

INTERNAL DEMOCRACY SELF-ASSESSMENT

TOOL # 2

A STUDY CIRCLE

The study circle has four sessions where different aspects of internal democracy are discussed among the participants. With it is a short basic description of the study circle method and a list of suggested literature. The idea is that each organisation may or even should add additional reading material.

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WHAT IS A STUDY CIRCLE?

A study circle consists of a group of people who meet regularly and study together. The size of a group, around 8 participants, is optimized for collective learning. The study circle is open to everybody, with no requirements of prior knowledge. The participants decide for themselves the content and working methods of the study circle. They jointly seek new knowledge, skills and insights. The leader of the study circle is well-versed in its topic and guides the discussions, making sure that everyone has a say and that all the participants experiences and personalities are met with respect.

Study circles may be formed to discuss anything from politics to religion to hobbies. When they emerged in the early twentieth century they were based on a democratic approach to self-education. They were often linked to social movements concerned with working class emancipation and temperance (= a social movement against the consumption of alcoholic beverages). Persons who discover a common interest typically create study circles; other study circles may be created to analyse and find solutions to social, political, or community problems. Often there is no teacher, but one member usually acts as facilitator to keep discussion flowing and on track and ensures that everyone has an

opportunity to become as involved as he or she desires to be. The facilitator does not have to be an expert of the topics discussed. Reading material and audio and visual aids are often used to stimulate dialogue.

A study circle may be at an introductory level, advanced level, or any level in between. Often no or very little money is involved, sometime only to purchase reading material and pay for coffee. They may be sponsored or assisted by government or community officials and have specific outcome goals such as generating ideas or suggesting courses of action; or they may be entirely independent and self-sufficient, existing simply for the pleasure of increasing the knowledge of their members.

While there is no single right way to do a study circle, organisations such as “Everyday Democracy” (formerly the Study Circles Resource Center)* have published simple and suitable dialogue methods for creating deeper understanding, for weighing options and making choices, or for making recommendations that lead to action. Study circles allow complex topics to be broken down into manageable parts. Single sessions can result in meaningful and productive dialogue, but study circles usually involve multiple sessions in order to fully investigate the question at hand.

Source: Extracted and adapted from:

<https://www.abf.se/distrikt--avdelningar/abf-vastra-gotaland/abf-fyrbodal/om-oss/about-us/>
https://en.wikipedia.org/wiki/Study_circle

* <https://www.everyday-democracy.org/stories/change>

The calendar in a democratic Civil Society Organisation

Despite the fact that CSOs differ depending on the kind of organisation, there are certain similarities. Many CSOs follow roughly the same calendar when it comes to democratic planning, decision and other governing and management procedures.

BEGINNING OF THE YEAR: THE ANNUAL MEETING

During the first part of the year, the annual meeting (or congress, assembly or whatever it is called) is held. It is the highest decision making body. The annual meeting looks both backwards and forwards. Here, members, have opportunities to make their voices heard. The meeting is the most important of the year for any democratic CSO and deals with, among other issues:

- The past year (operations and finances, discharge from liability for the board and more).
- Next year (election of board, business plan and budget, members' motions and proposals).

DURING THE YEAR

The activities are implemented in accordance with the decided annual plan.

During the ongoing work, remember:

- Keep the by-laws in mind.
- Follow the strategy and the annual plan.
- Act according to established values and rules

The members of the board hold regular board meetings and the auditor keeps track of the finances on an ongoing basis.

Member meetings can be a good way to spread information from the board to the members during the year.

END OF THE YEAR

At the end of the year it is time for the CSO's auditor to make financial statements. The financial statements consist of a balance sheet, income statement and a brief financial report.

An activity report is presented at the annual meeting in which the association's activities and results of activities during the past year are described. The financial statements are usually attached to that report.

The agenda for the meeting is sent to the members. The members are usually asked to submit proposals and candidates for board members that the annual meeting decides on.



SESSION 1: Planning of the study circle

Start with the planning of the study circle: Topic, number of sessions, how long should the sessions be, when, how often, frequency, selection of facilitator, location, reading, audio and visual material. Discuss also the objective and expected results of the studies.

Suggested reading and study material

1. Suggested reading below can be added and considered by other titles relevant for the national and local context where you operate. Political context refers here to social, cultural and economic context.

- Paolo Freire: *Pedagogy of the Oppressed*, on learning, empowerment of the voiceless, organisation.
 - Robert D. Putnam: *Making Democracy Work: Civic Traditions in Modern Italy* (Princeton University Press, 1993), a theory of importance of social capital for modern democracy, social and economic development
 - Rune Nilsson: *Non-profit associations – starting, running and develop them* (Björnen Förlag). A very practical handbook on how to work with internal democracy in civil society organisations. You can get it through Palme Center.
 - Olof Palme International Centre: *Project Handbook. For the Palme Centres Member Organisations* (selected chapter relevant for partner organisations). <https://www.palmecenter.se/resourcecenter/method-material/>
 - Sofia Schubert: Unity, Plurality and/or Hybridity? Assessing the Global Pattern of Political Cultures (Paper, World Values Research WVR Volume 8 / Number 4 / 2015). Download for free here: <https://www.worldvaluessurvey.org/WVSPublicationsPapers.jsp>
2. Try to summarise the discussion. Plan for next session: what to do or read, when and where to meet.

SESSION 2: What does internal democracy mean and does it matter?

Suggested initial questions to discuss:

1. We recapitulate the main conclusions from the previous session.
2. What is or does internal democracy in a civil society organisation mean, particularly for an organisation with an ambition to be or become democratic?
3. Why does internal democracy matter? (General discussion to be deepened in next session.)
4. What is the connection/relation, historically and/or currently, between internal democracy of organisations (trade unions, cooperatives, political parties, indigenous people's organisations and others) in the society and democracy more broadly (in our country): the state, public and private institutions, and the political and administrative system?
5. Who are the main stakeholders for our organisation, in terms of our organisational identity, mission, strategy, objectives, actions and capacity?
6. To what extent are members important for us, and if so for what reasons, and in which situations?
7. Try to summarise the discussion. Plan for next session: what to do or read, when and where to meet.

SESSION 3: Strive for a minimum, middle or maximum state of internal democracy in our organisation

Questions to discuss/take up:

1. We recapitulate the main conclusions from the previous session.
2. To what extent are our members/sympathisers important for the legitimacy or recognition of our organisation? Do we – honestly – really need them for the we do? What is the added value having members, for the effectiveness of our work (= achieving results), the efficiency of our work (use of resources to achieve the results) and our sustainability as an organisation? Is internal democracy maybe an issue donors mainly care about and we are mainly accountable to them?
3. Are there minimum, middle or maximum levels or standards of internal democracy, we should strive for, given the discussion or conclusion in the previous question? What is the content of internal democracy in each level of standard or state (minimum, middle or maximum internal democracy)?
4. Look at the outline of a checklist for internal democracy, to what extent is it relevant for our organisation. Is most of it relevant? Or is it a bit ambitious? Or is it far too ambitious? Discuss and maybe vote among the group?
5. Test to fill in the checklist (tool number 1), each one of the study circle members (during the session or later at home or in the office). Give it some time, maybe one hour or so. Be concentrated. Put your copy in a box – any kind - which the facilitator has prepared or pass it to the facilitator.
6. Try to summarise the discussion. Plan for next session: what to do or read, when and where to meet.

SESSION 4: Checklist result. What have we found?

Suggested initial questions to discuss:

1. We recapitulate the main conclusions from the previous session.
2. Discuss the result of the checklist. See tool number 1 for details. Before the session the facilitator may have prepared a summary or conclusion of all the checklists filled in by the participants. Or you can do that collectively during the session.

Step 1: Try to count your answers of yes, no, partly and don't know. Discuss your differences of opinions on the most important questions.

Step 2: How many thinks that the state of internal democracy in the organisation is fairly OK or at least does not need to be prioritised right now or in the short run. And how many thinks there is a need for improvement that should be taken on at least this year or even immediately?

Step 3: If not already done, try to summarise the main findings and conclusion of the checklists filled in by the participants. Can we see any pattern on strengths, weaknesses and needs?

3. Can you reach a consensus within the group? On what, also considering what should be done, why, how, when and with what resources (time, human, economic)? Or consensus cannot be reached? If so, what are the main differences in the opinions?
4. Try to summarise the discussion.
Plan for next session: what to do or read, when and where to meet.

SESSION 5: How to organise and realise the annual meeting of the highest decision-making body of a democratic organisation

1. We recapitulate the main conclusions from the previous session.
2. This session depends on the outcome of the previous sessions. As suggestion here the session focus on how the highest decision-making body – the annual meeting/yearly assembly/

congress (or whatever your organisation label it) – should be organised. The following steps and details are in accordance to more or less international standard. The idea is that you analyse how your organisation works with the annual meeting. Preparing, implementing and follow up decisions taken. Be sure that no organisation is perfect.

The detailed checklist:

Questions	Reply alternatives			
	Yes	No	Partly	Don't know
Do the by-laws/statues clearly define the annual general assembly and when and how they should be organised?				
Do the by-laws/statues clearly define the procedures for changes of the by-laws?				
Does the annual meeting decide which issues the board should work on?"				
Is the invitation and the agenda for annual meeting sent to members, board and staff duly on time?				
Is there an election of chairperson for the meeting?				
Is there an election of secretary for the meeting?				
Is there an election of two members to verify the minutes?				
Is there an election of two vote counters?				
Is there an adoption of the voting list?				
Is there an adoption of the meeting agenda?				
Is the annual report and annual accounts presented and discussed?				
Is the income statement and balance sheet presented, discussed and adopted?				
Is the auditor's report presented, discussed and adopted?				
Is the action plan and budget for the next year presented, discussed and adopted?				
Is the internal auditors' report and response of the board presented, discussed and adopted?				

	Yes	No	Partly	Don't know
Is the decision to discharge or approve the board's liability presented, discussed and adopted?				
Is there an election of Chairperson/President of the board for next period?				
Is there an election of Deputy Chairperson?				
Is there an election of other members of the Board?				
Is there an election of authorised public accountant and deputy?				
Is there an election of internal auditors?				
Is there an election of nominating committee?				
Do the elected representatives sit in their positions for an appropriate time?				
Does the nomination committee try to achieve a diversity of candidates among those who apply for a position of trust?"				
Has the agenda space for proposed amendment of the by-laws?				
Has the agenda space for proposal regarding fees for the chairperson and board members?				
Is there a decision taken about the next annual meeting, date and location?				
Has the agenda space for 'other matters' to be discussed?"				
Are the notes/minutes from the annual meeting published and accessible to relevant stakeholders (members and maybe others)?				

The sessions end with an analysis and maybe decision to what can be changed or improved. If there are needs please discuss and decide who should be doing what, how, when and reporting back to the board of the organisation or a dedicated committee/working group.

SESSION 6: Decide if more sessions should be added, based on findings in the checklist

More sessions can be added to the study circle using a similar checklist for specific topics/issues/sub-issues. They can deal with everything from relationship staff-board-members, gender equality, to leadership styles and more.