Volunteer Management

Templates

Developed

By

Sport New Zealand

These Word documents can be edited for use within your own club. They are provided as a guide to setting up your volunteer programme.

**Index to Template Files**

|  |  |
| --- | --- |
| **Volunteer Guidelines** | **3** |
| **SNZ Sample Volunteer Management Policy** | **4** |
| **Welcome Letter** | **6** |
| **Treasurer Role Sample** | **7** |
| **Commitment To Volunteers** | **8** |
| **List Of Committee Members** | **9** |
| **History** | **10** |
| **Guidelines** | **11** |
| **Conduct** | **12** |
| **Interview Guide** | **15** |
| **Recruitment Plan** | **16** |
| **Coach Role** | **17** |
| **Team Manager** | **18** |
| **Health And Safety** | **19** |
| **Marketing And Promotion** | **20** |
| **President Role** | **21** |
| **Secretary Role** | **23** |
| **Treasurer Role** | **25** |
| **Volunteer Management Action Plan** | **27** |
| **Volunteer Coordinator** | **28** |
| **Volunteer Role List** | **30** |
| **Volunteer Performance** | **31** |
| **Self Assessment** | **33** |
| **Volunteer Survey** | **34** |
| **Expense Claim** | **41** |
| **Volunteer Application** | **42** |
| **Reference Chacking** | **45** |
| **Succession Planning** | **47** |
| **Exit Interview** | **48** |

Volunteer guidelines

A Volunteer Welcome Pack is simply a collection of all the information a new Volunteer will need to prepare them for their new role.

A Welcome Pack might include:

* A personal letter of welcome from the Organisation/Club President
* A copy of their role description
* A list of the Committee members and information on their roles, responsibilities and phone numbers
* Volunteer Code of conduct
* Information on the size and structure of the Organisation/Club and some background about its history
* Dates and times of practices and competitions
* Schedule of Club fees and what they are used for
* Details of any fund-raising events
* Information on any forthcoming training course dates and costs
* Information on reimbursement for out-of-pocket expenses

Sample contents for a Welcome Pack follow, which you can use or adapt to meet your needs.

**SAMPLE VOLUNTEERING MANAGEMENT POLICY**

**1. Purpose**

[Enter Organisation Name] recognises that Volunteers are an integral part of our organisation and that our people are our most important asset.

The purpose of this policy is to:

* define what we mean by the word Volunteer;
* state [Enter Organisation Name] philosophy on Volunteering, and;
* outline rights and responsibilities of [Enter Organisation Name] and its Volunteers;

**2. Definitions and Scope**

A ‘Volunteer’ is an individual who for personal or charitable reasons freely (and without expectation of financial gain) contributes time, service and skills for the good of [Enter Sport Here].

This policy applies to all those who Volunteer for [Enter Sport Here], regardless of the size, level, or scope of their role. Volunteers may be involved in most [Enter Sport Here] programmes and activities and serve at all levels.

**4. Volunteering Philosophy**

Volunteers are at the heart of [Enter Sport Here]. Without Volunteers, the sport of [Enter Sport Here] as we know it would not exist. Volunteers make it possible for teams to be coached and games to be played and officiated, for Organisation/Clubs to be run and events to be organised and run successfully.

Volunteering for [Enter Sport Here] is inclusive and open to all who are willing to work in line with the rules and values of our sport.

[Enter Organisation Name] will work to ensure that Volunteers are provided with roles that are meaningful and relevant to their needs and interests, treated with respect and as equals, given appropriate induction, training and supervision, offered full involvement and participation and are recognised for their efforts.

**4. Rights and Responsibilities**

[Enter Organisation Name] is committed to involving its Volunteers in facilitating and improving the sport of [Enter Sport Here]. In this undertaking both [Enter Organisation Name] and its Volunteers have rights and responsibilities:

As a Volunteer for [Enter Organisation Name] you have the right:

* To perform a role that is meaningful and satisfying;
* To be assigned to a role that fits your interests and needs;
* To receive the induction, training and supervision necessary to fulfill your role;
* To receive feedback on the tasks you perform;
* To be treated with respect and as an equal partner in our organisation;
* To be trusted with confidential information necessary to carry out your role;
* To be kept informed on relevant matters within [Enter Sport Here];
* To expect that your time will not be wasted by poor planning or coordination;
* To work in a safe and healthy environment, and be given health and safety information relevant to your role, and;
* To be given a copy of [Enter Organisation Name] Volunteering Policy and other policies and procedures that affect your role.

As a Volunteer for [Enter Organisation Name] you have the responsibility:

* To be honest about your expectations and abilities;
* To not take on more responsibility than you can handle;
* To take part in induction, and orientation processes e.g. background checks, paperwork and training;
* To be reliable and punctual or provide notice so that alternative arrangements can be made;
* To be accountable, perform your role to the best of your ability and ask for help when you need it;
* To follow organisational policies and procedures;
* To respect those confidences entrusted to you;
* To voice your opinion and have input on ways in which your role might be performed better;
* To be open-minded and respectful of others opinions, and;
* To represent [Enter Sport Here] accurately and positively to others.

[Enter Organisation Name] will make every effort to ensure that Volunteers are advised of their rights and responsibilities.

**5. Out-of-pocket expenses**

Volunteers are eligible for reimbursement of reasonable expenses incurred while undertaking business for the club. The volunteer coordinator shall distribute information to all volunteers regarding specific items that may be reimbursed. Prior approval must be sought for any major expense.

**Organisation Name & Logo**

Dear (**Name of Volunteer)**

Welcome to **(Name of Organisation)**. As you may know our organisation/club has been around since **(Date)** and serves the needs of **(name of sport)** players of all ages and stages in our community. We pride ourselves on ….

Volunteers are vital to our organisation/club. As a Volunteer you will be helping us fulfil our mission and achieve our goals. We appreciate any time that you can give.

This Welcome Pack will answer some of the questions you may have and point you in the direction of those who can answer any other questions not dealt with here. The pack includes:

* A copy of your role description
* A list of the Committee members and information on their roles, responsibilities and phone numbers
* A copy of our Commitment to Volunteers statement
* Information on the size and structure of our **(organisation/club)** and some information about its history
* Dates and times of practices and competitions
* Schedule of **(organisation/club)** fees and what they are used for
* Details of fund-raising events
* Information on forthcoming training course dates and costs
* Information on reimbursement for out-of-pocket expenses

**(Name of VC)** is the Volunteer Coordinator at **(organisation/club).** If you have any questions regarding Volunteering, please give them a call on **(Phone Number of VC)** or email **(VC email address).**

Thanks again for volunteering.

Kind Regards

**(Name of President)**

President

**Name of Organisation**

**TREASURER ROLE DESCRIPTION (as an example)**

The Treasurer is the chief financial management officer for the \_\_\_\_\_\_\_\_\_\_\_\_\_\_club/group.

## Responsible To

The Treasurer is directly responsible to the President of \_\_\_\_\_\_\_\_\_\_\_\_\_\_ and members of \_\_\_\_\_\_\_\_\_\_\_\_\_\_.

The Treasurer may chair the Finance Committee at larger clubs/groups or associations.

## Responsibilities and Duties

The Treasurer should:

* Prepare a budget and monitor it carefully.
* Keep the club’s books up-to-date.
* Keep a proper record of all payments and monies received.
* Make sure financial reports are available and understood at all committee meetings.
* Show evidence that money received is banked and documentation provided for all money paid out.
* Ensure that information for an audit is prepared each year.
* Arrange the audit.
* Regularly provide a Treasurer’s report at meetings and when required.
* Produce an annual financial report.
* Send out accounts.
* Pay the bills.

## Knowledge and Skills Required

Ideally the Treasurer is someone who is:

* Well organised.
* Able to allocate regular time periods to maintain the books.
* Able to keep good records.
* Able to work in a logical orderly manner.
* Aware of information which needs to be kept for the annual audit.

*Estimated Time* C*ommitment* R*equired*

The estimated time commitment required as the Treasurer of \_\_\_\_\_\_\_\_\_\_\_\_\_\_ is \_\_\_\_\_\_\_\_\_\_\_\_\_\_hours per week.

*The time commitment required as the Treasurer of a club/group varies greatly from club/group to club/group. Smaller clubs may require a Treasurer to spend only a half hour per week or larger clubs two hours per week on club/group related duties.*

**Name of Organisation**

**Our Commitment to Volunteers**

Volunteers are at the heart of **(sport)**. Without Volunteers, the sport of **(sport)** as we know it would not exist. Volunteering for **(organisation/club)** is inclusive and open to all who are willing to work in line with the rules and values of our sport.

**(Organisation/Club)** is committed to ensuring that Volunteers are provided with roles that are meaningful and relevant to their needs and interests, treated with respect and as equals, given appropriate induction, training and supervision, offered full involvement and participation and are recognised for their efforts.

As a Volunteer for **(organisation/club)** you have the right:

* To perform a role that is meaningful and satisfying;
* To be assigned to a role that fits your interests and needs;
* To receive the induction, training and supervision necessary to fulfill your role;
* To receive feedback on the tasks you perform;
* To be treated with respect and as an equal partner in our organisation;
* To be trusted with confidential information necessary to carry out your role;
* To be kept informed on relevant matters within **(sport)**;
* To expect that your time will not be wasted by poor planning or coordination;
* To work in a safe and healthy environment, and be given health and safety information relevant to your role, and;
* To be given a copy of **(organisation/club)** Volunteering Policy and other policies and procedures that affect your role.

As a Volunteer for **(organisation/club)** you have the responsibility:

* To be honest about your expectations and abilities;
* To not take on more responsibility than you can handle;
* To take part in induction, and orientation processes e.g. background checks, paperwork and training;
* To be reliable and punctual or provide notice so that alternative arrangements can be made;
* To be accountable, perform your role to the best of your ability and ask for help when you need it;
* To follow organisational policies and procedures;
* To respect those confidences entrusted to you;
* To voice your opinion and have input on ways in which your role might be performed better;
* To be open-minded and respectful of others opinions, and;
* To represent **(sport)** accurately and positively to others.

**List of Committee Members**

|  |  |  |
| --- | --- | --- |
| **NAME** | **ROLE** | **Phone** |
|  | **President** | **Hm:**  **Mb:** |
|  | **Secretary** | **Hm:**  **Mb:** |
|  | **Treasurer** | **Hm:**  **Mb:** |
|  | **Club Manager/Captain** | **Hm:**  **Mb:** |
|  | **Property Manager** | **Hm:**  **Mb:** |
|  | **Representative Convenor** | **Hm:**  **Mb:** |
|  | **Umpire Convenor** | **Hm:**  **Mb:** |
|  | **Team Coach (Team)** | **Hm:**  **Mb:** |
|  | **Draw Steward** | **Hm:**  **Mb:** |

### A Little History

### In this section you may want to include information on:

### What year the (organisation/club) began and how many members it had initially

### Any significant events – e.g. merging with another club

* Any significant milestones or achievements e.g. tournaments or placings
* How many club members the club has now
* Any key people and the roles they have played
* Any fun facts e.g. XYZ Netball Club in Wellington notes that in:

*1977 - Subs were $9 for the year. New bibs were bought for $91. The drinks order for the end-of-year function included: 2 Bourbon, 1 Bacardi, 1 Gin, 1 Whiskey, 1 Vodka, 2 dozen large Coke, 1 doz large lemonade and 5 dozen Lion Brown. The total cost of the spirits was $28.86.*

**GUIDELINES FOR VOLUNTEER RECOGNITION**

The number one way to retain Volunteers is to make sure they know they are appreciated. Recognition should come from a range of people in different ways.

There a numerous ways to thank and recognise Volunteers. Expressions of appreciation and recognition go along way in keeping Volunteers motivated and enthusiastic.

***Make it a priority.*** Recognising the work of Volunteers is crucial to any Organisation/Club that wants to attract new Volunteers and keep the ones it has.

***Do it in different ways.*** Vary your recognition efforts from the informal thank you and spontaneous treats to more formal events, such as dinners and awards.

***Make recognition authentic.*** Make each occasion you use to recognise your Volunteers meaningful and an opportunity to truly reflect on his/her value to your Organisation/Club.

***Personalise the recognition.*** Make sure the recognition is personal – use “I” and “you” language and describe in specific terms how they have made a difference.

***Make it appropriate to the achievement.*** For example a paper certificate and a personal thank you may be appropriate for a few months of service, whereas an award at a formal dinner may be more appropriate for a long serving Volunteer.

***Be consistent.*** Make sure whatever standards for recognition you establish can be consistently maintained and applied by your Organisation/Club in the years to come. Holding a Volunteer recognition event once a year sets up expectations for future Volunteers.

***Be timely.*** Try to arrange recognition soon after the achievement has been achieved – delaying until weeks or months afterwards diminishes the value of your gratitude.

***Make it unique.*** Getting to know each of your Volunteers and delivering recognition in a way that the Volunteer would like to receive it is important – for some this will be public recognition and for others it will be private.

***Don’t spend a lot.*** Most Volunteers do not want you to spend a lot of money to appreciate them. It really is a case of the thought that counts.

***Make sure the reason for awards are clear and unambiguous.*** Transparency is key when it comes to giving awards. It needs to be clear to all, why a Volunteer received recognition, in this way, at this time, and why others did not.

# SAMPLE CODES OF CONDUCT FOR VOLUNTEERS

Check with your National Sport Organisation (NSO) to see whether they have established codes of conduct that are relevant to your sport. Alternatively, here are five codes of conduct developed by Sport New Zealand that reflect the different ways people are involved with clubs. You may want to tailor these Codes of Conduct to create one that’s specific for your volunteers.

**Administrators**

*I will:*

* create pathways for club members to participate not just as players but also as coaches, referees, administrators etc
* ensure that rules, equipment, length of games and training schedules are modified to suit the age, ability and maturity level of players
* ensure quality supervision and coaching for players
* remember that players participate for their enjoyment and benefit
* help coaches and officials highlight appropriate behaviour and skill development, and help to improve the standards of coaching and officiating
* ensure that everyone involved in sport emphasises fair play
* distribute a code of conduct to players, coaches, officials and parents and encourage them to follow it
* respect the rights, dignity and worth of all people involved in the game, regardless of their gender, ability or cultural background
* promote adherence to anti-doping policies.

*I will not:*

* arrive at the venue intoxicated or drink alcohol
* allow the unlawful supply of alcohol at training, games or club functions
* use bad language, nor will I harass players, coaches, officials or spectators.

## Coaches

*I will:*

* remember that players participate for enjoyment and winning is only part of the fun
* never ridicule or yell at players for making a mistake or not winning
* be reasonable in my demands on players’ time, energy and enthusiasm
* operate within the rules and spirit of the game and teach my players to do the same
* ensure that the time players spend with me is a positive experience. All players are deserving of equal attention and opportunities
* avoid overplaying the talented players and understand that the average players need and deserve equal time
* ensure that equipment and facilities meet safety standards and are appropriate to the age and ability of all players
* display control, respect and professionalism to all involved with the sport including opponents, referees, coaches, officials, administrators, the media, parents and spectators. I will encourage my players to do the same
* show concern and caution toward sick and injured players and follow the advice of a physician when determining whether an injured player is ready to recommence training or competition
* obtain appropriate qualifications and keep up to date with the latest coaching practices and the principles of growth and development of young players
* respect the rights, dignity and worth of all people involved in the game, regardless of their gender, ability or cultural background
* promote adherence to anti-doping policies.

*I will not:*

* arrive at the venue intoxicated or drink alcohol
* allow the unlawful supply of alcohol at training, games or club functions.
* use bad language nor will I harass players, officials, spectators or other coaches.

## Officials (referees, umpires etc)

*I will:*

* place the safety and welfare of players above all else
* show concern and caution towards sick and injured players
* be impartial, consistent, objective and courteous when making decisions
* accept responsibility for my actions and decisions
* condemn unsporting behaviour and promote respect for the individuality of players
* avoid any situations which may lead to or be construed as a conflict of interest
* be a positive role model in behaviour and personal appearance and ensure my comments are positive and supportive
* be a good sport as I understand that actions speak louder than words
* always respect and support other officials
* keep up to date with the latest ‘Laws of the Game’, trends and principles of their application
* refrain from any form of personal abuse towards players or other officials
* respect the rights, dignity and worth of all people involved in the game, regardless of their gender, ability or cultural background.

*I will not:*

* arrive at the venue intoxicated or drink alcohol.

## Parents

*I will:*

* encourage my child to play within the rules and respect officials’ and coaches’ decisions
* teach my child to respect their opponent
* remember that children learn best by example so I will applaud good plays/performances by both my child’s team and their opponents
* give positive comments that motivate and encourage continued effort
* support my child’s efforts and performance
* thank the coaches, officials and other volunteers who give their time to conduct the event for my child
* help when asked by a coach or official
* respect the rights, dignity and worth of all people involved in the game, regardless of their gender, ability or cultural background.

*I will not:*

* pressure my child in any way – I know that this is their game not mine
* I will not arrive at the venue intoxicated or drink alcohol
* use bad language, nor will I harass players, coaches, officials or other spectators
* criticise or ridicule my child’s performance after the game.

## Players

*I will:*

* always play by the rules
* never argue with an official. If I disagree with a decision I will inform the captain, coach or manager during a break or after the competition
* control my temper. I understand that verbal abuse of officials and other players or deliberately distracting or provoking an opponent is not acceptable or permitted behaviour in any sport
* work equally hard for myself and my team
* treat all players in my sport as I like to be treated. I will not bully or take unfair advantage of another competitor
* cooperate with my coach, team mates and opponents
* be a good sport and display modesty in victory and graciousness in defeat
* participate for my own enjoyment and benefit, not just to please parents and coaches
* respect the rights, dignity and worth of all participants regardless of their gender, ability, cultural background or religion
* thank the opposition and officials at the end of the game
* comply with anti-doping policies.

*I will not:*

* arrive at the venue or play sport while intoxicated.

# SAMPLE INTERVIEW GUIDE

There are some things to avoid in interviews and some things you should do.

# *Things to do*

* Remember it’s a two way process. Don’t just think of your own information needs – remember an interview is an opportunity to get to know the person and give them information
* Ask questions that relate to the role description
* Only ask questions that assess skills related to the role

# *Things you should avoid*

* Don’t ask questions that are protected by human rights laws – age, gender, disability, marital status, sexual orientation, religion and political views
* Don’t ask about educational achievements that aren’t relevant to the position

# *Questions to consider asking*

* Tell me about why you want to volunteer as: (for example: coach, treasurer, volunteer co-ordinator, volunteer training co-ordinator, club secretary?)
* I know from your application that you have a number of skills and abilities. Which of these do you think will be important as a volunteer?
* What aspects of volunteering do you think you will most and least enjoy?
* What skills and experience can we help you gain?
* Where did you see or hear about this volunteer opportunity?
* What time can you commit each week? Are you likely to be able to volunteer for more than one season?
* Would you be interested in learning about other sports related volunteering opportunities?
* What questions do you have?

**SAMPLE VOLUNTEER RECRUITMENT PLAN**

|  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- |
| Role | Level | No. required | Skill Set | Options for where and how to recruit | Action | By who, by when |
|  |  |  |  |  |  |  |
|  |  |  |  |  |  |  |
|  |  |  |  |  |  |  |
|  |  |  |  |  |  |  |
|  |  |  |  |  |  |  |
|  |  |  |  |  |  |  |
|  |  |  |  |  |  |  |

**SAMPLE VOLUNTEER COACH ROLE DESCRIPTION**

Responsible To:

\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

(The volunteer is generally responsible to club officials working in their immediate area of activity).  
  
***Responsibilities and Duties***

Provide a quality coaching service to athletes through:

1. Planning and managing training sessions.
2. Supervising and managing athletes in competition.
3. Developing technical, tactical and life skills of the athletes you are coaching.
4. Managing resources and equipment.
5. Building a positive, supportive and inclusive team environment that provides for athlete enjoyment, success and challenge.
6. Being a role model and providing leadership.
7. Ensuring the health and safety of the athletes you are coaching.
8. Following all aspects of the Sport NZ coaches’ code of ethics..

<http://www.sportnz.org.nz/Documents/Communities%20and%20Clubs/Coaching/Coaches_Code_of_Ethics.pdf>

*The responsibilities and duties should be as specific as possible and will vary depending on the sport, the age groups of the athletes, and sometimes the nature of the club. The above are examples only; it is important to think carefully about what is required of the coaches and outline it clearly in the role description.*  
***Knowledge and Skills Required***

1. Understand the characteristics and needs of the athletes you coach.
2. Understand the components of a training session and of competitions relevant to the athletes being coached.
3. Appropriate communication, management and coaching skills for the athletes being coached.

*Volunteers recruited to a specific position will bring with them skills and knowledge, and hopefully learn a little while volunteering as well. Think carefully about the skills and knowledge required to do the job well and outline them clearly in the section above.*

***Estimated Time Commitment Required & Period of Appointment***The estimated time commitment required for the role of \_\_\_\_\_\_\_\_\_\_\_\_coach

is\_\_\_\_\_\_ hours per week over \_\_\_\_\_\_\_\_\_ days/weeks.

The Coach is appointed for a \_\_\_\_\_\_\_\_\_\_\_\_\_\_period.

SAMPLE VOLUNTEER TEAM MANAGER ROLE DESCRIPTION

Responsible to:

\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

# (The volunteer is generally responsible to club officials working in their immediate area of activity).

# *Responsibilities and Duties*

The Team Manager has a variety of responsibilities. Some areas to consider when managing a team include:

* Liaising with all team members, parents, coaches and officials to ensure the athletes are appropriately dressed and informed of training and competition
* Adjudicating any problems that may arise amongst team members, parents, the coach and supporters
* Acting as liaison officer between the club and the team
* Ensuring the score card and any other rules/regulations of the competition are carried out
* Ensuring all welfare and safety requirements for the team are met
* Collection of team subs and any fundraising activities
* Organisation of first aid kit and supplies

# *Knowledge and Skills Required:*

1. Strong interpersonal and oral communication skills including the ability to effectively liaise with athletes, coaches and administrators
2. Strong organisational skills
3. Sound knowledge of the selection procedures and rules/regulations of the competition

*Volunteers recruited to a specific position will bring with them skills and knowledge, and hopefully learn a little while volunteering as well. Think carefully about the skills and knowledge required to do the job well and outline them clearly in the section above.*

***Estimated Time Commitment Required & Period of Appointment***The estimated time commitment required for the role of \_\_\_\_\_\_\_\_\_\_\_\_Team Manager is\_\_\_\_\_\_ hours per week over \_\_\_\_\_\_\_\_\_ days/weeks.

The Team Manager is appointed for a \_\_\_\_\_\_\_\_\_\_\_\_\_\_period.

# SAMPLE HEALTH AND SAFETY COORDINATOR ROLE DESCRIPTION

The Health and Safety Coordinator is responsible for overseeing the implementation of the \_\_\_\_\_\_\_\_\_\_\_\_\_\_ Health and Safety Policy.

## Responsible to:

The Health and Safety Coordinator is directly responsible to the President of \_\_\_\_\_\_\_\_\_\_\_\_\_\_ and the members of \_\_\_\_\_\_\_\_\_\_\_\_\_\_.

The Health and Safety Coordinator may chair the Health and Safety Committee.

## Responsibilities and duties:

* Develop in conjunction with the Health and Safety Committee, the club/group Health and Safety Policy
* Implement the Health and Safety Policy in order to;
* Manage hazards and remove/minimise/isolate hazards using a Hazard Identification Checklist
* Ensure all club members/management and other involved parties are aware of the Health and Safety Policy and how to adhere to the health and safety/emergency procedures.
* Bring to the attention of the President any major health and safety issues as soon as they arise
* Report all major accidents to OSH (if required by law).
* Work with the Treasurer to develop a budget for implementing the Health and Safety Policy
* Oversee the implementation of the strategies in the Health and Safety Policy
* Submit regular reports to the club/group committee.

## Knowledge and skills required:

* Can communicate effectively
* Is well organised
* Has a high level of attention to detail

*Time commitment required:*

The estimated time commitment required as the Health and Safety Coordinator of \_\_\_\_\_\_\_\_\_\_\_\_\_\_ is \_\_\_\_\_\_\_\_\_\_\_\_\_\_hours per week.

The time commitment required as the Health and Safety Coordinator of a club/group varies greatly from club/group to club/group. Smaller clubs may require a Health and Safety Coordinator to spend only a half hour week or larger clubs one hour per week on club/group related duties.

**SAMPLE MARKETING AND PROMOTIONS OFFICER ROLE DESCRIPTION**

The Marketing and Promotions Officer is responsible for overseeing the implementation of the \_\_\_\_\_\_\_\_\_\_\_\_\_\_ marketing plan.

## Responsible To

The Marketing and Promotions Officer is directly responsible to the President of \_\_\_\_\_\_\_\_\_\_\_\_\_\_ and the members of \_\_\_\_\_\_\_\_\_\_\_\_\_\_.

The Marketing and Promotions Officer may chair the Marketing and Promotions Committee.

## Responsibilities and Duties

The Marketing and Promotions Officer should:

* Develop in conjunction with the Marketing and Promotions Committee, the club/group marketing plan.
* Work with the Treasurer to develop a budget for the marketing plan.
* Oversee the implementation of the strategies in the marketing plan.
* Submit regular reports to the club/group committee.

## Knowledge and Skills Required

Ideally a Marketing and Promotions Officer is someone who:

* Can communicate effectively.
* Is positive and enthusiastic.
* Is well organised.
* Has marketing expertise and experience in dealing with the local media.

*Time* C*ommitment* R*equired*

The estimated time commitment required as the Marketing and Promotions Officer of \_\_\_\_\_\_\_\_\_\_\_\_\_\_ is \_\_\_\_\_\_\_\_\_\_\_\_\_\_hours per week.

*The time commitment required as the Marketing and Promotions Officer of a club/group varies greatly from club/group to club/group. Smaller clubs may require a Marketing and Promotion Officer to spend only a half hour week or larger clubs one hour per week on club/group related duties.*

# SAMPLE PRESIDENT ROLE DESCRIPTION

The President or Chairperson is the principle leader of the \_\_\_\_\_\_\_\_\_\_\_\_\_\_ club/group and has overall responsibility for the \_\_\_\_\_\_\_\_\_\_\_\_\_\_club’s/group’s administration.

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

*Responsible To*

The President is elected by the \_\_\_\_\_\_\_\_\_\_\_\_\_\_members and responsible for representing the views of the \_\_\_\_\_\_\_\_\_\_\_\_\_\_members.

## Responsibilities and Duties

The President/Chairperson should:

* Manage committee and/or executive meetings.
* Manage the annual general meeting.
* Represent the club/group at local, regional, state and national levels.
* Act as a facilitator for club/group activities.
* Ensure the planning and budgeting for the future is carried out in accordance with the wishes of the members.

## Knowledge and Skills Required

Ideally the President/Chairperson is someone who:

* Can communicate effectively.
* Is well informed of all organisation activities.
* Is aware of the future directions and plans of members.
* Has a good working knowledge of the constitution, rules and the duties of all office holders and subcommittees.
* Is a supportive leader for all organisation members.

## Estimated Time Commitment Required & Period of Appointment

The estimated time commitment required as the President/Chairperson of \_\_\_\_\_\_\_\_\_\_\_\_\_\_ is \_\_\_\_\_\_\_\_\_\_\_\_\_\_hours per week.

The time commitment required as the President/Chairperson of a club/group varies greatly from club/group to club/group. Smaller clubs may require a President to spend only a half hour to an hour per week or larger clubs two to three hours per week on Presidential duties.

The President/Chairperson is appointed for a \_\_\_\_\_\_\_\_\_\_\_\_\_\_term.

**SAMPLE SECRETARY ROLE DESCRIPTION**

The Secretary is the chief administration officer of the \_\_\_\_\_\_\_\_\_\_\_\_\_\_club/group. This person provides the coordinating link between members, the management committee and outside agencies.

The roles and responsibilities of the Secretary vary greatly from club to club and experienced secretaries will tell you that their duties often expand beyond what is normally expected of the Secretary.

The secretary is directly responsible to the President of \_\_\_\_\_\_\_\_\_\_\_\_\_\_and the members of \_\_\_\_\_\_\_\_\_\_\_\_\_.

## Responsibilities and Duties

The Secretary should:

* Prepare the agenda for club/group meetings in consultation with the Chairperson.
* Make arrangements including venue, date, times and hospitality for club meetings.
* Send adequate notice of the meetings.
* Collect and collate reports from office bearers.
* Call for and receive nominations for committees and other positions for the club/group AGM.
* Take the minutes of meetings.
* Write up the minutes as soon as possible after the meeting.
* Read, reply and file correspondence promptly.
* Collate and arrange for the printing of the annual report.
* Maintain registers of members’ names and addresses, life members and sponsors.
* Maintain files of legal documents such as constitutions, leases and titles.
* Act as the public officer of your club/group liaising with members of the public, affiliated bodies and government agencies.
* With Associations - process transfer applications; enter teams in competitions; represent your club/group at Association meetings; obtain Association sanction for club/group events; communicate information between Association and club/group members, such as event deadlines.
* Other tasks: handle bookings and entries; supervise uniforms; respond to general duties as directed by the club/group committee.

*Knowledge and Skills Required*

Ideally the Secretary is someone who:

* Can communicate effectively.
* Is well organised and can delegate tasks.
* Can maintain confidentiality on relevant matters.
* Has a good working knowledge of the constitution.

*Estimated Time* C*ommitment* R*equired*

The estimated time commitment required as the Secretary of \_\_\_\_\_\_\_\_\_\_\_\_\_\_ is \_\_\_\_\_\_\_\_\_\_\_\_\_\_hours per week.

The time commitment required as the Secretary of a club/group varies greatly from club/group to club/group. Smaller clubs may require a Secretary to spend only a half hour to an hour per week or larger clubs two to three hours per week on Secretarial duties.

The Secretary is appointed for a \_\_\_\_\_\_\_\_ period.

**SAMPLE TREASURER ROLE DESCRIPTION**

The Treasurer is the chief financial management officer for the \_\_\_\_\_\_\_\_\_\_\_\_\_\_club/group.

## Responsible To

The Treasurer is directly responsible to the President of \_\_\_\_\_\_\_\_\_\_\_\_\_\_ and members of \_\_\_\_\_\_\_\_\_\_\_\_\_\_.

The Treasurer may chair the Finance Committee at larger clubs/groups or associations.

## Responsibilities and Duties

The Treasurer should:

* Prepare a budget and monitor it carefully.
* Keep the club’s books up-to-date.
* Keep a proper record of all payments and monies received.
* Make sure financial reports are available and understood at all committee meetings.
* Show evidence that money received is banked and documentation provided for all money paid out.
* Ensure that information for an audit is prepared each year.
* Arrange the audit.
* Regularly provide a Treasurer’s report at meetings and when required.
* Produce an annual financial report.
* Send out accounts.
* Pay the bills.

## Knowledge and Skills Required

Ideally the Treasurer is someone who is:

* Well organised.
* Able to allocate regular time periods to maintain the books.
* Able to keep good records.
* Able to work in a logical orderly manner.
* Aware of information which needs to be kept for the annual audit.

*Estimated Time* C*ommitment* R*equired*

The estimated time commitment required as the Treasurer of \_\_\_\_\_\_\_\_\_\_\_\_\_\_ is \_\_\_\_\_\_\_\_\_\_\_\_\_\_hours per week.

*The time commitment required as the Treasurer of a club/group varies greatly from club/group to club/group. Smaller clubs may require a Treasurer to spend only a half hour per week or larger clubs two hours per week on club/group related duties.*

**SAMPLE VOLUNTEER MANAGEMENT ACTION PLAN**

|  |  |  |  |
| --- | --- | --- | --- |
|  | **What?** | **When?** | **Who?** |
| **Recruitment** |  |  |  |
| **Selection & Screening** |  |  |  |
| **Orientation** |  |  |  |
| **Training & Development** |  |  |  |
| **Recognition** |  |  |  |
| **Replacement** |  |  |  |

**SAMPLE VOLUNTEER COORDINATOR ROLE DESCRIPTION**

The Volunteer Coordinator is responsible for the human resource planning, recruiting, selection, training and recognition of \_\_\_\_\_\_\_\_\_\_\_\_\_\_ (club) volunteers.

## Responsible To:

The Volunteer Coordinator is directly responsible to the President of \_\_\_\_\_\_\_\_\_\_\_\_\_\_ and the members of \_\_\_\_\_\_\_\_\_\_\_\_\_\_.

## Responsibilities and Duties

The Volunteer Coordinator should:

* Assess the human resource needs for the club for general running and special events.
* Recruit and recommend the appointment of volunteers to roles and ensure the right person is found for each role.
* Organise the orientation and the induction of volunteers.
* Work with the Secretary organising volunteer rosters and maintaining records.
* Identify and organise the training and education opportunities for volunteers.
* Ensure that volunteers are reimbursed for their approved out-of-pocket expenses.
* Ensure all volunteers are recognised for their efforts.
* Submit regular reports to the club/group committee.

## Knowledge and Skills Required

Ideally a Volunteer Coordinator is someone who:

* Can communicate effectively and has good interpersonal skills.
* Is positive and enthusiastic.
* Is well organised.

*Time Commitment Required*

The estimated time commitment required as the Volunteer Coordinator of \_\_\_\_\_\_\_\_\_\_\_\_\_\_ is \_\_\_\_\_\_\_\_\_\_\_\_\_\_hours per week.

*The time commitment required as the Volunteer Coordinator of an organisation varies greatly from organisation to organisation. Smaller clubs may require a Volunteer Coordinator to spend only a half hour per week or less. Larger organisation may require one hour per week on organisation related duties.*

**SAMPLE VOLUNTEER ROLE LIST TEMPLATE**

|  |  |  |  |
| --- | --- | --- | --- |
| **Role** | **Filled (by who) or vacant?** | **Role** | **Filled (bu who) or vacant?** |
|  |  |  |  |
|  |  |  |  |
|  |  |  |  |
|  |  |  |  |
|  |  |  |  |
|  |  |  |  |
|  |  |  |  |
|  |  |  |  |
|  |  |  |  |
|  |  |  |  |
|  |  |  |  |
|  |  |  |  |
|  |  |  |  |
|  |  |  |  |
|  |  |  |  |
|  |  |  |  |
|  |  |  |  |
|  |  |  |  |
|  |  |  |  |
|  |  |  |  |
|  |  |  |  |
|  |  |  |  |
|  |  |  |  |
|  |  |  |  |
|  |  |  |  |
|  |  |  |  |

**SAMPLE VOLUNTEER PERFORMANCE REVIEW**

Volunteer performance reviews should be seen as a reflection of their importance to your organisation/club. They are an effective way of expressing appreciation, identifying issues and needs, and holding both the Volunteers and the organisation to account. They shouldn’t be seen as something that is too formal, or too much to subject a Volunteer to.

Increasing numbers of Volunteers are looking to develop and enhance their skills through Volunteering and welcome opportunities to receive constructive feedback and opportunities to reflect and develop further.

Initiating a Volunteer performance review process should be done sensitively and gradually, taking into account any concerns Volunteers may have. Developing a self-assessment tool can be a good first step.

***What is a Performance Review?***

A performance review is a regular opportunity (usually 6 monthly or annually) to review how a Volunteer is tracking against a set of agreed outcomes. A good Volunteer Performance Review includes the following components:

* A written role description
* A mutually agreed set of outcomes for a particular role
* An implementation plan

The best performance reviews involve no surprises. Nothing the Volunteer hears in the review should be new to them, if the person they are reporting to, has done their job and given them regular feedback in the proceeding period.

***How does it work?***

The process can be formal or informal but it is important to schedule a time for it.

Before the session:

* Have the volunteer fill out a self-assessment of how they think they’ve done against the outcomes that were set
* Review the Volunteer’s role description, outcomes/goals
* Do your own evaluation on how you think the Volunteer has performed against the outcomes that were agreed.

During the session:

* Together, review the role expectations and outcomes
* Share positive feedback and appreciation
* Invite the Volunteer to share their self-assessment and assessment of the support they have received in their role
* Offer your assessment of the volunteer’s performance
* Discuss the barriers to the volunteer’s current or continued success
* Discuss future plans for the volunteer – what else they’d like to do, what development they might need etc.

After the session:

* Write a summary report for the volunteer’s file which both you and the volunteer sign off on
* Follow-up on actions and agreements

The self-assessment questions on the next page may be useful in shaping the conversation.**SAMPLE QUESTIONS FOR VOLUNTEER SELF-ASSESMENT PERFORMANCE REVIEW**

1. Do you feel you have reached the expectation or goals that were set for your role? If not, what do you think the reasons are for this?
2. Was the estimated time to perform your volunteer role realistic? Please explain.
3. Did the Organisation/Club provide adequate induction, training, supervision and resources for you to accomplish your role? Please offer any ideas you may have for improvement.
4. What areas of your role have been the most satisfying?
5. What areas of your role have been the most challenging?
6. Have other Volunteers (and staff) been receptive and appreciative of your efforts?
7. What have been the greatest areas of growth for you in your Volunteer role?
8. Overall how would you rank your performance:

* Exceeding expectations
* Have met all expectations
* Have not met all expectations and need to improve

Please tell us more about your choice:

1. What type of role and time commitment would you like to make in the coming year? (i.e. same role but new challenges? different role?)
2. Please provide any other comments or suggestions you consider relevant:

**SAMPLE VOLUNTEER SURVEY**

1. **What is the main reason(s) you volunteer with [enter club here]?**Please indicate with a tick

|  |  |
| --- | --- |
|  | For the love of the game |
|  | I have a child who plays |
|  | To meet new people |
|  | I’ve been a player and wanted to give something back |
|  | I like helping others succeed |
|  | To spend time with friends |
|  | For fun |
|  | To gain skills or experience for the future |
|  | I can’t remember |
|  | Other (please specify) |

|  |
| --- |
|  |

1. **How did you get involved with [enter club here]?**Please indicate with a tick

|  |  |
| --- | --- |
|  | Asked to volunteer |
|  | Saw an advertisement |
|  | I approached [enter sport] myself |
|  | Friend roped me in |
|  | Other (please specify) |

|  |
| --- |
|  |

**3. Your Experience as a Volunteer**

Please tick the extent to which you agree or disagree with the following statements

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
|  | Strongly Disagree | Disagree | Agree | Strongly Agree | Unsure |
| What is expected of me in my volunteer role is clearly explained |  |  |  |  |  |
| I know what I need to know to undertake my role |  |  |  |  |  |
| I feel that my skills and experience are well suited to the role I do |  |  |  |  |  |
| I understand the roles of other volunteers (and staff) |  |  |  |  |  |
| There are regular opportunities to share information and provide feedback |  |  |  |  |  |
| My views and suggestions receive due consideration |  |  |  |  |  |
| Communication about information related to my role is clear and frequent |  |  |  |  |  |
| There is someone designated to monitor my task load, check in with me regularly, and to whom I can go if I need support |  |  |  |  |  |
| The environment for volunteering is positive, supportive and encouraging |  |  |  |  |  |
| My motivations for volunteering are being satisfied |  |  |  |  |  |
| I feel my efforts as a volunteer are appreciated |  |  |  |  |  |
| I enjoy volunteering with [enter club] |  |  |  |  |  |

**Please note any other aspects of your volunteer experience that have been particularly positive:**

|  |
| --- |
|  |

**Please note any aspects of your volunteer experience that are in need of improvement:**

|  |
| --- |
|  |

**Please indicate the extent to which the amount of time you volunteer has been more, less or about what you anticipated**

|  |  |
| --- | --- |
|  | Much less than I anticipated |
|  | Somewhat less than I anticipated |
|  | About what I anticipated |
|  | Somewhat more than I anticipated |
|  | Much more than I anticipated |

**Overall how satisfied or dissatisfied are you with the recognition you have received for your efforts as a volunteer in the past year?**

|  |  |
| --- | --- |
|  | Very satisfied |
|  | Generally satisfied |
|  | Neither satisfied nor dissatisfied |
|  | Generally dissatisfied |
|  | Very dissatisfied |
|  | I don’t expect my efforts to be recognised |

**In your opinion which of the approaches listed below, if any, would be the best way to recognise your efforts as a [enter club] volunteer: (Please tick as many as are relevant)**

|  |  |
| --- | --- |
|  | Being thanked personally verbally |
|  | Being given a thank you card |
|  | Being thanked publicly for your efforts |
|  | Being given petrol vouchers |
|  | Having your expenses reimbursed |
|  | Being given tickets to games |
|  | Being given a small gift |
|  | Being given an award |
|  | Additional responsibility |
|  | Additional training |
|  | No recognition required |
|  | Other (please specify) |

|  |
| --- |
|  |

**4. Training and Development**

Please indicate the extent to which you agree or disagree with the following statements

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
|  | Don’t Know or Can’t Remember | Strongly Disagree | Disagree | Agree | Strongly Agree |
| The induction or orientation I received when I first volunteered was sufficient for me to find my way around and know what was expected of me |  |  |  |  |  |
| I have received the necessary training to undertake my current role with confidence |  |  |  |  |  |
| I would like additional training to help me perform better in my current role |  |  |  |  |  |
| I would like to progress to a different or more senior volunteering role |  |  |  |  |  |

**If you would like additional training in your current role please specify:**

|  |
| --- |
|  |

**If you are happy for us to follow up with you about this please indicate**

|  |  |
| --- | --- |
|  | Yes |
|  | No |

**If you would like to progress to a different volunteering role in [enter club] please tell us more**

|  |
| --- |
|  |

**If you are happy for us to follow up with you about this please indicate**

|  |  |
| --- | --- |
|  | Yes |
|  | No |

|  |
| --- |
|  |

**Please do not complete the below contact details if you would prefer to remain anonymous**

**Name:**

|  |
| --- |
|  |

**Email Address:**

|  |
| --- |
|  |

**Phone Number:**

**5. Length of Time as a Volunteer**

How long have you been a volunteer for [enter club]?

|  |  |
| --- | --- |
|  | Less than 6 months |
|  | 6 months – 1 year |
|  | 1-2 years |
|  | 2-5 years |
|  | 5-10 years |
|  | Over 10 years |

**6. Primary Role**

What is your primary volunteering role?

|  |  |
| --- | --- |
|  | Board or Executive Committee Member |
|  | Team Manager |
|  | Secretary |
|  | Coach |
|  | Official (referee, umpire etc) |
|  | Treasurer |
|  | Volunteer Coordinator |
|  | Other (please specify) |

|  |
| --- |
|  |

**Is there anything else you would like us to know about Volunteering at** **[enter club]?**

|  |
| --- |
|  |

[Enter Organisation Name]

**SAMPLE EXPENSE FORM**

(Add Organisation Contact Details here - Postal Address, telephone, fax and email)

**Name:** \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_**Phone:** \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

**Address:**\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

|  |  |  |  |
| --- | --- | --- | --- |
| **Bank** | **Branch** | **Account** | **Suffix** |

**Bank Account Details:**

**Expense Activity:** \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
|  |  |  | **OFFICE USE ONLY** | |
| **Date** | **Details** | **Amount** | **Event** | **Code** |
|  |  |  |  |  |
|  |  |  |  |  |
|  |  |  |  |  |
|  |  |  |  |  |
|  |  |  |  |  |
|  |  |  |  |  |
|  |  |  |  |  |
|  |  |  |  |  |
|  |  |  |  |  |
|  |  |  |  |  |
|  |  |  |  |  |
|  |  |  |  |  |
|  |  |  |  |  |
|  |  |  |  |  |
|  |  |  |  |  |

Total Expenses $ \_\_\_\_\_\_\_\_\_\_\_

**NB: Please remember to attach all receipts**

Signed: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

**AUTHORISED:**

**Checked Manager: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_**

**Checked Accounts: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_**

SAMPLE VOLUNTEER APPLICATION FORM

Thank you for considering volunteering at our club. The information in this form is being collected for the purposes of better managing our volunteers and assisting you to assist us. Only people in the club with a legitimate reason will have access to this information.

|  |  |  |
| --- | --- | --- |
| Name: | Sex: M/F | Date of birth: |
|  | | |
| Home Address | | Telephone No:  Mobile No (if different):  Email address: |
|  | |
| Postcode: | |

|  |
| --- |
| Why do you want to volunteer as: (for example: coach, treasurer, volunteer co-ordinator, volunteer training co-ordinator, club secretary?) |
| What skills and experience could you bring to the position? |
| Where did you see or hear about this volunteer opportunity? |
| What time would you like to commit each week? |
| Are you likely to be able to volunteer for more than one season? |
| Do you have any health conditions that would affect your role as a volunteer, is there anything we need to do to assist you in your volunteering? If so, please explain. |
| Someone we can contact in case of an emergency  Name:  Phone:  Address:  Relationship: |
| Is there anything else you would like to add that you think would be helpful or useful as part of this application? |

PLEASE PROVIDE DETAILS OF A REFEREE:

(We will not contact them without first letting you know)

|  |
| --- |
| Name:  Phone:  Address:  Relationship:  Years known: |

|  |  |
| --- | --- |
| Signed: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ | Date: \_\_\_\_\_\_\_\_\_\_\_\_\_ |

If required, I would be happy to participate in a police check. Y / N

**SAMPLE REFERENCE CHECKING FORM**

A guide for conducting a telephone reference check for prospective volunteers.

ROLE: CLUB:

NAME OF VOLUNTEER:

NAME OF REFEREE: DATE OF CALL:\_\_\_\_\_\_\_\_\_\_\_\_

TELEPHONE:

COMMITTEE MEMBER:

## This is [Name] with [CLUB] …

[Applicant Name] has applied for a role with [CLUB] and he/she gave us your name as a reference.

Is now a good time to talk as I will need about 5 minutes of your time? (If not) When can I call you back?

Thank you for agreeing to speak with me.

1. How long have you known [Applicant Name] and in what capacity?
2. In your opinion, would [Applicant Name] make a good …
3. A part of this club’s culture is to support … in a positive way. Do you think … would be comfortable in this environment?
4. In your experience is … an easy person to work with?
5. Can you comment on his/her:

• Attendance and Dependability

• Initiative and follow-through

• Ability to take on responsibility

Is there anything else you would like to comment on regarding [Applicant’s Name] character that might be relevant to their performance as a club volunteer?

**SUCCESSION PLANNING GUIDELINES**

Succession planning is about planning appropriate action for when a person who currently holds a key role in your Organisation moves on, or is no longer available.

Succession planning is also about retaining your current Volunteers, and engaging fresh new faces. There are four key strategies that help ensure effective succession planning:

***Review regularly***

Each year when you are reviewing your Volunteer Action Plan review you key Volunteer roles and ask: *“What would we do if this key Volunteer were to leave?”* Then ask: *“How likely is this?”*

You need to have a plan in place for the circumstances you can foresee and those emergencies that might put your Organisation at risk.

***Develop contingencies***

Consider having a ‘second in charge’ or ‘shadow’ Volunteer for those Volunteers in key roles, so that if they are unavailable for some reason someone else could fill in.

***Plan for successors***

Consider having a formal succession plan for that role in which long-standing Volunteers have indicated they would like to move on. Often Volunteers hold a lot of institutional knowledge in their heads. With the permission of both Volunteers ask a newer Volunteer to prepare themselves to move into the current Volunteer’s position at the start of a new season. In the meantime explain that it is their role to find out what the person currently in the role does and to document what they know – for their own information and for your Organisation.

***Capture Iinstitutional knowledge***

Make sure that when a Volunteer leaves everything they know doesn’t walk out the door with them. Document critical policies, procedures and critical information and keep this information up to date and accessible.

**SAMPLE EXIT INTERVIEW QUESTIONNAIRE FOR VOLUNTEERS**

Name: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ Phone number: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Date: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ Date you began volunteering: \_\_\_\_\_\_\_\_\_

1. What benefits did you obtain through your Volunteer role(s) with [enter club]?

2. What was your original motivation for volunteering with [enter club]?

3. Were your expectations of what it would be like to volunteer for [enter club] met?

3. How adequate was the orientation and training you received for your role(s)?

4. What was the most rewarding aspect of volunteering with us?

5. What suggestions, changes or recommendations would you make to improve the experience of Volunteers at [enter club]?

*Thank you. We appreciate you taking time to give us your thoughts.*