11. Petty cash up to a maximum of £20 may be kept by the Treasurer for incidental expenses, such as stationary, stamps, out of pocket expenses etc. No money is to be issued without a receipt.
12. A proper record is to be kept of all income and expenditure which will run for each financial year. Books are to be examined by a reputable independent person outside the organisation. Copies of the examined accounts must be presented to the Annual General Meeting.
13. The Treasurer must report details of expenditure and income at each meeting of the association for the period since the previous meeting.
14. These rules are to be brought to the second meeting after an AGM for review and amendment if necessary.

Adopted on date:

Signed:

Treasurer

Chair

Appendix 3

Sample agenda

Residents' Association for ***Anywhere*** Meeting to be held on ***any date*** at ***whatever time***
Anywhere Community Centre

Agenda

1. Welcome and introductions
2. Apologies
3. Reasons for forming a Resident's Association and the type of group required
4. Choice of name
5. Nomination and election of officers and committee members – Chairperson – Secretary – Treasurer – Other committee members
6. Adoption of a constitution
7. Identification of issues of interest / concern
8. Any Other Business – How are you going to make the meeting enjoyable?
9. Date of next meeting