



# **Basic guide to starting and running a Tenants and Residents Association (TRA)**

Updated March 2020

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# Tenants and Residents Associations (TRA)

This guide has been written to help you set up and run a TRA effectively and independently. The information supplied is for a guide only, how you run your Association is up to your committee. There is however certain criteria you need to meet to become a Registered Tenants Organisation (RTO) and to receive funding from West Dunbartonshire Council.

## **What is a Tenant & Residents Association?**

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A Tenants & Residents Association is a community group made up of local people who come together to represent the views of tenants and residents living in their area. Acting in a voluntary capacity they help to make their neighbourhood a better place to live. It's up to the local community to decide what its aims and objectives are and these are then set out in the Association's constitution.

## **Why tenant and residents?**

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Many neighbourhoods are made up of people who rent or own their home so they have a joint interest in their area. Tenants have legal rights to be consulted about their landlord's policies and how they deliver services so they can use a TRA to give them a stronger local voice. Owners, who may not have a direct relationship with Housing Services will often have common issues and so being involved in a TRA can be a positive experience. Tenant Participation staff and Tenant Participation Grants are funded through the Housing Revenue Account so to ensure that is spent for the benefit of tenants, at least half a TRA committee must be tenants to benefit from this support and funding. TRAs can still be set up with no funding from Housing Services and seek out independent funding or charge for membership.

## **Initial meeting**

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Interest in setting up a TRA can happen in many ways- often there are a few people interested in having more say in what happens in their area and seek to set up a group. A public meeting can then be set up to gauge if there is public support and if there is, a TRA can be started. Tenant Participation staff can help with advertising the public meeting and to book and pay for a suitable meeting place although this can be done independently and some local community facilities could provide a meeting space for the first meeting.

## **Agreeing meetings**

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You have to agree how often you will meet as a group. In order to meet registration criteria you are required to agree that some of your meetings will be public meetings where anyone from your area can attend.

It is common for groups to agree to meet on a monthly basis excluding July (plus sometimes August) and December, with every third meeting being a public meeting.

It is also common practice to meet at a regular time in the month (for example, the 3<sup>rd</sup> Wednesday of the month) so it is easier to remember when the meetings are. Some groups also agree their meetings for the forthcoming year, which allows the secretary to book accommodation in advance.

## **Agreeing a constitution**

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In order to register as an Association you will need to agree a constitution. A constitution contains the main principles for your group. It will outline things like when you will meet, how many people you require at meetings. A sample constitution is included on page xx to give you an idea of what needs to be covered and can easily be adapted to how your group wants to run. Once your constitution is agreed, it can only be changed at an Annual General Meeting and if required at an Emergency General Meeting held specifically for that purpose to ensure that there is always public discussion and agreement about this important document.

## **Electing Committee Members**

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To start a Tenants and Residents Association you will need at least 5 committee members. Within the 5 members, you will need to elect a minimum of 3 office bearers. You are required to elect:

- Chairperson
- Treasurer
- Secretary

You can also decide to elect

- Vice Chairperson
- Minute Secretary

More information on the roles of the office bearers can be found on page 7. We also have training material on all committee roles and can provide individual support as well as support to the whole committee so please make use of this.

To officially elect members of the committee, a proposer and seconder are required so that there is a least 2 people nominating a particular person. If more than one person is proposed and seconded for a single position, a vote

should be held with the person gaining most votes getting the post. This process ensures that your committee is democratically elected.

## **Finance – Grants and start up grants**

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To be eligible for a Tenant Participation Grant from the Council at least half of your group's committee (50%) must be West Dunbartonshire Council tenants. This is because the grants are funded from the Housing Revenue Account (HRA).

A Tenant Participation Grant will financially support the running of a group and this will include money for meeting accommodation, stationary, and travel on behalf of the Association.

A start up grant can also be provided to help a group get constituted and cover things like hall hire, publicity material.

## **Opening a bank account**

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Electing a treasurer to maintain your accounts is essential. They will record all income/expenditure, ensuring all records are up to date and accurate. Financial reports should be made available at meetings.

In order to receive funding and maintain the finances you will need a bank account. Generally you will need to assign 3 signatories to the account and 2 of these people will need to be present to withdraw funds or write cheques. Many high street banks don't promote community accounts so it is getting more difficult to open one but not impossible.

Using a High Street bank that you already have an account with can also make the account opening process easier.

We recommend the following bank:

### **Unity Trust Bank – [unity.co.uk](http://unity.co.uk)**

Telephone: 0345 140 1000

Monday to Friday, 8.30am to 5pm, calls are charged at local rate

### **Email addresses**

Enquiries: [us@unity.co.uk](mailto:us@unity.co.uk)

Customer Services: [utb@unity.co.uk](mailto:utb@unity.co.uk)

### **Postal address**

Unity Trust Bank plc , Nine Brindley Place, Birmingham, B1 2HB

Using the Unity Trust Bank is quick and easy, and you can also assign a local branch (any bank provider) to deal with your transactions, cheques etc.

**The Clydebank Municipal Bank** also offer community accounts though not a cheque book but you can still request cheques to pay specific items – if you are in Clydebank this can be a good local solution.

Clydebank Municipal Bank, Clydebank Town Centre Office,  
10 Sylvania Way South, Clydebank, G81 1EA

Tel: 01389 738682 or visit: [www.west-dunbarton.gov.uk/clydebankmunicipalbank.co.uk](http://www.west-dunbarton.gov.uk/clydebankmunicipalbank.co.uk)

## **Registering with West Dunbartonshire Council**

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Registering with West Dunbartonshire Council makes you a Registered Tenants Organisation. If you are registered you have the right to be consulted on any major changes to the Housing Service across West Dunbartonshire and on any local issues. Tenant Participation staff will also circulate regular information and invites directly to your group. You must re-register every 3 years and registering ensures that you can demonstrate that you are representative and run democratically.

## **Contacting West Dunbartonshire Tenants and Residents Organisation (WDTRO)**

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The WDTRO are the umbrella organisation who represents all Tenants & Residents Associations in West Dunbartonshire. They meet on a monthly basis and also have meetings every 2 months with senior members of housing staff and the Housing Convener – the WDC/WDTRO Liaison meetings.

Anyone from your TRA can become a member of the WDTRO. You can also pass any issues onto them that you feel are of an authority wide nature.

They can be contacted on the below details:

Harry McCormack, WDTRO secretary

01389 720 970 or [harrymccormack.wdtro@gmail.com](mailto:harrymccormack.wdtro@gmail.com)

## **Using an Action Plan**

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A simple way to keep on top of what you need to do to run your Association and what you want to do to achieve your outcomes is to use an action plan.

An action plan will do more than your monthly minutes – it will help you to stay focused, and help you organise and record your progress. Developing and agreeing an action plan with your committee will help make sure that everyone is clear about what the Association is working on and can contribute to its achievements. More information and training on action plans can be provided by Tenant Participation staff or on the TP webpages.

## **Equipment**

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If your group require any equipment in order to run the organisation, such as a laptop for the secretary to type up minutes, please discuss this with the Tenant Participation Section.

## **Printing**

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We recommend that you use a local library to print any documentation. The group can set up an account and it costs 10p per sheet. This is often easier than keeping and maintaining a printer.

## **Training Requirements**

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If any of your committee wants training or support to carry out any of their duties please contact the Tenant Participation staff who can provide on going support and will either carry out the training or get an external organisation to help.

## **Online information**

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On the West Dunbartonshire Council webpages there are specific pages on Tenant Participation which we are continually updating and are a good source of information. They include training and information on committee skills, how to apply for a TP Grant as well as minutes from the WDC/WDTRO Liaison meetings, Joint Rent Group , copies of the Housing News and much more.

# The Committee

## Chairperson

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How successful a meeting is can depend upon how it is chaired. The Chairperson is the person who makes sure things get done; not the person who does everything.

The Chairperson should have a good knowledge of the TRA Constitution

### Main duties:

- Chair the meetings and make sure everyone has a chance to contribute
- Making sure the group achieves its aims
- Agreeing accommodation, agenda and speakers with the Secretary for future meetings

## Vice Chairperson

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If a Vice Chairperson is elected they will assume the role of Chairperson in their absence – good to have but not essential.

## Secretary

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The role of the secretary within a group is crucial to the effective running of the group and will help the group achieve their goals.

### Main duties:

- Taking minutes of meetings and distributing them to committee members 7 days (or what's on your constitution) before meetings
- Keep an accurate filing system of all correspondence and minutes of meetings
- Dealing with correspondence
- Agreeing accommodation, agenda and speakers with the Chairperson for future meetings



## Minute Secretary

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The Association can also decide to elect a minute secretary to ease the duties of the secretary.

### **Main duties:**

- Recording and typing up minutes
- Distributing minutes to committee members 7 days (or whatever is stated in your constitution)

## Treasurer

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The Treasurer handles and records money coming in and out of the Association

### **Main duties:**

- Ensure all bills are paid
- Keep an accurate financial record of outgoings (Tenant Participation can provide a booklet that simplifies this process)
- Provide financial information at meetings
- Ensures an independent audit of finances is carried out for the Annual General Meeting

# Guide to preparing for meetings

## Committee Meeting - before the meeting

Task	Responsible Member(s)
Decide agenda	Chair and Secretary
Type up and print the agenda	Secretary
Discuss required accommodation	Chair and Secretary
Book agreed accommodation (it is recommended that the group agrees meeting dates for the year and the secretary books it in advance)	Secretary
Discuss required speakers based on previous minutes or requirements	Chair and Secretary
Send requests for attendance <ul style="list-style-type: none"> <li>Request for WDC staff to attend should be sent to staff at least 10 working days before the meeting. Staff will respond to the request within 5 working days.</li> <li>You should state the reasons for the officer to attend the meeting so they can come prepared</li> <li>If you are unsure who to invite the Tenant Participation Section can advise on what service is responsible for the issues and recommend a contact person</li> </ul>	Secretary
Send minutes of the previous meeting to committee members 7 days (or whatever is stated in your constitution) before the meeting. The minutes should include the date in time of the upcoming meeting as a reminder.	(Minute) Secretary
Ensure that all correspondence has been dealt with, and when necessary, obtain replies	Secretary
Ensure all bills are paid	Treasurer
Prepare a financial update ( <i>Tenant Participation provide a booklet that simplifies this process</i> )	Treasurer
Take financial information to meeting (eg bank statements)	Treasurer

## Committee Meeting - During the meeting

Task	Responsible Member(s)
Welcome members and introduce guests	Chair
Request for previous minutes to be agreed as accurate and seconded	Chair
Ensure fair discussion	Chair
Stop anyone taking over, dominating discussions	Chair
Keep discussions short and to the point	Chair
Sum up problems, points, decisions	Chair
Keep order/ensure a chance for all to have their say	Chair
Stick to agenda	Chair
Get through the agenda on time	Chair
Ensure decisions are carried out	Chair
Assign tasks relating to the action plan	Chair
Take minutes	(Minute) Secretary
Keep a record of everyone attending the meeting or collect their signatures in an attendance list	(Minute) Secretary
Ensure that the meeting has enough attendees to meet the quorum agreed in the constitution <ul style="list-style-type: none"> <li>If this is not met you can still discuss issues but cannot carry out any business or votes.</li> </ul>	(Minute) Secretary
Read out all correspondence received (should be an item in the agenda) and report any action taken since last meeting	Secretary
Present financial update as per agenda	Treasurer

## Public Meeting/AGM - Before the meeting

Task	Responsible Member(s)
Decide agenda ( examples available)	Chair and Secretary
Type up and print agenda ( <i>sample agendas in Appendix 6</i> )	Secretary
Discuss required accommodation	Chair and Secretary
Book agreed accommodation (it is recommended that the group agrees meeting dates for the year and the secretary books it in advance)	Secretary
Discuss required speakers based on previous minutes/requirements	Chair and Secretary
Send requests for attendance <ul style="list-style-type: none"> <li>Request for WDC staff to attend should be sent to staff at least 10 working days before the meeting. Staff will respond to the request within 5 working days.</li> <li>You should state the reasons for the officer to attend the meeting so they can attend the meeting prepared</li> <li>If you are unsure who to invite the Tenant Participation Section can advise on what service is responsible for the issues and recommend a contact person</li> </ul>	Secretary
Ensure minutes of previous public meeting are printed and will be available at the meeting	(Minute) Secretary
(AGM) Produce a chairperson's report to advising of the success of the association over the past year and the aims and objectives for the coming year.	Chair
(AGM) Ensure all bills are paid	Treasurer
(AGM) Have accounts audited by: <ul style="list-style-type: none"> <li>West Dunbartonshire Council Tenant Participation Section</li> <li>Community Volunteer Services (CVS)</li> <li>Accountant (an accountant should be used if your group has a large income and expenditure for the year, for example, if you have a community flat)</li> </ul>	Treasurer
(AGM) Take financial information to meeting	Treasurer

## Public Meeting/AGM - During the meeting

Task	Responsible Member(s)
Welcome members and introduce guests	Chair
Request for previous minutes to be agreed and seconded, as per constitution (people who attended the previous meeting must do this)	Chair
Chairpersons report	Chair
Ensure fair discussion	Chair
Stop anyone taking over, dominating discussions	Chair
Keep discussions short and to the point	Chair
Sum up problems, points, decisions	Chair
Keep order/ensure a chance for all to have their say	Chair
Stick to Agenda	Chair
Get through the agenda on time	Chair
Ensure decisions are carried out	Chair
Take minutes	(Minute) Secretary
Collect attendee signatures in an attendance list ( <i>examples available</i> )	(Minute) Secretary
Ensure that the meeting has enough attendees to meet the quorum agreed in the constitution <ul style="list-style-type: none"> <li>If this is not met you can still discuss issues but cannot carry out any business or votes.</li> </ul>	(Minute) Secretary
Read out all correspondence received (should be an item in the agenda) and report any action taken since last meeting	Secretary
(AGM) Deliver Chairperson report	Chair
(AGM) Treasurers report based on audited accounts	Treasurer
(AGM) Committee stands down and elections take place (see 'Electing Committee Members' on page 3)	This should be carried out by someone who is not a member, such as an invited speaker or TP staff

## AGM – After the meeting

Task	Responsible Member(s)
Complete new committee contact details and send a copy to Tenant Participation Officer	Secretary
Write up a minute of the AGM including details of the voting for the new committee	
Complete re-registration form (See 'registering with West Dunbartonshire Council' on page 5)	Secretary
Apply for annual grant if required	Treasurer

