



Department of  
**Local Government, Sport  
and Cultural Industries**

# Volunteer Management Guide

A guide to better recruiting, retaining and managing volunteers within sport and recreation organisations.







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The DLGSC works with partners across government and within its diverse sectors to enliven the Western Australian community and economy through support for and provision of sporting, recreational, cultural and artistic policy, programs and activities for locals and visitors to the State.

The department provides regulation and support to local governments and the racing, gaming and liquor industries to maintain quality and compliance with relevant legislation, for the benefit of all Western Australians. This publication is current at November 2019.

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# Volunteer Management Guide

A guide to better recruiting, retaining and managing volunteers within sport and recreation organisations.





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# Introduction

This guide has been developed to improve the recruitment, retention and management of volunteers in volunteer-run State Sporting Associations. The guide is also relevant to sport and recreation clubs.

The term 'organisation' is used throughout the guide as a generic description for all the SSAs and clubs that may use this guide.

The guide assumes that organisations accessing the information do not have internal human resource or volunteer coordination expertise and support.

Key to the success of developing a strong volunteer workforce is:

- Creating a culture of volunteering where all members contribute in some small way;
- Applying formal volunteer recruitment strategies and procedures;
- Establishing volunteer management and coordination processes;
- Understanding compliance and regulatory requirements;
- Defining acceptable volunteer conduct;
- Recognising and rewarding volunteer effort;
- Providing a safe, supportive and inclusive environment;
- Making available an appropriate complaints and grievance process; and
- Applying succession and transition arrangements for Management Committee positions and other key volunteer roles.

The guide provides practical advice that will support the development and implementation of policies and procedures for effective volunteer management.

The development of the guide has been informed by a range of existing material including:

- Volunteering Australia's National Standards for Volunteer Involvement;
- Not-for-profit Law's National Volunteer Guide; and
- The Department of Local Government, Sport and Cultural Industries volunteer resources, templates, information and guides developed in association with Volunteering WA.

The guide is built upon the foundation of Volunteering Australia's formal definition that:

Volunteering is time willingly given for the common good and without financial gain



# Volunteering culture

Organisational culture is built upon the shared values, belief systems, attitudes and assumptions that people in an organisation share. Although each individual brings his or her own views influenced by environment and experiences, collectively people in an organisation can work together to create a shared culture.

By and large, it is the leadership and management of an organisation that defines the cultural requirements and provides the framework, cues and prompts that allow the people in an organisation to build and maintain the required culture.

In the paid workforce, the leadership and management of organisations encourage 'positive workplace culture' by defining vision and values, putting in place formal policies and procedures that encourage particular employee behaviours and reinforcing good practice through effective communication and clear commitment to the organisation's goals and objectives.

Employees respond to a positive workplace culture through increased productivity and efficiency, better collaboration and teamwork, improvements in job satisfaction, better morale, loyalty and retention.

The principles that underpin the creation of a positive workplace culture in the paid workforce apply equally to organisations that rely on the efforts of unpaid volunteers.

Organisations that rely on the efforts of volunteers for the majority, if not all of their operation and activity need to create an appropriate organisational culture.

This need is captured in the first standard of the National Standards for Volunteer Involvement developed by Volunteering Australia which States:

The governing body and senior employees lead and promote a positive culture towards volunteering and implement effective management systems to support volunteer involvement.

Effective leadership ensures the aims and values of volunteer involvement are promoted within the organisation, and that there is clear accountability for the implementation of volunteer involvement.

Effective management ensures that processes and systems are in place to implement positive volunteer involvement.

Meeting this standard assists the organisation to provide clear direction and guidance for the work of volunteers, as well as understand and mitigate any risks related to involving volunteers.

For the organisations that are the focus of this guide, the first step in the creation of a volunteering culture is to ensure that all members understand the operational reliance on volunteers.

Without the combined efforts of volunteers, the organisation would not be able to operate.

The second step in the establishment of an appropriate culture is to ensure that members accept that membership brings with it an expectation of giving, contribution and commitment. The expectation should be that volunteer efforts are shared across the membership and not just carried by the few.

These initial steps position an organisation for the development of a culture that recognises volunteering as an expected and accepted part of membership.

Although the focus here is on organisations with State-wide responsibility, the principles also apply at the individual club level.

Membership of an organisation should provide access to activity, the services provided and participation in competition and events, but also an opportunity to contribute to the effective operation of the organisation through voluntary effort. This is a fundamental issue. Membership denotes belonging and ownership. The members belong to and own the organisation and as such should be encouraged to promote and support the organisation's objectives.

Many volunteer-run sports and recreation organisations are operated by just a few key people who carry the load for the entire membership. A focus on a volunteering culture will spread the volunteer load across the entire membership.

The key to successful volunteering is to position and promote it as an inclusive activity that requires commitment and a contribution from all members.

It would be naïve to think that all members will be prepared to volunteer for the same type of activity or to commit the same amount of time and effort. However, it is not naïve to think that all members of an organisation should provide some level of commitment and some amount of time to support the organisation of which they are a member.

The intention should be to find everyone a job, or at least to get a commitment from all members that they are prepared to do a job. When an organisation creates the appropriate culture and puts in place the right processes and procedures to manage volunteer activity, there will be enough members available and every job will be allocated.

Establishing the right culture is the starting point for effective volunteering. An organisation should ensure the language used in relation to its membership clearly specifies “this is the way we do things around here” in relation to volunteering. At the point of joining, members should know that the organisation is managed and operated by volunteers and that without voluntary effort things would not get done.

The establishment of a volunteering culture as defined here focuses on organisations that are membership based and has not considered the involvement of volunteers who may give of their time without membership status.

However, if there are circumstances where volunteers make a contribution outside the membership arrangements the principles may still apply.

In summary:

- Ensure that there is a common understanding that the organisation relies on the efforts of volunteers for its operation;
- Define membership as both participation and giving, contribution and commitment;
- Connect volunteering to organisational vision, objectives and goals;
- Establish the appropriate processes and procedures to build, manage and maintain a volunteering culture;
- Coordinate volunteer effort and allocate jobs; and
- Use appropriate language to reinforce volunteering expectations.



# 1. Volunteer recruitment

As already identified, the establishment of a strong volunteering culture within organisations will provide the foundation for the recruitment of volunteers.

For the organisations that are the focus of this guide, volunteer recruitment should in the first instance target members.

The recruitment approach will be dependent on the membership arrangements for individual organisations as defined in the Rules of Association (Constitution).

In some cases, membership will cover clubs or teams that participate in association competitions and events. In other cases, membership will extend to individuals involved in the activities of an organisation.

The starting point should be the establishment of a potential volunteer list created from individual members and/or the members of clubs and teams.

Where there is a requirement to extend the recruitment process beyond the membership there are a range of strategies that may be applied and these are defined in the list that follows.

A key consideration is to identify specific volunteer roles and positions and to define the skills and attributes required to effectively undertake these.

The following list identifies strategies for both member and non-member volunteer recruitment.

- Produce volunteer information kits including position descriptions for specific volunteer roles and positions. There are a number of position descriptions provided at Appendix 1 of this guide;
- Include all members on a potential volunteer list and extend the list if required to include past members;
- Ask new members for their occupation and/or areas of interest on membership forms to identify skills that may be suitable for specific volunteer roles and positions;
- Conduct a skill audit of exiting members to identify the range of skills and attributes available;
- Provide new members with detailed information as part of a new member pack about ways they can get involved with your organisation as a volunteer;
- Encourage members who volunteer their time to be advocates for your organisation and active recruiters for new volunteers;
- Use the local community newspaper – classified advertisements, letters to the editor, or feature articles to promote and raise the profile of your organisation as an element of your volunteer recruitment process;
- Use local community radio in the same way to promote and raise the profile of your organisation;
- Use all available social media platforms for profile and promotion purposes and to advertise volunteer opportunities and the benefits of giving and contribution;
- Advertise volunteer opportunities and vacancies on your website;
- Produce hard copy promotional material such as posters, pamphlets and flyers to promote your organisation and highlight the benefits of volunteering;
- Develop partnerships with universities, TAFE colleges, schools, service groups and like-minded organisations to attract and engage new people to volunteer within your sport or recreational activity and to promote volunteering opportunities;
- Develop partnerships with the commercial sector and look for opportunities to present information on your sport, recreational activity and the benefits of volunteering such as in pre-retirement seminars and training sessions;

- Develop general advertising strategies for use in the commercial sector, with local businesses and sponsors;
- Promote your organisation and volunteer opportunities at local lifestyle and retirement villages and organisations that support retirees;
- Provide opportunities for members to take up assistant, apprentice or shadow roles so that they can learn the details of various positions prior to taking on formal responsibilities at your organisation;
- Use the Volunteering Australia 'GoVolunteer' site at [www.govolunteer.com.au](http://www.govolunteer.com.au) to promote and advertise volunteering at your organisation;
- Contact Volunteering WA about utilising its volunteer referral service to promote and advertise volunteering at your organisation; and
- Ensure you recognise and reward your volunteers – they will be the best promoters of your organisation and the fun and benefits of volunteering.

In summary:

- Volunteer recruitment should focus on the first instance on SSAs/club members who are not currently volunteering their time;
- Although not all members will give their time willingly, more members are likely to give and extend their voluntary effort if they know what is expected of them;
- An organisation needs to be clear about the type and number of volunteers it needs, the positions and jobs they will fill and the skills and attributes required for effective operation;
- It is important to identify specific volunteer roles and positions and to define the skills and attributes required to effectively undertake these; and
- There is a need for formal documentation such as job or position descriptions for Board or Committee roles and other key volunteering functions.





## 2. Volunteer management and coordination

A simple explanation of volunteer management could be the process used to bring volunteers into an organisation, supporting them in their volunteering activity and replacing them with new volunteers when they leave.

Although the explanation is simple, it is the attention to detail that is required to ensure that all aspects of volunteer management and coordination are defined, integrated and implemented that can make it a complex and complicated process.

For sport and recreation organisations with small numbers of employees or that are fully dependent on the support of volunteers, the process can have another level of complexity because volunteers are required to manage volunteers.

It is important that organisations use an approach to volunteer management that covers the detail, deals with all aspects of the volunteer process and once established is easy to apply. This is important because the process will be managed mostly by volunteers who already commit their time to other aspects of running the organisation.

The information that follows sets out the essential elements of volunteer management and coordination.

### Culture

As previously described, an organisation should ensure it creates, manages and maintains a positive volunteering culture that defines the organisation's reliance on voluntary effort and states the importance of comprehensive membership giving, contribution and commitment.

The leadership of the organisation should actively promote volunteering as an inclusive, whole of membership activity and discourage the notion of a few key members carrying most of the load.

### Recruitment

As previously described, an organisation should look within its membership for volunteers and extend its recruitment to external sources only when its volunteering needs cannot be supported by its members.

Volunteers should be recruited for specific and defined roles and formal documentation to describe the roles, responsibilities, skills and attributes should be developed and/or sourced to support the recruitment process.

The leadership of an organisation should utilise a range of strategies and approaches to raise profile, to promote their sport or recreational activity and to advertise the benefits of volunteering and the availability of various roles and positions.

### Planning

Volunteer effort should be aligned to the operational needs of the organisation and also to the future requirements as defined by vision and in strategic plans.

Planning is simply deciding in advance what is to be done, when it will be done, where and how it will occur and who will be responsible for doing it.

Planning takes an organisation from where it is to where it wants to be.

In relation to volunteering, a useful approach is for an organisation to develop and implement a formal Volunteer Management Plan.

A Volunteer Management Plan contains all the details required to ensure current operations are dealt with and the strategies for future development are defined.



A typical plan should cover:

- The scope, scale and extent of the volunteer effort required;
- The number of volunteers required to undertake the volunteer effort;
- The specific roles and responsibilities and how volunteer effort will be distributed across roles and positions;
- Role, job and position descriptions;
- The skills and attributes required for the specific roles and responsibilities;
- The skills and attributes available within the organisation – typically identified from a skills audit of the current membership;
- The requirements and expectations an organisation has of its volunteers;
- Orientation and induction processes;
- Training and development provided to support volunteers;
- Volunteer support processes;
- Recognition and reward procedures;
- Volunteer coordination strategies; and
- Evaluation and measures of success.

An example Volunteer Management Plan template is provided as Appendix 2 of this guide.

## Orientation and induction

A formal orientation and induction process will ensure that volunteers understand their role and responsibilities within the organisation and have the knowledge to perform their voluntary role as required.

The leadership of an organisation is responsible for ensuring that all volunteers are properly inducted and have the necessary information, resources and knowledge to perform their role.

Orientation and induction also provide a benchmark for volunteer performance so that both the volunteer and the organisation can agree on expectations and the actions to be taken if there are issues with the level of performance.

There are two distinct components, a general induction and a specific orientation to the defined role or position.

- Induction
  - Welcome to the organisation
  - Organisational culture and values
  - Organisation history, purpose, structure and vision
  - Volunteer expectations and responsibilities
  - Safety and regulatory requirements
- Orientation
  - o Specifics of the role or position
  - Relationship between the organisation leadership and the volunteer role
  - Training and development requirements and/or opportunities
  - Policies and procedures relevant to the role or position
  - Resources, material and equipment required for the role or position

## Training and development

The leadership of an organisation should identify training and development needs across the organisation and for specific volunteer roles and positions.

If external training support is required, programs and providers should be identified and steps taken to secure training places.

An allocation should be made in the annual budget for volunteer training. Where free training opportunities are available through government funded programs these should be identified and accessed.

## Support

Volunteer effort should be supported and volunteers should have access to:

- Defined points of contact – refer to the coordination notes that follow;
- Open and transparent communication channels. Volunteers should have the opportunity to hear about the activity of the organisation, ask questions, discuss problems, raise issues and make suggestions;
- Support for out of pocket expenses. Although volunteers give their time willingly without the expectation of financial gain, it is important that they are not significantly out of pocket and where possible steps should be taken to cover expenses;
- Information and advice. If there are organisational changes that impact on the role and responsibilities of a volunteer these should be clearly explained; and
- Recognition and reward mechanisms. Although most individuals do not volunteer with an expectation of recognition and reward it is important that an organisation puts in place appropriate mechanisms.

## Coordination

Managing and coordinating all aspects of volunteer effort and ensuring the effective implementation of a Volunteer Management Plan is best dealt with through the appointment of a Volunteer Coordinator.

The Coordinator becomes the point of contact within the organisation for all volunteer effort and manages all the elements of volunteering previously defined.

Volunteer coordination is a paid position in many charitable and community based organisations, but is not typically a formal employed position in the sport and recreation sector as yet.

For the sport and recreation organisations that are the focus of this guide, it is unlikely that the role will be a paid position. However, it is an important role that requires substantial volunteer effort and as such organisations may want to consider the appointment of several volunteers to undertake the function collectively.

An example Volunteer Coordinator position description is provided in Appendix 1 of this guide.

In summary:

- Volunteer management may be defined as the process used to bring volunteers into an organisation, to provide support for their volunteering activity and to replace them with new volunteers when they leave;
- Volunteers need to be identified, trained, supported and allocated appropriate roles, positions, jobs and tasks and volunteer effort needs to be coordinated;
- It is important that organisations use an approach to volunteer management that covers the detail, deals with all aspects of the volunteer process and once established is easy to apply;
- Organisations may want to consider the development and application of a Volunteer Management Plan as a useful tool in managing volunteers; and
- The establishment of a Volunteer Coordinator role is one way an organisation can effectively manage volunteer effort.





### 3. Compliance and regulatory requirements

There are three specific areas that need to be considered by organisations in relation to volunteer activity. These are:

- The Working with Children (WWC) Check;
- Volunteer National Police Certificate (VNPC); and
- Associations Incorporation Act 2015 – Eligibility requirements for committee members.

Other national and State legislative matters associated with areas such as health and safety are dealt with elsewhere in this guide.

#### WWC Check

The following information has been sourced from the Government of Western Australia, Working with Children Check site at [www.workingwithchildren.wa.gov.au](http://www.workingwithchildren.wa.gov.au).

The Working with Children (WWC) Check is a compulsory screening strategy in Western Australia for people who engage in certain paid or unpaid work with children, described as “child-related work” under the Working with Children (Criminal Record Checking) Act 2004.

Volunteer organisations have a number of obligations and responsibilities under the WWC Act and are required to ensure that all volunteers involved in child-related work have applied for or hold a valid WWC card before they commence child-related volunteer activity.

The definition of child-related work is broad and there is a range of categories that an organisation needs to be aware of. Coverage extends to the Board or Committee members of an organisation if the sport or recreational activity involves the participation of children.

Application for a WWC card is a personal responsibility. Individual volunteers are required to complete and lodge an application form. However, there is a requirement for an “authorised representative” of the organisation to complete and sign a section of the form prior to lodgement.

An organisation is required to keep records of WWC card holders and must be able to demonstrate compliance with the legislative requirements.

WWC cards are only valid for three years and organisations need to have in place procedures to ensure card renewal arrangements are applied.

Association and organisations should refer to Factsheet 18: WWC Checks in the Sport and Recreation Sector available from the Working with Children Check site. The following link will provide direct access to the factsheet; <https://workingwithchildren.wa.gov.au/docs/default-source/default-document-library/factsheet-18-wwc-checks-in-the-sport-and-recreation-sector-2015.pdf>

#### Volunteer National Police Certificate

The following information has been sourced from the Western Australian Police Force site at [www.police.wa.gov.au](http://www.police.wa.gov.au)

A National Police Certificate (NPC) contains a list of a person’s disclosable court outcomes and pending charges from all Australian police jurisdictions. This may include traffic and non-police prosecuted matters.

Individuals apply for a certificate. This is common practice for employment reasons where proof is required that an applicant does not have a criminal history.

The Volunteer National Police Certificate arrangements provide the same level of information, but the application is made by an individual in connection with a volunteer organisation.

There is a formal process for volunteer organisations to become registered under the Volunteer National Police Certificate arrangements.

Once registered, an organisation is given access to a web-based portal that manages the data associated with all volunteer applications and approvals for the individual organisation.

To become registered an organisation must be:

- Incorporated, or have relevant legal status if a non-government group;
- Provide a community service;
- Be a parent body, not a sub-branch with volunteers working within Western Australia; and
- Utilise eligible volunteers as defined.

The definition of eligible volunteers is that individuals receive no payment for work (except out of pocket expenses) and are involved in activities that provide a community service and are not part of an obligated work placement such as work experience.

Detailed information about applying for registered volunteer organisation status may be found at the Government of Western Australia Department of Communities site at [www.communities.wa.gov.au](http://www.communities.wa.gov.au)

## Associations Incorporation Act 2015

The following information has been sourced from the Government of Western Australia, Department of Mines, Industry Regulation and Safety site at [www.dmirs.wa.gov.au](http://www.dmirs.wa.gov.au)

The Associations Incorporation Act 2015 includes requirements to ensure that only suitable persons are responsible for running an incorporated association.

For organisations with incorporated status, the requirements of the Act are an important consideration in relation to the election and/or appointment of Board or Management Committee members.

Under the Act, a person is prohibited from sitting on the Board or Management Committee of an incorporated association where they:

- Are an undischarged bankrupt or their affairs are being managed under insolvency laws;
- Have been convicted of an offence in connection with the promotion, formation or management of a body corporate;
- Have been convicted of an offence involving fraud or dishonesty punishable on conviction by three months or more imprisonment; and/or





- Have been convicted of an offence under Division 3 (the duties of officers provisions) or section 127 (the duty with respect to incurring of debt) of the Act.

It is the responsibility of each individual to ensure that they are eligible to act as a member of the Board or Management Committee.

An incorporated association can also take steps to ensure that the processes in place for the election/appointment of committee members meet the requirements of the Act and ensure that all members of the committee are eligible under the Act to hold their positions.

This may require an incorporated association to:

- Update the rules and/or internal policy documents to ensure that the provisions are consistent with the requirements of the Act;
- Make potential committee members aware of these requirements;
- Add a tick box to nomination forms requiring candidates to confirm that they are not an undischarged bankrupt and have not been convicted of one of the specified offences within the last five years.

A checklist to support incorporated associations in relation to these matters is available for download at; [www.dmirs.wa.gov.au/associations](http://www.dmirs.wa.gov.au/associations)

In summary:

- There are legal and legislative obligations on associations, organisations and clubs in regard to volunteers that need to be understood and appropriate procedures applied;
- Associations and organisations need to manage the requirements for volunteers working with children and for any past court outcomes, police matters or convictions that might exclude individuals from holding Board or Committee positions; and
- An incorporated association must ensure procedures are in place so that the election or appointment of Management Committee members meets the eligibility requirements of the legislation.



# Volunteer conduct

Sport and recreation organisations with small numbers of employees or when an organisation is fully dependent on the support of volunteers should have formal documentation that sets out the requirements for volunteer conduct and behaviour.

The information that follows may also be applied at the individual club level.

A Volunteer Code of Conduct should set out the level of professional and ethical conduct, behaviours and intent expected of volunteers who are representing and working on behalf of an organisation in a formal capacity.

The code should apply to members of the Board or Management Committee of an organisation and to other key volunteer functions where individuals are engaged with members and/or external stakeholders while representing the organisation.

Typically, the code should have a clear statement of purpose that shows volunteers what is expected of them when representing the organisation.

A generic statement might be:

The purpose of this code of conduct is to:

- Provide practical guidelines of what is expected of a volunteer;
- Give enough context that a reasonable person will understand what is acceptable behaviour when representing the organisation;
- Establish agreed standards of appropriate behaviour and a shared understanding of the role and responsibilities of volunteers;
- Provide a reference for volunteers in solving problems and resolving conflict; and
- Gain explicit agreement from volunteers to self-monitor their behaviour and comply with the standards.

The details of the code will be specific to each organisation, but generally they will cover matters such as:

- Appropriate behaviour;
- Respect;
- Integrity;
- Support;
- Encouragement;
- Safety and well-being;
- Personal presentation;
- Use of appropriate language;
- Adherence to policies and procedures;
- Privacy; and
- Use of information and resources.

For organisations where volunteers are actively involved in day-to-day operations, the code may extend to more detailed matters such as social media, email and internet usage.

Where volunteers are accessing membership information and data and using the organisation's systems and resources for internal and external communications, there may be a requirement to include content in the code of conduct relevant to this area.



An organisation may want to consider content and statements such as:

- Volunteers need to be sure that they are not breaching any data protection or privacy requirements when using the organisation's systems to write and send emails or social media posts;
- Passing on personal member information to other individuals or third parties is not permitted without the express permission and consent of the organisation and the individual;
- Volunteers must not participate in any online activities using the organisation's systems which may bring the organisation into disrepute or create or transmit material that might be defamatory, incur liability or adversely impact on the reputation of the organisation;
- Volunteers must not use the organisation's systems to view or download material from sites which contain illegal or inappropriate content; and
- Using the organisation's systems to access sites for personal financial gain, to undertake illegal activities or for general personal use is prohibited.

In summary:

- There is a need to ensure that the behaviour and conduct of volunteers is appropriate and acceptable;
- Volunteer actions impact on the reputation of organisations. When a volunteer is undertaking work that is in the public eye they are the visible representatives of the organisation;
- Organisations need to document expectations around volunteer behaviour and conduct in a formal code of conduct; and
- Where volunteers are managing the day-to-day operations of an organisation there is a need for clear policies and procedures that define expected professional behaviour.



## 4. Recognition and reward

All sport and recreation activities in Australia rely on the efforts of an army of volunteers to support operations. Without volunteers there would be no organised sports competitions, events or recreational activity.

For the organisations that are the focus of this guide, the input and efforts of volunteers is even more critical given that most of the organisations have few if any paid employees.

Volunteers are the backbone of the sports and recreation industry and a significant source of social capital. For smaller sport and recreation organisations the unpaid work of volunteers is crucial to their operations and the effort to recruit, retain, recognise and reward volunteers is of strategic significance.

It is useful for organisations to consider the development of documentation, for example in a Volunteer Management Plan, that covers the following key elements:

- Positive first impression – develop and apply a high-quality orientation and induction process that immediately connects the volunteer to the organisation and establishes a strong working relationship;
- Seek regular feedback – establish open and transparent communication processes that encourage volunteers to speak out about the operations of the organisation, offer suggestions on improvements and know that their feedback is valued;
- Provide regular feedback – ensure that volunteers know how they are performing. Look for opportunities to praise, reinforce and offer constructive advice;
- Create an inclusive environment – make sure volunteers are part of the decision making process at the strategic or operational level as appropriate. Define volunteers as part of the team;

- Offer training and development opportunities – identify organisational skill requirements and provide opportunities for volunteers to build their skills base. Support volunteers that want to move into new or different roles; and
- Publicise volunteer impact – let volunteers know how their efforts support the strategic goals and operational activities of the organisation. Ensure that they know they make a difference.

The previous explanation about the importance of a volunteering culture supports the need for the development and implementation of volunteer recognition and reward strategies.

Recognition for individual volunteer effort is probably the most important element in the overall management of volunteers.

The simple act of recognising and acknowledging the work people put into an organisation will do more than almost any other action to motivate, enthuse and retain volunteers.

Recognition is a genuine and planned response that values the efforts and contribution made by volunteers. The extension of the recognition process is to provide a reward for the volunteering work. Rewards are tangible and meaningful actions that show volunteers that their efforts are recognised, valued and appreciated by the organisation.

Recognition and reward activities work best when they focus on individual effort, are personalised, varied and genuine.



Recognition and reward activities should be:

- Immediate and provided soon after a particular volunteer effort has been applied;
- Specific and detailed to suit a particular individual effort;
- Consistent and unbiased so that individual volunteers are not favoured over others who have applied similar effort; and
- Sincere and provided by the organisation because of what has been done rather than who did it.

The list of recognition and reward activities is almost endless and is only limited by the imagination within the organisation and the resources available. Organisations may want to consider some of the following things:

- Provide proper volunteer inductions;
- Include volunteers in planning activities;
- Provide training and development opportunities;
- Support development and look for opportunities for volunteers to extend their skills;
- Provide a safe working environment;
- Recommend volunteers to prospective employers;
- Make time to listen to volunteers' ideas and concerns;
- Recognise and accommodate personal needs and problems;
- Celebrate achievements and effort;
- Keep volunteers informed via a newsletter or social media platform;
- Provide letters of reference;
- Allocate noticeboard or social media space to acknowledge volunteer achievement;
- Organise awards with certificates, plaques or medals;
- Offer personal praise to volunteers;
- Write letters and postcards of thanks;
- Acknowledge volunteers in newsletters and on social media;

- Present volunteer awards at presentation nights or annual general meetings;
- Provide complimentary tickets to special events and functions;
- Arrange discounts with businesses or sponsors for volunteers;
- Reimburse out-of-pocket expenses;
- Farewell people when they move out of the organisation; and
- Present awards for years of service.

## Volunteer payments

Payment to volunteers is not generally regarded as part of an organisation's recognition and reward strategy.

The foundation of the voluntary work upon which this guide is built is the Volunteering Australia definition that:

Volunteering is time willingly given for the common good and without financial gain

However, there may be occasions where an organisation wants to make a payment to a volunteer in recognition of work done, to reimburse expenses or as an honorarium – a reward for voluntary or professional services rendered.

The Associations Incorporation Act 2015 allows for the members of an incorporated association to be reimbursed for any out of pocket expenses relating to the affairs of the association. It is normal to request that the member provide evidence of the payment such as a receipt before the refund is paid.

Where an organisation wants to pay a member an honorarium for a service they provide, there is a requirement to define the reason for payment. The Act does not refer directly to honorariums, but general payments to members cannot be used as a way of distributing the income of the association. Any payments must satisfy the specifications in the Rules of Association (Constitution).

As a general rule, payments to volunteers are not regarded as assessable income for taxation purposes if they have some or all of the following characteristics:

- Paid to reimburse expenses;
- No connection to the recipient's income-producing activities or services;
- Not remuneration for employment;
- Not relied upon for day-to-day living expenses;
- Not expected by the recipient as regular payment;
- No obligation on the association to pay; and
- Regarded as a token payment.

Where an organisation makes regular, ongoing payments to volunteers there is a need to seek formal professional legal and/or financial advice about the impact of these payments on employment status and taxation.

In summary:

- It is important that the unpaid work of volunteers is recognised and procedures established to reward volunteer effort:
- For organisations that rely exclusively on the input and efforts of volunteers recognition and reward strategies are critical to effective operation:
- Recognition and reward strategies are the single most powerful stimulus to motivate, enthuse and retain volunteers;
- Recognition and reward strategies are most successful when they are personal and focus on individual effort; and
- Payments to volunteers are allowable, but an organisation should seek professional advice where regular, ongoing payments are made.





## 5. Benefits of volunteering

All organised sports and recreation activities in Western Australia rely on the efforts of volunteers. Without volunteers weekend games, matches, events and competitions would not take place, mid-week training sessions would not be held and there would be no army of parents, family members and friends who willingly give of their time to manage, coach, administer and organise sporting activity.

Volunteers involved in sport and recreation organisations are the foundation of the sports and recreation industry and provide the State with a significant source of social capital.

However, not all members of organisations volunteer and not all people recognise the benefits of volunteering.

Research conducted by the Australian Sports Commission that resulted in the 2014 report into volunteering, *Volunteers – Market Segmentation*, identified different categories of volunteers and the motivations that drive the different categories.

The research identified that nearly 70% of sports and recreation organisation volunteers are actively involved in support of family members because they enjoy the social interaction and connections from being involved in a voluntary organisation.

The report described the categories as ‘Happy Helpers’, those people who willingly give of their time to support children and other family members who participate and the ‘Community Committed’, individuals who get real enjoyment from their voluntary effort and are strongly connected to the objectives of the organisation. In both categories, it was likely that the volunteering extended beyond a single organisation.

The report identified a number of other categories including groups of people who do not ordinarily volunteer, but there are categories additional to the ‘Happy Helpers’ and the ‘Community Committed’ who will volunteer

and who understand the benefits and this is where organisations should focus recruitments efforts. These included, individuals identified as:

- ‘Self Servers’ who will readily volunteer if they can see a tangible personal benefit of some kind, such as skills and work experience;
- ‘Sidelined’ who will happily volunteer if they are aligned with tasks and activities that fit their physical capability and other commitments; and
- ‘Occupied Observers’ who participate in the organisation through their children’s involvement and will volunteer as long as their child continues to participate.

In all categories, there are clear benefits to both the organisation and the individual from more volunteering.

It is clear that without volunteers most sports would cease to operate, so the direct benefit to the sport organisations is obvious, but what is the benefit to the individual volunteer?

### Individual benefits

There is a significant amount of evidence from research conducted over many years that shows the health and social benefits of volunteering. In general, volunteers have a strong sense of community, enjoy the company of the people they interact with for a common purpose, enjoy better physical and mental health and get a sense of satisfaction from their volunteering work.

Those individuals who volunteer in sport and recreation organisations are also more likely to live healthy lifestyles.

Volunteering in sport is often linked to the activities of children and as such parents, siblings and extended family members who volunteer report that it is one of the most rewarding things they can do as a family.



Volunteering delivers a positive contribution that supports local community organisations and provides the individual volunteer with a range of positive experiences.

A volunteer will:

- Develop a greater sense of self-confidence. Volunteering provides an opportunity to try something new and different in a non-threatening environment where there is support from others and the outcome is not tied to financial reward or career progression. Volunteering supports a sense of achievement.
- Make a difference to the organisation. Most sport and recreation volunteers are members of the organisation at which they volunteer. In a very real sense the voluntary effort is improving the individual's own association or club and as such delivers a tangible outcome for the individual, other members and the organisation.
- Meet people and develop relationships. Sport and recreation organisations are full of people pursuing a common interest. Volunteering can help people to meet others who share the same interest, enthusiasm and passion for a sport or recreation activity.
- Make a contribution to their local community. Sport and recreation organisations are focused on participation, involvement and inclusion. Volunteering can support an individual to develop connections and relationships throughout their community.
- Gain knowledge and learn new skills. Many volunteers start their volunteering life with little understanding of the roles or responsibilities required within an organisation. Over time and with the support of the organisation, individuals acquire knowledge and develop administrative skills, leadership and management ability, financial understanding, coaching and mentoring skills and a broad range of other attributes that often help beyond their volunteer life and support work aspirations and career progression.



- Face challenges. Through volunteering an individual can attempt tasks, activities and projects that they may not be able to experience or try in their personal, work or study lives. They can try something different, look to achieve personal goals, practice, develop and improve their skills.
- Enjoy participating. It is highly unlikely that an individual joins a sporting or recreation organisation to be miserable. The intention is to participate in enjoyable pursuits and have fun with like-minded people. Volunteering adds to the fun.

## Community benefits

Sports and recreation organisations are an essential part of the social fabric. Organisations provide an opportunity for individuals and groups within a community to actively engage in physical and mentally stimulating activity and competition.

Sport promotes participation and healthy competition and local associations and clubs become a focal point for community development.

The effort of volunteers in supporting local associations and clubs provides significant community benefit, including:

- Positive group membership, improved civic participation, strong social networks, greater levels of trust between organisation members and across the membership of other organisations involved in the same sport or activity;
- Stronger community connections, social interaction and relationships that promote co-operation within and across organisations and the development of friendships that are an essential component of life;
- Increased community participation with many volunteers giving their time to multiple organisations; and
- Better social cohesion through volunteering provides a key element in the development and maintenance of healthy, integrated and secure local communities.

In summary:

- Volunteers provide the foundation for sport and recreation activity and provide the State with a significant source of social capital;
- As a group, volunteers typically enjoy their voluntary work and are committed to the goals and objectives of the organisation of which they are a member;
- Volunteers working together in an organisation share a common purpose, enjoy the interaction with people who have a common interest and get a sense of satisfaction from their volunteering work;
- The work of volunteers is an important contribution that supports local community development and provides the individual volunteer with a range of positive experiences; and
- Sports and recreation organisations reliant on volunteer effort are a community asset that provide opportunities for active engagement competition and events.



## 6. Safe, supportive and inclusive environment

All organisations have a responsibility to provide a safe, supportive and inclusive workplace for employees. This responsibility extends to volunteers.

For sport and recreation organisations with few if any employees, there is a need to ensure that policies and procedures deal with all aspects of the work environment and extend to cover the activities of Board and Management Committee members and other key volunteers undertaking formal and defined work on behalf of the organisation.

Standard 6 of the National Standards for Volunteer Involvement developed by Volunteering Australia States:

The health, safety and wellbeing of volunteers is protected in the workplace.

Workplace safety and wellbeing ensures that the organisation includes volunteers in its health and safety procedures, and recognises its duty of care to volunteers.

Meeting this standard assists the organisation to meet its obligations for the health and safety of volunteers, manage risk and provide a supportive and responsive workplace for volunteers.

There is a requirement that all volunteers working with or involved in the activities of an organisation must not encounter bullying, harassment, intimidation or victimisation on the basis of gender, race, colour, ethnicity, sexual orientation, marital status, religion or belief, age or disability.

Organisations should take steps to create an operating environment in which the individual characteristics and differences of volunteers and the contribution they make are recognised and valued.

An organisation should consider:

- The use of formal policies and procedures that ensure all volunteers operate in a work environment that promotes dignity and respect and excludes all forms of intimidation, harassment and bullying;
- The availability of training, development and progression opportunities that support the development of volunteer skills and allow for volunteers to move between various roles, positions and functions in an organisation;
- The promotion of transparency, fairness and equality in all aspects of the organisation's work;
- A formal process to deal with policy and procedural breaches and misconduct: and
- Annual reviews of all workplace health, safety and wellbeing policies, procedures, processes and systems to ensure currency and relevance.

An organisation may also want to include other work related safety and wellbeing issues such as alcohol and substance abuse in a Volunteer Code of Conduct as previously described.

Although it is unlikely that the organisations that are the focus of this guide will have the internal capacity to deal with drug and substance abuse by volunteers involved with the organisation's activity, there is a need to define a policy about how this issue will be dealt with.

An organisation may want to specify that it will:

- Provide reasonable assistance to a volunteer with alcohol or substance abuse issues – within the capacity and capability of the organisation; and
- Enforce disciplinary measures where the use of alcohol and other substances impacts on volunteer behaviour, performance and the reputation of the organisation.



## Workplace safety

There is a range of federal and State legislation covering workplace health and safety that extends to cover the work undertaken by volunteers on behalf of an organisation.

Organisations are required to ensure that they have in place systems to manage workplace safety obligations.

There are two elements of workplace safety an organisation needs to understand and act upon. These relate to negligence and work health and safety (also known as occupational health and safety or OHS).

There are two elements of workplace negligence. Firstly, there is the organisation's responsibility for the safety of the volunteer and, secondly, the safety of those people the volunteer is engaging and working with such as other volunteers, members of the organisation and members of the general public.

An organisation is required to understand its duty of care to volunteers and the standard of care that needs to be satisfied so that volunteers, the organisation and the people that the organisation interacts with are protected.

Legislation related to workplace health and safety (the provision of a safe working environment) is complex and there are definitions about workplaces and employed persons that do not extend to all volunteer activity.

In essence, there is a requirement for an organisation to:

- Identify any hazards within the workplace;
- Assess the risks that may result as a consequence of the hazards;
- Decide on appropriate control measures to prevent and minimise the level of the risks; and
- Implement those control measures and monitor and review the outcomes.





When hazards, risks and measures have been identified, an organisation may need to provide the following as part of its workplace health and safety strategy:

- Tools, equipment and resources that are appropriate to the task, in good working condition and do not put the volunteer at risk;
- Training, advice and support in relation to manual handling and the lifting of heavy objects;
- Personal protective equipment and advice on personal hygiene;
- Training, advice and support to ensure designated roles, positions and tasks can be performed safely; and
- Advice and support in relation to other identified areas of risk such as lack of hydration, exposure to the sun, smoking, drug and substance abuse and injury management.

Organisations may access detailed information on all aspects of the provision of a safe workplace for volunteers, with a particular emphasis on the legal obligations an organisation has to its volunteers by consulting the National Volunteer Guide. The guide may be accessed directly from the following link: [www.nfplaw.org.au/sites/default/files/media/NFP\\_Law\\_-\\_National\\_Volunteer\\_Guide.pdf](http://www.nfplaw.org.au/sites/default/files/media/NFP_Law_-_National_Volunteer_Guide.pdf)

Organisations may also want to seek formal professional advice about their workplace safety obligations in relation to volunteers undertaking work on behalf of the organisation.

In summary:

- Organisations have a responsibility to provide a safe, supportive and inclusive workplace for volunteers.
- When an organisation is dependent on the work of volunteers, there is a requirement to ensure volunteers feel safe and not subjected to bullying, harassment or intimidation.
- An organisation is obligated to ensure volunteers are not exposed to any unsafe work practices.
- An organisation should understand its duty of care requirements so that its volunteers, the organisation and the people that the organisation interacts with are protected.



# Complaints and disciplinary matters

There are numerous ways conflicts may arise with the sport and recreation environment and organisations should have in place procedures designed to deal with and resolve conflict situations informally and as soon as they arise. Early intervention and open communication will benefit all parties in the conflict. Every effort should be made to find a resolution that satisfies all parties before escalating the matter to a more formal process.

When a conflict situation becomes a complaint or disciplinary matter, there is a requirement that an organisation has in place a formal complaint and dispute resolution process.

The Associations Incorporation Act 2015 requires all incorporated associations to define a procedure in the Rules of Association (Constitution) about how disputes and complaints will be dealt with.

Regardless of the need for formal procedures, the starting point for an organisation reliant on the efforts of its volunteers for its operation should be the adoption of management and communication practices based on mutual respect.

Board or Management Committee members and volunteers should adopt practices that encourage open and honest communication, cooperation and collaboration.

Organisations may want to consider the adoption of the following principles:

- Pause and think carefully before reacting – issues may be resolved with minimum fuss and without the need for formal processes if individuals consider the options before reacting;
- Listen and reflect – actively listening to the words of others and acknowledging their concerns will diffuse the situation;
- Assure fairness – do not make assumptions about issues and situations;

- Deal with the issue – put aside emotions and deal directly with the issue;
- Accept responsibility – take ownership of the issue and admit fault as required;
- Communicate directly – speak clearly and directly;
- Identify the real issue – look for underlying causes that may result in repeat concerns or issues;
- Focus on the future – learn from the situation and position the organisation and individuals for the future; and
- Mutual success – always try for an outcome that is in the best interests of the organisation, its members and the volunteer.

For organisations that rely on volunteers, the adoption of the principles as described above and prevention using the culture, coordination and conduct advice previously described in this guide, is the best way of dealing with concerned or disgruntled volunteers.

However, where issues do arise it is essential that an organisation has in place clear procedures that can be readily applied with fairness for the individuals involved and in the best interests of the organisation and its members.

When unambiguous and transparent arrangements are in place, it is likely that most issues may be resolved by dealing directly with the individuals involved rather than progressing the matter to a formal complaint.

It is only when a Board or Management Committee fails to deal openly with volunteer concerns and ignores the issues that relatively minor concerns can escalate.

Organisations should consider the following:

- Disputes and complaints are likely at some point and as such there is a need for simple procedures to resolve these. For incorporated associations, there is no choice in this. There is a legislative requirement to define procedures in the Rules of Association (Constitution).
- There is a collective responsibility to ensure that an organisation operates in accordance with its rules. This responsibility extends across the membership and is not restricted to just the Board or Management Committee. If there is a whole of membership proactive focus on proper governance and good management, complaints and disputes are less likely.
- In the majority of cases, it is likely that issues, concerns and complaints can be resolved through informal processes where Board or Management Committee members and the volunteers discuss the matter and come to a satisfactory outcome before progressing to the formal procedure.
- The primary aim of a dispute resolution process is to maintain harmony in an organisation and to deal with complaints in a fair, consistent and timely way. Where volunteers are actively involved in a broad range of operations, it is likely that issues are more likely to arise. Common sense and good practice will ensure these issues are dealt with appropriately.

When a complaint or dispute moves beyond informal discussion and the formal complaint and dispute resolution process is activated, both the volunteer making the complaint and the Board or Management Committee members should recognise that their behaviour throughout the process will play a major part in the outcome.

At the conclusion of the process, the complainant and the organisation will need to move on and, as such, the best interests of the organisation and the interests of all of its members need to be protected.

Individuals involved in the process should be mindful of the following:

Volunteers lodging a complaint need to:

- Accept that their complaint or dispute has triggered a formal process and the Board or Management Committee should be allowed to respond to the complaint before concerns are raised with external parties;
- Understand that Boards and Management Committees at smaller sport and recreation organisations are almost always comprised of other volunteers with limited time and resources available to them. There is a need to accept that a realistic timeline is required to deal with the issue;
- Recognise that when complaints and disputes are directed at other members of an organisation (usually other volunteers), it is important that claims are fully supported by some proof of the alleged incident and/or activity. Organisation time and effort should not be wasted on false claims; and
- Ensure that all their dealings with the Board or Management Committee members tasked with overseeing the complaint and dispute resolution process are conducted in a courteous and respectful manner.
- Board and Management Committee members managing the complaint and dispute resolution process need to:
- Accept that all members of an organisation providing their time and energy as a volunteer have the right to raise their concerns and where appropriate make formal complaints. Volunteers should not be discriminated against, targeted or punished for raising an issue or making a complaint;
- Ensure that the Board or Management Committee members understand their responsibility to ensure that complaints are given full and proper consideration and that the process used to resolve the dispute is transparent, fair and unbiased;
- Manage the process appropriately where a complaint or dispute involves a Board or Management Committee member. In these cases, it is inappropriate for a member who is the subject of a complaint to be involved in the formal process;



- Deal with complaints and disputes within agreed timelines. It is unacceptable to extend the process unnecessarily. Avoidable delays only aggravate the situation; and
- Ensure that all their dealings with the volunteer making the complaint are conducted in a courteous and respectful manner.

For incorporated associations reference should be made to the Department of Mines, Industry Regulation and Safety publication 'INC – A Guide for Incorporated Associations in Western Australia' and the section on resolving complaints and disputes. The guide is available at; [www.commerce.wa.gov.au](http://www.commerce.wa.gov.au)

In summary:

- An organisation that relies on volunteers should apply work practices that encourage open and honest communication, cooperation and collaboration;
- When conflict occurs, an organisation should look for solutions and a resolution that satisfies all parties before escalating the matter to a more formal process; and
- Where issues arise that require formal intervention, it is important that an organisation applies procedures that are fair to the individuals involved and are in the best interests of the organisation and its members.







# Succession and transition

Succession planning is the process of identifying and developing key people in an organisation so they can replace others when they leave, or identifying people external to the organisation who could be recruited to fill roles when people depart.

Properly applied, the succession process should create a pool of capable and experienced people who are prepared and available to move into positions as they become vacant.

The desired outcome is that an organisation will be sustainable with continuity and certainty around its operations and will be positioned for continued and/or greater success, growth and improvement.

In the commercial world, succession planning – particularly for Board or Committee positions and senior management roles – is a structured, detailed and comprehensive process.

In organisations dependent on the efforts of volunteers, the application of succession planning principles is more problematic.

It is harder to find the time to focus on future needs and the volunteers required to attend to these needs, when most of the available time is spent managing the operations of the organisation.

However, it is important that the organisations that are the focus of this guide take the time to think about succession and the transition of volunteers to replace departing volunteers.

The process may not be as detailed as those used in the commercial world, but there is still a need for structure and formality and it is the responsibility of Board and Management Committee members to plan for the future in the best interests of their members.

Although it may seem like an obvious statement, an organisation needs to know what roles, positions and jobs need to be filled and completed before it looks to recruit volunteers to do that work.

For most of the organisations that are the focus of this guide, the roles and jobs that need to be considered in relation to succession are Board and Management Committee positions – President, Vice President, Secretary and Treasurer – and any other key volunteer roles that are essential to efficient operation.

Finding people to take on volunteer roles can be a challenge, but the culture, coordination and conduct information described elsewhere in this guide is designed to position an organisation so that volunteer recruitment becomes less difficult.

It is important to get the culture, coordination and conduct components right first.

When the structure is right and the culture, coordination and conduct principles are being applied, the recruitment, succession and transition processes will be easier to implement.

The information on volunteer recruitment provided elsewhere in this guide applies to the filling of Board or Management Committee positions.

An organisation should analyse the details of all of its key volunteer roles and develop an accurate picture of the skills and attributes required for the effective leadership and management of the organisation.

Details should be captured and documented in formal position descriptions for all Board or Management Committee positions and any other key volunteer roles that are essential for effective operation.

Organisations should:

- Focus on the skills and expertise required to operate and manage an efficient organisation in a 'business-like' way;
- Source the right skills. Steps should be taken to inform members looking to fill elected positions about the skills and attributes required for the roles. Skills and experience should be the measure for all appointed positions;
- Adopt succession and transition practices built upon a proper analysis of the skills, attributes and capabilities required to lead and manage the organisation rather than an ad hoc filling of roles;
- All volunteer recruitment associated with Board or Management Committee positions and other key volunteer roles should be aligned to the overall strategic direction of the organisation;
- Plan for future skill and capacity needs. Volunteers should be recruited into assistant, apprentice or shadow roles so that the organisation builds a pool of skilled people;
- Establish skills and professional development pathways for its volunteers and look for opportunities to provide training and development;
- Stay dynamic and relevant. Organisations need to identify, assess and make use of contemporary practices and technology. Ensure the requirements of the Rules of Association (Constitution) are followed, but operate with best practice and adjust to changing circumstances; and
- Recruit, develop and promote the right people based on skills, capacity, experience, knowledge and enthusiasm.

There will always be succession and transition difficulties for smaller sport and recreation organisations that rely almost exclusively on the efforts of volunteers. The aim is to reduce the level of difficulty and to establish an organisational culture and adopt practices that make the volunteering efforts easier and more enjoyable.

Organisations need to be proactive and to look at ways of bringing in new talent.

Organisations may want to consider the following key elements are part of their organisational focus:

- Plan

Ensure that there is a clear strategic direction for the organisation, preferably documented in a formal strategic plan. Work out where the organisation is heading, figure out the best way to get there and ensure there is the capacity, skills and attributes to get there.

- Continuity

Work towards a model that values continuity of systems, policies, processes and procedures. Individual volunteers will come and go, but the structures and frameworks inside an organisation should be strong and should be maintained regardless of personality. Work out what needs to be done and who needs to do it to maintain the effective operation of the organisation.

- Ego

Every role, position and job in an organisation adds value. There are obviously some roles that require a greater commitment of time or a broader set of skills, but collectively all the volunteer effort is required to ensure effective operation. There is no room for misguided ego. Every job and all work can be done by others.

- Internal

The first place to look for new volunteers and for people to succeed into key organisational roles is internally. Look for enthusiastic and willing members. Develop culture, coordination and conduct principles that will encourage greater volunteer involvement.

- External

There is always room for new talent and if the Rules of Association (Constitution) allows for appointed members an organisation should look outside for the skills, attributes and experience that they do not have.



- Unexpected

A key element of organisational leadership and management is the identification and management of risk. Prepare for the unexpected. Ensure that there is a repository of internal knowledge that understands the organisation's systems, policies, processes and procedures. Share the load.

In summary:

- Organisations need to plan for the future and have in place proper succession and transition processes to ensure key roles are filled with the best available people;
- When a succession process is well-developed and properly implemented, the outcome should be a supply of skilled volunteers who are prepared to move into positions as they become vacant;
- The best outcome of an effective succession process is that an organisation will continue to operate with certainty and will be positioned for growth and improvement regardless of the individuals involved;
- When an organisation has the right culture and the appropriate coordination and volunteer conduct practices in place, the succession of new volunteers should be easier to apply.



# Checklist – key components of volunteer management

The content of this guide is designed to assist smaller sport and recreation organisations that rely mostly on the efforts of volunteers for governance, management and general operations.

The intention of the guide is to ensure organisations have the information necessary to secure the volunteer workforce they need and put tools in place to guarantee good work practices.

Although the circumstances and context of each organisation will influence the outcomes, if properly applied the information in the guide will produce positive results.

The checklist that follows will allow an organisation to measure its current situation against the various components of the guide and to identify areas for improvement or development.

Please take the time to assess the current situation at your organisation when measured against the items in the checklist.

Your honest appraisal will allow you to identify areas where work is required and highlight issues where your organisation may need to source additional information or seek further advice, assistance and support.



# Appendix 1

Example key volunteer  
position description forms



## President/Chairperson

The President plays a key leadership role in the organisation and has overall responsibility for the governance, management and administration.

The President sets the overall annual committee agenda (consistent with the views of members), helps the Board or Committee prioritise its goals and then keeps the Board or Committee on track by working within that overall framework. At the operational level, the major function of the President is to facilitate effective committee meetings.

**Responsible to:** The President is typically elected by the members and responsible for representing the views of the members. The President is accountable to the members and Board or Committee of the organisation. At Committee meetings, the President should report on operations.

### Responsibilities and Duties

- Adhere to the mission, vision, strategic direction and values of the organisation
- Provide effective, efficient leadership for including holding those in the organisation accountable that are responsible for administration and finances
- Manage committee and/or executive meetings including the annual general meeting including the associated reports
- Represent the organisation at local, regional, State and national levels
- Encourage an organisation that is inclusive, supportive, and strengthens the community
- Facilitate the activities of the organisation
- Develop good relationships internally and externally
- Act as a signatory for the organisation regarding legal and financial matters

- Ensure all Board/Committee members and sub committees fulfil their responsibilities to the organisation, assisting them with their duties as needed
- Collaborate with the Vice President to ensure the smooth operation of the organisation
- Ensure the planning and budgeting for the future is carried out to allow the organisation to be sustainable and operate in accordance with the wishes of the members.

### Knowledge and Skills Required

- Effective communicator
- Well informed of all organisation activities
- Aware of and able to direct the future directions and plans of the organisation by taking the members' plans into consideration
- Good working knowledge of the constitution, rules and the duties of all office holders and subcommittees
- Supportive leader for all members of the organisation.



## Vice President/Vice Chairperson

The Vice President plays a key leadership role in the organisation and supports the President in the governance, management and administration of the organisation.

The Vice President assists the President to set the overall annual Committee agenda (consistent with the views of members), helps the Board or Committee members prioritise its goals and supports the other members of the Board or Committee members to keep on track and to work within the overall framework.

At the operational level, the major function of the Vice President is support the President and to stand in for all official duties and activities when the President is unavailable.

**Responsible to:** The Vice President is typically elected by the members and responsible for representing the views of the members. The Vice President is accountable to the President, other Board or Committee members and the general membership of the organisation. At Board or Committee meetings when the President is unavailable, the Vice President should report on operations.

### Responsibilities and Duties

- Adhere to the mission, vision, strategic direction and values of the organisation
- Provide effective, efficient collective leadership for including holding those in the organisation accountable that are responsible for administration and finances
- Manage committee and/or executive meetings including the annual general meeting including the associated reports in the absence of the President

- Represent the organisation at local, regional, State and national levels in support of the President
- Encourage an organisation that is inclusive, supportive, and strengthens the community
- Facilitate the activities of the organisation
- Develop good relationships internally and externally
- As required, act as a signatory for the organisation regarding legal and financial matters
- Assist the President to ensure that all Board or Committee members and sub committees fulfil their responsibilities to the organisation, assisting them with their duties as needed
- Collaborate with the President to ensure the smooth operation of the organisation
- Work with the President and other Board or Committee members to ensure the planning and budgeting for the future is carried out to allow the organisation to be sustainable and operate in accordance with the wishes of the members.

### Knowledge and Skills Required

- Effective communicator
- Well-informed of all the organisation's activities
- Aware of and able to direct the future directions and plans of the organisation by taking the members' plans into consideration
- Good working knowledge of the constitution, rules and the duties of all office holders and subcommittees
- Supportive leader for all members of the organisation.

## Secretary

The Secretary is the chief administration officer. This person provides the coordinating link between members, the Board or Committee and outside agencies.

**Responsible to:** The Secretary is directly responsible to the President and Board or Committee members and the overall membership of the organisation.

### Responsibilities and Duties

- Adhere to the mission, vision, and values of the organisation
- Consult with the President in preparing the agenda for organisation meetings
- Organise meetings, including venue, date, times and catering
- Send adequate notice of the meetings to attendees
- Collect and collate reports from office bearers
- Call for and receive nominations for the Board or Committee and other key positions within the organisation
- Organise the Annual General meeting (AGM)
- Take, write up, and promptly distribute minutes for each meeting
- Read, reply and file correspondence promptly
- Collate and arrange for the printing of the annual report
- Maintain registers of members' names and addresses, life members and sponsors
- Maintain files of legal documents such as constitutions, leases and titles

- Act as the public officer of organisation liaising with members of the public, affiliated bodies and government agencies.
- Enter teams in competitions; represent the organisation at State Association meetings; communicate information between the organisation and its members.

### Knowledge and Skills Required

- Well-organised
- Able to delegate
- Effective communicator
- Confidentiality
- Knowledge of the organisations rules/constitution, by-laws and policies.

## Treasurer

The Treasurer is the chief financial management officer for the organisation. The Treasurer oversees all of the finances of the SSAs/club and may chair the Finance Committee.

Responsible To: The Treasurer is directly responsible to the President and the Board or Committee members for the financial management of the organisation.

### Responsibilities and Duties

- Adhere to the mission, vision, and values of the club
- Be fully informed about the club's financial position at all times
- Prepare a budget and monitor it carefully
- Keep the club's books up-to-date, including a record of all payments and monies received, including issuing receipts
- Give Treasurer's report at regular meetings when required, and make sure financial reports are available and understood at all Board/Committee meetings
- Show evidence that money received is banked and documentation provided for all money paid out
- Ensure that information for an audit is prepared each year and produce an annual financial report
- Send out accounts, pay bills, arrange financial audits, and manage petty cash
- Invoice SSAs/club members, as appropriate (e.g. annual dues, uniform, equipment).

### Knowledge and Skills Required

- Well-organised
- Able to allocate regular time periods to maintain the books
- Able to keep good records
- Able to work in a logical, orderly manner
- Knowledge of annual audit requirements.

# Volunteer Coordinator

## Purpose

The role of the Volunteer Coordinator is to recruit, support and recognise volunteers throughout the organisation.

**Responsible to:** The President and the other Board or Committee members.

## Responsibilities

- Develop a list of the volunteer requirements for the organisation.
- Develop, manage and maintain the Volunteer Management Plan
- Actively recruit volunteers.
- Ensure the necessary volunteer screening is undertaken.
- Induct new volunteers or support induction by organising relevant people to support newcomers into their roles.
- Be the main contact point for volunteers should they have a concern or problem.
- Actively recognise volunteers generally and individually through the organisation's communication channels.
- Attend Board or Management Committee meetings as required.

## Knowledge and Skills Required

- Well-organised with good attention to detail
- Able to allocate the time required for the coordination role
- Enthusiastic about being a volunteer and able to sell involvement to others
- Ability to develop good working relationships
- High profile and visibility throughout the organisation
- Expert in use of various communication channels
- Expert in the use of social media platforms.



## General Committee Position

### Purpose

An effective Board or Committee is comprised of people with an appropriate range of skills. In general they should possess the following qualities:

- Be willing to accept responsibility
- Be enthusiastic and dedicated to the organisation
- Have good communication skills
- Be ethical, honest and trustworthy
- Be a team player
- Have a sound understanding of the Committee's roles and functions.

**Responsible to:** The President and the other Board or Committee members and the overall membership of the organisation.

### Responsibilities

The responsibilities of a General Committee member are to support the formal office holders and to show collective leadership with regard to:

- Acting in the best interests of the organisation at all times
- Ensuring the organisation operates within the boundaries of its Rules of Association
- Ensuring compliance with policies, laws and regulations
- Managing risk
- Monitoring the performance of the organisation against the agreed goals

- Ensure the President and the other senior office holders provide satisfactory leadership, planning, organisation, control and succession
- Keep the organisation's members and other stakeholders informed of all the organisation's activities, including the outcome of meetings and forthcoming events through open communication, newsletters, emails and regular meetings
- Acknowledge the needs of SSAs/Club members
- Create and administer action plans, set objectives, develop and update policies and procedures
- Evaluate and monitor the performance of the volunteers that run the organisation
- Oversee the financial management of the organisation



# Appendix 2

## Example Volunteer Management Plan



## Introduction

For purposes of this plan, a volunteer will be defined as a person or persons who are performing a role defined by the organisation. This definition is aligned with Volunteering Australia's definition of volunteering which is 'time willingly given for the common good and without financial gain'.

The roles performed may include one-off and on-going activities, but this does not negate the valuable contribution of all volunteer roles. Without each volunteer, an organisation would not be able to function successfully.

This document is meant to be read in conjunction with the policies and procedures of the organisation and should give proper consideration to the content of volunteer position descriptions.

### The Volunteer Cycle

This Volunteer Management Plan (VMP) has been written to support a positive volunteering culture.

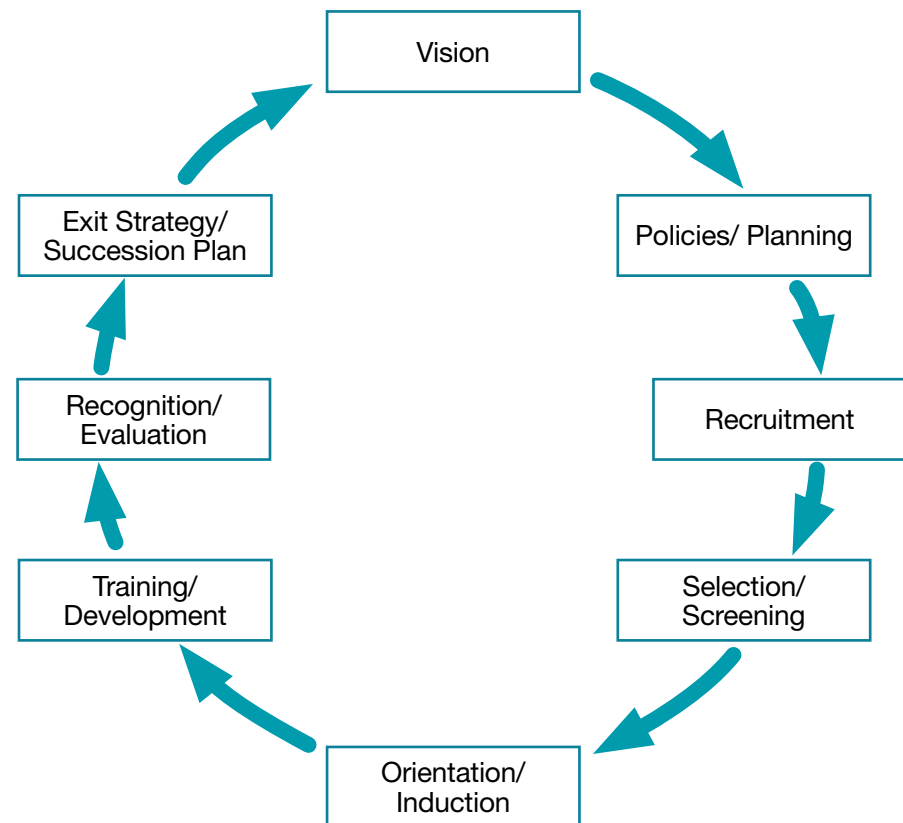
The plan prioritises the organisation goals and identifies the key strategies to be implemented.

The purpose of the plan is to:

- Connect the organisation's mission and vision with the activity of its volunteers
- Help bring volunteers into the organisation
- Help volunteers develop a sense of commitment to the organisation
- Provide and/or plan for training and development opportunities
- Recognise and reward volunteer effort and performance.

The following diagram illustrates the phases of the Volunteer Cycle in regard to the activity undertaken by a volunteer. The cycle provides a framework for volunteer management and should be monitored and reviewed as appropriate.

The plan will specifically target each of the areas of the Volunteer Cycle. It is important to note that not all phases of the Volunteer Cycle will be relevant to all volunteer roles. The level of involvement from a volunteer and the role they perform will determine which phases of the cycle they will go through.







## Vision

The vision of the organisation will be accomplished through the contribution of volunteers.

(Insert vision statement)

## Policies/Planning

In order to effectively manage volunteers and the relationship between volunteers and any paid staff, the organisation has the following policies and procedures in place:

(Insert policies and procedures)

## Recruitment

Recruitment is the process of attracting new volunteers to the organisation. However, it can also include finding new roles for existing volunteers.

The methods of recruitment currently used by the association/organisation include:

(Insert methods)

The method(s) used will vary based on the requirements of the role. During the induction process, a full role description will be provided to each volunteer.

## Selection and Screening

Where applicable, prospective volunteers will apply for the role they are interested in.

Applicants will be assessed based on experience, skills, and training relevant to the role.

Depending on the role, applicants may also be required to obtain a Police Clearance Certificate and/or Working with Children's Check. The cost of these checks will be borne by the organisation.

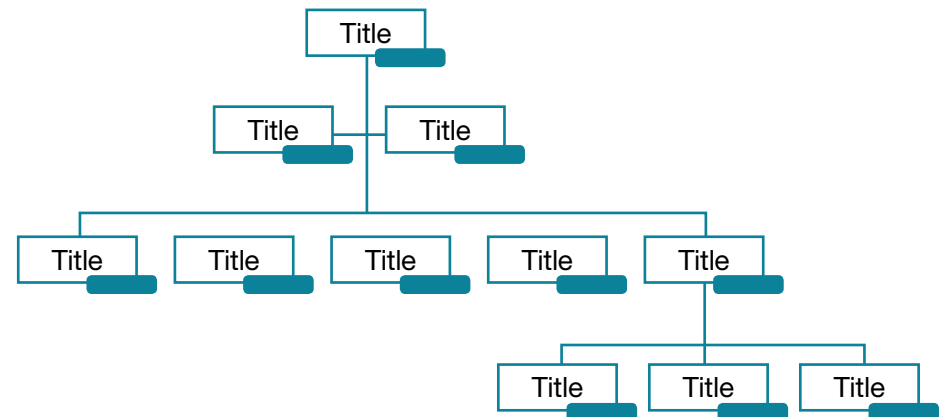
All volunteers are expected to sign a copy of their position description indicating that they are equipped for the duties expected of them and agree to the responsibilities of their role. In addition to agreeing to the provided position description, all volunteers should be provided with a copy of all organisation policies and procedures. Upon reading the policies and procedures, the volunteer should also sign a form stating that they have read the policies and procedures and agree to adhere to them.

The expectations outlined for volunteers will include details such as:

(Insert details)

## Orientation/Induction

The organisational chart for the association/organisation is shown below.



The orientation process allows volunteers to become familiar with the organisation and the key information involved in being a part of it. This process also ensures that the organisation is able to outline clear expectations of volunteers, including behaviour and attitudes.

Induction for volunteers will vary based on the position.

For ongoing positions, the contact person for volunteers is:

(insert the Volunteer Coordinator details).

The Volunteer Coordinator will meet with the volunteer formally and ensure that all appropriate paperwork is completed. For one-off event volunteering, the contact person for volunteers may vary based on the event. An induction will take place on the day of the event or arranged prior with the designated volunteer coordinator for that event.

## Training/Development

Volunteers will be offered training and development opportunities, as available. These opportunities will be presented as a means of assisting volunteers in better performing their roles and developing their skills.

If there is a different volunteer role within the organisation that a volunteer is interested in, reasonable effort will be made to up-skill or train the volunteer for that role. An organisation may not be aware at all times of all available training opportunities and as such, volunteers are both encouraged and supported to independently seek out training, educational, and development opportunities for themselves.

## Recognition/Evaluation

The contribution of all volunteers to the organisation is highly valued. Given that a key to volunteer retention is appropriate recognition, every effort will be made to thank volunteers and recognise their contribution.

Currently, appreciation is shown to volunteers using the following strategies:

(Insert strategies)

In providing recognition for volunteers' contribution, we will adhere to the following guidelines on providing feedback on volunteer performance. The organisation will be:

- Immediate
- Prepared
- Specific
- Active listener
- On task
- Objective
- Consistent
- Positive
- Sincere

## Exit Strategy/Succession Plan

Volunteer roles will be for an agreed length of time based on the role. For example, a Board PR Management Committee member may be designated for a role for two years, but a coach or team manager may be needed for one year or one season. The length of service will be agreed with the volunteer upon commencement and included in their position description.

When the end of the agreed time arrives, a review will be done to determine if the volunteer will remain in the role for another term or if a new volunteer will fill the position. This allows the volunteer to comfortably step out of their role, if they so desire. This also allows the organisation to move a new volunteer into the role if a situation should arise that requires the current occupant of the role to cease volunteering.

An annual review will be conducted which enables feedback to be given both from the volunteer and the organisation. The review process helps to ensure that the volunteer will continue to perform to the best of their ability and the organisation provides the best possible support.

At all times of the Volunteer Cycle, the organisation's Board/Committee and employees (if applicable) will ensure that they are approachable and communication is open. However, it is important to ensure that the Volunteer Coordinator is kept as the primary contact for volunteers and informed of relevant communication between other organisation office holders and employees.

Should a volunteer choose to cease volunteering with the organisation they will be asked for the reasons they are no longer volunteering. While in many cases the reason(s) may be unavoidable, the explanation may help the organisation to improve its volunteer program by identifying gaps in the Volunteer Management Program and in monitoring the support given to volunteers.

This feedback will be gathered, when possible, during a formal exit interview. This will help ensure that the volunteer completes their role in a positive manner and the organisation can plan for the continuation of the role they were performing.

The following mechanisms are in place for volunteer succession planning:

(Insert mechanisms)





## Volunteer Management Plan – Actions

The following table reflects the items identified throughout this plan that require action to implement. By identifying the individual actions needed and assigning responsibility for those actions, the organisation will be able to improve its volunteering program.

| Phase in cycle            | Brief description of action required | Individual responsible for implementation   | Other person(s) involved | Completion Date              | Notes                         |
|---------------------------|--------------------------------------|---|--------------------------|------------------------------|-------------------------------|
| Policies and procedures   | Grievance Policy                     | Secretary                                   | Vice-president           | End of year                  | For review and Board approval |
| Orientation and Induction | Update of current Induction process  | Nominated Committee members – Working Group | NIL                      | Two months from commencement |                               |
| Insert others as required |                                      |   |                          |                              |                               |
| Insert others as required |                                      |   |                          |                              |                               |





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