

# VOLUNTEER MANAGEMENT PLAN WORKBOOK



**SPORT AND  
RECREATION  
VICTORIA**



# VOLUNTEER MANAGEMENT PLAN WORKBOOK

## TABLE OF CONTENTS

Chapter	Page
1 Introduction .....	3
2 Who should be involved in developing a Volunteer Management Plan? .....	4
3 How to develop a Volunteer Management Plan .....	6
4 Key Principles for Effective Volunteer Management .....	8
5 Support material	
5.1 Assessment Table proforma .....	21
5.2 Examples of evaluation comments .....	25
5.3 Volunteer Management Strategy Table proforma.....	35
5.4 Examples of Strategies .....	41
5.5 Project Brief Information Sheet .....	53
5.6 Project Brief proforma .....	55
5.7 Example Project Brief .....	57
5.8 Position Description Information Sheet .....	59
5.9 Position Description proforma .....	61
5.10 Example Position Descriptions .....	63
5.11 Volunteer Opportunities Listing proforma .....	69
6 Managing the Implementation of the Volunteer Management Plan .....	73
7 Review process .....	74
8 Resources	
8.1 Resources available through Sport Recreation Victoria .....	75
8.2 Resources available through Local Government .....	77
8.3 Resources available through Volunteer Resource Centres .....	78
8.4 Resources available ‘on-line’ .....	81

## **1. Introduction**

The role of volunteers in the sport and recreation industry is well known. Their contribution in both economic and social terms is extensive and much of the activity of the industry would not happen without their support. A large and active volunteer workforce is essential to the survival of much of the industry. It is with this in mind that Sport and Recreation Victoria has developed this resource to assist sport clubs and associations across the industry manage and retain their volunteer support base more effectively. The year 2001 has been declared the International Year of the Volunteer in recognition of the value they give to the community and this workbook serves the same ends.

The Volunteer Management Plan Workbook has been developed as one of the results of a consultancy commissioned by Sport and Recreation Victoria that was conducted during 2000 to examine and test appropriate ways for sport and recreation organisations to improve their volunteer recruitment and retention. Six organisations were directly involved in the consultancy, involving state wide associations, local clubs and specialist groups and the workbook reflects the practical experiences of these organisations in taking steps to manage their volunteers more effectively, over the life of the project. Its value lies not only in the blueprint it provides for some basic sensible procedures that any organisation can reasonably undertake but also in its having been tested in experience.

The workbook is a valuable tool in its own right for any sport and recreation organisation faced with the challenges of recruiting, managing and retaining volunteers. It is also relevant to organisations taking advantage of the Active Australia Provider model, not only those who have achieved provider status but also those who are currently going through the process to achieve that end. Furthermore it is closely related to some of the material in the Volunteer Management Program and the Organisation Management Program (VMP/CAMP) that have recently been published by the Australian Sports Commission to replace the Volunteer Involvement Program. Presenters and Facilitators will find it a particularly useful tool in supporting the implementation of the VMP/CAMP programs.

It also has potential in the future as an action learning resource that could be used in association with the delivery and assessment of competencies in the sport and recreation training packages.

Sporting and recreation organisations obviously vary in scope, size and in the organisational culture they adopt. This workbook can be customised to meet the varying needs of organisations, depending on the complexities of their volunteer workforce. It should be stressed, however, that the full benefits of a volunteer management plan would only be realised if all the steps in the process were followed.

## 2. Who should be involved in developing a Volunteer Management Plan?

It is important to ensure that everyone in the organisation is at least aware that the project is occurring and what the intended purpose and outcomes of the project are. This is as important in relation to committee members as it is in relation to the ‘occasional’ volunteer.

The more people involved in the project in some way the greater the understanding of the issues and benefits among members. This will also assist to identify any potential 'roadblocks' to the project early. These can then be handled proactively and as part of the project rather than present as surprises when the project is nearing completion.

There are a number of strategies for providing opportunities for different types of involvement. Remember you need to cater for those that want to be closely involved and those that require only comment.

The opportunities for involvement can include:

Member of the project team	The project team may involve 6 people from a range of organisation operations and types of volunteer involvement (e.g. irregular, on-going)
‘Brainstorm’ session or workshop	A workshop can be held once or twice during the project to give members an chance to express issues and opportunities.
Written comment	Members can be invited to raise any issues and opportunities and submit them in writing to the project.
Informal input	Members may pass comment to project team members on an informal basis. It is important that these comments are recorded and noted.
Commenting on draft documents	Some people prefer to see something in writing first before they may get involved. For these people their ideas are generated from ‘reviewing’ material. Offering members the opportunity to comment on written material early and then later in the project provides continuing feedback on the direction of the project.
Information feedback	Some members may not want to be directly involved in the project but may well want to stay ‘informed’. It is essential that members be kept in touch with the project. This can be done through the organisation newsletter, on noticeboards, or reporting at committee meetings etc.

In addition to members, there may well be other people or organisations with an interest in the project or whom it may be of benefit to involve. These may include:

- The state association, if a club is undertaking the project
- Member clubs, if a state association is undertaking the project

- The local council
- Regional Sporting Assemblies
- Current or potential funding bodies
- Active Australia provider
- Another club that has already developed a plan (learn from experience!)

It is important that the key stakeholders are identified at the outset of the project.

### 3. How to develop a Volunteer Management Plan

(√ - Place a tick in the column once the step has been completed.)

Step	√	Description	Notes
1		Form a project Working Group.	Involve people representative of volunteers in your organisation and relevant external key stakeholders
2		Nominate 1 or 2 people to 'drive' the project.	These people will not be solely responsible for the project. They will however act as 'the whip' to keep the project going.  (Having two people makes it a less lonely task!)
3		Determine 'how' you are going to involve the membership in the project.	Refer chapter 2.
4		Promote the project within your organisation.	Inform members how they can be involved. Keep general membership updated. (Refer chapter 2).
5		Read information in chapter 4 of the Workbook – ' <i>Key Principles for Effective Volunteer Management</i> '.	Ensure people on the working group have a good understanding of this information and make available to the membership that want to familiarise themselves more with the project and its value.
6		Assess the performance of the organisation in relation to volunteer development and support.	Use the ' <i>Assessment Table Proforma</i> ' in section 5.1 as a guide through the process. (Remember to modify to the organisations needs).  Be sure to allow adequate time for discussion on each of the checklist items.  Section 5.2 provides some typical comments that may be made in relation to each item. Also note the things that the organisation is doing well at this time.
7		Develop strategies or actions to address issues identified.	Use the ' <i>Strategy Table Proforma</i> ' in section 5.3 as a guide through the process. (Remember to modify to the organisations needs).  Be sure to allow adequate time for discussion on each of the checklist items. <i>It is essential that timelines and the person responsible for co-ordinating each strategy is identified.</i>  Section 5.4 provides some typical comments that may be made in relation to each item.

8	Appoint person responsible for co-ordinating the implementation of the Plan.	<p>It is important that once all the hard work of developing the Volunteer management plan is completed that the impetus is not lost.</p> <p>Placing someone (or 2 people) in charge of overseeing the implementation will ensure the benefits start to flow immediately.</p>
9	Establish review dates.	Establish timelines to review the progress of the Plan. The review can be done by the original working group or by the management committee.
10	Include 'Volunteer Management' as an item on the committee's monthly agenda.	<p>This will keep the plan and volunteer issues generally on the organisation's 'agenda'.</p> <p>It will also serve to remind incoming committees that the organisation has a Volunteer Management Plan that is integrated into the organisation's operations.</p>
11	Review the Volunteer Management Plan.	<p>The organisation may well choose to do this annually, or once the strategy has been implemented, or on a cycle that is determined by the organisation.</p> <p>The process used will be that followed putting together the original plan. That is, commence at step 1.</p>

**Additional Information**

12	Developing project briefs (project outlines).	Use the information contained in sections 5.5 to 5.7 to assist with preparing project briefs.
13	Developing position descriptions (roles and responsibilities).	Use the information contained in sections 5.8 to 5.10 to assist with preparing position descriptions.
14	Developing a listing of all Volunteer opportunities.	Use the proforma in section 5.11 as a framework for listing both volunteer positions and project opportunities.

## 4. Key Principles for Effective Volunteer Management

A wealth of information exists through various agencies and resources to assist organisations better manage their volunteer membership. The following is a summary of the most common and recurring themes that emerge from this information, from meetings with large volunteer management organisations and from the valuable input provided by organisations participating in the original project.

The information is compiled under four headings that relate to the stages of developing and implementing a successful volunteer management program and are as follows:

- **Stage 1 - Pre-recruitment**
- **Stage 2 - Recruitment**
- **Stage 3 - Retention**
- **Stage 3 - Review**

The information provided on each of the four stages outlines the necessary structures, processes and information that should be in place so as to ensure the success of the volunteer management program. It also provides a breakdown of the stages together with information that will provide an understanding of the importance of each stage.

This information should also be used to assist with any review of the Volunteer Management Plan.

### STAGE 1 - PRE-RECRUITMENT

#### **1. Organisational goals and framework clearly established and known to membership.**

It is essential that the organisation has an understanding of and focus on what it wants to achieve and why. That is, its goals, objectives and the rationale on which these are based are clear.

This is important for any organisation, but critically so for an organisation that wants to recruit volunteers to its projects and activities. If there are no clearly stated organisational goals and principles, nor a framework in place to help achieve these, then it will be difficult for the organisation to identify clear, concise volunteer tasks that will be rewarding to the volunteer and of benefit to the organisation.

In addition, the volunteer will become increasingly disenchanted with an organisation that cannot show them a clear way forward, how they fit into the organisation and what (quality) value they will be adding through their efforts.

It is essential for both the organisation and the volunteer that the organisational goals and values, and the way in which these are to be achieved, are reviewed on a regular basis. If not, the organisation will find itself increasingly irrelevant to its volunteers who will quickly see the inconsistency between the executive and the membership.

#### **2. An organisational inventory of task and project needs identified and documented.**

Once the organisation has established its goals and strategic framework, an inventory of tasks or activities to help achieve these goals can be identified and prioritised.

These tasks can be formulated in accordance with key priority areas that the organisation has already identified in the 'forward plan' or 'business plan'. Alternatively, the 'needs inventory' can assist in formulating these key priority areas e.g. membership recruitment, promotion, fund-raising. At this stage it is too early to identify specific volunteer opportunities. The tasks have not been well enough defined or broken down into the necessary phases and requirements. If the organisation looks for volunteer roles at this stage it risks not having clearly defined roles, tasks and requirements for volunteers.

### **3. Project and/or task briefs prepared**

It is only by preparing a project or task brief that the organisation will be able to identify all opportunities for volunteer involvement. This can also be the tool that is used to determine whether a project is possible given the current *level* (number of people, type of and level of skill etc.) and *mix* of resources (paid, volunteer, part-time, full-time etc) that are currently available.

A project in its entirety may well be beyond the capacity of the organisation at this time, however, by preparing a good project brief the organisation will develop opportunities for achieving some of its objectives. Then in the future, when further resources are available, the framework is in place for extending the project.

The benefit of this process is that there is a clear task outline, complete with any specific expectations of the task, to give a prospective volunteer.

### **4. Personal attributes and skills for all volunteer roles documented and clearly define the requirements of the position.**

A poor matching of personal skills and abilities can have a negative outcome for both the volunteer and the organisation, particularly if the situation persists for a length of time. The volunteer who is feeling frustrated or ill equipped to handle the role will not derive any sense of satisfaction from their position.

The outcome can be the loss of a willing volunteer, who if better placed, would still be active as a volunteer. Alternatively, the organisation can suffer the consequences of not having roles and responsibilities undertaken to the level required, often causing wider spread operational difficulties within the organisation.

There are always situations where it is necessary, due to lack of volunteers, to place a volunteer in a role for which they may not have the appropriate skills or confidence. However by recognising this in advance, the volunteer can be supported in their role through industry and sports training programs.

By identifying the technical and personal skills the organisation needs in a role, the type of culture the organisation is looking to cultivate is reinforced.

### **5. Position descriptions for volunteer roles documented and clearly define the requirements of the position.**

By having position descriptions in place the potential volunteer can clearly establish the expectations of any role.

Timelines for critical tasks must be included in the position description. This will provide the volunteer with timeframes to work to and will help overcome the last minute panic for both the volunteer and the organisation administrator.

It is essential that the volunteer is made familiar with the position description. This is most effectively done by the outgoing volunteer, or by someone familiar with the role. This is a crucial part of any induction program.

Having the position description prepared assists to reassure the 'cautious' volunteer who is concerned of becoming over-committed. It also helps to define the boundaries for both the volunteer and the organisation.

Most organisations are in the position where an existing volunteer takes on more than one role. While this is commendable, it can have a negative effect when trying to attract the new volunteer to the position. The combination of roles is seen by the potential volunteer as one position, this can be overwhelming. The position description helps to separate the roles and clarify demands and expectations, and importantly avoid 'burnout'.

## **6. The culture of the organisation and people in key positions is encouraging of volunteer involvement.**

The importance of the 'organisational culture' cannot be over-rated yet it is rarely part of an organisation's operational 'review'. A review of this nature should consider:

- the degree to which the organisation recognises its volunteer skills and supports the involvement of the 'not so confident' potential volunteer in the ranks
- the degree to which existing volunteers do not share the load around despite not having the necessary resources (i.e. time, skills, knowledge etc) to complete the task themselves. This is largely caused by the volunteer with good intentions, but not the resources to match
- the impact of existing volunteers who are miss-matched to their role and who as a result have a negative impact on the recruitment of new volunteers and on the culture of the organisation as a whole - either through dissatisfaction or poor performance in the role
- the degree to which people in key positions in the organisation act as positive role models therefore encouraging new volunteers to the positions
- the degree to which the organisation values and supports its volunteers and discourages unproductive criticism

## **7. Alternative avenues and ways for volunteer recruitment have been identified and a strategy for accessing volunteers through these means has been developed.**

This requires a consideration of:

- The manner in which the organisation has traditionally gone about recruiting volunteers from within its ranks.  
If traditionally the organisation has recruited internally through advertisements in newsletters or approached the same volunteers to do more, and these methods are increasingly becoming unsuccessful, then alternative methods need to be developed.
- Opportunities for involving volunteers from outside the organisation.  
These opportunities can be sought for example through Volunteer Resource Centres, Regional Sports Assemblies, and over the Internet where the ability to access 'on-line' volunteers is increasing.

These can be an excellent supplement to the organisation's traditional volunteer base.

- Increasing opportunities for recruiting volunteers for one-off, stand alone or technical roles within the organisation e.g. setting up databases and mailing lists, developing organisation newsletters, accountancy skills, training programs for committees etc.

Approaching potential volunteers one-to-one, with a clear picture of the intended role (position description) or project (project brief), and with an explanation as to how the position or task will affect the overall performance of the organisation yields the most productive results. All volunteers like to feel that they will be doing something that is valuable to the effective operation of the organisation.

By providing this information the volunteer will be making a decision based on the real expectations of the position and not what they may wrongly perceive the position to be, that is, greater than the actual requirements of the role. In some cases the potential volunteer may have underestimated the responsibilities of the role. However it is far better that this be realised before the position is taken up, so as to avoid potential frustration and feelings of having been misled.

While the most successful strategy for recruiting volunteers is the direct one-to-one approach, other methods of recruiting must not be dismissed e.g. noticeboards, newsletters, informal 'word-of-mouth', email etc. A well thought out combination of all methods that is relevant to the membership should be used.

It needs to be kept in mind that people with professional skills may well be prepared to offer their skills for specific projects while not able to offer time for attending committee meetings etc.

Where necessary develop the project requirements and scope in response to the volunteer skill available at the time and target external organisations that can best provide skills needed.

Any strategy for accessing volunteers through sources external to the organisation must involve an understanding of the 'target' organisation's requirements. For example many tertiary institutions require that a 'project brief' be submitted and student placement support be provided. The timing of this submission needs to coincide with the institutions course planning and preparation.

Volunteer Resource Centres on the other hand require position descriptions for any volunteer positions an organisation is attempting to fill.

It is necessary that after compiling a list of agencies, businesses, educational institutions etc, that the requirements and procedures of these organisations are understood and complied with, so as to maximise the success of seeking volunteers through these channels.

### **8. The organisation has a policy on volunteers and their role in the organisation.**

Volunteers form the backbone of sporting and recreation organisations at both the club and association level yet it is rare to find policy references to volunteers and the critical roles they play. Reference should be found in such documents as the Business Plans, Development Plans etc.

An organisational policy should send clear messages to both the general membership and the volunteers themselves as to the importance of volunteers, the manner in which the organisation will support them, responsibilities towards volunteers, expectations of volunteer's etc.

The policy can set the boundaries and mutual understandings between the volunteer and the organisation. Importantly, any policy must be supported with the appropriate action, attitudes and behaviours towards its volunteers.

## **STAGE 2 -RECRUITMENT**

### **9. There are clearly defined opportunities for different types of volunteer involvement in the organisation.**

An inventory of all *the roles* that are required by the organisation in order to function effectively is a solid starting point for identifying the range and type of opportunities for involving volunteers. This inventory will include positions relating to committees, sub-committees, tournaments, promotional activities, coaching, umpiring, canteen, maintenance, administration and activity based opportunities etc. It is worth noting to if there are any specific positions or roles where it is appropriate for a paid employee to be used or professional advice hired.

In addition, a list of *all projects* that are identified in the organisation's business plan or alternatively that exists in members 'to do' or 'wishlists' should be documented. These projects may include the development of a new membership database, the formulation of a sponsorship package or the preparation of new members' information kit.

Developing an inventory or list of these opportunities (in summary form) with critical information the volunteer is seeking e.g. time required, skills required, location of the role, frequency of the task, provides an excellent first source of information for the volunteer. This information can be profiled in newsletters, on noticeboards, websites etc.

### **10. Information that clearly states the purpose of the organisation is readily available to the potential volunteer.**

Long-term members take for granted that new or potential members have the same understanding of the organisation as they do. There are those organisational activities and goals that are obvious, however it is often the secondary activities or programs that are of equal importance and interest to the potential member. These may include skill development programs, junior or older adult activities, or the social functions organised for families.

Providing this information not only informs the current membership about events and activities it can also give the organisation a 'marketing edge' in relation to new members. At a time when all sporting and recreation groups have to work hard to maintain their membership numbers because of competing community organisations, this is an important consideration.

The benefit for the volunteer recruitment program is a membership that is knowledgeable about the organisation's programs and activities, that has an awareness of how essential volunteers are to the organisation, and of the various opportunities for involvement as a volunteer.

The organisation should be pro-active in circulating information on a regular basis and should appoint a volunteer with this specific responsibility.

### **11. Volunteer and task needs are matched where practical.**

“We have so few volunteers that we can’t afford to be fussy” is a common call from many organisations, yet these same organisations will talk of the dire impact of placing an inappropriately skilled or motivated volunteer in the wrong role.

Whether it is the junior coach, who although is an ‘A-grade’ player does not relate well to young children, or the secretary who is ‘burnt out’ and needs to resign but is wracked with guilt about doing so, the results can be significant on the organisation. The coach becomes one of the greatest impediments to developing the teenage and senior ranks, and the secretary’s frustration turns to resentment and cynicism which is detrimental to the effective operation of the committee.

A person in a position to which they are not suited or satisfied can have negative long-term consequences for the organisation.

With a good knowledge of the membership through the organisation’s comprehensive database and clear role requirements, a more positive outcome for both the organisation and the volunteer is possible.

Removing or limiting the barriers that may discourage volunteer involvement can be achieved by identifying the barriers, and then looking for alternative opportunities. These barriers may include timeframes, transport, lack of confidence, level of skill.

For roles that have specific time and location requirements there may be little room for flexibility, but for other roles, particularly administrative functions, there may be greater flexibility. ‘Role sharing’ should not be eliminated nor should challenging the traditional means of carrying out specific functions within the organisation so as to be more adaptive to the changing needs of volunteers.

## **12. The organisation has a comprehensive membership database that identifies member ‘interests’ and/or professional involvements.**

A comprehensive database will not only make the administrative functions of the organisation easier to handle it will provide a wealth of information on potential volunteers.

Information on membership interests, motivations and professional skills can be sought with general membership information. New members identified through the database can be approached directly to discuss opportunities for volunteer involvement.

The database also allows the organisation to note any requirements that the potential volunteer has in relation to taking on any tasks. Noting this type of information on the database will ensure that the member is not approached for the same task a number of times.

## **STAGE 3 – RETENTION**

### **13. ‘One-off events and short term project opportunities for volunteer involvement identified and documented.**

Recognising how an individual may prefer to volunteer will assist in matching the volunteer to the task. There is an increasing preference among volunteers for short-term and one-off projects or activities. If these types of opportunities are identified ahead of time or separated out of existing position requirements then the organisation is well placed when a volunteer with this preference is identified or comes forward.

### **14. A ‘succession plan’ developed and is in place**

The failure to have in place a 'succession' or handover strategy can result in the loss of considerable information and knowledge that is important to the organisation and can affect the ease with which the incoming volunteer transitions into the role.

All too often the incoming volunteer is handed a collection of paperwork and expected to understand the current state of affairs or indeed 'fix it'. This is not an encouraging start for the incoming volunteer, particularly if they have reluctantly taken on the role.

An excellent source of feedback and information for the organisation is to be found with the exiting volunteer who frequently leaves a role without being asked to pass anything but the mere basics on. Any succession plan should:

- review the position description including the range of responsibilities and demands associated with the position
- review the level and type of resources required to support or enhance the role, including training
- identify any difficulties associated with the role
- identify broader organisational issues that may have contributed to the volunteer vacating the position
- 'order' the information/documentation for the incoming volunteer
- inform the incoming volunteer of immediate actions and timelines that need to be noted
- clarify procedures and responsibilities of the position for the incoming volunteer particularly if the position requirements have altered

This process should ideally be undertaken with the incoming and outgoing volunteer together, and should be regarded as part of the organisations training or induction program.

### **15. Motivations of the existing and potential volunteer are understood.**

Understanding the motivations or aspirations of the volunteer or potential volunteer can provide an insight as to

- How to best nurture and encourage the volunteer
- Roles or positions that are better suited to one volunteer and not another
- Why certain committees or functions are not as effective as they might be.

Some organisations require that individuals volunteering for key or strategic positions stipulate their motivations during the application or nomination process. It is essential that the primary motivation driving any volunteer is to make a contribution to the advancement or effective running of the organisation. The reason behind this however, will vary from one volunteer to another.

Knowing and understanding the real motivations of a volunteer is not always easy. However, having the potential volunteer outline reasons for aspiring to the role, helps clarify any gaps between the organisations vision for the role and the volunteers assessment of the role. This is also a good starting point for discussions at a later date should motivations of either party alter.

### **16. A relevant reward and recognition system in place**

Any reward or recognition process must:

- Have structure, be relevant to the volunteer, and appropriate to the task or position.  
Consideration needs to be given to the structure of the program and the type of recognition various roles, projects or 'service' will be given. It is essential that the type and level of

recognition is relevant to the level and type of involvement. This will ensure that the 'recognition' does not lose its impact. Developing criteria for the program is essential.

Not to be forgotten in the recognition process are the basic courtesies of a letter of welcome to the position/committee, the letter of thanks etc

- Be manageable and have a clear process for implementing  
The organisation must ensure that it has the resources to manage the program. It is inappropriate to implement a program that will place a financial burden on the organisation for example by the issuing of weekly movie passes for the canteen volunteers, or develop a program that makes for an administrative nightmare for the committee.  
The ability to manage the program easily must be a consideration in establishing the framework and this must ensure accuracy.
- Be consistently applied  
Any program must be administered consistently, for the right reasons and without favour. The impact of not doing so can be significant. All organisations can report the impact of an oversight or of an inappropriate 'reward'. It is better to contain the recognition program but ensure consistency than to manage a large but inconsistently implemented program.
- Involve volunteers in the initial development and subsequent review  
The most effective way to develop a recognition program is to involve volunteers from a cross section of roles in the organisation. This will ensure that the program is relevant to volunteers. Similarly, any review of the program effectiveness should extend beyond the executive or committee.

### **17. 'Burn-out' managed effectively and in a timely manner.**

Burnout or overwork is a difficult issue for volunteer organisations to deal with head on, for to do so can often create an additional short-term burden on existing volunteers.

However the effect of not dealing with 'burnout' directly can be long-term and can result in

- An increasingly tired and frustrated volunteer who:
  - fails to fulfil responsibilities as they should
  - is increasingly unable to make a positive contribution to the organisation
  - is suffering the personal consequences of the situation
- An organisation that is
  - soured by the efforts of having to counter the impact
  - has to 'rebuild' following any negative impacts
  - takes on the role of 'trouble-shooting' rather than expend energy into the development of the organisation.

Burnout occurs for a vast number of reasons but invariably because the organisation asks too much of the volunteer, the organisation does not give the volunteer 'permission' to resign, retire, take time out, the volunteer takes on too much or the volunteer assumes 'guilt' about leaving the role.

No matter what the cause, burnout needs to be managed pro-actively so that the impact on both the organisation and the individual is not irreparable. Reviewing roles and responsibilities and making amendments to project and position demands, if they are too great, can insure that the organisation

and the individual do not suffer the consequences of ‘burn-out’. For the organisation this is the ultimate loss of the valuable volunteer, and for the individual a sense of dissatisfaction, frustration and loss.

### **18. Training and/or induction program in place and actioned.**

The minimum level of support that should be available to the volunteer is an induction to the new position or role. This should involve a clear outline of the responsibilities and specific timeframes associated with the role, any immediate issues, relevant policies and procedures, a handover of ‘ordered’ documentation, and importantly information about the organisation itself, including goals, key people etc. Ideally this will be undertaken in conjunction with the previous incumbent.

An organisation that is fully supportive of its volunteers will develop or identify opportunities for the volunteer to enhance existing technical and interpersonal skills, develop new skills and develop confidence in the role. At the time the volunteer indicates their preparedness to take on a role is the ideal time to identify any gaps between the level of skill and knowledge required for the role and the abilities of the volunteer.

Given the organisation has in place thorough position and project briefs that identify the type and level of skill required it will be straight forward for the volunteer and the organisation to identify gaps in skill and knowledge. By doing this and providing access to the appropriate level of support and or training will ensure that the volunteer has a level of comfort in their role.

Equally this same process should be applied to an existing volunteer who is struggling with the position, or indeed, who wants to extend their skills and knowledge. Support for the training of volunteers is available through a range of resources, some of which are identified in Section 4 of this kit.

### **19. A person *with the necessary skills, or with the ability to develop the skills to manage volunteer roles is in place.***

Managing and supporting volunteers effectively takes time and resources. However, if done well will reap major benefits to the organisation in terms of recruiting and retaining volunteers.

A valuable inclusion on the executive or committee of any organisation is the addition of a person who has responsibility to oversee the volunteer management program.

This person *will not* take on the sole responsibility for recruiting and managing volunteers, though they may provide assistance and advice in relation to this. Rather, it is the responsibility of this position to ensure that the people responsible for these tasks have in place the appropriate groundwork for doing this well and in accordance with the organisation’s policy. They would play a role for example in:

- identifying potential volunteer problems and working with the appropriate people to resolve these problems
- assist in volunteer ‘counselling’, support and negotiations when conflict arises
- identifying opportunities for volunteer development
- oversee the implementation of the volunteer management strategy, volunteer policy and procedures etc
- ‘drive’ the review of the volunteer management plan and associated tasks and strategies including position and project briefs etc

## STAGE 4 – REVIEW

### **20. The organisation has a structured process for understanding why volunteers *continue* in their current roles.**

A valuable source of information for understanding why an organisation's volunteer recruitment and retention strategy is successful, or requires enhancing, is with the volunteers themselves.

This will provide information on what is working well in relation to a position or project, it is an excellent opportunity to identify any issues that can be handled ahead of time so as to avoid situations that are more difficult to remedy at a later time. It is also an opportunity to reinforce the good work the volunteer is doing.

It is essential that any feedback or information exchange process focus on the issues, the tasks, the achievements and opportunities for enhancing the role, and not personalities.

Sometimes issues that arise in relation to volunteer management can be 'personality' driven. With a strong framework in place, clear organisational goals and a positive culture in the organisation, the focus can be the role or position itself.

### **21. The organisation has a structured process for understanding why volunteers *have left* their volunteer roles.**

An equally valuable source of information lies with volunteers who have either left the organisation or who no longer play an active volunteering role. Many departures from an organisation are understandable and are for reasons of age, ill health, relocation, children having grown up etc. Reasons for departures should not be assumed, but rather need to be fully understood particularly if a re-occurrence of a negative situation is to be avoided.

Similarly, it is valuable to follow-up with volunteers who remain with the organisation but who have 'retreated' from volunteer activities. For the volunteer it will act as a debriefing, and may result in them resuming an active volunteer role in the future, particularly if any necessary changes are made. The process needs to be managed well.

### **22. A process for the review of project and position descriptions is in place.**

With changing organisational needs, new directions or new relationships between positions or roles it is necessary to ensure that the position or project brief remains relevant. There are strategic times when this process is best undertaken and these times will be dependent on the needs of the organisation.

For example, a review of the committee or board position descriptions should occur well prior to the Annual General Meeting. This is so that committee membership can be increased or amended at the AGM depending on changing priorities for the organisation over the next 12 months. Or, as in the case of the annual event, an early review of project briefs well ahead of the event will ensure that the focus or theme is still current, that timelines and reporting processes are still relevant etc.

Alternatively, the organisation may well have all incumbents review project and position descriptions at a specific time of the year. Once the descriptions have been initially prepared the review process is straightforward.

**23. A process for the review of the ‘culture’ of the organisation and members in relation to volunteers has been developed.**

This is the time for the organisation to reflect as to how effectively the volunteer management program is being handled.

The ‘Assessment Table’ used at the outset of this project can provide the basis for the annual review of the organisation’s ‘volunteer culture’ and volunteer management program.

If the strategies presented in this project are implemented, valuable information and feedback will be obtained as part of the process. The challenge for any organisation, and in particular for the executive or committee, is to take this information for what it provides – and that is a valuable tool for creating and sustaining a positive and effectively managed organisation.

The less defensively an organisation can react to the information, the greater the opportunity to develop a self-supporting volunteer management structure.

## 5. Support Material

This section contains proformas and reference material necessary to assist the organisation develop its individual Volunteer Management Plan.

This section contains:

- Section 5.1 - A blank Assessment Table proforma
- Section 5.2 - A completed Assessment Table that contains typical comments
- Section 5.3 - A blank Strategy Table proforma
- Section 5.4 - A completed Strategy Table that contains sample strategies
- Section 5.5 - A Project Brief Information Sheet that provides a guide to developing the brief
- Section 5.6 - A blank Project Brief proforma
- Section 5.7 - A sample Project Brief
- Section 5.8 - A Position Description Information Sheet that provides a guide for developing a position description
- Section 5.9 - A blank Position Description proforma
- Section 5.10 - Sample Position Descriptions
- Section 5.11 –A sample Volunteer Opportunities listing

### 5.1 Assessment Table

There are a number of key industry criteria that are recognised as central to an effective volunteer management program and they are contained in the Assessment Table following. Members of the project working group should critically appraise the organisation's effectiveness in relation to this criteria.

This assessment process requires the project working group to:

1. Review the information in chapter 2 – *'Key Principles for Effective Volunteer Management'*.
2. Give an 'importance' (IMP column) rating, to each of the criteria. (1=low, 3=high)
3. Rate the organisation's actual performance (PERF column) in relation to each of the checklist criteria. (1=low, 3=high)

*In the 'comments' column note all of the issues and points raised as part of the discussion during 2 and 3 above. These comments are very important since they will provide the basis for the strategies you will develop to address the issues raised during this 'assessment' process.*

4. On the Strategy Table insert High, Medium or Low in the 'priority' column depending on the gap between the 'importance' rating and the 'performance' rating.

*Example 1 - If the organisation gives checklist item 1 an 'importance' rating of '3+' but regards their performance as a '0' then it is considered an issue of 'high' priority for the organisation at this time.*

*Example 2 - If the organisation gives checklist item 2 an 'importance' rating of '3' and regards their performance as '3' then it is considered an issue of 'lower' priority at this*

*time. This does not mean however, that the organisation should not continue to work on this item, nor does it mean that the organisation might not identify other opportunities as subsequent reviews take place.*

The purpose of this exercise is to challenge conventional thinking about volunteer management and to identify strategies that would address issues currently being faced by the organisation.

This Assessment Table represents the organisation's first review of current practices and reactions in relation to the industry criteria. When benefits start to flow from the strategy then both 'importance' and 'performance' ratings will alter with future appraisals.

**ASSESSMENT TABLE PROFORMA**

	Checklist	Rating		Comments
		Imp	Perf	
<b>Stage 1 -Pre-recruitment</b>				
	1. Organisational goals and framework clearly established and known to membership.			
	2. An organisational inventory of task and project 'needs' identified & documented.			
	3. Project and/or task briefs prepared.			
	4. 'Personal attributes' <i>and</i> 'skills' needed for tasks or positions have been identified & documented			
	5. Position descriptions for volunteer roles documented and clearly define the requirements of the position.			
	6. The culture of the organisation and people in key positions is encouraging of volunteer involvement.			

	7. <i>Alternative</i> ways for volunteer recruitment have been identified and a strategy for accessing volunteers through these means has been developed.			
	8. The organisation has a policy on volunteers and their role in the organisation.			

	Checklist	Rating		Comments
		Imp	Perf	
<b>Stage 2 - Recruitment</b>				
	9. There are clearly defined <i>opportunities for different</i> type of volunteer involvement in the organisation. (E.g. meetings vs. one-off project vs. technical support.			
	10. Information that clearly states the purpose of the organisation is readily available to the potential volunteer.			
	11. Volunteer and task needs are matched where practical. (E.g. time, other commitments the volunteer may have etc)			

	12. The organisation has a comprehensive membership database that identifies member 'interests' and 'professional involvements'.			
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	Checklist	Rating		Comments
		Imp	Perf	
<b>Stage 3 -Retention</b>				
	13. 'One-off' events and short term project opportunities for volunteer involvement identified and documented.			
	14. A 'succession plan' developed and in place.			
	15. Motivations of the existing and potential volunteer are understood.			
	16. A relevant reward and recognition system is in place.			
	17. 'Burnout' managed effectively and in a timely manner.			

	18. Training or induction program in place and actioned.			
	19. A person <i>with the necessary skills</i> or, <i>with the ability to develop the skills</i> to manage volunteer roles is in place.			

	Checklist	Rating		Comments
		Imp	Perf	
<b>Stage 4 - Review</b>				
	20. The organisation has a structured process for understanding why volunteers continue in their current roles.			
	21. The organisation has a structured process for understanding why volunteers have left their volunteer roles.			
	22. A process for the review of project and position briefs is in place.			
	23. A process for review of the culture of the organisation and members in relation to volunteers is in place.			

## 5.2 Examples of evaluation comments

The following are comments that may typically be made in summing up issues the organisation is facing and opportunities that the organisation has in order to better manage its volunteers.

	Checklist	Rating		Comments by organisation representatives
		Imp	Perf	
<b>Stage 1- Pre-recruitment</b>				
<b>High priority</b> (Insert on 'Strategy Table')	1. Organisational goals and framework clearly established and known to membership.	<b>3</b>	<b>1</b>	<ul style="list-style-type: none"> <li>➤ Informal, not written down.</li> <li>➤ This changes with change in committee membership because no formal 'plan' or 'strategy'.</li> <li>➤ Needs to be formalised for continuity over successive committees.</li> </ul>
	2. An organisational inventory of task and project 'needs' identified & documented.			<ul style="list-style-type: none"> <li>➤ Organisation has no documentation of the number or type of roles. This puts organisation at disadvantage when someone offers to assist.</li> <li>➤ Projects and tasks largely in people's heads – we lose this when people leave.</li> <li>➤ "Becomes a 'stress' when we try to hold everything in our heads."</li> </ul>
	3. Project and/or task briefs prepared.			<ul style="list-style-type: none"> <li>➤ Events, one-off, and specific projects that may occur on an annual or infrequent basis have not been documented well.</li> <li>➤ Cannot give a volunteer an idea of a specific project because not all the details written down. Means that we keep 'projects to ourselves' because can't explain 'on the run'.</li> </ul>

	Checklist	Rating		Comments by organisation representatives
		Imp	Perf	
	4. 'Personal attributes' <i>and</i> 'skills' needed for tasks or positions have been identified & documented.			<ul style="list-style-type: none"> <li>➤ Been afraid in the past to specify these – “we might frighten people off. As a result we have had some poor matches of tasks and people.”</li> <li>➤ Would assist to identify gaps between skills and position requirements and help identify training needs.</li> <li>➤ Volunteers will be able to identify where they might need some support if they don't feel they have all the skills.</li> </ul>
	5. Position descriptions for volunteer roles that documented and clearly define the requirements of the position			<ul style="list-style-type: none"> <li>➤ Some position briefs have been developed but need more information and specifics.</li> <li>➤ Positions not defined well that is why people don't understand all that is expected of them.</li> <li>➤ “Things keep falling through the gaps because the committee hasn't told them the full job requirements.</li> <li>➤ Volunteers get annoyed when they find they have to do more than originally told.</li> </ul>
	6. The culture of the organisation and people in key positions is encouraging of volunteer involvement.			<ul style="list-style-type: none"> <li>➤ Recognised the need to stand back and see where obstacles discourage involvement and/or how club can be more pro-active in encouraging involvement.</li> <li>➤ Sometimes the attitude 'it is easier to do the job myself' prevails – the job never gets done.</li> <li>➤ Should give more people the opportunity to be and FEEL involved.</li> </ul>

	Checklist	Rating		Comments by organisation representatives
		Imp	Perf	
	7. <i>Alternative</i> avenues and ways for volunteer recruitment have been identified and a strategy for accessing volunteers through these means has been developed.			<ul style="list-style-type: none"> <li>➤ This only occurs when ‘desperate’.</li> <li>➤ Some members may be prepared to volunteer ‘on-line’ because they can do some work at ‘odd times’.</li> <li>➤ Volunteer Resource Centres may have volunteers able to assist with ‘special projects’.</li> <li>➤ Potential to use alternative sources e.g. tertiary institutions etc.</li> </ul>
	8. The organisation has a policy on volunteers and their role in the organisation.			<ul style="list-style-type: none"> <li>➤ Good opportunity to acknowledge how club appreciates the efforts and importance of volunteers in club.</li> <li>➤ More ‘paperwork’</li> <li>➤ Makes clear what the organisation will do for the volunteer and what the volunteer can expect from the organisation e.g. training, out of pocket expenses, recognition etc.</li> </ul>

	Checklist	Rating		Comments by organisation representatives
		Imp	Perf	
<b>Stage 2 -Recruitment</b>				
	9. There are clearly defined <i>opportunities for different</i> type of involvement in the organisation (E.g. meetings vs. one-off project vs. technical support.			<ul style="list-style-type: none"> <li>➤ Organisation only promotes ‘committee and ‘on-going’ positions. It hasn’t identified ‘short-term or ‘one-off’ projects that may appeal to those who can’t commit long-term.</li> <li>➤ Perception by members that you have to volunteer to be ‘on-site’, don’t promote ‘home-based opportunities well</li> <li>➤ Organisation hasn’t targeted specialist skills projects that may have appeal to a different type of volunteer.</li> </ul>
	10. Information that clearly states the purpose of the organisation is readily available to the potential volunteer.			<ul style="list-style-type: none"> <li>➤ Information not provided to new members or prospective volunteers as to opportunities</li> <li>➤ Information available but not given out, needs putting into appropriate format.</li> <li>➤ Opportunities for developing ‘new members’ kit.</li> <li>➤ Members probably not aware of organisation priorities and directions and therefore would not know where they could assist.</li> </ul>
	11. Volunteer and task needs are matched where practical. (E.g. time, other commitments the volunteer may have etc).			<ul style="list-style-type: none"> <li>➤ Recognises volunteer stresses/overload and that the club should do more to prevent/minimise.</li> <li>➤ Recognise that volunteers doing ‘more than their fair share’ could be a deterrent to other potential volunteers. Position briefs could stipulate time requirement for ‘core tasks’ of the position.</li> <li>➤ Organisation has not been good at looking for alternative ways to achieve tasks or projects.</li> </ul>

	12. The organisation has a comprehensive membership database that identifies member 'interests' and 'professional involvement's.			<ul style="list-style-type: none"> <li>➤ Do not have a comprehensive/accurate/centralised database.</li> <li>➤ A good database could enhance opportunities to 'access' potential volunteers.</li> <li>➤ Membership database does not identify member interests, contacts or skills.</li> </ul>
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	Checklist	Rating		Comments by organisation representatives
		Imp	Perf	
Stage 3 - Retention				
	13. 'One-off' events and short term project opportunities for volunteer involvement identified and documented.			<ul style="list-style-type: none"> <li>➤ Recognise that if this was done better that many one-off tasks could be achieved.</li> <li>➤ Could possibly involve another type of volunteer if these opportunities were identified.</li> <li>➤ Could look at breaking tasks or positions down to make 'heavy' positions more manageable.</li> </ul>
	14. A 'continuance plan' developed and is in place.			<ul style="list-style-type: none"> <li>➤ Members leave without being asked to 'share' their knowledge or experience.</li> <li>➤ There are no 'operational' or 'how to' notes for any positions which means everyone has to 'reinvent the wheel'.</li> <li>➤ Sometimes people leave and we don't understand why. Need to get feedback from them particularly if something is to be avoided in the future.</li> </ul>

	15. Motivations of the existing and potential volunteer are understood			<ul style="list-style-type: none"> <li>➤ Understanding this would help understand why someone has taken up a position and if they have a misunderstanding of the role.</li> <li>➤ Can help match motivations with jobs that have a 'leaning in that direction'.</li> <li>➤ Would help committee determine suitable volunteers.</li> </ul>
	16. A relevant reward and recognition system is in place.			<ul style="list-style-type: none"> <li>➤ Juniors – recognition done quite well. System not documented. And needs documenting for future volunteers and committees.</li> <li>➤ Other – a good system been developed e.g. Life membership, fee payment for players. Other volunteer roles (i.e. non-players) may need some further consideration. System not documented</li> <li>➤ Don't acknowledge 'the little things' people do around the place.</li> <li>➤ Tend to recognise 'on-court' related volunteers well but not the 'behind the scenes' people well</li> </ul>
	17. 'Burnout' managed effectively and in a timely manner.			<ul style="list-style-type: none"> <li>➤ Recognise when people are at the stage of 'burnout' but do not handle pro-actively.</li> <li>➤ Do not deal 'upfront' with the issues because of possible repercussions i.e. volunteer really does want to leave position.</li> <li>➤ Need to 'give permission' for volunteer to step back/take time out – this may result in volunteer staying in the longer term.</li> </ul>

	Checklist	Rating		Comments by organisation representatives
		Imp	Perf	
	18. Training or induction program is in place and actioned.			<ul style="list-style-type: none"> <li>➤ Do not identify where volunteers may be needing more skill development well – position descriptions would assist with this.</li> <li>➤ Do not know all the resources available and through whom we can access these.</li> <li>➤ Do not have good ‘new members’ kit – this could include summary of volunteer opportunities.</li> </ul>
	19. A person <i>with the necessary skills</i> or, <i>with the ability to develop the skills</i> to manage volunteer roles is in place.			<ul style="list-style-type: none"> <li>➤ An appropriate and necessary role for the President to have. Need to ensure that future Presidents have the right level and type of skills. Identify skills in Position Brief.</li> <li>➤ Should look at having someone on the committee with the responsibility of overseeing volunteer management.</li> <li>➤ Volunteers are important, there is the need to take volunteer issues more seriously e.g. recruitment strategies, recognition etc</li> </ul>

	Checklist	Rating		Comments by organisation representatives
		Imp	Perf	
Stage 4 - Review				
	20. The organisation has a structured process for understanding why volunteers continue in their current roles.			<ul style="list-style-type: none"> <li>➤ “Our perceptions are that things are ok but need to make sure perceptions are correct.”</li> <li>➤ Need a process for understanding why they stay in roles. We can then look at making other positions work as well.</li> <li>➤ Understanding this would provide feedback re issues and positive aspects of roles and the organisation etc.</li> <li>➤ May assist with remedying problems that could otherwise cause volunteer departures.</li> </ul>
	21. The organisation has a structured process for understanding why volunteers have left their volunteer roles.			<ul style="list-style-type: none"> <li>➤ Need to understand the negative aspects of a position or the organisation that result in people leaving a position or the organisation.</li> <li>➤ Need to talk to people who have left 1. Volunteer positions and 2. The organisation.</li> <li>➤ Will help with understanding of issues relating to roles, the organisation (culture), governance etc.</li> </ul>
	22. A process for the review of project and position briefs is in place			<ul style="list-style-type: none"> <li>➤ Opportunity to be pro-active in addressing potential problems due to the following: <ul style="list-style-type: none"> <li>- role has too high expectations</li> <li>- role is mundane/not interesting enough</li> <li>- role does not have enough challenge</li> </ul> </li> <li>➤ Need to make sure positions descriptions include new tasks that a position has taken on in the past year.</li> </ul>

	Checklist	Rating		Comments by organisation representatives
		Imp	Perf	
	23. A process for the review of the culture of the organisation and members in relation to volunteers is in place.			<ul style="list-style-type: none"> <li>➤ Serves as ‘reminder’ for organisation administration to review operations, attitudes, behaviours that are encouraging or discouraging to volunteer participation.</li> <li>➤ Need to challenge current practices e.g. organisation is not good at ensuring members have access to information,</li> <li>➤ “We always ask the same people because we know them, therefore we need to know what others are prepared to do</li> </ul>

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### 5.3 Strategy Table

Once the project working group has identified the issues in relation to volunteer management, then strategies should be developed to address these.

To complete the Strategy Table the following steps should be taken:

1. Review the comments made and issues identified in the Assessment Table in relation to checklist item 1.
2. Develop a strategy or a number of strategies (actions) to address the issues or opportunities identified in the Assessment table. Insert these in the 'Strategies' column.
3. Repeat these steps for all 23 checklist items. Once this is completed,
4. Identify the person/people that will be responsible for co-ordinating or overseeing the completion of each strategy. Insert the name/s in the 'Person responsible' column.
5. Set a date for the completion of each strategy and insert this in the 'Timeline' column.

*Refer to the table in section 4.4 for examples of strategies. These should be modified to cater for the specific needs of the organisation.*

**VOLUNTEER MANAGEMENT STRATEGY TABLE**

Priority	Checklist	Strategies	Timeline	Person Responsible
<b>Stage 1 - Pre-recruitment</b>				
	1. Organisational goals and framework clearly established and known to membership	<ul style="list-style-type: none"> <li>➤</li> <li>➤</li> <li>➤</li> </ul>		
	2. An organisational inventory of task and project 'needs' identified & documented	<ul style="list-style-type: none"> <li>➤</li> <li>➤</li> <li>➤</li> </ul>		
	3. Project and/or task briefs prepared.	<ul style="list-style-type: none"> <li>➤</li> <li>➤</li> <li>➤</li> </ul>		
	4. 'Personal attributes' and 'skills' needed for tasks or positions have been identified & documented.	<ul style="list-style-type: none"> <li>➤</li> <li>➤</li> <li>➤</li> </ul>		

	<p>5. Position descriptions for all volunteer roles documented and clearly define the requirements of the position.</p>	<ul style="list-style-type: none"> <li>➤</li> <li>➤</li> <li>➤</li> </ul>		
	<p>6. The culture of the organisation and people in key positions is encouraging of volunteer involvement.</p>	<ul style="list-style-type: none"> <li>➤</li> <li>➤</li> <li>➤</li> <li>➤</li> </ul>		
	<p>7. <i>Alternative</i> ways for volunteer recruitment have been identified and a strategy for accessing volunteers through these means has been developed.</p>	<ul style="list-style-type: none"> <li>➤</li> <li>➤</li> <li>➤</li> </ul>		
	<p>8. The organisation has a policy on volunteers and their role in the organisation</p>	<ul style="list-style-type: none"> <li>➤</li> <li>➤</li> <li>➤</li> </ul>		

Priority	Checklist	Strategies	Timeline	Person Responsible
<b>Stage 2 - Recruitment</b>				
	9. There are clearly defined opportunities for different type of volunteer involvement in the organisation.	<ul style="list-style-type: none"> <li>➤</li> <li>➤</li> <li>➤</li> </ul>		
	10. Information that clearly states the purpose of the organisation is readily available to the potential volunteer.	<ul style="list-style-type: none"> <li>➤</li> <li>➤</li> <li>➤</li> </ul>		
	11. Volunteer and task needs are matched where practical.	<ul style="list-style-type: none"> <li>➤</li> <li>➤</li> <li>➤</li> </ul>		
	12. The organisation has a comprehensive membership database that identifies member 'interests' and professional involvements.	<ul style="list-style-type: none"> <li>➤</li> <li>➤</li> <li>➤</li> </ul>		

Priority	Checklist	Strategies	Timeline	Person Responsible
<b>Stage 3 - Retention</b>				
	13. 'One-off' events and short term project opportunities for volunteer involvement identified and documented.	<ul style="list-style-type: none"> <li>➤</li> <li>➤</li> <li>➤</li> </ul>		
	14. A 'succession plan' developed and in place.	<ul style="list-style-type: none"> <li>➤</li> <li>➤</li> <li>➤</li> </ul>		
	15. Motivations of the existing and potential volunteer are understood.	<ul style="list-style-type: none"> <li>➤</li> <li>➤</li> <li>➤</li> </ul>		
	16. A relevant reward and recognition system in place.	<ul style="list-style-type: none"> <li>➤</li> <li>➤</li> <li>➤</li> </ul>		

	17. 'Burnout' managed effectively and in a timely manner.	➤ ➤ ➤		
	18. Training or induction program in place and actioned.	➤ ➤ ➤		
	19. A person <i>with the necessary skills</i> or, <i>with the ability to develop the skills</i> to manage volunteer roles in place.	➤ ➤ ➤		

Priority	Checklist	Strategies	Timeline	Person Responsible
<b>Stage 4 - Review</b>				
	20. The organisation has a structured process for understanding why volunteers continue in their current roles.	➤ ➤ ➤		

	<p>21. The organisation has a structured process for understanding why volunteers have left their volunteer roles.</p>	<ul style="list-style-type: none"> <li>➤</li> <li>➤</li> <li>➤</li> </ul>		
	<p>22. A process for the review of project and position briefs is in place.</p>	<ul style="list-style-type: none"> <li>➤</li> <li>➤</li> <li>➤</li> </ul>		
	<p>23. A process for the review of the culture of the organisation and members in relation to volunteers is in place.</p>	<ul style="list-style-type: none"> <li>➤</li> <li>➤</li> <li>➤</li> </ul>		

### 5.4 Examples of strategies

Priority	Checklist	Examples of strategies or actions	Timeline	Person Responsible
<b>Stage 1 - Pre-recruitment</b>				
	1. Organisational goals and framework clearly established and known to membership	<ul style="list-style-type: none"> <li>➤ Establish goals for the organisation for the next 3 years and the actions needed to achieve these.</li> <li>➤ Form a working group to identify, document and prioritise key issues facing the organisation.</li> <li>➤ Form a working group consisting of club representatives to develop a 5-year Club Development Plan. The Plan would contain mission statement and statement of purpose, establish goals and objectives, establishing priority projects, and process for reviewing the Plan and other planning documents.</li> </ul>		
	2. An organisational inventory of task and project 'needs' identified & documented	<ul style="list-style-type: none"> <li>➤ Make a list of all volunteer roles needed to run the organisation.</li> <li>➤ Make a list of all events and projects that the organisation manages including fund-raising, promotional events, tournaments etc and those that the organisation proposes to hold.</li> <li>➤ Prepare a listing of all volunteer opportunities available within the organisation, including one-off roles and 'on-going' positions. These opportunities will be identified from the 'Strategy Plan', Development Plan, Calendar of Events etc, and will include all volunteer roles currently carried out.</li> </ul>		

Priority	Checklist	Strategies	Timeline	Person Responsible
	3. Project and/or task briefs prepared.	<ul style="list-style-type: none"> <li>➤ For all projects commence to prepare project briefs in accordance with the Project Brief proforma (section 5.6)</li> <li>➤ Develop a timeline for preparing Project Briefs for all projects and events managed by the organisation or proposed.</li> </ul>		
	4. 'Personal attributes' and 'skills' needed for tasks or positions have been identified & documented.	<ul style="list-style-type: none"> <li>➤ As part of the membership database make provision for recording specific skills that members are prepared to offer the organisation.. Information to be collected through both informal and formal processes e.g. surveys, reviews etc).</li> <li>➤ Position requirements relating to operational and personal attributes to be identified on all Position Descriptions</li> </ul>		
	5. Position descriptions for all volunteer roles documented and clearly define the requirements of the position.	<ul style="list-style-type: none"> <li>➤ For all volunteer positions identified prepare a timeline for completing all position descriptions.</li> <li>➤ Develop a process for documenting all volunteer positions in accordance with the Position Description proforma (section 5.9). This will include the documentation of;                             <ul style="list-style-type: none"> <li>➤ The following positions in stage 1 - the Board, sub-committees, .....(insert positions).....</li> <li>➤ The following positions in stage 2 – ..... (insert positions).....</li> <li>➤ All other positions in accordance with the timetable to be established by the committee</li> </ul> </li> <li>➤ Determine which Position Description will include responsibility for maintaining currency of the above information and add to the position requirements.</li> </ul>		

Priority	Checklist	Strategies	Timeline	Person Responsible
	<p>6. The culture of the organisation and people in key positions is encouraging of volunteer involvement.</p>	<ul style="list-style-type: none"> <li>➤ Establish a set of criteria for assessing and reviewing ‘the culture’ of the organisation and develop a process for seeking input from membership (e.g. surveys, face to face etc). Key priority areas for reviewing appropriateness of the organisational culture are:                             <ul style="list-style-type: none"> <li>➤ The Committee</li> <li>➤ Event management</li> <li>➤ Within existing volunteer ranks</li> </ul> </li> <li>➤ Document the organisation’s operational structure, including names roles, contact details and photographs and promote this through a number of avenues including noticeboard, newsletters, regional meetings etc.</li> <li>➤ Develop a ‘club code’ that promotes and encourages supportive and positive behaviour between members.</li> <li>➤ Formally survey members on an annual basis to gain feedback on the operations and philosophy of the organisation and the administration</li> </ul>		

Priority	Checklist	Strategies	Timeline	Person Responsible
	<p>7. <i>Alternative</i> avenues and ways for volunteer recruitment have been identified and a strategy for accessing volunteers through these means has been developed</p>	<ul style="list-style-type: none"> <li>➤ In view of information provided in the '<i>Key Principles for Effective Volunteer Management</i>' in chapter 3 review current internal volunteer recruitment practices.</li> <li>➤ Develop and document a process for formalising links with tertiary institutions and community networks so as to access volunteers for specific projects identified in the 'Volunteer Opportunities' inventory. As part of process document process required by each organisation (e.g. times, applications etc.)</li> <li>➤ Investigate opportunities for accessing volunteers through Volunteer Resource Centres.</li> <li>➤ Ensure that the organisation identifies all the different ways volunteers can assist. E.g. 'One-off' project, technical support, special project input. List these on the 'Volunteer Opportunities' listing (refer section 5.11)</li> </ul>		
	<p>8. The organisation has a policy on volunteers and their role in the organisation .</p>	<ul style="list-style-type: none"> <li>➤ Develop a volunteer policy that:                             <ul style="list-style-type: none"> <li>➤ Recognises the importance of volunteers and makes a statement as to how the organisation 'values' volunteers</li> <li>➤ States the organisation's commitment to volunteers e.g. risk management, recognition etc</li> <li>➤ Identifies the responsibilities of volunteers</li> <li>➤ States how volunteers will be supported</li> </ul> </li> </ul> <p>(refer <i>Volunteer Management Policy booklet</i> available through SRV)</p>		

Priority	Checklist	Strategies	Timeline	Person Responsible
<b>Stage 2 - Recruitment</b>				
	<p>9. There are clearly defined opportunities for different type of volunteer involvement in the organisation.</p>	<ul style="list-style-type: none"> <li>➤ Ensure that the ‘Volunteer Opportunities’ listing (section 5.11) highlights the range of options for volunteer involvement whether within a particular position or an activity e.g. roster, day or evening, home-based, strategic planning, marketing, ‘support’ to secretary position etc. and the time requirements.</li> <li>➤ Identify positions that are currently difficult to fill or to retain volunteers in and identify opportunities to breakdown the tasks/commitment required.</li> <li>➤ Identify opportunities for administrative, technical or project support and tasks that can be undertaken by volunteers from home and for which there are no ‘on-site attendance’ requirements.</li> </ul>		
	<p>10. Information that clearly states the purpose of the organisation is readily available to the potential volunteer.</p>	<ul style="list-style-type: none"> <li>➤ Develop an information sheet or kit which summarises the organisations aims and objectives, mission statement and key initiatives for next say 12 months, that can be easily distributed to existing members, new members, new volunteers etc. Opportunities for distribution of information to include website, newsletters, Email etc.</li> <li>➤ Develop an information kit for all members and new members that provides an overview of the organisation and its purpose. This kit will include- an introduction to the organisation, summary of goals and objectives etc, current program of sporting, recreation and social events.</li> </ul>		

	<p>11. Volunteer and task needs are matched where practical.</p>	<ul style="list-style-type: none"> <li>➤ Develop an application, direct appointment or nomination process for those positions where a close match of skills and attributes is necessary e.g. Board/committee, tournament organisers etc.</li> <li>➤ Work with volunteers currently in positions to identify where they are needing additional resources and support to better enjoy and manage their role.</li> <li>➤ Identify and put in place training opportunities for volunteers who need additional skill development, and put in place support mechanisms for volunteers whose role requires additional support or resourcing.</li> </ul>		
	<p>12. The organisation has a comprehensive membership database that identifies member 'interests' and professional involvements.</p>	<ul style="list-style-type: none"> <li>➤ Develop a comprehensive membership database that includes information on membership, insurance, financials, volunteer interests and skills etc.</li> <li>➤ Design an membership application form that provides opportunity for members to provide information</li> <li>➤ Prepare a Project Brief and nominate 'person in charge' of project for developing membership database.</li> </ul>		

Priority	Checklist	Strategies	Timeline	Person Responsible
<b>Stage 3 - Retention</b>				
	13. 'One-off' events and short term project opportunities for volunteer involvement identified and documented.	<ul style="list-style-type: none"> <li>➤ Develop a process for ensuring that current and potential volunteers are aware of alternative volunteer involvement opportunities. This process may include regular inclusion of information at Presidents meetings, through newsletters, targeting of past volunteers for new or different tasks, profiling of volunteer position, circulating 'Volunteer Opportunities' listing.</li> <li>➤ Promote 'short-term' tasks that are available to volunteers through the monthly newsletter.</li> <li>➤ Nominate a member to ensure that volunteer positions are regularly profiled in the organisations newsletter and noticeboard and add this responsibility to the position description for the position.</li> </ul>		

Priority	Checklist	Strategies	Timeline	Person Responsible
	14. A 'succession plan' developed and in place.	<ul style="list-style-type: none"> <li>➤ Establish volunteer 'progression pathways' that include opportunities for extending level and type of responsibilities and involvement with the organisation.</li> <li>➤ Develop a 'handover' process to ensure that incoming volunteers are fully briefed to ensure that volunteer transition into and out of a position is smooth. The process will include information package on the club, position description, training opportunities, and requirements etc.</li> <li>➤ Develop 'operational' or 'how to' notes for each position and include in an 'Operations Manual'. These notes to include specific details relating to each position such as location of keys, security issues, times, procedures for collecting money etc.</li> <li>➤ Formalise process for 'debriefing' of volunteers, that is               <ul style="list-style-type: none"> <li>➤ Establish a process for 'debriefing' volunteers following special events and annual projects.</li> <li>➤ Review information gathered through debriefing process and make refinements to existing project briefs and position descriptions.</li> <li>➤ Ensure responsibility for organising debriefing and taking follow-up action is incorporated into relevant position descriptions.</li> </ul> </li> </ul>		
<b>High</b>	15. Motivations of the existing and potential volunteer are understood.	<ul style="list-style-type: none"> <li>➤ For board /committee positions develop an application form that asks applicants to state their understanding of the role and responsibilities.</li> <li>➤ Ensure all position have position descriptions that state the requirements of the position.</li> </ul>		

Priority	Checklist	Strategies	Timeline	Person Responsible
	16. A relevant reward and recognition system in place.	<ul style="list-style-type: none"> <li>➤ Develop a reward and recognition program that recognises new initiatives and achievements of members/member organisations, or achievements by specific individuals or groups of individuals, or recognise length of time volunteers have played a role.</li> <li>➤ Form a working group of volunteers who represent different types of volunteer involvement in the organisation, to develop a reward and recognition program.</li> </ul>		
	17. 'Burnout' managed effectively and in a timely manner.	<ul style="list-style-type: none"> <li>➤ Develop and implement rosters for volunteers working at special events that provide a balance in commitment and challenge without overtaxing.</li> <li>➤ Develop a 'debriefing' process for volunteers involved in 'on-going' positions, special events and one-off activities.</li> <li>➤ Nominate a person in charge of volunteers who will have the responsibility of monitoring volunteer satisfaction and issues. Develop a position description for this role or incorporate into an existing position description.</li> </ul>		

Priority	Checklist	Strategies	Timeline	Person Responsible
<p><b>Low</b></p>	<p>18. Training or induction program in place and actioned.</p>	<ul style="list-style-type: none"> <li>➤ Identify training needs for volunteers involved in special events, tournaments and special projects and provide for these needs through training and support resources (identified in this workbook). Use position descriptions and project briefs to assist with identifying gaps between skills and position requirements.</li> <li>➤ Identify and promote training and skill development opportunities to the membership. Formalise these support avenues for distribution to membership. E.g. Active Australia, local councils, taxation office, Volunteer Victoria etc.</li> <li>➤ Identify skills that are available within the organisation’s networks e.g. other clubs/organisations, through Active Australia etc, for purpose of developing membership skills and knowledge. Volunteers identified with specific technical or professional skills can be approached re a role in volunteer training within the organisation.</li> </ul>		
	<p>19. A person <i>with the necessary skills</i> or, <i>with the ability to develop the skills</i> to manage volunteer roles in place.</p>	<ul style="list-style-type: none"> <li>➤ Identify a person to take on the responsibility of managing volunteers and overseeing the implementation of this strategy and incorporate into position description.</li> <li>➤ Develop a position description for a Volunteer Co-ordinator who will have the responsibility of working with volunteers and developing opportunities and support structures.</li> </ul>		

Priority	Checklist	Strategies	Timeline	Person Responsible
<b>Stage 4 - Review</b>				
	20. The organisation has a structured process for understanding why volunteers continue in their current roles.	<ul style="list-style-type: none"> <li>➤ Establish a formal process for surveying current volunteers to determine issues associated with volunteering with the organisation, provide information on positive aspects of positions/roles and possible enhancements to positions/roles.</li> </ul>		
	21. The organisation has a structured process for understanding why volunteers have left their volunteer roles.	<ul style="list-style-type: none"> <li>➤ Establish a personal and formalised process for approaching past volunteers to determine issues associated with volunteering with the organisation, for the purpose of providing information on positive aspects of positions/roles and possible enhancements to positions/roles.</li> <li>➤ Identify changes to operations/roles, new initiatives necessary or opportunities for attracting past volunteers back to their roles.</li> </ul>		
	22. A process for the review of project and position briefs is in place.	<ul style="list-style-type: none"> <li>➤ Ensure that a review of all position and ongoing project/event briefs is undertaken on an annual basis. The timing of this review should be determined by the timing of the event or meeting requirements etc.</li> <li>➤ Ensure that the responsibility for reviews is included in appropriate position descriptions.</li> </ul>		

Priority	Checklist	Strategies	Timeline	Person Responsible
	<p>23. A process for the review of the culture of the organisation and members in relation to volunteers is in place.</p>	<ul style="list-style-type: none"> <li>➤ Review on an annual basis this aspect of the organisation. This can be undertaken in conjunction with members, Board/committee, members of staff etc.</li> <li>➤ Develop a formal survey to canvass member's views and opinions about various aspects of the organisation and the manner in which it operates.</li> <li>➤ Develop an annual survey where members from all levels in the organisation can have input to the operations and generate new initiatives</li> </ul>		

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## 5.5 Project Brief information sheet

### 1. Title of the Project –

### 2. Committee/project Contact Person - \_\_\_\_\_ Ph. \_\_\_\_\_

Provide the details of the person who will be overseeing the project or providing the primary support to the project. If the person who is to manage the project longer term is not known indicate a temporary contact.

This provides the potential volunteer with a person to discuss the project with.

### 3. Purpose and benefits of the Project

Explain here why the project is being undertaken, and the value of the project to the organisation and members.

‘Dot points’ will provide clear and concise information.

### 4. Description of the project

Provide a brief overview of the project

### 5. Timelines

If the project can be broken down into stages with relevant timelines then the potential volunteer can identify project demands that may impact on personal commitments. These can then be negotiated or additional assistance brought on board for these times.

At a minimum any commencement or completion dates that impact on the project should be included.

### 6. Project partners

This is the place to identify people, groups or agencies that may have an interest or a stake in the project or the outcome of the project. It is important to identify them here so that there are not difficulties at a later stage of the project because they were not appropriately consulted.

### 7. Project Management

Indicate here any requirements relating to the management of the project. Points will include, for example:

- requirements relating to who shall be included on any working group and how often the group may be required to meet
- any reporting requirements i.e. to the committee etc
- who the day to day contact for the project will be if it is different to the ‘contact person’
- any funding, grants, budget allocation etc that the project may have at its disposal.

### 8. Skills & Resources needed

#### Personal skills

Detail any personal and interpersonal skills the project may require. These may relate to team building, communication and organisational skills for example.

**Technical skills**

Detail any technical resources or equipment required by the project. These may relate to computer skills, understanding of the organisation's operations and goals, access to computer etc.

**Other requirements**

Detail any other project requirements. These may include need to access transport, ability to meet at different sites for meetings etc.

**9. Project tasklist**

Give as detailed information as possible about the components of the project. Tasks may for example relate to;

- Co-ordinating meetings
- Collecting and researching information
- Developing and managing a budget
- Organising equipment
- Developing rosters
- Seeking sponsors etc
- Planning

**10. Other Information**

Include any other information relating to the project that you feel is important for the volunteer to know or understand. Remember, the more information that is provided to the volunteer the greater the understanding the volunteer will have of the project.

**5.6 Project Brief proforma**

**1. Title of the Project –**

**2. Committee/project Contact Person - \_\_\_\_\_ Ph. \_\_\_\_\_**

**3. Purpose and benefits of the Project**

**4. Description and benefits of the project**

**5. Timelines**

**6. Project partners**

Project partner	Stake/interest

**7. Project Management**

**8. Skills & Resources needed**

**Personal skills**

- 
- 
- 

**Technical skills**

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**Other requirements**

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**9. Project tasklist**

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**10. Other Information**

## 5.7 Example Project Brief

### PROJECT BRIEF

#### 1. Title of the Project – **Development of Computerised XYZ ASSOC Registration Cards**

#### 2. Committee/project Contact Person -

#### 3. Purpose and benefits of the Project

- Reduce data entry time for XYZ ASSOC staff
- Ensure all players are registered before participating (for insurance purposes) and reduce the incidence of players participating under false names
- Marketing/sponsorship initiatives for members

#### 4. Description of the project

- The project will enable easier recording of players at games by providing each XYZ ASSOC member with a photo ID card that can be easily checked by umpires before games.
- Players cards, scores, umpires, etc can be scanned and the data sent to XYZ ASSOC computer for record keeping.
- It is proposed that Player registrations be completed in person at the XYZ ASSOC office or other designated area.
- An initial trial using the cards will take place with teams involved in the 2000 Winter Competition.

#### 5. Timelines

- Staff training
- System hardware (bar code reader/scanner) - ASAP
- Trial teams/divisions - 2000/2001 season
- Fully operational - winter 2001 season
- Club/umpire training/procedures -

#### 6. Project partners

Project partner	Stake/interest
Clubs	Assisting with the development of procedures, trial of and review of the project, and implementation
XYZ ASSOC	Overseeing the development, trial and implementation of the project
Umpires/officials	Trial, review and implementation
Software and systems provider/contractor	Will need to work with association in relation to modifications, trouble-shooting etc.
Database managers	Staff responsible for inputting data, making modifications etc

#### 7. Project Management

The project will be managed by the XYZ ASSOC office. ....(insert name)..... will be the project co-ordinator and will work with club representatives to develop, trial and implement the project.

## **8. Skills & Resources needed**

### **Personal skills**

- Teamwork and interpersonal skills
- Time management
- 

### **Technical skills**

- Project co-ordination skills
- Teaching skills (to instruct clubs)
- Computer/database knowledge

### **Other requirements**

- 
- 

## **9. Project tasklist**

- Meeting with Sportzware, Easy Ids, ASP, Executive Director, and Senior Competition Administrator to ascertain/confirm compatibility and workability of systems.
- Once confirmed, select games/teams for trial, contact relevant people within the Clubs, and organise meetings with them to instruct.
- Take photos and print cards.
- Instruct umpires.

## **10. Other Information**

## 5.8 Position Description Information Sheet

- 1. Volunteer Job Title –** Name of position
- 2. Operational Area** E.g. Committee, Regional representatives, Training, Subcommittee

### 3. Brief description of the position

Approximately 1 paragraph on the following - what the position entails – on canteen roster, coaching support, committee position; other people/positions the role has a close relationship with; the importance of the position; other?

Add also the ‘selling points’ of the position i.e. what the volunteer can get out of the position, how it relates to the organisations operations – importance etc.

### 4. Commitment (length, type, hours per week per month etc)

This is the place to clearly state up front what the minimum commitments of the position are. It needs to be realistic and honest. The volunteer will know exactly what will be required and it will prevent there being any misunderstanding at a later time. The volunteer will appreciate not being misled.

Information will include meeting times and frequency, time required for liaising with other agencies, members, the media, time required to do administrative work etc.

‘Dot points’ will make information clear and concise.

### 5. Location

Where the position is ‘located’ e.g. on-field, clubrooms, off-site, away games etc

### 6. Key Tasks and Responsibilities

‘Dot points’ outlining the key tasks/responsibilities involved in the role will make the roles and expectations of the position clear.

### 7. Requirements of the position

#### Personal skills

Personal attributes relating to team work, attitude, behaviour etc

#### Operational skills

List here any specific skills that are ‘a must’, ‘desired’ or would need to be developed etc

#### Other requirements

List here any other requirements that don’t ‘fit’ above categories e.g. clothing, vaccinations, trial periods etc

### 8. Support -Induction/training/supervision/resources

This is the opportunity to make the volunteer feel that they will be ‘trained/taught’ any skills they may lack or not have confidence in. Include training through the organisations, Active Australia, local council, the i.e. induction programs, skill development programs etc. let them know how the club will help them access these.

Include support and ‘mentors’ that are available within the organisation and let them know who will be their immediate point of contact or support in relation to talking over issues and opportunities.

### **9. Key timelines relating to the position**

List here any key tasks and associated dates/timelines that the position will be responsible for, e.g. sending out season registration papers, , notification of AGM, minutes, co-ordination of volunteers, management of equipment etc depending on the position.

Include both short-term and longer term timelines, and make note of ‘on-going’ and regular requirements as well as ‘one-off’ and irregular requirements.

‘Dot points’ make it clear and concise.

### **10. Benefits of the position**

This is the opportunity to ‘sell’ the benefits to the volunteer. The benefits may include such things as learning or enhancing new skills through formal training opportunities, working with an enthusiastic team of people, influencing the direction and future of the organisation, liaising with state and federal government etc.

### **11. Other opportunities**

This is the opportunity to promote other opportunities that may appeal to the volunteer. It is also a good opportunity for ‘promotion’. The potential volunteer can be a good source of ‘word of mouth’ promotion.

Identify here other *types* of opportunities available or merely make reference to where they can seek other or different involvement t that which they are currently involved in

### **12. Thank-you**

Opportunity to ‘personalise’ the position description and the process. Words such as ‘Thank-you for your interest in this position we look forward to working with you.’

### **13. Application form**

Inform the potential volunteer of the process from here. You may add any requirements to the position description if you want to include an ‘application ‘ process.

**For further information contact** \_\_\_\_\_ (NAME) \_\_\_\_\_ (PH.)

**5.9 Position Description proforma**

**1. Volunteer Job Title – Club Secretary**

**2. Operational Area Senior Committee**

**3. Brief description of the position**

**4. Commitment (length, type, hours per week per month etc)**

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**5. Location**

**6. Key Tasks and Responsibilities**

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**7. Requirements of the position**

**Personal skills**

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**Operational skills**

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**Other requirements**

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## 8. Support - Induction/Training/Supervision/Resources

### General Support

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- 
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### Resources

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## 9. Key timelines relating to the position

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## 10. Benefits of the position

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## 11. Other opportunities

There are many other opportunities for volunteer involvement with the .....  
Please ask anyone on the committee for a list of the many and varied ways you can get further involved with club activities.

## 12. Thank-you

Thank-you for your interest. We look forward to receiving your application or inquiry.

## 13. Application form

## 14. For further information contact

-----  
(NAME)

(PHONE)

## 5.10 Example Position Description

(Example Position Description 1)

### POSITION DESCRIPTION

**1. Volunteer Job Title – Club Secretary**

**2. Operational Area Senior Committee**

### 3. Brief description of the position

The position of Secretary is not necessarily an onerous one. It does however require coordination, timeliness and an ability to relate to people to ensure that the club runs smoothly. The holder of this position is the keeper of club records and is responsible for ensuring that players are registered, that official correspondence is answered in a timely fashion and that the club records are maintained. An ability to delegate is desirable. It is vital that the Secretary works closely with the President and other committee members for the betterment of the club and its members.

### 4. Commitment (length, type, hours per week per month etc)

- Committee meetings are held on one evening per month and are approximately 2 hours duration. In season these are held in the clubrooms and off season are held at a nominated (voluntary) committee members home. Day of the week and starting time are determined by committee preference.
- The Secretary is expected to be part of a team which liaises with Council and Council Officers on matters relating to the club.
- The Secretary is expected to attend one training night per week especially at the start of the season (mainly to pass on relevant information to the club coaches on selection night and to be available for player registrations) and to attend games on a regular basis during the season.
- The P&S (XYZ ASSOC) meetings are held on the first Monday of each month at Melbourne Ball Park and are from 8pm to approximately 9.30pm. The purpose of these meetings is to distribute information from the association to the clubs and to discuss relevant issues.

### 5. Location

- The Club grounds are located in XYZ Park, Recreation Drive, Sportcity South.

### 6. Key Tasks and Responsibilities

- Receive all correspondence on behalf of the committee.
- Respond to all official correspondence in a timely fashion.
- Advise the committee on procedural matters especially in regard to the constitution.
- Maintain an official register of the members of the association.
- Attend all committee meetings of the association.
- Attend the P&S Meeting (XYZ ASSOC) & report on proceedings to the committee.
- Ensure that an accurate record of all meetings is kept.
- Provide notice of all meetings in line with the constitution.
- Ensure that advantage is taken of any opportunity for grants or facility funding.

- Be the holder and be responsible for the maintenance of all club records.

## **7. Requirements of the position**

### **Personal skills**

- Ability to work as part of a team.
- Very good written and communication skills.

### **Operational skills**

- Ability to network.
- Ability to delegate.
- Knowledge of computer software such as MSOffice is desirable but not essential.

### **Other requirements**

- 
- 
- 

## **8. Support - Induction/Training/Supervision/Resources**

### **General Support**

- All committee members are available to support the secretary when and if required.
- The XYZ ASSOC Senior Administrator is readily accessible for enquires.
- The City of Fitness Recreation Planner is the first point of call when dealing with Council on ground or pavilion issues.

### **Resources**

- The constitution sets out the rules of the incorporated body (the club). It is necessary that the Secretary attains a good knowledge of the constitution once installed in office.
- The Victorian XYZ Association Administration Handbook is available. This manual contains all relevant procedures of the Association together with a contact list for the XYZ ASSOC Board and for Club Officials (Presidents and Secretaries).
- The City of Fitness Sports Ground and Pavilion Guide is available.

## **9. Key timelines relating to the position**

- The registration and clearance procedures and timeframes are set out in the XYZ ASSOC Administration Handbook
- Players are to notified at least six weeks prior to the start of the season or sooner if directed by the Committee.
- Notification of meetings etc are as per the clubs constitution.
- The club usually receives notification well in advance from either the XYZ ASSOC or Council.

## **10. Benefits of the position**

- Opportunity to work with a group of dedicated club members on the senior committee and make a significant contribution to the operation of the club
- Opportunity to develop a greater understanding of the Victorian XYZ Association and associated activities and competitions
- Opportunity to make a contribution to the way in which the club is administered and recommend procedures

- Opportunity to undertake a range of XYZ ASSOC and other skill development programs relating to the position

### **11. Other opportunities**

There are many other opportunities for volunteer involvement with the Club. Please ask anyone on the committee for a list of the many and varied ways you can get further involved with club activities.

### **12. Thank-you**

Thank-you for your interest. We look forward to receiving your application or inquiry.

### **14. Application form**

#### **14. For further information contact**

-----  
(NAME)

(PHONE)

(Example Position Description 2)

## POSITION DESCRIPTION

**1. Volunteer Job Title – Volunteer Co-ordinator**

**6. Operational Area Administration**

### 3. Brief description of the position

The position is responsible for providing a strong link between the Executive Committee/Board of Management and the many volunteers in this organisation. It will require a fine balancing of the interests and needs of the volunteers with the demands and expectations of the Executive Committee/Board of Management.

It is a challenging role that is important to the effective operation of the organisation given that there are over volunteer roles involved in the organisation.

### 4. Commitment (length, type, hours per week per month etc)

- Attendance at monthly committee meetings
- Flexibility to work with other volunteers in co-ordination roles (e.g. coaches, committee convenors etc) to assist with putting together position descriptions, training/induction programs etc
- In the first 6-8 months it is anticipated that a significant commitment of up to 15-20 hours a month will be required to establish the volunteer management program, allocate tasks and determine priorities
- Following this time a commitment of up to 12 hours a month would be envisaged

### 5. Location

- Much of the administrative work can be undertaken from home
- Meetings with relevant personnel can be at a location mutually agreed
- Committee meetings will normally be held at the clubrooms

### 6. Key Tasks and Responsibilities

- Co-ordinate the listing of all volunteer opportunities in the organisation including job roles and special project opportunities
- In conjunction with the executive and relevant personnel (e.g. coaches, committee convenors etc):
  - Develop a policy on volunteering in the organisation
  - Ensure that position descriptions are developed for all roles
  - Ensure that induction and training programs are developed and put in place for all volunteers
  - Recruit, select and appoint volunteers to roles that suit them
  - Develop and implement volunteer rosters
  - Develop, implement and review reward and recognition processes and programs
- Develop and maintain good communication channels between the volunteers and the executive
- Develop communication with all volunteers in order to:
  - Identify potential issues ahead of time
  - Receive feedback on opportunities identified by the volunteer
  - Support them in their role
  - Identify support and training needs

- Determine levels of satisfaction
- Prepare project briefs for special or one off events
- Identify alternative sources of volunteer support including those available from outside the organisation
- Submit regular reports to the executive
- Ensure volunteers are reimbursed for out of pocket expenses in accordance with executive policy/guidelines
- Co-ordinate the implementation of the Volunteer Management Plan

## 7. Requirements of the position

### Personal skills

- Enthusiastic and able to support volunteers in their role
- Good at dealing with people particularly in relation to listening and communicating verbally
- Able to work with others to resolve areas of potential conflict
- Able to work as part of a team

### Operational skills

- Able to work with the executive to develop procedures and timelines for achieving set tasks
- Access to a computer and basic computer skills would be of assistance
- Able to liaise with other organisations developing volunteer programs

### Other requirements

- 
- 

## 8. Support - Induction/Training/Supervision/Resources

- The position will report to the executive which will provide operational advice and support
- Training will be available through programs provided through the *Organisation Management/Volunteer Management Program (CAMP/VMP)*,.. (insert names of any other organisations through which assistance programs are available, including peak associations, member clubs, local councils etc)

## 9. Key timelines relating to the position

Task	Complete by
➤ In conjunction with the committee develop a list of key tasks for the next 12 months that include the following:	
➤ Develop a policy on volunteers and volunteering in the organisation	
➤ Identify all volunteer roles in the organisation	
➤ Develop a timeline for preparing position descriptions for all roles	
➤ Identify training requirements for all positions	
➤ Prepare a Volunteer Information Kit	
➤ Develop a reward and recognition program for volunteers	
➤ Prepare project briefs for all one-off and special events	
➤ Develop an 'Operations manual' that contains key operational information for each position	
➤ <b>Other?</b>	

### **10. Benefits of the position**

- The opportunity to improve the range of activities and tasks available to volunteers
- The opportunity to put in place procedures and structures to better support volunteers
- The opportunity to assist the organisation to better recognise the valuable work undertaken by volunteers

### **11. Other opportunities**

There are many other opportunities for volunteer involvement with the.....(*insert name of organisation*) ..... Please ask for the list of ‘Volunteer Opportunities’ which describes opportunities in a range of fields including marketing, promotion, administration, database development and maintenance, tournament management etc.

### **12. Thank-you**

Thank-you for your interest. We look forward to receiving your application or inquiry.

### **13. Application form**

### **14. For further information contact**

.....(*insert name and phone no. of contact person*) .....

### 5.11 Volunteer Opportunities listing proforma

The following table can be used to list ALL the volunteer positions AND project opportunities that exist in the organisation. Table 1 should be used to identify all the positions or roles and provide a description and an overview of the requirements of the position. Table 2 should be used to provide a list of all the current special project, special event, irregular or short-term opportunities as well as those proposed.

This listing should be added to regularly. A strategy is to update it at every monthly meeting.

**Table 1. – Summary of Positions**

AREA OF OPERATION (Eg Board, Committee, Tournament, F'raising, Coaching, social etc)	TITLE OF POSITION	BRIEF DESCRIPTION OF THE POSITION	REQUIREMENTS OF THE POSITION (E.g. Dates/times/location/transport/skills, timelines etc)
<b>(Example only)</b>  <b>Senior Committee</b>	<b>Secretary</b>	The position will be one of 6 senior committee members responsible for the management of the club. It is a position that is appointed at the Annual General meeting for a period of 1 year.	<ul style="list-style-type: none"> <li>➤ Develop agenda, take minutes and forward to committee members monthly</li> <li>➤ Respond to correspondence</li> <li>➤ Attend committee meetings 7-9pm on last Wednesday of the month</li> <li>➤ Skills needed include general administration, letter writing and team skills.</li> </ul>
			<ul style="list-style-type: none"> <li>➤</li> <li>➤</li> <li>➤</li> <li>➤</li> <li>➤</li> <li>➤</li> </ul>

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**Table 2 – Project, special events, short-term opportunities for volunteers**

PROJECT	BRIEF DESCRIPTION & REQUIREMENTS OF THE PROJECT	REQUIREMENTS OF THE PROJECT (E.g. Dates/times/location/transport/skills)
<p><b>(Example only)</b></p> <p><b>Develop electronic membership database.</b></p>	<p>Developing a database that will contain membership information including, member contact details, financial records, membership status, member interests, competition status etc.</p>	<ul style="list-style-type: none"> <li>➤ Design of computer database format</li> <li>➤ Designing of membership application form</li> <li>➤ Surveying of all members</li> <li>➤ Input of data</li> <li>➤ Project needs to be completed before commencement of next season</li> <li>➤ Group of people with knowledge of databases, computers, administrative processes etc., needed to develop and oversee the project.</li> </ul>
		<ul style="list-style-type: none"> <li>➤</li> <li>➤</li> <li>➤</li> <li>➤</li> <li>➤</li> <li>➤</li> </ul>
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## 6. Managing the implementation of the Volunteer Management Plan

It is recognised and understood that implementation of the volunteer management plan may present some difficulties for organisations in terms of:

- Competing priorities
- Important day-to-day operational demands specific to the sport, eg: “teams on the field next week”
- Lack of people willing to take on the strategies
- Level and type of resources not available, eg: skills, time, funding, etc.

A valuable strategy to help the organisation ‘stay on track’ is to identify a person or organisation that can act as a ‘Mentor’, particularly during the initial stages of the project.

The role of a mentor could include:

- Making contact with the organisation on a regular basis, eg monthly
- Monitoring the implementation of the strategies according to the goals and timelines set by the organisation
- Offering suggestions of resources and contact people where needed, and making contact on behalf of the organisation if appropriate
- Attending an occasional meeting of the organisation if appropriate
- Providing feedback on issues being faced during the development and implementation of the Volunteer Management Plan.

As project “mentors” may change from time to time and there may be more than one relevant contact person, the following table is provided for your organisation to note the current mentor and relevant details:

### MENTOR:

Name:	Organisation:	Contact Details:

Other useful strategies for the organisation to consider in managing the implementation of the project are:

- Discuss the status of the volunteer management plan at each Board/Committee meeting – it should be a standard agenda item
- Ensure that all members are informed about the plan (through a newsletter or notices) and are invited to be involved
- Re-appoint responsible people to strategies after each AGM to ensure that current and relevant members are allocated to strategies and tasks

## 7. Review Process

### Review of Volunteer Management Plan:

The fourth phase of volunteer management is the Review Phase, involving strategies for the organisation to re-assess specific volunteer recruitment and management practices.

As part of this review process, it is necessary for the committee to annually review its overall approach to implementing the volunteer management plan. The following should be included in the review:

- Timelines for implementation. Have these been realistic? Or have they extended too long so that members have lost their interest and drive in the project.
- Responsible person/sub-committee. Is the initial structure that was set up to implement the plan still appropriate or sufficient?
- Re-assessment of the organisation's volunteer management practices. Are members familiar with new procedures etc. Is the organisation putting into practice the new principles and philosophies?
- Re-assessment of the resources, skills, knowledge and personnel, that have been allocated to the project and whether this is sufficient.
- Re-defining of strategies and priorities where appropriate. This may need to occur where strategies have been too ambitious or not ambitious enough given organisational requirements.

### Who should be involved in the review?

Do not limit the people involved in the review to those who have played a part in developing the Volunteer Management Plan. Involve the general membership. These are the people who will give and independent appraisal.

This management plan kit has been prepared so that the organisation can regularly review and update its volunteer management strategies. This is to ensure that the plan stays relevant to the organisation's needs.

As needs of the organisation change so will priorities in relation to the volunteer management strategies. As changes are made

## 8 Resources

### 8.1 Resources available through Sport and Recreation Victoria

The following information and resources can be obtained through Sport and Recreation Victoria to assist with club and volunteer development:

- *‘Planning For Success – Course Organisers Resource Kit’*

#### **Summary**

Provides step by step checklist for anyone planning and co-ordinating a workshop. Contains list of course presenters indicating area of expertise and proformas for registration/applications and review of the event etc.

- The Active Australia Organisation Management Program has two components; (1) The Club/Association Management Program (CAMP) and (2) the Volunteer Management Program (VMP) – Series of Resource Booklets

Titles under the Club/Association Management Program (CAMP) include:

- ‘Club Planning’*
- ‘Committee Management’*
- ‘Conducting Meetings’*
- ‘Creating a Club’*
- ‘Event Management’*
- ‘Financial Management’*
- ‘Legal Issues and Risk Management’*
- ‘Marketing and Promoting Sport and Recreation’*
- ‘Sponsorship Fundraising and Grants’*

Titles under the Volunteer Management Program (VMP) include:

- ‘Managing Event Volunteers’*
- ‘Recruiting Volunteers’*
- ‘Retaining Volunteers’*
- ‘The Volunteer Co-ordinator’*
- ‘Volunteer Management Policy’*

These two programs were consulted in the development of the workbook and the authors would like to acknowledge the materials developed by the Australian Sports Commission for these programs in the preparation of Section 4 *Key Principles for Effective Volunteer Management* of the workbook. Sport and Recreation organisations are encouraged to use the resources provided in these programs. In addition to this, you should also look out for opportunities for training courses and sessions under the CAMP/VMP banner, often run by local councils.

Sport and Recreation Victoria also funds and supports a range of sporting agencies, that provide various services and resources to sporting organisations. The following list is an example of the agencies that exist – further information and contact details can be sought from Sport and Recreation Victoria (Ph: 03 9666-4200).

*'Managing Event Volunteers'*  
*'Recruiting Volunteers'*  
*'Retaining Volunteers'*  
*'The Volunteer Co-ordinator'*  
*'Volunteer Management Policy'*

The Organisation Management (CAM) and Volunteer Management Program (VMP) information is particularly relevant and the organisation is encouraged to use the resources provided in this kit. In addition to this, you should also look out for opportunities for training courses and sessions under the CAM/VMP banner, often run by local councils.

Sport and Recreation Victoria also funds and supports a range of sporting agencies, that provide various services and resources to sporting organisations. The following list is an example of the agencies that exist – further information and contact details can be sought from Sport and Recreation Victoria (Ph: 03 9666-4200).

- Australian Society of Sports Admin. Vic. Branch
- Australian Sports Trainers Assoc.
- Sports Federation Foundation
- Sports Federation of Victoria (Vicsport)
- Sports Medicine Australia – Victorian Branch
- Victorian Institute of Sport (VIS)
- Australian Sports Drug Agency
- Womensport and Recreation Victoria
- Victorian Commonwealth Games Association
- Victorian Olympic Council Inc
- Victorian Coaching Centre
- Associated Public Schools
- Victorian School Sport Unit
- Victorian Secondary School Sports Association
- Surf Lifesaving Victoria
- The Royal Life Saving Society of Australia (Vic. Branch)
- VicSwim
  
- Regional Sports Assemblies:
  - Barwon Region
  - Central Gippsland (GippSport)
  - Central Highlands
  - East Gippsland
  - Loddon/Campaspe (Sports Focus)
  - Mallee
  - North-East Region
  - South West
  - Goulburn Valley (ValleySport)
  - Western Region
  - Wimmera Region

## 8.2 Resource available through Local Government

Local Government often takes on responsibility for supporting and assisting organisations in a range of facility management, funding and community development areas. If you haven't already made contact with the local council that your facility falls under, you should follow this up as soon as possible.

Local councils often produce information that would be valuable for your organisation to obtain. This information may include the local community directory, information kits for committees and clubs, calendar of training programs, etc.

Some council representatives to ask about:

<b>Manager responsible for:</b>	<b>Name</b>	<b>Position Title</b>	<b>Direct contact details</b>	<b>Comments &amp; additional information</b>
Parks				
Recreation				
Building Maintenance				
Capital Works Projects				
Community Training Programs				
Insurance				

### 8.3 Resources available through Volunteer Resource Centres

As well as recruiting from within the membership of an organisation, there is value in also looking outside the membership ranks for possible assistance. One form of resource that hasn't been used by recreation and sporting organisations in the past is Volunteer Resource Centres. These centres are located within communities, for general volunteer enquiries, and matching of people who register for volunteer work with appropriate referrals. Sporting organisations can register with any of these centres, as long as the "pre-recruitment" phase has been completed and tasks are well defined in the context of the organisation's goals.

The following are details relating to Volunteer Resource Centres in Victoria:

#### **Volunteering Victoria**

247 Flinders lane  
Melbourne 3000  
Ph. (03) 9650 5541  
Fax (03) 9650 8868  
Email: [volunteer@infoxchange.net.au](mailto:volunteer@infoxchange.net.au)

#### **Boroondara Volunteer Resource Centre**

405 Camberwell Rd,  
Camberwell 3124  
Ph. (03) 9882 5860  
Fax (03) 9804 0060  
Email: [bvrc@cybernex.net.au](mailto:bvrc@cybernex.net.au)

#### **Eastern Volunteer Resource Centre**

Ringwood Plaza  
4 Melbourne St. Mall  
Ringwood, 3134  
Ph. (03) 9870 7822  
Fax (03) 9879 4200  
Email: [eastvolr@smart.net.au](mailto:eastvolr@smart.net.au)

#### **Monash Volunteer Resource Centre**

583 Ferntree Gully Rd.,  
Glen Waverley, 3150  
Ph. (03) 9562 0414  
Fax (03) 9562 0411  
Email: [mvrc@cybernex.net.au](mailto:mvrc@cybernex.net.au)

#### **Albury/Wodonga Volunteer Resource Centre**

PO Box 730 Wodonga 3690  
Ph. (02) 602 10990  
Fax (02) 602 10993  
Email: [volunteercentre@hotkey.net.au](mailto:volunteercentre@hotkey.net.au)

**Wimmera Volunteers Inc.**

PO Box 267  
Horsham 3400  
Ph. (03) 538 25607  
Fax (03) 538 25711

**The Centre for Continuing Education**

Chisolm St.  
Wangaratta 3677  
Ph (03) 572 10200  
Fax (03) 572 19994  
Email: [centre@netc.net.au](mailto:centre@netc.net.au)

**Shepparton Information and Resource Centre**

272 Maude St.  
Shepparton  
Ph (03) 583 12723  
Fax (03) 582 12614

**La Trobe Information and Support Centre**

20 Tarwin St.,  
Morwell 3840  
Ph. (03) 513 41118  
Fax (03) 513 41122

**Geelong Volunteer Resource Centre**

87c McLarty Place  
Geelong 3220  
Ph. (03) 522 11377  
Fax (03) 522 11499  
Email: [manager@geelongvolunteer.org.au](mailto:manager@geelongvolunteer.org.au)  
Website: [www.geelongvolunteer.org.au](http://www.geelongvolunteer.org.au)

In addition, the following web pages may also be useful:

- Volunteering South Australia: [www.volunteeringsa.com.au](http://www.volunteeringsa.com.au)
- Volunteering Victoria: [www.govolunteer.com.au](http://www.govolunteer.com.au)

Other publications available through Volunteer Resource Centres

The following are some more resources that may be useful for effective management of volunteers and in some cases, for general organisation management:

**Volunteer Management: An Essential Guide.** By Joy Noble & Louise Rogers:

This book assists with managing, initiating, extending or reviewing activities which involve volunteers, and is presented in three main sections:

- The Big Picture: implications for volunteering
- Setting the Scene for effective volunteer management
- Managing the program

Available through Volunteering SA Inc: ([www.volunteeringsa.com.au](http://www.volunteeringsa.com.au))

**Volunteers and Paid Workers: A Collaborative Approach.** By Joy Noble.

This book examines issues regarding paid and voluntary work. Topics include:

- Nature and impact of work in a changing society
- Characteristics, motivations and expectations of paid and voluntary work and workers
- Structures and strategies which maximise the skills and commitment of all workers

Available through Volunteering SA Inc: ([www.volunteeringsa.com.au](http://www.volunteeringsa.com.au))

**Just A Tick – A Best practice Guide for Committees and Boards of Management**

A guide to some of the obligations that committees and boards have under various legislation. It also explains some of the ways committees and boards can implement best practice strategies in the area of community management.

**Volunteer Update: Newsletter of Volunteer Victoria**

This publication provides a range of information on volunteer initiatives, programs, policy and projects.

Available through Volunteer Victoria, 4<sup>th</sup> Floor, 247 Flinders Lane, Melbourne, Vic. 3000

### 8.3 Resources available 'On-line'

- The Virtual Volunteering Project: [www.serviceleader.org](http://www.serviceleader.org)
- Range of information to assist with volunteer management programs [www.serviceleader.org](http://www.serviceleader.org)
- On-line volunteer positions: [www.volunteermatch.org](http://www.volunteermatch.org)
- Material to assist with volunteer management programs and retention initiatives [www.cybervpm.com](http://www.cybervpm.com)
- Material to assist with volunteer management programs including on-line library [www.charityvillage.com](http://www.charityvillage.com)