

A Guide to Volunteer Management

Lotto
NZ **Volunteers**

Supporting Local
Sport Makers



SPORT
NEW ZEALAND



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Each week Lotto players raise over \$3.8 million for the community.

Lotto has been supporting New Zealand communities for over 25 years, with over \$3 billion in profits distributed to New Zealand arts, cultural, sporting and community organisations.

Sport New Zealand is the largest recipient of lottery funding, receiving over \$35 million this year, which is redistributed out to sports throughout New Zealand.



Cover image:

Lin Tozer from Palmerston North's Ice Breaker Aquatics swimming club – recipient of the Lotto and Sport New Zealand Sport Maker 2013 Award.

Introduction

This guide is designed to help your sports organisation set up an effective programme for your on-going recruitment, support and retention of volunteers.

It has been made possible through a partnership involving the Lotto Volunteer Foundation, Sport New Zealand and Regional Sports Trusts to recognise and reward the sport volunteers who make sport happen throughout New Zealand.

Volunteers are the lifeblood of sport and literally make sport happen in our communities, with over 750,000 wonderful people giving 50 million hours of their time annually to keep our world class sport system humming.

**Peter Miskimmin – Chief Executive,
Sport New Zealand**



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This guide contains links to Word document sample templates that you can download and adapt to suit your needs.



Section 1: Appoint a Volunteer Coordinator

Appointing a Volunteer Coordinator is the key first step in establishing your volunteer management programme. Your volunteers are the lifeblood of your organisation and they require coordination, assistance and support to be effective, to enjoy their experience and to keep volunteering.

The Volunteer Coordinator can be a stand-alone position, or part of a separate volunteer management committee – depending on the size of your organisation and what's involved. Having such a role recognises the importance of volunteers to the successful operation of your organisation. The Volunteer Coordinator needs to be a good organiser, with the time and energy to look after volunteers and match the skills and experience of all volunteers with an appropriate position.

The Volunteer Coordinator's role is to:

- ▶ Liaise with other members of your organisation to:
 - determine where volunteers are needed.
 - write task/job descriptions.
 - assign specific jobs to volunteers.
 - plan a volunteer recruitment strategy.
 - prepare written volunteering material for posters, newsletters, social media networks etc.
- ▶ Organise orientation/induction programmes for volunteers.
- ▶ Hold regular meetings with volunteers.
- ▶ Find other members to supervise volunteers – 'buddy' /mentoring system.
- ▶ Organise training for volunteers.
- ▶ Keep up-to-date volunteer records.
- ▶ Motivate volunteers.
- ▶ Revise volunteer duties when needed.
- ▶ Develop a volunteer succession plan.

The amount of time and energy needed to accomplish these tasks will depend on the size of your organisation, its current performance level and why volunteers are needed. Whoever takes on the task of Volunteer Coordinator will need to be committed to the role.

Sample Volunteer Coordinator Role Description at:

<http://loftovolunteers.co.nz/documents/Sample-Volunteer-Coordinator-Role-Description.docx>



Section 2: Identify volunteer requirements

The starting point for your Volunteer Coordinator should be to identify the volunteer requirements for your organisation. They'll find it helpful answering the following questions:

- ▼ How many volunteers are needed?
- ▼ To do what?
- ▼ When?
- ▼ For how long?
- ▼ What sort of people do we want in these roles?
- ▼ What authority will each type of volunteer have?
- ▼ Who will each type of volunteer report to?
- ▼ What will be done so new volunteers feel welcome and fit in?
- ▼ What support is available for new volunteers?
- ▼ Is it possible for experienced volunteers to work with new volunteers?

Tip - making a list of all the roles required at your organisation will help to answer these questions.

Sample Volunteer Role List Template at:

<http://lottovolunteers.co.nz/documents/Sample-Volunteer-Role-List-Template.docx>

VOLUNTEER MANAGEMENT ACTION PLAN

Creating a Volunteer Management Action Plan is a useful tool for setting both short and longer-term goals for improving the experience your volunteers have at your organisation. Seek agreement to the plan from your Board or Executive Committee and their commitment to support its implementation.

Sample Volunteer Management Action Plan at:

<http://lottovolunteers.co.nz/documents/Sample-Volunteer-Management-Action-Plan.docx>

VOLUNTEERING POLICY

Depending on the size of your organisation you might not feel the need to have a formal Volunteering Policy. Having a policy does however, provide a useful framework for outlining what volunteers can expect from your organisation and what you can expect from them.

Sample Volunteer Management Policy provided at:

<http://lottovolunteers.co.nz/documents/Sample-Volunteer-Management-Policy.docx>

DEVELOPING VOLUNTEER ROLE DESCRIPTIONS

An important task for the Volunteer Coordinator is to work with the other members of the organisation to write role descriptions for all of the jobs/roles that your organisation needs. Developing role descriptions means volunteers know exactly what they're signing up for so they can plan accordingly and be confident they can meet expectations. It also shows new volunteers that your organisation is organised and knows what's needed from its volunteers.

Drafting role descriptions for every volunteer position can take a bit of time up front, but once they're written, revising and updating them is relatively straight forward.

The role description should include:

- ▼ Role name.
- ▼ Purpose of the role.
- ▼ Responsibilities and duties.
- ▼ Who the volunteer reports to.
- ▼ Knowledge and skills required.
- ▼ The time commitment required, including the term of the role if applicable.

Sample Volunteer Role Descriptions provided at:

<http://lottovolunteers.co.nz/documents/Sample-Volunteer-Coordinator-Role-Description.docx>

<http://lottovolunteers.co.nz/documents/Sample-President-Role-Description.docx>

<http://lottovolunteers.co.nz/documents/Sample-Secretary-Role-Description.docx>

<http://lottovolunteers.co.nz/documents/Sample-Treasurer-Role-Description.docx>

<http://lottovolunteers.co.nz/documents/Sample-Marketing-and-Promotions-Officer-Role-Description.docx>

<http://lottovolunteers.co.nz/documents/Sample-Health-and-Safety-Coordinator-Role-Description.docx>

<http://lottovolunteers.co.nz/documents/Sample-Volunteer-Coach-Role-Description.docx>

<http://lottovolunteers.co.nz/documents/Sample-Volunteer-Team-Manager-Role-Description.docx>

Section 3: Understand why people volunteer

A volunteer is someone who donates their time to an organisation or cause without expectation of payment. Volunteers come from all age groups, cultural and educational backgrounds, income levels, genders and types of employment.

People become sport volunteers for a variety of reasons - often it's to support their children and family members who play, or because they're a former player looking to give back to the sport. Other reasons include:

- ▶ Helping others.
- ▶ Being devoted to the cause.
- ▶ Having an interest in the work or activity.
- ▶ Wanting to learn and gain experience.
- ▶ Having a lot of free time.
- ▶ Knowing someone who is involved.

Read Sport NZ research about volunteers and what motivates them at:

<http://www.sportnz.org.nz/Documents/sport%20development/Volunteers-heart-of-sport-experiences-motivations.pdf>

It's important to understand why each volunteer in your organisation has offered their help. Being aware of what individuals value in volunteering will help you to provide satisfying and rewarding opportunities that will keep volunteers challenged and interested in fulfilling your organisation's needs.

Use your understanding of why each person in your organisation volunteers to match them to a suitable role and check your thinking by talking to them about the role.



Section 4: Recruitment

Research indicates that the personal approach is the most effective strategy for recruiting volunteers. This needs to be backed up with a simple but effective recruitment process that makes the transition into the organisation and role easy for volunteers.

This section offers useful advice and helpful tools to attract good volunteers. People are at the heart of this section, because recruitment is all about people.

HAVE A RECRUITMENT PLAN

Finding volunteers is challenging. It's important to have a plan in place so you:

- ▼ Know what you need.
- ▼ Can engage others in helping you.
- ▼ Can measure your success.

Sample Volunteer Recruitment Plan at:

<http://lottovolunteers.co.nz/documents/Sample-Volunteer-Recruitment-Plan.docx>

PROMOTE YOUR VOLUNTEERING OFFER

If a volunteer feels like they're getting something back from their experience, they're more likely to stay with your organisation and offer their services again in future. Highlight the benefits of volunteering, such as gaining new skills, making friends, having fun and helping others succeed.

Things you can do to promote your volunteer offer:

- ▼ On your website, social network platforms, noticeboard and printed resources, include information about what's involved in volunteering for your organisation and what the benefits are for the volunteer.
- ▼ Produce volunteer information kits and showcase some of your volunteers and their roles.
- ▼ Check past and present membership lists – compile a mailing list and send out details about your organisation's upcoming events and/or recent achievements and include details about volunteering and the roles you have available.
- ▼ Organise "recruitment" drives using current volunteers to promote your organisation and its activities.
- ▼ Look for angles about your organisation/members that local media will be interested in (eg your organisation's anniversary, a player's 100th game) and weave the volunteering message into your interviews and media releases.
- ▼ Organise community announcements on the radio.
- ▼ Produce posters, pamphlets and flyers that promote your organisation, its activities and role in the community and place them where potential volunteers visit: noticeboards in supermarkets, malls, community centres and schools.
- ▼ Target senior secondary and university students of Physical Education and Leisure Studies – they're often desperate for experience and enthusiastic.
- ▼ Organise a "bring a friend" day where current volunteers bring along a potential recruit.
- ▼ Link with local volunteer award programmes and highlight the volunteers who have been nominated.
- ▼ Attend local community events and expos.

ASK PEOPLE TO VOLUNTEER

It might sound simple, but studies have shown that simply asking people to volunteer is a very effective way of recruiting. Word of mouth is still the cheapest and best way of finding the people you want. Don't be scared to ask people – often people love to be asked for help and are flattered when you do so.

FOLLOW UP ON EXPRESSIONS OF INTEREST IMMEDIATELY

The sooner you make contact with someone who expresses interest, the more likely they'll become a volunteer.

DEVELOP AN APPLICATION FORM

An application form is a good way of collecting relevant information from potential volunteers, such as contact details, emergency contacts and relevant experience.

Sample Volunteer Application Form at:

<http://lofftovolunteers.co.nz/documents/Sample-Volunteer-Application-Form.docx>

SCREEN YOUR CANDIDATES

By screening your potential volunteers with interviews and police checks, you can make sure they're a good fit and that they're able to make a valuable contribution to your organisation.

Screening is also important because your organisation has a responsibility to meet a duty of care to its members, particularly young and/or vulnerable people. This means making every practicable effort to ensure their safety.

Screening begins before a volunteer has even made contact with you. The way your organisation recruits volunteers, and the types of people you target with your advertising, are both ways of screening volunteers.

Depending on what sort of responsibilities a volunteer will undertake, police checks and interviews are common ways to screen potential volunteers.

Whether screening is required and the best method to use, should fit with the volunteer's role and how much responsibility they will have. For example, someone volunteering to fix a fence during the off-season probably won't need a police check.

Screening alone doesn't guarantee unsuitable volunteers will be ruled out. It's equally vital to make sure other aspects of volunteer recruitment, training and supervision are effective.

Screening is a two-way process. There are ways for potential volunteers to screen themselves out if they think they aren't right for the job, or the job isn't right for them. For example, if people are made aware that a police check is part of the process before they begin (in advertising or on the application form) and they know they have a criminal record, they can choose not to apply. This is known as self-vetting.

POLICE CHECKS

Check with your National Sport Organisation (NSO) to see if they have a policy regarding police checks. If you decide that a police check is something you need to do, then the following information might be useful:

- ▶ **Information about the Police vetting process:** <http://www.police.govt.nz/service/vetting>
- ▶ Your organisation must respect the confidentiality of potential volunteers and all potential volunteers must fill out a consent form in which they agree to disclose their information before you carry out Police vetting.

Sample Consent to Disclose Information at:

<http://lofftovolunteers.co.nz/documents/Sample-Consent-to-Disclose-Information.docx>

REFERENCE CHECKS

If your recruitment process includes checking an applicant's referees, you can use a reference checking form. The application form your organisation uses, is also a good place to collect the contact information needed for a reference check.

Sample Reference Checking Form at:

<http://lofftovolunteers.co.nz/documents/Sample-Reference-Checking-Form.docx>

Sample Volunteer Application Form at:

<http://lofftovolunteers.co.nz/documents/Sample-Volunteer-Application-Form.docx>

INTERVIEW PROSPECTIVE CANDIDATES

If your organisation intends to interview potential volunteers, having a standard set of interview questions will ensure consistency, even if the interviewer is not always the same person. An interview also provides an opportunity for you to tell the prospective candidate more information about your organisation and what you expect, and gives them an opportunity to clarify what they're interested in.



BE PREPARED

- ▶ Think about the purpose of the interview. Are you interviewing for a specific role, or are you interviewing to find a role that uses the skills and meets the interests of the potential volunteer?
- ▶ Have your list of questions ready. Make your questions open-ended, because this encourages discussion between you and the volunteer. Using open-ended questions means you want to avoid asking questions that can be answered “yes” or “no”. For example, open-ended questions can start with:
 - Tell me about...
 - What do you think about...
 - How would you feel...

Tip - if the person is shy or unsure about how to answer your question, guide them through a scenario.

- ▶ If you’ve been given a volunteer’s application form before the interview, take a look at it. Think about what things you can ask this person to find out more about them and what they can potentially bring to your organisation.
- ▶ It might be a good idea to have a list of available positions handy to show your potential volunteer the types of roles they could do. They might not know you have several positions available.
- ▶ Another useful tool for conducting a good interview is an interview guide – a list of standard questions and some of the do’s and don’ts.

Sample Interview Guide at:

<http://lottovolunteers.co.nz/documents/Sample-Interview-Guide.docx>

GUIDELINES FOR MATCHING VOLUNTEERS TO ROLES

If the volunteer hasn’t applied for a specific role, there are a number of ways to match the volunteer to a role.

CONSIDER THE NEEDS OF YOUR ORGANISATION

Review your Volunteer Recruitment Plan and consider where the priorities are. Share the potential roles with the volunteer and explain what the various roles entail and what skills are needed for each.

SCHEDULING NEEDS

At times it might be helpful to narrow down the possibilities based on the availability of the volunteer at different times of the day, week or year (if a seasonal sport).

SPECIFIC EXPERTISE

You might find a volunteer with a particular area of expertise that your organisation can benefit from. Finding a special role for them might be appropriate and allow you to get the best out of the volunteer.

Tip - create a one-off role description and identify the support the volunteer will need to do the role. You could also use the volunteer to mentor others.

VOLUNTEER MOTIVATION

It’s important that there’s a match between the volunteer’s motivation and the role they take on. You can help facilitate this by explaining the nature of the various roles available and checking in with them, especially at the start, to make sure the role is actually a good fit and to troubleshoot any issues.

ESTABLISH A CODE OF CONDUCT

A code of conduct helps set down your organisation’s expectations of volunteers.

Sample codes of conduct for volunteers at:

<http://lottovolunteers.co.nz/documents/Sample-Codes-of-Conduct-for-Volunteers.docx>

Section 5: Training and support

Once you've recruited your volunteers it's important they feel welcome, are brought up to speed on your organisation and their role, and are provided with on-going training and support. This will ensure they can contribute as much as possible through their volunteering.

WELCOME AND ORIENTATION

WELCOME

Have the Volunteer Coordinator (or appropriate person) welcome the volunteer to your organisation and provide an orientation so they feel like they belong as quickly as possible.

Tip - a welcome letter and welcome pack including items like the Code of Conduct, contact lists, role description and information about your organisation, is a great way to make your new volunteers feel like they're part of the team. Where appropriate, you could use different languages (eg Maori) to make your volunteer feel even more comfortable. Holding a group welcoming evening is also something to consider.

ORIENTATION

Research has shown that volunteers prefer a structured orientation programme. They like to know how things work and what their role is so they can help out properly.

A basic orientation programme should include:

- ▶ A copy of your welcome pack.
- ▶ An outline of your organisation's rules and procedures.
- ▶ Clarification of the volunteer's role.
- ▶ Who they report to/where they can direct questions.
- ▶ Confidentiality expectations.
- ▶ Where to find equipment and resources.
- ▶ Explanation of tasks.
- ▶ Who they notify with scheduling issues or if they're going to be absent.
- ▶ How to handle problem situations that might arise.
- ▶ A tour of your organisation including restrooms, tea and coffee making facilities, fire evacuation procedures as well as other health and safety matters they should be familiar with.
- ▶ Information on upcoming training or meeting times.

Sample Volunteer Welcome Pack at:

<http://lottovolunteers.co.nz/documents/Sample-Volunteer-Welcome-Pack.docx>

TRAINING

In addition to the basic induction there might be common information and skills needed by particular groups of volunteers eg coaches, umpires and managers. If you can offer these types of training in a quality way to your volunteers, you'll be significantly enhancing their volunteer experience and their level of engagement.

Of course, not all volunteers will want to learn more or have the time to commit to training, but others will benefit from on-going opportunities to meet and talk about their work.

Tip - consider how training can best be offered. For volunteers short on time, working through paper or web-based resources in their own time can be helpful. Otherwise, you can take those with more time through site-based training, referring them to regional training as appropriate.



SUPERVISION AND SUPPORT OF VOLUNTEERS

There are three main reasons for the on-going supervision and support of volunteers:

- ▶ Helping them to do their job properly.
- ▶ Helping them to enjoy themselves - this can increase the chances of them wanting to continue volunteering.
- ▶ Helping them to play by the rules and fulfil the requirements of their role.

Follow up a volunteer's initial welcome and training with regular contact – it's a good opportunity to gauge the volunteer's on-going satisfaction in their role and provides you with a chance to offer more support.

Some of the things people get out of volunteering are social connection, appreciation and the enjoyment of being generous. For this reason, on-going support might just mean keeping in touch to make sure the volunteers are enjoying their role by feeling part of your organisation, appreciated and properly trained.

Tailor the way you manage volunteers to the type of volunteer you're working with. While some volunteers want to be involved in the running of the organisation's policies and processes, others might simply want to contribute some time and want very little responsibility. It's important to make sure that the expectations of the role they are filling match the kind of involvement they want.

Tip - ways of providing on-going support to volunteers include:

- ▶ **Having a designated Volunteer Coordinator.**
- ▶ **Being available to volunteers.**
- ▶ **Considering whether supervision is appropriate, especially when the volunteer is starting out – this could range from one-on-one to group supervision, or a casual chat based on observations.**
- ▶ **Building relationships with the volunteers – eg have a volunteers' BBQ, or invite them to special events like a closed training session with the organisation's top team (if applicable).**
- ▶ **Involving volunteers in planning if they're interested.**
- ▶ **Allowing for flexibility of roles – changes in position, role-sharing.**
- ▶ **Addressing any conflict quickly.**
- ▶ **Showing trust in their abilities and taking on board their views and ideas.**

DEALING WITH DIFFICULT VOLUNTEERS

Although good screening, supervision and training help to minimise problems arising with volunteers, they can still happen from time-to-time. Often a "difficult" volunteer is simply in the wrong role. Effective review and a new placement can often solve the problem.

However, when a volunteer's performance or behaviour has a negative impact on fellow volunteers, the organisation, its members, or the public, that person should be spoken to about the problem. This practice should be applied consistently with all volunteers.

For small indiscretions:

- ▶ Meet in private with the volunteer and present your concerns.
- ▶ Go over the expectations in the role description.
- ▶ Make sure the volunteer is aware of the organisation's expected standard of behaviour and code of conduct.
- ▶ Allow a response, in writing if necessary.
- ▶ Be fair and open to the possibility that the volunteer has been misunderstood.
- ▶ Take notes of the discussions you have.
- ▶ Write up any agreement you come to and give the volunteer a copy to review and sign.

For larger indiscretions where behaviour is clearly unacceptable - eg harassment or dishonesty:

- ▶ Address the problem as soon as possible.
- ▶ Discuss the issue calmly and objectively.
- ▶ Keep the discussion focused on the behaviour, not the person involved.
- ▶ Allow the volunteer to explain their position.
- ▶ Consider the most appropriate type of disciplinary action to take (ranging from a warning to dismissal), its likely effect and any mitigating circumstances.
- ▶ Ensure all disciplinary action is consistent – all members are treated fairly and in the same way.

DISMISSING A VOLUNTEER

Sometimes there might be a situation where the only appropriate course of action is to dismiss a volunteer. This decision should never be made by an individual. The organisation's Executive Committee and President should be involved in the process, with approval to dismiss the volunteer obtained.

- ▶ Conduct the dismissal in private and in a sensitive manner that focuses on the facts and honesty.
- ▶ Document the dismissal and flag it so the volunteer is not unwittingly taken on again.
- ▶ Follow up with a short, neutral letter confirming the dismissal.
- ▶ Notify all concerned parties, but respect the volunteer's privacy.



Section 6: Reward and recognition

People who volunteer want to feel appreciated and usually want their efforts recognised. They're more likely to keep up the good work if their volunteering is acknowledged.

WAYS OF RECOGNISING AND REWARDING VOLUNTEERS

FORMAL RECOGNITION

All volunteers should have their efforts formally recognised at least once a year, including Board or Executive Committee members. Tangible examples include: awards/prizes, a Sport Maker thank you e-card, access to sports gear, Christmas cards, vouchers, a trophy, a function or special event.

A number of regional schemes are also in place to recognise volunteers and Regional Sports Trusts (RSTs) usually have awards for volunteers. Some National Sport Organisations (NSOs) also have their own schemes in place. Contact details for RSTs and NSOs are available at www.sportnz.org.nz

INFORMAL RECOGNITION

All volunteers should have their efforts praised on a regular basis. Research on employee engagement indicates that people need to receive recognition or praise for doing good work once every seven days to feel engaged.

VOLUNTEER VOICE

Volunteers are a valuable source of information about the community at large. It's important that volunteers feel they are heard and that their perspectives and ideas are given due consideration. Volunteers should also be part of the decision-making process in developing the Volunteer Management Action Plan.

However your organisation chooses to recognise and reward volunteers, it sometimes helps to ask volunteers about what they're most comfortable with, in terms of recognition.

Tip - use surveys, meetings and workshops to ask volunteers for their views and then let them know how you're going to integrate their views into your planning. If you choose not to use a suggestion it's also important to explain why.

Guidelines for Volunteer Recognition at:

<http://lottovolunteers.co.nz/documents/Guidelines-for-Volunteer-Recognition.docx>

Sample Volunteer Survey at:

<http://lottovolunteers.co.nz/documents/Sample-Volunteer-Survey.docx>

Section 7: Review and evaluation

To continue to grow your volunteer base it's important to continually review your practices to ensure that what you're offering is meeting the needs of both your organisation and your volunteers. This means regularly reviewing your Volunteer Management Action Plan and updating it to take account of changing circumstances and needs.

REPORT AGAINST THE VOLUNTEER MANAGEMENT ACTION PLAN

Ideally the Volunteer Coordinator should report to the Board or Executive Committee once a month on progress and activities of the volunteer programme. The Board or Executive Committee is then responsible for taking any action required.

The Volunteer Management Action Plan should be evaluated annually. A range of stakeholders should be involved in assessing the effectiveness of the plan, eg Executive Committee members, players and different groups of volunteers such as coaches and referees. Following this consultation, actions should be identified to ensure an adequate supply of volunteers in the coming year.

CONSIDER A PERFORMANCE REVIEW FOR KEY VOLUNTEERS

For many volunteers simply being involved is sufficient. However, for a few, often those in key positions, a more formal way of assessing their progress, growth and development will be important.

Sample Volunteer Performance Review at:

<http://lottovolunteers.co.nz/documents/Sample-Volunteer-Performance-Review.docx>

CONDUCT EXIT INTERVIEWS

When volunteers leave your organisation take the opportunity to learn more about their experience and how it could be improved for others. This information can also help you with succession planning.

Sample Exit Interview Questionnaire for Volunteers at:

<http://lottovolunteers.co.nz/documents/Sample-Exit-Interview-Questionnaire-for-Volunteers.docx>

SUCCESSION PLANNING FOR KEY ROLES

Keeping an eye on the future and thinking about what you'll do when key volunteers move on is an important aspect of volunteer management.

Succession Planning Guidelines at:

<http://lottovolunteers.co.nz/documents/Succession-Planning-Guidelines.docx>



Following the steps contained in this guide should help you effectively manage your invaluable volunteers and ensure the long-term health and survival of your club/sports organisation.

Good luck



For more information please visit
www.lottovolunteers.co.nz/sportmakers



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