Volunteer Management

Acknowledgments

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Introduction

Every sport and recreation organisation requires overall guidance to ensure that its day-to-day activities are coordinated and conducted in ways that are fair, impartial and consistent. Policies assist in this process. Organisational policies reflect and clarify the values and beliefs considered important by the organisation. By developing and implementing policies, the organisation is indicating the rules, boundaries and expectations of behavioural standards to members and other stakeholders. Given the extensive reliance on volunteers by sport and recreation organisations, policies that address the interaction between volunteers and the organisation are especially important Whether the organisation is aware of it or not, decisions are policies. In cases where the organisation does not take a planned approach to policy development, it tends to operate in an unsystematic fashion. This means that each 'new' situation needs a new policy and results in ad hoc and inconsistent decision making.[1] Such an approach is not only inefficient but can create a climate of uncertainty, mistrust and potential conflict among stakeholders – they can never be sure how the organisation will react each time. This can be particularly frustrating for volunteers as their needs are often of low priority in terms of organisational policy development. Clearly stated and communicated policies allow volunteer management processes and priorities to become more transparent to stakeholders – this is critical for effective organisational accountability.

The purpose of this module is to:

- Define polices and outline rationale for policies
- Clarify the lines of responsibility for policy development
- Outline the policy development, implementation and evaluation process
- Introduce and explain a number of policy areas relevant to volunteer management.

What are Policies?

Policy means many things to many people. For some, policy means a formal written statement delivered from the highest levels in the organisation. Such statements result from a systematic process and usually outline some type of broad philosophy or intent on the part of the organisation. For others however, policies are synonymous with more detailed operational procedures. Using a dictionary definition of policy ('a principle, plan or course of action') it seems that there are two elements to policy:[2]

- a principle expressing some position, value or belief
- a plan or course of action including

It can be argued that both elements are required in voluntary organisation policies.[3] Organisations need to communicate their values and philosophies, as well as communicating to stakeholders what to do or not to do. In general, policies outline to people what to do while procedures tell people how to do it. Furthermore, detailed procedures tend to flow from broader statements of policy, although the distinction can be very imprecise in practice.

Put simply however, any decision made by a sport and recreation organisation is actually 'policy' (eg to provide bus transport to club members volunteering as officials at the national championships). Consequently, members come to expect the same treatment in future similar situations – a precedent has been established. However, such decisions are

often made expediently (the 'squeaky wheel' metaphor usually applies) with little thought about the suitability of that particular decision for future circumstances. When a subsequent decision is then made that varies from members' expectations of 'policy', they feel they have reason to be upset. What this suggests is that a more systematic approach to policy development is needed. Furthermore, all decisions should be made with care and due concern for their policy and precedent setting consequences.

Sport and recreation organisations should also consider the potential impacts of policy on its stakeholders. There are three ways in which policy affects behaviour in organisations:[4]

- Enabling behaviour to occur that would be difficult without policy (eg adopting a rule that sets out the hours and days of operation of a sport and recreation facility).
- Regulating behaviour into routine matters (eg standardising procedures for receipt of cash). This allows the organisation to concentrate more on major issues and reduces the need for repetitive decision making in areas that can be delegated.
- Inhibiting behaviour that might be widespread without policy (eg adopting hours and days of operation restricts the use of the facility out of hours).

Those responsible for policy development also need to be aware that a policy which enables certain kinds of behaviour, may inhibit other forms of behaviour, eg the use of suspensions and fines that might be imposed for foul play, may impact on when a player can be selected for a representative team.

A rationale for polices

Perhaps the most important overall justification for policies is that they are an integral component of accepted good managerial practice. Policies are also required because the environment in which sport and recreation organisations operate has become more complex in recent years. Consequently, organisations have developed policy and procedures to help stakeholders cope with their more dynamic and uncertain circumstances. In particular, policies help define boundaries for volunteers and paid staff and allow them some degree of delegation and discretion in decision making within these parameters. Therefore, policies are important for both organisational control and volunteer satisfaction. Furthermore, if policies are adhered to consistently, then sport and recreation participants also know what to expect and may be less likely to feel that they have been treated unequally. The dynamic nature of the sport and recreation service delivery environment also means that policies are part of an effective approach to risk management. However, policies must be communicated accurately to stakeholders if they are to be effective.

Policies are also required because management committees come and go in sport and recreation organisations. And it is inefficient if new committees have to continually 'reinvent the wheel' because of undeveloped organisational policies. Policies should represent the overall direction and values of the organisation, therefore they can help with effective committee transition procedures and organisational continuity.

For management and operational level volunteers, volunteer management policies are critical. Volunteer work has become 'increasingly responsible, sophisticated and complex'.[5] Furthermore, rapid change in the operating environment has been exacerbated by a lack of understanding by organisations (particularly by top administrators) of the complexity of volunteer involvement and the changing needs and expectations of volunteers. Consequently, many volunteer programs operate in a policy vacuum and this may impact on accountability if a problem occurs

Reasons for policy development[6]

- Ensure continuity
- Fairness and equity
- Clarify values and beliefs
- Communicate expectations
- Specify standards

- State rules
- Improve risk management
- Reduce liability
- Good personnel management

Responsibility for policy development

Although the management committee is usually charged with the responsibility for policy development (ie via the organisation's constitution), it is vital for policy success that as many stakeholders as possible have some involvement in the policy process. This is especially the case for those who will either be affected by the policy (eg 'participants will be required to have all equipment pass a safety audit prior to being allowed to compete') and/or those who will be responsible for administering the policy (eg volunteer equipment marshalls).

Both the participants and officials may also have knowledge and perspectives different to those of the management committee, which if incorporated into the policy may result in more workable outcomes. However, if a sense of ownership is not present and stakeholders feel the policy has been imposed without any consultation, then commitment and adherence may be low. If so, many of the purposes of having the policy (eg safety, fairness, consistency and equity) may not be realised.

Responsibility for different types of policy development may also vary between the management committee and paid staff. For many sport and recreation organisations, the management committee may develop broad policy statements reflecting the philosophy and values relevant to the entire organisation (eg 'the organisation will encourage equal access to all its programs'). This approach is of course consistent with the overall governance role of the management committee (*see the Committee Management module*).

On the other hand, more limited and specific types of policies (eg whether subcommittee members receive free tea and coffee at meetings) may not necessarily require management committee attention and can appropriately be developed by personnel further down the line. However, given the nature of the sport and recreation industry and the number of relatively small organisations, the management committee is likely to be involved in the full range of policy issues.

The policy development process

It is important that organizations follow a systematic process in order to develop policy rather than use (usually by default) the ad hoc approach described earlier. From a risk management perspective, it is vital that sport and recreation organizations can demonstrate an active commitment to establishing policies.

Figure 1 Overview of the policy process
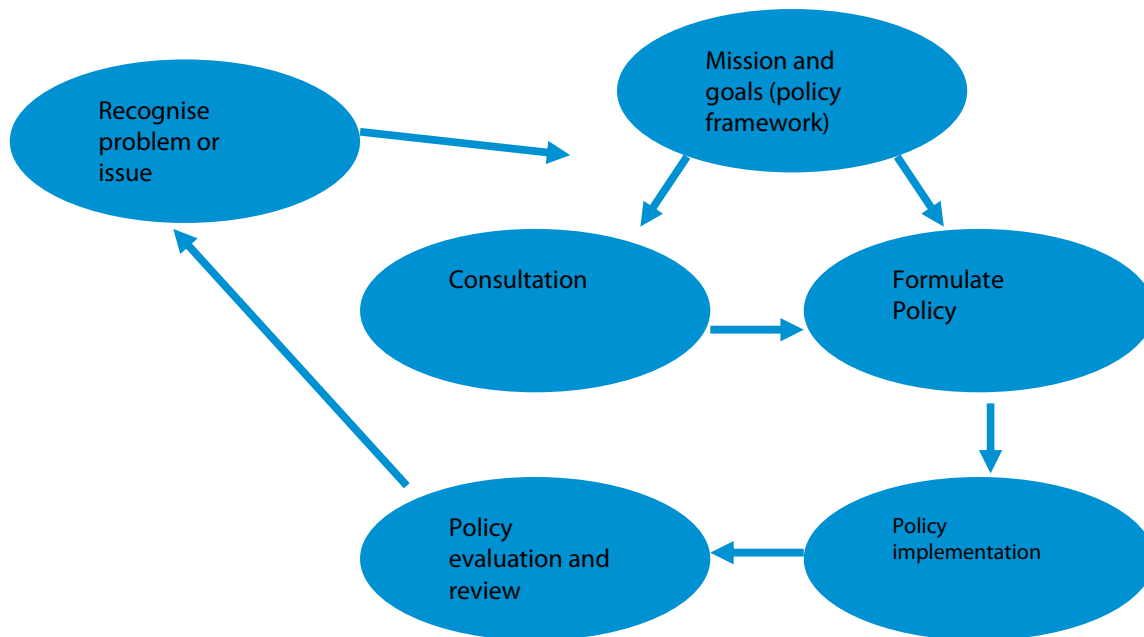
Initially, the organisation needs to identify that an issue or problem requires policy development. A need for a policy usually exists when there is a gap between what the organisation would like to see happen and the current situation. Awareness of the need to establish a policy may come through a number of sources, eg the type of decisions being made at the management committee level (ie recurring issues), through feedback from members about problems or concerns, or because of legal action taken against the organisation.

The next step is to determine the overall context in which the policy should be developed. The organisation should ask their state and national associations about their policy position on the particular issue (see Figure 2). This may provide guidance about appropriate policy directions for the organisation. The organisation should then examine its overall mission and goals, as these should also provide further policy direction.

Figure 2 Overview of policy structure

Major policy statement

Secondary policies

(State dept of sport and recreation or state sport or recreation organisation)

Functional Policies

(eg District or regional sport or recreation organisation)

Operational procedures and rules

(eg local sport or recreation club)
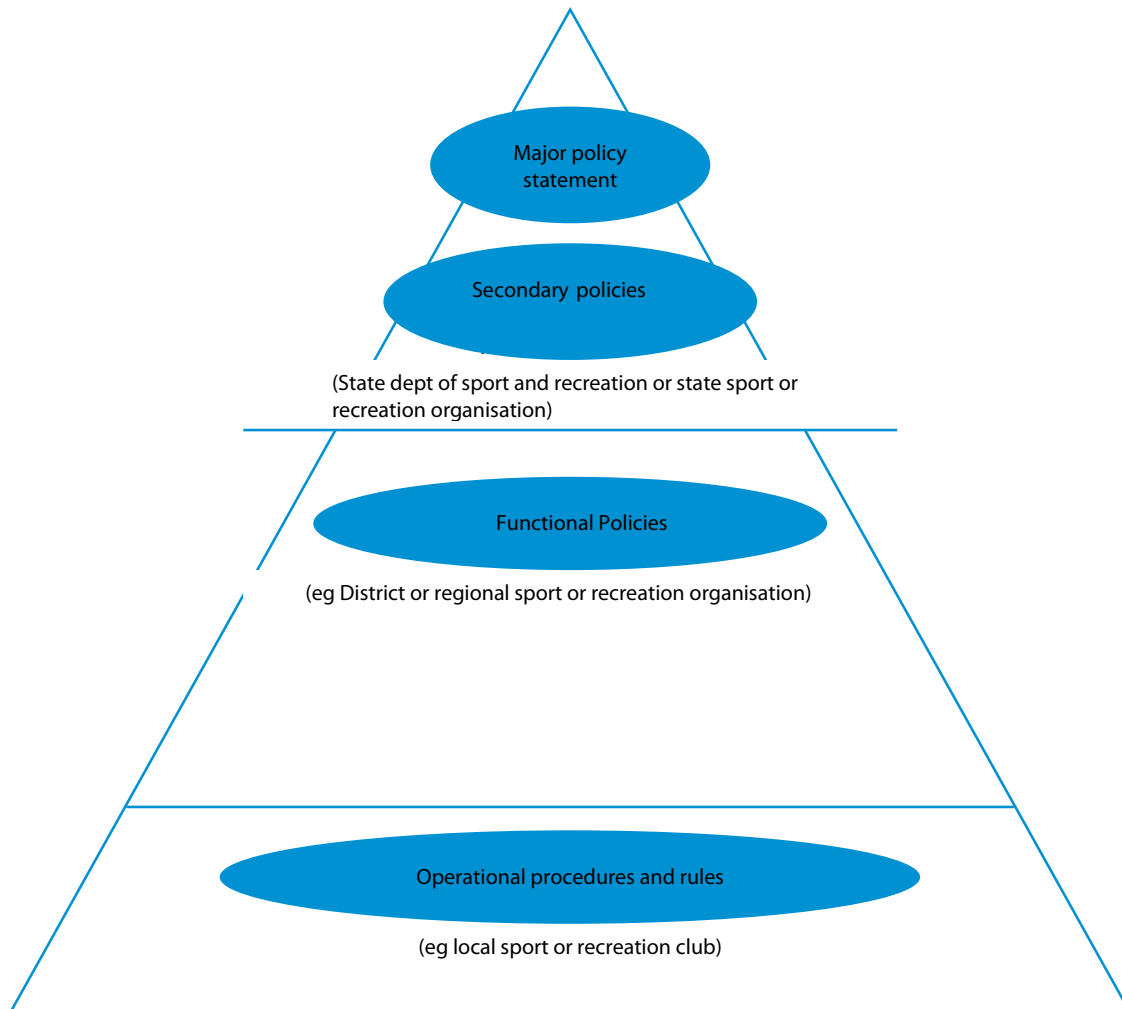
Policy Development Process – continued

Once the decision has been made to proceed with policy development, the organisation then needs to determine who should take overall responsibility for the process, who should be involved, and the extent and nature of that involvement. An important consideration is recognising that because of the complexity of the operating environment, no individual is likely to have the full range of skills and knowledge required across all potential policy areas. Those involved in policy development should be encouraged to ask for help. Developing policies for volunteer programs can require skills and background in a wide range of areas including:

- human resource management
- industrial relations
- contract law
- risk management
- insurance
- information management
- fundraising
- planning
- workplace health and safety
- accounting
- continuing education and training

Collaboration and involvement helps deal with environmental complexity and should be the guiding principles in the policy process. Some organisations actually establish a policy subcommittee which may delegate to a small number of temporary policy development task groups. Therefore, there may be a number of policies under development or revision at any point in time.

The next step is to collect relevant information so that those responsible for drafting the policy are sufficiently briefed about the issues under discussion. Much of the necessary information may be gleaned from organisational records but some outside sources may also be required (eg state or national associations, local government). Direct input from those stakeholders who are likely to be directly affected by the policy should also be sought.

The next step is to prepare a draft policy to be used for wider organisational consultation. This step may include informal meetings and possibly a special general meeting if warranted by the magnitude and importance of the issue. Based on input and feedback to the draft policy, the document should then be revised (there may be more than one revision) in order to present the policy for ratification at a management committee meeting. It is advisable to have a range of people (including some from outside the organisation) involved in the revision and editing stages.

Six principles for writing volunteer management policies[7]

• Be concise	- Ensure material is appropriate to the audience
• Be clear	- Emphasise the positives
• Be directive	- Provide examples to illustrate (especially for a policy manual

Because there may be more than one policy in progress simultaneously, a systematic approach is required to monitor the policy development and review cycle.

Policy Development record8

Policy issue:………………………………………………………………………………
………………………………………………………………………………………………
Who will be involved:……………………………………………………………………
………………………………………………………………………………………………
Volunteer Coordinator:…………………………………………………………………..
President:……………………………………………………………………………………
CEO:……………………………………………………………………………………..
Volunteers:…………………………………………………………………………………
………………………………………………………………………………………………
Staff:…………………………………………………………………………………………
………………………………………………………………………………………………
Others (eg insurance broker, solicitor)…………………………………………………..
………………………………………………………………………………………………

	Version	Responsibility	Due date	Complete (Y/N)
First draft				
Second draft				
Third draft				
Approval				
Review/revision				

Policy implementation and evaluation

All the effort of policy development can be wasted if the organisation does not pay sufficient attention to the implementation phase. In particular, appropriate levels and types of resources (eg people, time and finance) should be devoted to support the desired policy impact on the organisation. Sometimes there is a mismatch between what an organisation says it will do and what it actually does. People may not be aware of this situation and then wonder why there do not seem to be any changes occurring. This can sometimes be checked by finding out what areas the organisation puts its resources into. The actual priorities of organisations are revealed by the allocation of organisational resources – regardless of what is written down in the goals, objectives and policies.

Furthermore, people must be able to understand and follow the policy. Problems that can occur at this stage are often due to two main causes:

- Lack of ownership (usually because people have not been included in the policy development process).
- Varying interpretation (usually because the wording may be ambiguous and/or the policy has not been well communicated).

There are a number of strategies that may help with policy implementation and compliance:

- Ensure that the wording is appropriate to the audience.
- Make sure that stakeholders are aware of the reason for the policy (eg well-being of participants, safety of volunteers).
- Involve stakeholders in the policy development process.
- Make sure the policy is not too complex and/or ambiguous.
- Communicate the policies in a way that is easy and convenient.

- Communicate policies regularly: remind volunteers about policy and procedures at each appropriate opportunity.
- Get volunteers to sign a membership form that indicates they will follow policies and procedures.
- Consistently monitor policy implementation and impact (eg as part of the volunteer performance review process).

Resistance to policy
It is naive to assume that there will be no resistance to new policy development, especially if it represents a departure from previous practice. Some stakeholders may feel that policy development tends to make sport and recreation organisations (especially the volunteer management component) too bureaucratic and structured. 'We have always done it this way – why do we need to do anything different?' is a common reaction. Therefore, resistance is inevitable and may take the form of absenteeism, grievances and noncooperation.

Ways of overcoming resistance include:
- involving people in the policy development process
- educating stakeholders about the benefits of the policy to the organisation
- appealing to stakeholder's self-interest by outlining how they may benefit personally from the policy (eg deliver rewards for compliance)
- force compliance through coercion and/or sanctions for non-compliance such as suspension or termination of membership (generally used as the last resort)

Policy evaluation
Policies that are developed to cope with the present circumstances will require review and revision as the environment continues to evolve. A certain way to commit the organisation to stagnation is to assume that once a policy has been developed and implemented, that the process has ended. Implementation is only one step in an ongoing policy cycle – the next step is review and evaluation. Each new policy should be reviewed at the end of the first year of implementation. Others may be reviewed every 2-3 years. However, in practice evaluation and revision of polices should be continuous rather than periodic. Furthermore, just as in the policy development phase, it is important to involve stakeholders in reviewing policies and devising corrective actions if they are required.

Policy evaluation consists of three basic activities:
- Examining the basis of the policy (ie is the rationale still sound?).
- Comparing expected changes/behaviours with actual outcomes (some may be unintended).
- Taking corrective action if required (eg revise policy, allocate more resources or rescind the policy).

Volunteer management policy areas

The range of issues potentially addressed by volunteer management policies is quite extensive. This section will introduce, discuss and provide examples for a number of these areas. However, two points need to be made about this section. First of all, the list of policy areas is not exhaustive but is intended as a guide only. Secondly, the policy examples provided are only that – each sport and recreation organisation should carefully examine its own circumstances and develop policies that are relevant to its particular culture, resources, current situation and future aspirations.

Volunteer management philosophy
It is important that the range of volunteer management policies reflect an overall organisational philosophy regarding volunteers and their role in the organisation. This may be reflected in a broad policy statement such as:

The achievement of the goals of this sport and recreation organisation is best served by the active participation of members of the community. To this end, the organisation accepts and encourages the involvement of volunteers at all levels of the organisation and within all appropriate programs and activities. All staff are encouraged to assist in the creation of meaningful

and productive roles in which volunteers might serve, and to assist in recruitment of volunteers from the community.[9]

Who is eligible to volunteer?
Despite a shortage of volunteers, sport and recreation organisations still need to carefully consider the extent they may want to limit involvement in volunteer programs and for what reasons. The following example may highlight some of these considerations.

The organisation also accepts as volunteers those participating in student community service activities, student work experience projects, corporate volunteer programs and other volunteer referral programs. In each of these cases, however, a special agreement must be in effect with the organisation, school, or program from whom the special case volunteers originate, and must identify responsibility for management and care of the volunteers.
The organisation accepts [does not accept] the services of paid staff as volunteers. This service is accepted provided that the volunteer service is provided totally without any coercive nature, involves work which is outside the scope of normal staff duties, and is provided outside of usual working hours. Family members of paid staff are [are not] allowed to volunteer with the organisation.

Volunteer rights and responsibilities
The relationship between the organisation and volunteers should be viewed as reciprocal.

Volunteers are viewed as a valuable resource to this organisation, its staff and its members. Volunteers shall be extended the right to be given meaningful assignments, the right to be treated as equal co-workers, the right to effective supervision, the right to full involvement and participation, and the right to recognition for work done. In return, volunteers shall agree to actively perform their duties to the best of their abilities and to remain loyal to the goals and procedures of the organisation.

Out-of-pocket expenses
From time to time volunteers may incur costs associated with their organisational responsibilities. How this situation is handled by the organisation may have a significant impact on levels of volunteer satisfaction. The Australian Bureau of Statistics reported that many individuals in Australia incurred expenses associated with their role as a volunteer.[10] Of all volunteers, 43.9% had telephone call expenses, 43.8% travels costs, 18.5% postage and 10.7% meal costs. Of all those volunteers who did incur expenses, only 27.4% reported that reimbursement was available. These data suggest that not only do many non-profit organisations rely on voluntary labour but they may also have a considerable proportion of operational costs absorbed by volunteer workers. It seems that this is an area that requires further policy development in Australia, especially as there are some 'hard' data to help guide potential policy directions.

Volunteers are [may be] eligible for reimbursement of reasonable expenses incurred while undertaking business for the organisation. The Volunteer Coordinator shall distribute information to all volunteers regarding specific reimbursable items. Prior approval must be sought for any major expenditure.

Record keeping
Due to the increasingly litigious nature of society, sport and recreation organisations should keep accurate and current records of all their activities. This should include involvement by volunteers.

A system of records will be maintained on each volunteer with the organisation, including dates of service, positions held, duties performed, evaluation of work and awards received. Volunteers and paid staff shall be responsible for submitting all

appropriate records and information to the Volunteer Coordinator in a timely and accurate fashion. Volunteer personnel records shall be accorded the same confidentiality as paid staff personnel records.

Training and accreditation

Research suggests that many volunteers seek continuing education and training opportunities through their voluntary work. However, the issue of who pays can be difficult to resolve. On the one hand volunteers gain personally from the opportunity but also provide an improved level of service to the organisation currently involved as volunteers with the

Just as paid staff, volunteers should attempt to improve their levels of skill during their terms of service. Additional training and educational opportunities should be made available to volunteers during their connection with the organisation. This continuing education may include both additional information on performance of their current volunteer roles as well as more general information, and might be provided either by the organisation or by assisting (up to a limit of $[ ]) the volunteer to participate in educational programs provided by other groups. Volunteers are encouraged to attend conferences and meetings that are relevant to their volunteer roles. Prior approval from the Volunteer Coordinator should be obtained before attending any conference or meeting if attendance will interfere with the volunteer's work schedule or if reimbursement of expenses (up to a limit of $[ ]) is sought.

Absences

A critical aspect of volunteer performance is reliability. However, like paid staff, volunteers may not always be able to carry out their assigned responsibilities,

Volunteers are expected to perform their duties on a regular scheduled and timely basis. If expecting to be absent from a scheduled duty, volunteers should inform their supervisor as far in advance as possible so that alternative arrangements may be made. Continual absenteeism will result in a review of the volunteer's job or term of service Volunteers may be encouraged to find a substitute for any upcoming absences that might be filled by another volunteer. Such substitution should only be taken following consultation with a supervisor and care should be taken to find a substitute who is qualified for the position. Substitutes may only be recruited from those who are currently involved in the
Organization

Conflict of interest

In recent years there has been an increased focus on the accountability of sport and recreation organisations. In cases where the organisation is partly supported through public funds, care should be taken to avoid situations that could be interpreted adversely for the organisation.

No person who has a conflict of interest with any activity or program of the organization, whether personal, philosophical, or financial shall be accepted or serve as a volunteer with the organization. When a potential conflict of interest does arise, volunteers must declare their interest.

Dismissing volunteers

There may be occasions when volunteers need to be dismissed. How this process is handled by the organisation (eg appraisal and evaluation, counselling and development programs to improve performance) is vital to good volunteer management. The grounds for dismissal must be made clear to the volunteer and they should have an opportunity to defend the accusation.

Volunteers who do not adhere to the rules and procedures of theorganisation or who fail to satisfactorily perform their volunteer assignment are subject to dismissal. No volunteer will be dismissed until the volunteer has had an opportunity to discuss the reasons for possible dismissal with the Volunteer Coordinator. Possible grounds for dismissal may include, but are not limited to, the following: gross misconduct or insubordination, being under the influence of alcohol or drugs, theft of property or misuse of organisational equipment or materials, abuse or mistreatment of members or co-workers, failure to abide by policies and procedures, and failure to satisfactorily perform assigned duties

There are a number of other areas that may require policy development. These may include:

Attendance – signing in/signing out	Pecuniary interests (see 'conflict of interest above)
Bullying and harassment	Relationships between volunteers & paid staff
Complaints and disputes	Sexual harassment
Equal opportunity	Speaking to the media
Health & safety	Supply and use of uniforms
Illness, injuries, accidents	Use of official stationery
Insurance coverage	Use of personal/organisation equipment
Intimate personal relationships	Use of private vehicle
Keys, security & out f hours access to premises	Volunteer performance appraisal
Limited terms in key committee roles	Working conditions

Summary

Policy development and implementation are essential for effective management and governance of sport and recreation organisations. Policies help ensure fairness and equity in the way that organisations interact with stakeholders, and nowhere is this more important than in managing volunteers. This module has outlined the purpose of and processes required for policy development, indicated where responsibility lies for the policy process and emphasised the need for evaluation and regular revision of volunteer management policies. A number of areas that should be considered by sport and recreation organisations in the development of volunteer management policies have also been discussed.

Further information

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5   Graff op cit

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8   ibid

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10   Ibid

Glossary

Operational procedures. Detailed statements that usually prescribe what to do or not to do. In general, policies outline to people what to do while procedures tell people how to do it. Detailed procedures tend to flow from broader statements of policy.

Policy. A statement expressing some position, value or belief and/or a plan or course of action including specific steps and procedures.

Policy development record. A summary record of the policies existing within a sport and recreation organisation. The record may indicate the development stage of the policy.

Policy evaluation. The assessment of the extent to which a policy has been successful. A certain way to commit the organisation to stagnation is to assume that once a policy has been developed and implemented, that the process has ended. Implementation is only one step in an ongoing policy cycle - the next step is review and evaluation.

Policy issue/problem. The recognition that a problem requires policy development. A need for a policy usually exists when there is a gap between what the organisation would like to see happen and the current situation.

Policy process/cycle. The ongoing process of problem recognition, consultation, policy formulation, implementation, review and evaluation

Policy purpose. The outcomes usually desired by implementing the policy. They may include safety, fairness, consistency and equity.

Policy structure. The hierarchical policy links between different levels of the sport and recreation industry. Policy ranges from major policy statements at the national level to operational procedures and rules at the local club level.

Policy subcommittee. A group that has responsibility for policy development in the organisation and puts forward recommendations to the management committee. The policy subcommittee may delegate to a small number of temporary policy development task groups.

Precedent. Where a previous decision establishes a course of action that people expect to be followed in the future.

Resistance. Many people dislike change and therefore will resist new developments brought about by policy. Resistance is inevitable and may take the form of absenteeism, grievances and noncooperation.