

*H.*

*running* SPORT

# *Volunteer and Staff Management*

## Supporting Sport

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SPARC is the public funding agency that encourages New Zealanders to participate and achieve in sport, fitness and leisure. We support around 100 national sport organisations and the 17 regional sports trusts, encourage more people to be more active more often, help athletes compete at top levels, and improve the way sport and physical activity services are delivered.

We increase the number of people involved in sport and physical leisure activities through Push Play, help people reach their potential and succeed, and recognise the worth of coaches, sports officials and volunteers of all kinds.

The Community Sport Fund, delivered in partnership with local authorities, supports training and community activities in over 4,000 sports and active leisure clubs.

A special focus is giving young New Zealanders an active start to life. Our programme, called KiwiSport, is a New Zealand phenomenon that holds the key to our future as an active and sporting nation. KiwiSport teaches primary school children a wide range of basic skills and motivates them to stay involved in active leisure in the years ahead. Sportfit is our programme for those of secondary school age. It encourages healthy active lifestyles for people moving into adulthood. Leadership, outdoor activities and fair play on and off the field are big parts of our junior sport programme.

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This resource is one of a series produced by the SPARC.

Topics in the series include:

- A. Legal Obligations of Boards
- B. Strategic Planning
- C. Policy Development
- D. Financial Management
- E. Sport Marketing
- F. Public Relations
- G. Recruitment and Selection
- H. Volunteer and Staff Management**
- I. Strategic Leadership

The series targets board members and executive officers of national and regional sports organisations. The topics were developed following a needs analysis of SPARC's client organisations.

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# ***Volunteer and Staff Management***

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# Introduction

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Managing people presents a huge challenge for sport where many organisations have few paid employees and depend heavily on unpaid workers – the volunteers. Managing both groups effectively demands considerable skill. But for organisations that get it right, the rewards are immense.

In a competitive environment, sports organisations must seek to manage all their people, encouraging best performance and a willing commitment to the organisation’s mission, values and goals. Sports organisations must make a particular commitment to managing volunteers because of the enormous contribution they have – and will continue to make – to New Zealand sport. Your volunteers deserve the best you can offer them.

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Much of the information in this guide is relevant to managing both paid staff – employees, contractors, agents and the like – and unpaid volunteers. Where both groups are covered, the term ‘workers’ has been used. Where the groups are separate, they are referred to as ‘employees’ and ‘volunteers’.

Managing people and their performance is a key role for every manager. Good managers also manage themselves well, and maintain good relations with stakeholders and decision-makers inside and outside the organisation. Fortunately, many of the same principles and techniques apply to these different tasks.

This resource guide aims to outline the key requirements for effective people and performance management. The final two chapters deal specifically with current volunteer management issues.

Good managers also manage themselves well, and maintain good relations with stakeholders and decision-makers inside and outside the organisation. Fortunately, many of the same principles and techniques apply to these different tasks.

# ***I. Managing people***

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Managing people and their performance involves these factors:

- Communication
- Change Management
- Conflict Resolution
- Creativity
- Coach
- Captain
- Commitment

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## *Communication*

Effective communication can be defined as an exchange of understanding. As a manager you should make sure that all workers understand the organisation's objectives, policies, programmes and rules – and what is expected of them. In turn, you need to understand their views and aspirations.

## *Change Management*

Change is a feature of today's organisation. Most people welcome change – but do not much like being changed. To ensure change is not a negative one the process needs to be managed carefully.

Change should be addressed openly and honestly. Managers must explain why and how change is happening, working to build trust and confidence.

## *Conflict Resolution*

Open conflict is not inevitable, although people will always have different opinions. The challenge is to encourage healthy debate of issues, and not close down discussion in an attempt to maintain a superficial peace.

Managers should take a problem-solving approach to managing conflict – involving others in identifying its causes and working out solutions. For organisational problems, ‘win-win’ outcomes offer the best results.

## *Creativity*

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Innovation and creativity are important for today’s organisations.

Managers should stimulate people to contribute new and different ideas relating to the organisation’s operations – and develop a culture that encourages innovation and creativity. Don’t reject ideas you don’t like – or feel threatened by. Discuss them.

## *Coach*

Effective managers help people achieve results by providing conditions that make them want to perform better. The manager’s role as coach is to help people develop their talents and skills, and learn from their work experiences.

## *Captain*

The manager is also the team leader. To be successful as the organisational team captain, you must be able to combine the formal authority of your job as manager with the informal authority people grant their leader.

## *Commitment*

Like the successful athlete, highly motivated and high performing people are strongly committed to what they are doing – and the challenge for the manager is to build and maintain that commitment.

## 2. The Manager's Style

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Managers should think about their own management styles, how appropriate they are for their organisations, and the impact they have on other people. There is no 'right' or 'wrong' management style: the key to success is to adopt an approach that suits the situation or incident.

*[Module 1 on Strategic Leadership in this series explores leadership and styles in more detail.]*

Ask yourself these questions? What style do you use most often?

### *Style One*

- Do you make decisions on your own and take responsibility for the outcomes?
- Do you tell others what you want done, how it is to be done, and why – and then expect your instructions to be carried out?
- Do you reward those who follow your directions?
- How would you feel if your manager (or national president) acted in this way?

### *Style Two*

- Do you base your decisions on information and advice from other people?
- Do you involve others in your decision making and in carrying out your responsibilities
- Do you reward people who contribute to solving problems?
- Do other people get frustrated when you won't make a decision for them?

### *Style Three*

- Do you help people think through their problems?
- Do you provide support for people who have problems to solve?
- Do you reward others who go looking for support for solving their problems?
- Do you get annoyed when other people seem to be very slow at decision making?

### *Style Four*

- Do you let other people make decisions on their own?
- Do you expect people just to give you updates on their work progress?
- Do you reward people for taking responsibility for solving problems?
- Do people find you rather remote and uninvolved?

### ***3. Managing the new worker***

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Can you remember your first day in your job? Are they good memories? Most of us can recall our first impressions of various jobs. So we should try to ensure that the first experience is a good one. A planned induction is critical.

#### *Induction*

An induction is held to introduce new people to your organisation, the people in it, and the way it operates. The organisation's aim is to quickly settle the new worker into the job, so they become effective and productive more quickly. This saves both time and money for the organisation.

Think through what your new worker needs and plan the induction accordingly. Don't forget that 'informal' advice is as important as the 'formal' information. For new workers, a planned induction programme:

- provides information about the organisation (objectives, policies, procedures, rules, office culture etc).
- provides and clarifies information about the job (targets, priorities, relationships, resources, etc).
- increases motivation and morale by making them feel welcome and significant.
- ensures they have realistic expectations of the organisation, the job and their managers and colleagues.
- reduces the uncertainty and relieve the anxiety which they inevitably feel.

### **When does induction begin?**

Induction begins from the beginning of your recruitment campaign. Think about the impressions you give potential applicants or volunteers. Did your advertising look professional? Were applicants dealt with promptly and with courtesy? Were changes or delays in the selection process communicated to applicants?

A more formal induction procedure begins after you have selected your employee or volunteer. Below are some suggestions for dealing with new workers:

#### *Before the first day*

Well before the starting date, make certain that the new worker is sent a welcoming letter, outlining what will happen on the first day. Cover these points:

- Time to meet. Suggest a later-than-usual starting time for the first day. You will then have time to deal with pressing matters and the workplace will be humming along when the new person arrives.
- Place to meet. Make your reception arrangements as clear as possible. Include details about car parking, security requirements etc.
- Who to meet. The person who will be managing the new worker should meet him/her. In a small organisation, that manager will run the induction process. In a larger organisation, the task may go to a human resources specialist or a co-worker who is assigned as the newcomer's 'buddy' for the first few days or weeks.
- Schedule for the day. Outline what you have planned for the first day – don't spring any surprises! If you plan to have a special lunch or a welcoming drink at the end of the day, say so: it's embarrassing for everyone if the new worker makes other arrangements.

## *On the first day*

People generally have two aims when starting a new job:

- To prove to the organisation that it was right to make the appointment – and they can do this by quickly settling into the job and the work team
- To prove to themselves that joining this organisation was the right decision.

### **First Day Do's**

- Give the new employee some real work to do. Ensure the worker can complete the task without having to search out too much information.
- Make it a relatively small task. Ideally it can be completed by the end of the day – so that the individual can answer the "What did you do today?" question.
- Get the new worker interacting with colleagues. Plan a task which means the new worker has to seek information from a number of different people – and brief them on what's going to happen.
- Ensure the new worker knows who to ask for help. Make sure that person will be around if needed! Appointing a 'buddy' is a good idea, especially in larger organisations. In the small organisation, check frequently that the new worker isn't 'stuck' or has something to do.

### **First Day Don'ts**

- Dump excess information on the new worker. People can only absorb so much information at a time, and the new employee wants to get started. Save the history of the organisation for later.
- Give the new employee a pile of files to read. The newcomer won't remember much of their contents. Wait until the file information relates to a work task.
- Introduce everyone at once. Try drawing a floor plan of the office showing each person's name, title and location.
- Make the first day an administrative nightmare. While you need to gather some data for the employee's personal file, and for payroll, tax and other purposes, it probably doesn't need to be done on the first day.

## *Induction Checklist*

Use this to develop a checklist for your own organisation:

### **1. Pre-employment welcome and information**

Welcoming letter:

- Confirm terms and conditions of appointment
- Confirm starting date and time
- Advise first day arrangements - parking, work clothes, programme.

### **2. Preparations for new worker**

- Advise volunteer leaders and other staff of start date and role of new worker
- Ensure work station ready and fully equipped
- Arrange communication links - e.g. inclusion in telephone directory
- Arrange work programme for initial period and check with others involved
- Appoint and brief 'buddy' or mentor.

### **3. First day reception**

- Remind work group that new worker starting
- Welcome new worker
- Introduce to colleagues
- Introduce 'buddy' or mentor
- Tour immediate work area.

### **4. Initial information and administration**

Workplace geography:

- Toilets, washing facilities
- Personal locker, cloakroom
- Tea and coffee facilities.

### **5. Health and safety**

- Emergency procedures and exits
- Safety hazards, rules, equipment
- Safety policies and procedures

### **6. Employment**

- Timekeeping requirements
- Check terms and conditions
- Pay system and 'sign up'
- Issue identity card, etc
- Expected behaviour and conduct
- Disciplinary procedures
- Complaints and grievances

## **7. Further information and orientation**

### **Organisation**

- Mission, goals, plans
- Values, culture
- Activities, services
- Organisation structure
- Role of volunteer workers

### **Communication**

- Employee associations
- Employee handbook
- Social club

### **Performance**

- Performance planning and review
- Performance standards
- Quality, service, etc

### **Training and development**

- Policies and programmes
- On job skills/knowledge
- Off-job courses
- Personal, professional, career development

## *Helping New Workers Settle In*

Induction is complete when the new worker is performing to required levels and is a fully participating member of the work team/organisation.

Employees progress at different rates. But positive management can speed up the process. Try these ideas:

- Meet with the new worker at the end of the first day to deal with questions and comments; for volunteers, it may be more appropriate to meet at the end of the first event.
- After two or three days, meet with the new worker to review the job description and to agree on goals for the first 2-3 months. This is a good opportunity to describe the organisation's performance planning and review system.
- Meet with the new worker weekly for the first six weeks, to discuss issues, review experiences and to develop a working relationship.
- Six weeks should clarify whether the new worker is making satisfactory progress. If so, you can arrange to meet less often and agree on a longer-term performance plan.
- To encourage their acceptance, give the new worker opportunities to work with others, and involve others in the training of the new worker as much as you can.

### *The first review*

It may be unrealistic to expect a new worker to be performing satisfactorily in all aspects of the job after only six weeks. So establish a performance benchmark – to measure progress, and to set a starting point for further improvement.

Here's a sample review form that could be used after the first six weeks:

- The performance items in the first column are general and won't apply to every job. Use items that suit your organisation and the particular job: the key responsibilities in the job description would be a good starting point.
- Be generous with recognition and praise where the new worker is making satisfactory progress.

- Items rated ‘needs to do better’ should be discussed in detail. Make sure your expectations are understood and accepted. Think about the coaching you can offer to help the worker come up to those standards.
- Any item ranked ‘significant improvement needed’ should become the subject of a written and agreed plan, with targets and a time frame for performance improvement.

<b>Performance item</b>	<b>Making good progress</b>	<b>Needs to do better</b>	<b>Significant improvement needed</b>
Quality of work			
Quantity of work			
External relationships			
Internal relationships			
Communication and presentation			
Initiative			
Willingness to ask questions			
Team work			
Problem solving			
Application of skills and knowledge			

## 4. *Managing performance*

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Managers are responsible for encouraging, developing, supporting and sustaining people in their work. Performance management should be part of normal management practice for your organisation.

Performance management should be continuous, not an annual event that no one looks forward to. It should take in the worker's all-round performance – and future development – not just the results achieved for specific targets.

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### *Planning performance*

An organisation does not need a complex performance appraisal system for staff and volunteers. But it needs to be able to:

- describe the work it wants done;
- establish performance standards and levels for each job;
- set performance goals or targets for its workers;
- provide workers with information and feedback on their performance
- give them appropriate recognition, rewards and remuneration.

As a guideline, remember that your staff or volunteers will be looking for answers to these key questions:

- What do you want me to do?
- How well do you want me to do it?
- How well am I doing? What do you think of my performance?
- How will I be rewarded for my contribution?

### *Job descriptions*

Good job descriptions – which are discussed in Module G Recruitment and Selection in this series – should clearly set out what job-holders are expected to do. They should be able to be expanded to describe the required levels and standards of performance. In this way, the job description becomes a performance contract between the organisation and the worker.

## *Performance standards and goals*

If you don't know where you're going, how are you going to get there?  
Performance standards and goals help organisations and individuals to avoid wasted journeys.

Different organisations use different terms, which can be confusing. Whatever terms your organisation uses, you should distinguish clearly between standards and goals:

- Performance standards, levels, measures and indicators are objective descriptions of the quantity or quality of the work expected.
- Goals, targets and objectives are statements of what an individual job holder is expected (usually as a result of discussion and agreement) to achieve.

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Why set performance goals?

People want to know what is expected of them. Goals have a key role in building a person's sense of motivation and desire to achieve. The adage that 'nothing succeeds like success' is true: people who reach their targets are encouraged to go on to seek bigger and higher goals.

The manager's role is not to set goals for people, but to provide the environment and context in which people set their own goals. Here are some ideas for creating this environment:

- Let people set their own goals  
Give people a say in what they are going to do and how they will do it.
- Encourage people to take responsibility  
Give people responsibility for achieving the goals they establish.  
Make certain they understand their roles and have reasonable control over what they have to do, without other people interfering.
- Make the goals moderately risky  
People respond to situations where there is some risk. Goals should not be so easily achieved that they pose no challenge; nor should they be too difficult.

- Give prompt and relevant feedback  
People need and want information about their performance. Give feedback often so that people can adjust what they are doing.
- Link achievement and rewards  
Rewards and recognition are more effective if people can see how they are directly related to their achievements.
- Offer support and encouragement when needed  
Give people help when they need it, and leave them alone when they don't.

### *Setting goals*

Effective performance goals are S.M.A.R.T. goals.

S.M.A.R.T. goals

S specific

M measurable

A agreed

R realistic

T time-framed

### **Specific**

- Goals should be specific, not vague  
"Increase membership 10% by 31 December" is more specific than "Try to increase membership".
- Focus on the results - rather activities for achieving those results  
Whether the employee achieves a 10% increase in membership will be a matter of fact: whether the employee tried to increase membership will be a matter for debate.
- Start the goal statement with an accomplishment verb. Words like increase, reduce, establish, agree, provide and achieve state an expected outcome – words like study, consider, discuss or review describe activities or inputs.
- Not all goals will be about improving performance. Many people are expected to reach a certain level of performance in an aspect of their jobs – and then maintain it. See if you can broaden the scope and interest of the job in some other area.

Key question:

Does this goal describe precisely what the worker has to do to succeed in this aspect of the job?

### **Measurable**

- All jobs can be broken into various aspects and each of these can be measured in some way.
- Goals may be quantitative – incorporating some objective measure.
- "Increase membership by 10%" is a quantitative measure.
- Goals may be qualitative – with criteria agreed by the manager and the employee. But even qualitative performance improvements can be measured quantitatively.

"Improve client satisfaction so that, on average, there are no more than five service complaints in the week following a home game" is a qualitative goal, but it is measured quantitatively.

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### **Key question:**

Does this goal set out how the results will be measured or assessed?

### **Agreed**

- Involve workers in goal setting - people will be more committed to achieving goals they agree with. Your role is to ensure that the goals are of a sufficient standard, provide enough challenge, and fit in with the organisation's goals and priorities.

### **Key question:**

Is the worker, and anyone else who needs to be involved, committed to the achievement of this goal?

### **Realistic**

- Goals should be challenging, but not so out of reach that people won't strive to achieve them. Equally, there's no sense of achievement in reaching a goal without some effort.
- Goals should be in line with the organisation's strategies and plans.
- Goals should be achievable within the individual's current skills and abilities – unless learning of new skills is part of the goal.

**Key questions:**

Does this goal present the worker with a challenge?

Does the worker believe it is likely that the goal can be met?

**Time-framed**

- Goals should have a time frame or target completion date. "...by 31 December" is better than "...soon" or "within a reasonable timeframe".
- Time frames or target dates should be staggered so that the worker is not trying to get everything completed for 31 December.
- Target dates may be less effective if they are too far away (eg one year) – unless the project is a major one. It might be better to set some intermediate goals for completion at, say, three month intervals.
- Target dates must be realistic. How often do we under-estimate how long a task will take?

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**Key question:**

Does the worker know when this goal should be reached? Does he/she know how and when progress will be reviewed in the meantime?

*Reviewing performance*

Performance plans should be reviewed in the light of what the worker actually achieved. However most managers don't like doing performance reviews, and many workers have unhappy experiences of their performance appraisals.

It shouldn't be like that. If the manager and the worker discuss the job and its priorities, how the worker's performance and contribution can be improved – and agree on performance plans and goals – then a performance review should hold no fears for either of them.

The purpose of the review is not to fix a worker's behavioural or performance problems once a year or every six months. Problems should be discussed and dealt with as they arise and the manager should provide regular coaching. Regular performance reviews are an opportunity to take a longer-term view of the job and its responsibilities and the worker's performance.

### **What do we review?**

The performance plan agreed to at the beginning of the period or project will be the main tool for subsequent performance discussions.

- Focus on what has been achieved.
- Discuss how the work was done only where this is important, or where a new worker is still learning the job's skills or contents.
- Personal characteristics and behaviours – e.g. working with others, managerial style – will be relevant in some performance discussions, but talk about what people do rather than who they are. You can influence a person's performance, but not his or her personality.

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### **Who does the review?**

The worker's immediate supervisor is usually best placed to review performance. To ensure fairness and consistency, the manager's supervisor might later check the review. You might consider inviting the worker to carry out a self-review before the performance discussion.

Your review set-up will depend on how you are organised. In team-based work groups, all the team members might be invited to contribute. This can include seeking the views of team members on the style and performance of their manager. Where there is significant contact with people outside the organisation, or with elected officials, their views might also be sought. For specialist positions – e.g. medical specialists or coaching experts – professionals outside the organisation might be involved in the review.

Where a chief executive or specialist adviser is responsible to elected officials, it is important to work out in advance who will conduct the review (and how it will be conducted and what it will cover). A similar process needs to be agreed if any external body – such as a funding agency – is involved in the performance review.

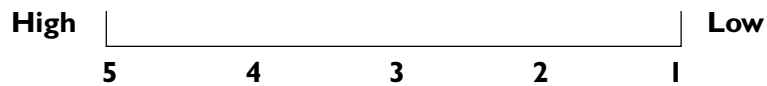
A simple approach is sometimes best. A review process involving more people becomes more cumbersome – and potentially more threatening to the worker.

### How is the review done?

A variety of performance review methods are used. Some are very simple, others much more complex. The most useful methods enable you to compare a person's actual performance with previously agreed standards and goals.

### Using rating scales

1. Consider using a rating scale (such as the one below) for performance assessments. In its simplest form, a rating scale is made up of a series of numbers, but offers no more information.



2. More detailed rating scales (below) probably help managers to make more accurate performance assessments and help workers to better understand the rating.

**But be aware that these assessments are judgmental, rather than descriptive, and it may be difficult for workers to relate the rating to their performance standards, goals and achievements.**



3. The rating format below meets all the objectives because:
  - It rates performance in each key responsibility area, so the review focuses squarely on the job description.
  - It is also based on the current performance plan and priorities (as agreed by the manager and the job holder at the beginning of the review period) so is as current as possible.
  - Actual performance is recorded so that both the manager and the worker are clear about what has been achieved.

Note that there are only four performance ‘ratings’ or descriptors: performance meets or exceeds the standards or requirements - or it does not. And there is no middle point (3 on a 5-point scale) to tempt managers towards the ‘average’: they have to assess the worker’s actual performance.

<b>Key responsibility (Take from the job description)</b>			
<b>Performance goal (Take from the current performance plan)</b>			
<b>Performance achieved (Record measurable results in terms of plan goals)</b>			
Results consistently exceed job requirements	Results consistently meet job requirements and exceed requirements in some areas	Results overall meet job requirements	Results do not meet job requirements

*The performance discussion*

Reviews can be carried out by the organisation’s manager or chief executive – and never shown to or discussed with the worker. This approach is a waste of time if you want to help people develop their performance and potential.

It’s much better for the manager and the worker to sit down and have a detailed discussion of the job holder’s performance.

They should:

- review the job description – Is it still relevant? Is it up to date? Does it still accurately describe what the worker does?
- review results and achievements against the agreed performance plan.
- set new performance standards and/or goals where necessary.
- discuss any training or other support (e.g. additional resources, new equipment, assistance from the manager) which would help the job holder achieve better results.

## *Plan your performance discussion*

### **Warm up**

The first few minutes of a performance discussion can be a time for nerves and apprehension. Managers don't like playing God and workers don't like being judged! Making work-related 'small talk' might ease the tension, but make sure the worker understands the purpose of the meeting.

### **Job responsibilities**

Get the worker talking about the job and its responsibilities and priorities. This will get him/her involved right at the start. If you start with your views, the discussion will probably continue as a one-way communication. Use these questions to get the discussion started:

- What do you see as your key responsibilities at present?
- What are the priorities? Why?
- What would you change in your job? In the organisation?
- How could we use your talents and time better?

### **Performance goals**

- Review the performance goals set at the last discussion.
- How do you feel about the goals we set?
- Have any of them proved to be inappropriate? Why?

### **Accomplishments and results**

Begin with a general discussion. If you go straight to a review of the performance targets, the discussion may become centred on what has not been achieved and whose fault that was!

- How do you feel the job is going overall?
- What has interested you most in your job in the past year?
- What have been your major accomplishments?
- Where do you think you are being most effective?

## **Areas for improvement**

Keep the discussion positive and forward-looking. Focus on how to improve existing performance and overcome any problems or barriers. Try to avoid allegations of fault and blame. Don't shy away from justifiable criticisms of the employee's behaviour or performance – but keep the criticism descriptive rather than personal.

- What disappoints or frustrates you most about the job at present?
- Where do you feel least effective?
- What can I do to help you be more effective?
- What extra help or support could I give you?

## **Improvement plans**

Agree on performance improvement plans and goals for the next period. Both the manager and the worker might want time to think about priorities and timing. That's fine. Don't impose your plans on the employee – but be clear that the worker's plans must be in line with the organisation's goals overall.

## **Assessment**

Remember that the purpose of the performance review is to tell the worker what you (and the organisation) think of their performance and contribution. Choose your words carefully. Keep the assessment balanced. Be descriptive rather than judgemental. Be open and honest. And give praise where it is due.

## **Conclusion**

Ending a performance discussion can be more difficult than getting it started. Ask if the worker has anything else to discuss, summarise the discussion, agree on future action, thank him/her for giving time and effort, and end the meeting.

## **Giving feedback**

Providing workers with feedback on their performance is one of the key skills in managing performance. Feedback is as important when things are going well as it is when they are not. Managers who say Well done and Thank you will get more attention when the message is a negative one.

*Effective feedback is:*

- specific rather than general
- descriptive rather than evaluative
- focused on behaviour that can be changed
- concerned with the what of behaviour, not the why
- timely and relevant to the issues being discussed.

### *Performance problems*

Problems with worker arise from time to time. In most cases, the problem is not with the worker but with his/her behaviour or performance. Trying to fix a problem worker leads to frustration and anger. Dealing with that person's performance is more likely to lead to an improvement.

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First, identify whether your worker can't or won't perform. Use this checklist to help:

- 3 Can't perform due to a lack of the knowledge/skills needed for this job;
- 3 Can't perform due to a lack of the resources needed for this job;
- 3 Can't perform because of some temporary or permanent disability;
- 3 Won't perform because ...

#### **1. Can't perform**

These situations require relatively straightforward responses. These include providing training or work experience so the person can develop the missing knowledge and skill; recruiting or reassigning people (perhaps temporarily) who have the necessary skills and knowledge; or allocating more/different resources.

## **2. Won't Perform...**

Here you have a major challenge! It's difficult when a paid employee is involved; it is even trickier when you are dealing with a volunteer.

Remember that volunteers should also be expected to meet the organisation's standards – and provided with the skills, information and support they need to perform.

Do something.

Performance problems must be dealt with as soon as they arise. Too often, managers are reluctant to confront the problem and nervous about the worker's reaction, so do nothing in the hope it will correct itself. It won't!

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Problem behaviour left unchecked can get worse, or become regarded as part of normal behaviour. A manager's failure to act gives workers the signal that performance standards aren't taken seriously and don't have to be met.

Be clear and up front.

Remind the worker of the performance standard and ask if there are any reasons why it is not being met. That will tell you quickly whether the individual is unable or just unwilling to perform to the required level. Often the fact that you have noticed will be enough to get the worker focussed on the acceptable performance level.

Where the performance of a previously satisfactory worker falls away, you might have other problems to deal with. But until you talk with that person, you can't know what those problems are and have no opportunity to indicate that you are willing to help the individual work through them - provided their performance returns to an acceptable level.

## *A Sample Procedure for Solving Performance Problems*

### **Arrange to meet**

Make sure the worker clearly understands that you're meeting to discuss a performance problem.

I want to talk with you about your reports to the executive committee.

### **State the problem**

Plan what you want to say, in observable and measurable terms. Describe what you expect the performance to be, what is actually happening, and the effects of the current performance.

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We need to have your reports ready 10 days before the meeting so I can review them, discuss them with you if necessary, and have them finalised for distribution to the committee one week before it meets. At the moment, I am not getting to see them before they go out – which can make it difficult for me to deal with questions at the meeting. I know they're your reports, but I have to take ultimate responsibility for them.

- Get the worker's comments

Do you agree with my description of what is happening?

How do you feel about the situation?

- Analyse the problem

Discuss the possible causes of the problem. Try to identify any contributing factors.

Why is there a problem getting the reports to me?

What's holding you up? Who else is involved?

- Look for a solution that suits everyone

What suggestions does the worker have for solving the problem? If the individual doesn't come up with any solutions, suggest a course of action and seek a response. Summarise.

How do you think we might solve the problem?

How would that work?

How would you feel about ..... ?

- Assistance and follow-up

Find out what help might be needed and be specific about the assistance you will provide. Be clear about the actions to be taken. Follow-up and review each time the work task has to be done – until actual performance meets your expectations.

How can I help you to get your reports drafted sooner?

How long do you think it will take to get this problem resolved?

Let's make a diary note to meet two weeks before the next committee meeting to see how your drafts are coming along.

### *Disciplinary action*

Disciplinary action should be a last resort. Too often a manager's first response to performance problems is a knee jerk one, which is unlikely to encourage most people to take steps to improve their behaviour or performance. In addition, taking disciplinary action can be a legal minefield requiring specialist advice.

Before even considering talking to an employee about performance problems you must ensure your policies and procedures on disciplinary action are legally correct. Seek expert advice on the appropriate disciplinary procedure for your work and organisation.

## **5. Developing people and performance**

Training is not the answer to all performance problems. Sending someone on a course might seem an easy solution but it won't always be effective in improving the performance.

The focus for learning and training should be on equipping people with the knowledge and skills they need to meet the performance requirements of their jobs. The most effective training often occurs on-the-job where everyday activities are turned into learning opportunities.

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### *The manager as coach*

Sports administrators will be familiar with the benefits and techniques of coaching. While not a substitute for other forms of training, it is an on-the-job supplement that helps people improve how they apply knowledge and skills gained in other ways.

- Coaching is a one-to-one process, in which a worker receives information or support from a manager, a work colleague or a specialist.
- Communication in the coaching process is two-way, and concerned with discussion, discovery and understanding rather than simple transfer of skills or knowledge.
- Coaching has a problem-solving focus.

*Three things are needed if the manager's role as coach is to be effective:*

*Mutual respect.* The manager and the worker must accept that they depend on each other. Based on the contribution each can make, respect can grow as part of their developing relationship.

*Supportive environment.* The working environment will be supportive where the partners have respect for each other. Frustrating as it may be for the manager, mistakes have to be allowed (even welcomed) as part of the learning process – although repeating the same mistake might suggest the employee isn't learning very well!

*Trust.* Where there is fear, there cannot be trust. So the workplace must have an atmosphere of trust, where communications are open and honest, and where people feel free to offer ideas and suggestions.

## Are you a good coach?

Complete this questionnaire to decide what coaching means to you and how it relates to your work. (Think of occasions when you are helping others with their work problems.) Check your score below.

**1. During a typical month, do I spend at least two hours developing each of my staff?**

- A. Rarely
- B. Occasionally
- C. Usually
- D. More than two hours

**2. Do I:**

- A. Plan in advance specific coaching assignments or learning opportunities for my staff?
- B. Keep an eye open for situations I can use for coaching purposes?
- C. Allow my staff to learn by experience that comes their way in the normal course of business?
- D. Deliberately create coaching situations - even at the expense of some immediate operational efficiency?

**3. When I am away, who does my work?**

- A. Someone does the urgent things - the rest can wait
- B. My boss
- C. My staff
- D. Nobody - only I can do it properly, so it waits until I return

**4. If the performance of a staff member clearly indicates a weakness in an area where I have special expertise, I am likely to:**

- A. Tell the employee exactly what should have been done and ensure that someone gives close supervision next time?
- B. Avoid giving the employee that kind of work in future?
- C. Send the employee on a course?
- D. Get the employee to do another job of the same kind, ask for regular progress reports, and review and discuss problems as they arise?

**5. If a member of my staff comes and asks me what to do about a problem which has come up in a delegated task, do I:**

- A. Tell the employee to come back in a few days when I have had time to think about it
- B. Say politely that it is the employee's job to find the answers, not mine?
- C. Tell the employee what to do?
- D. Ask the employee for ideas on what should be done, and how?

**Scoring:**

Use this grid to score your answers and then total your score. If your score is close to the maximum (20), you already have a positive approach to coaching. Those who have lower scores can go back to individual questions to identify areas where their performance might need to improve

	<b>A</b>	<b>B</b>	<b>C</b>	<b>D</b>
<b>1</b>	1	2	3	4
<b>2</b>	4	2	1	3
<b>3</b>	3	1	4	2
<b>4</b>	3	1	2	4
<b>5</b>	3	2	1	4

Richard Rudman (1995), *Performance Planning and Review*, Pitman Publishing, Melbourne, pp 151-2

**Training programmes**

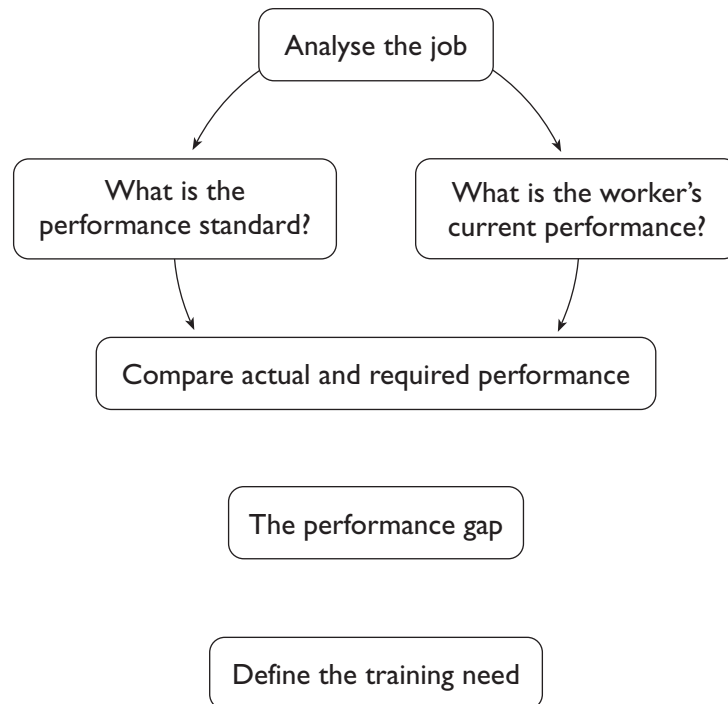
Before introducing any training programme, ask two questions:

- What training is needed by the organisation? What training do individuals need?
- How should the training be delivered?

The answer to the first question will be found in your job descriptions and in performance reviews. Look also to the organisation's future plans: they might need people to have new or different knowledge/skills from those required for their present jobs. Training and development is not just concerned with fixing present performance problems: it should also help people and organisations prepare for their futures.

### What training is needed?

Follow this flow chart to determine what training is needed – not just to fix present problems, but also to meet future performance needs.



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Now ask yourself these four questions:

- Can this person be trained?
- How should the training be organised so that the individual learns most effectively?
- How do we make sure the person understands the reasons for the training, and its objectives?
- How will we ensure that the new learning is applied on the job?

## **Designing the training**

Follow this sequence where you're deciding on a training programme – use the same questions if you are considering sending someone on a course.

- What are the objectives of the training? (For an outside programme, are the course objectives consistent with your training objectives and your employees' learning needs?)
- How is the training to be carried out?
- Where, when and by whom?
- How will you measure the effectiveness of the training?

The first question is probably the most important. Many training programmes start with good intentions but have vague objectives, and leave everyone unsatisfied.

Managers should discuss with people why they have been selected for a training programme, to agree on any performance improvements or changes which should result from the training, to set their shared learning objectives, and for a briefing on what they might expect at the course. Selection for a training programme should be a commitment to performance and professional development, not just a means of correcting a fault or weakness.

### **Was the training effective?**

Managers have two important roles in checking the effectiveness of any training:

#### *Training evaluation*

Most training course participants are asked to fill out an evaluation form at the end of the programme. These are often known as 'happy sheets', because they're less concerned with training effectiveness – which can't be assessed in any case until the learner gets back on the job – than with whether or not the trainees enjoyed themselves and had a good lunch!

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A few days or weeks after the training is complete, the manager should ask these questions:

- How well were our learning objectives met by the course?
- How has the worker's performance or behaviour changed?
- How has this been of benefit to the organisation?
- What is the worker's assessment of the training programme, the trainer, the organisation and the facilities? (This information will help you decide whether to use the course again.)

### **Handling re-entry after a training course**

- Managers should treat training seriously – not as a holiday activity. Don't welcome someone back from a course by saying: "Okay, you've had a few days off. Time to get down to some work."
- Consider having a 're-entry' strategy for when the staff member returns to the workplace. That strategy should be based on discussions and plans agreed by the manager and the staff member. It should seek to:
  - Give the trainee every possible opportunity to practise newly acquired skills and apply new knowledge on the job.
  - Reinforce the off job learning
  - Give the staff member every opportunity to demonstrate improved performance
  - Show that the organisation takes training seriously
  - Share the new learning as widely as possible in the organisation
  - Don't ask staff member to write a report. Get them to tell other staff what was covered/learnt on the course, what new ideas were gathered, what suggestions there are for system changes or performance improvements – and let people discuss and implement changes if appropriate.

## **6. Rewarding and recognising people and performance**

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Make a list of all the ways your organisation rewards and recognises people and their performance. The items you have listed can probably be divided into three groups:

### *Pay and benefits*

Wages and salaries, fringe benefits, holidays, superannuation and 'perks' like club memberships are common.

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### *Workplace and job-related advantages*

People can be motivated by a range of 'benefits' which mainly have value only in the mind of the individual. They include the job itself, work group relationships, the development of knowledge and skills, and the opportunities to make a contribution to something the individual regards as worthwhile.

These 'benefits' can be more powerful than pay and benefits when it comes to rewarding past performance and encouraging future performance. Ask any successful competitor which was more satisfying – the money or the medal?

## *Symbols and recognition*

Sports organisations have long rewarded the achievements of competitors with medals, cups, trophies, ribbons and certificates, and the contributions of officials with life memberships, gold watches and other gifts. This symbolic and public recognition of performance excellence could be extended to staff members or volunteers.

Often, saying 'thank you' and 'well done' loudly and publicly can be a very effective reward for workers' performance. Many New Zealanders feel uncomfortable about giving praise. Here are some hints to make it easier:

- Focus the recognition. Thank workers for a particular task well done. Don't talk about anything else, or the effect will be lessened.
- Remember everyone. If you have workers in different locations, who don't see you every day, use the fax, or e-mail or voicemail to send them 'thank you' messages.
- Share the recognition. If you get recognition, acknowledge that you had the help of your workers, and do something tangible to share that recognition.
- Symbols last longer than cash. A gold watch is worth more than what it cost. But symbols need not cost much to be effective. Think of a scheme for your organisation.
- Involve your volunteer leaders. Ask the club president or a similar official to be present when you publicly recognise staff contributions or achievements. Or get the volunteer leader to phone through thanks to an employee (or a volunteer worker, of course) who has done something special.
- Share the workload. Recognise a worker's outstanding skill or expertise by using that person to coach or mentor others. It's a public statement of professional respect and personal trust.
- Share the positives. Listen out for positive comments, and repeat them to the people concerned as soon as you can.

## **7. Managing the team**

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Many organisations now place considerable emphasis on teams and teamwork. As anyone familiar with team sports knows, the strength of the team lies in its ability to make the most effective use of the different skills and talents of its individual members.

Once individual team members understand how they can best contribute to the team's work, then achieving goals and objectives becomes possible and enjoyable. The challenge for the team leader is two-fold:

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- To identify which skills and talents are needed for a particular task.
- To encourage team members to use their individual strengths and abilities to achieve an overall objective.

At the same time, the team leader must balance each team member's personal aims and agendas with the wider needs and objectives of the team.

Teams are usually more flexible and powerful than individuals. In small organisations, team-based activities make it easier for paid staff and volunteers to work together on larger scale projects. Teams are also developmental, because they allow their members to learn from each other.

## *Building a team*

Whether you are putting together a team for the short term (e.g. to organise a tournament) or the long term (i.e. your chosen approach to working), some general guidelines apply:

Clear objectives. The team and its members should have a clear objective – and should regularly check their behaviour and progress against that objective.

Commitment to guidelines and procedures. The team must develop operating guidelines and procedures that all team members must commit to following until the objective is reached - even when they don't agree with all of them.

Strategies for working together. The team must be given time to develop strategies and procedures to allow members to work together effectively. Throwing a group of people together without giving them time to work on this is not team-building.

Everyone represented. Team members should represent all those areas of the organisation with an interest in the outcome of the work – and they should be able to refer back when key decisions are to be made.

Individual talents identified. The skills and talents of each team member must be identified and assessed in relation to the task ahead. Who is best equipped to deal with situations as they arise?

Appoint a team leader. A key member of the organisation should be available as team leader, team adviser or team supporter – to act as the team's advocate if necessary and to signal that this is an important task.

Recognise effort. The organisation must regularly recognise the team's efforts and show that it values what is being accomplished.

## *Directing the team*

How is the team going to be led? There are two main options:

- Leader-directed teams have a team leader who sets the agenda, runs its meetings, allocates tasks, sets goals, and has accountability for its results. The team leader usually picks the team members, and must then keep them focussed on their tasks and on the agreed goals.
- Self-directed teams are usually made up of people with different skills and talents from different parts of the organisation. As the name suggests, these teams rely on internal leadership and manage themselves. They are given a task and a completion date, then left to get on with it. The risks are obvious.

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### **Tips for leading a team:**

- Set out the team's objective so members are enthusiastic and committed to achieving it. Act as the team's advocate to other people and other groups when needed.
- Ensure the team represents all parts of the organisation with an interest in the task or project. There's no magic size for a team. Larger teams may take longer and cost more – but might be worthwhile in getting a more widely accepted outcome. Smaller teams might be more efficient, but their decisions might not be as well-informed nor as welcomed as those of a larger group.
- Allow conflict within the team, so long as it is part of a creative problem-solving process and does not become destructive or personal. Team members should be able to challenge each other's ideas, and to disagree respectfully.
- Celebrate the success of the team in as many ways as you can.
- Use the team experience as a learning opportunity and as input for performance reviews. Ask team members to think about how the other members participated and contributed. Then get them to discuss and provide feedback to each other. You might ask for a summary to be used in an end-of-year performance review.

## 8. *Managing volunteers*

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Volunteers are the lifeblood of New Zealand's sport and leisure industry. Over the years they have given their time, skills and energy to make sport happen. Money could not buy their collective wisdom, experience, time and leadership.

SPARC recognises that volunteers are sport's most precious commodity. Its vision is to have a New Zealand where volunteers are heroes – where they are thanked, rewarded, supported and offered incentives for their contribution to sport.

Volunteering has changed in recent years. Sports organisations need to be aware of the societal and lifestyle changes that have had an impact on volunteering – and to develop strategies to keep these people involved. This section is about increasing our understanding of the people who give so freely to sport, and to making a positive contribution to their lives as sporting volunteers.

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### *The Changing Nature of Volunteer Service*

Massive changes in the society and the working world in recent years have had an impact on sport and leisure – and on the world of volunteering. Perhaps most notable is the decline in people who want to make a long-term membership commitment to an organisation.

Modern volunteering is more work-like, there are greater expectations on people who give their time to sport, including demands for higher skill levels, greater time and energy commitment, more client focus, more accountability.

Managing volunteers in this environment can be as difficult as running a successful business, but it offers huge rewards. The challenge for sports organisations is not just to adapt to this environment, but to act on the new opportunities that change inevitably brings.

A successful volunteer programme requires commitment at all levels of an organisation.

### *Trends in Volunteering:*

- More women are in now paid work leaving them less time for unpaid work for sports organisations, charities and hobby groups.
- At least quarter of adult New Zealanders are involved with sport – coaches, instructors, officials, parent helpers and administrators – equates to over 700 000; more young people.
- More people are working weekends, meaning they need flexibility in roles if they are to gift some time to sports organisation..
- People face more competition for their ‘spare’ time, and find it more difficult to commit to one organisation – especially to a role that lasts a year or more.
- Growing numbers of active, older people are looking for opportunities to become involved in volunteer service at the end of their paid working careers.
- Many traditionally unpaid or volunteer roles in sports and recreation organisations have become much more complex. It is increasingly difficult to get people with the necessary skills and experience to give the time these roles demand.
- The distinction between volunteers and employees is becoming blurred in many organisations as they become more professional or are forced to recruit paid staff for roles formerly held by volunteers.
- A youth ‘bulge’ in many areas of New Zealand, especially within Maori and Pacific Island populations lends itself to getting younger people into volunteering – Australian research suggest that if not involved by the age of 20, they are unlikely to ever be.

## *Recruiting and Selecting Volunteers*

The changes outlined above make recruiting, managing and retaining volunteers more challenging – and ultimately more rewarding. Both the organisation and its managers need to develop an appropriate philosophy or strategy for their engagement of volunteer workers.

That philosophy or strategy should cover the four stages of the volunteer's life cycle:

- recruitment and selection
- information and orientation
- involvement
- retirement or replacement.

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## *Defining Volunteers Roles*

Your organisation will generally have two types of volunteers. Although these roles often overlap, it is important to understand the difference:

1. Policy Volunteers
2. Programme Volunteers.

### **1. Policy Volunteers**

Policy Volunteers are elected by members or selected (headhunted). They are accountable to your organisation's members regardless of whether you employ paid staff.

Policy volunteers must be committed to your organisation, its purpose and philosophy.

It is increasingly common for job descriptions clarifying all aspects of the job to be used when appointing policy volunteers. This also helps when replacing these people 'Peer review' systems so the performance of their policy volunteers can be assessed may be a good tool.

[The module in this series titled Legal Obligations of Boards will be a useful reference for those wanting to find about more about this area].

## 2. Programme Volunteers

Programme volunteers carry out the organisation's operations or activities. Tasks need to be broken down, and then simple job descriptions can be developed for each of these. These will make you think about the work you want done and help identify who could do it.

Ask how many of these tasks:

- need to be performed in the traditional way?
- need to be done at the traditional time?
- need to be done by someone who has played your sport?
- need to be done by the same person all year?

### *Selection and Orientation*

Naturally you want to attract the 'best' people you can to your organisation. But the 'best' people are not always the ones who volunteer. Getting the wrong person involved because you are desperate to fill a position or get a job done is a poor option. Take your time! Think about the skills you need, the roles people might play, the personal characteristics those people need, and how they will relate to your other staff (paid and unpaid).

Many experts recommend all programme volunteers undergo a basic interview to assess both parties' objectives and get a good match. Written job descriptions and personality profiles can help to clarify what you want done – and what you are offering people who volunteer. Confusion at this point can leave a bad taste for your organisation - and any potential volunteers.

### *Job descriptions and person profiles*

Job descriptions and person profiles [see the Recruitment and Selection module in this series for more detail] are a great starting point for recruiting volunteers. Give copies to people who offer themselves as volunteers. *Ask them to assess whether they have the knowledge, skills and other identified characteristics. And whether they see themselves fitting into the roles outlined in the job description(s).*

Job descriptions for volunteers' roles should be realistic about the work and the time commitment you expect. Don't 'talk a job up' in a bid to encourage a potential volunteer to take it. And don't underestimate the time involved: your committee meetings might only last three hours, but effective committee members probably put in another hour or two in preparation and have related conversations between meetings.

## *Sample Job description*

### *Events Host*

This is a 'front line' job for the organisation's forthcoming 'event'. You will introduce event visitors to the various activities and exhibits and help them to get as much information and pleasure as they can from the event.

### **Involvement**

- You will be expected to take part in a training session two weeks before the event. This will provide you with the necessary information and understanding of the various activities and projects on display.
- Each host will be rostered 'on duty' for two hours at a time.

### **Time commitment**

- The training session will last for four hours.
- Each host will be asked to work a minimum of three two-hour shifts over the three days of the event. Times will be arranged to suit the hosts.

### **Host characteristics**

- You should be interested in our activity, and have some relevant knowledge or experience.
- You must be able to communicate clearly with our visitors.
- You need to have patience and must feel comfortable around excited children.

### **Benefits**

- You will have fun and enjoy yourself doing something worthwhile.
- We will provide you with light refreshments at the end of each 'duty period'.
- We will give you a certificate of appreciation.

For further information, please contact Jo Smith (Tel 123 4567)

### *Volunteer recruitment tips:*

- Some organisations appoint a Volunteer Co-ordinator who acts as the Human Relations advisor and gives people an easy point of contact for their queries. It also sends a message that an organisation is serious about volunteering.
- From the outset, try to identify any potential volunteer who might later be disappointed or a disappointment. It may be better not to let that person get involved.
- Make volunteer recruitment part of your overall staffing strategy.
- Look for opportunities – through such outlets as speaking engagements, media stories and personal contacts – to ‘sell’ the idea of volunteering. Let people know that volunteering can be fun.
- Include information about volunteer opportunities in every piece of mail that leaves your office.
- Be clear about the job – the kind of work, the time commitment, the knowledge and skills required.
- Select volunteers carefully – to ensure they are suited to working with your organisation and its paid staff, that they will fit in with the organisation and its culture.

## *Information and orientation*

Finding the right volunteer is only the start of the process: getting volunteers involved in the organisation's life is the next challenge. As with any new worker, this orientation should start with how they fit into the big picture.

### **1. Induction Programmes**

Consider running group induction programmes for new people. In sport, this can work well for a group of new committee members. However it is more likely that you will be introducing new people to your organisation individually. Use the checklist on page 8 of this guide.

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### **2. Orientation Handbooks**

An orientation handbook for new volunteers at all levels will help people feel comfortable with the organisation they have joined: sharing information is a good way to lay worries to rest. The handbook might include:

- information about the organisation's aims, activities and history – so that volunteers quickly get a feel for the organisation they are now involved with;
- a description of the organisational structure, the roles and responsibilities of the key paid and unpaid positions, and your decision making processes – so that volunteers know where decisions are taken and where everybody fits in;
- any rules or codes of practice – or other information about how people are expected to behave.

*[The module in this series titled *Legal Obligations of Boards* will be a useful reference for those wanting to find about more about this area].*

### **3. Newsletters/Technology**

Volunteers deserve to be kept in touch with what is going on in your organisation. Include volunteers on staff circulation lists where appropriate. A basic one page newsletter is still a very good communication tool. Little and often is best!

Modern technology has made communication easier and faster. Email and websites can provide instant information. However don't use this as a replacement for people contact – many people become involved in clubs for social reasons.

Volunteer workers, like your paid staff, have different information needs. eg. People serving on the executive committee will need all the details of operating plans and performance, of income and expenditure etc; people who come in to help you run a weekend tournament only need to know about the organisation of that event.

Volunteer workers often want to know more than they need. If the organisation is big enough to warrant it, and has the resources, then a regular newsletter for both paid and unpaid staff serves two purposes: it ensures that everybody gets the same information in the same way, and signals the organisation's belief that its volunteers are important and entitled to the same information as its paid staff.

### **4. Information Sessions**

Consider scheduling orientation or information sessions for new volunteers – according to their different roles. eg. a new board member will need different information from a team coach. Plan how to provide that information so that the volunteer quickly becomes effective in the new role and feels part of your team.

## *Retaining Volunteers*

People have choices! They will not stay as volunteers if their needs are not being met. Many of the aspects covered in this guide on motivating people, managing performance and developing people apply equally to volunteers.

As a manager, you have three important roles:

- achieve tasks
- build teams
- develop individuals

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*Here are some practical ideas for keeping volunteers:*

- Full and open orientation is critical. Ensure that volunteers have a realistic understanding of their role and your expectations right from the start. Make them feel welcome and a valued part of the team.
- Keep volunteers informed and involved. Over-do it if that will help. Information-sharing can encourage commitment. Take volunteers to regional meetings to expand their knowledge.
- Train your volunteers. Train people at the beginning and on a continuous basis. Use experienced volunteers to coach or mentor new people.
- Value your volunteers. Provide public and frequent recognition of their work and contributions.
- Reward volunteers. Consider running a volunteer of the week/month award; include volunteer/administrator awards in your prize giving ceremony; waive or reduce membership fees for those who give time.
- Give volunteers feedback on their work. Many people leave because nobody ever talked to them about what they were doing.
- Treat volunteers as professionals. Co-ordinating volunteers, and providing support so they can contribute fully might be a key role for one of your paid staff.
- Recognise volunteers' limits. Volunteers can't do everything – but nor can the paid staff.
- Don't waste volunteers' time. Know what you want them to do, and be ready for them to do it.

- Make volunteering fun!

### *When It's Time for a Volunteer to Leave*

#### **1. Retirement**

Your organisation must adapt to changes in people, and in the environment it operates in. While there are benefits in bringing in new people and their new ideas, it is important to hold onto the memory and history provided by its existing members.

Ideally you should have a replacement plan for club stalwarts so that their knowledge can be passed on. However this is not always practical. Some organisations put a fixed term limit on volunteer service, believing organisations benefit in the long term from regular personnel recycling. Terms should be long enough for volunteers to make a real contribution, but not so long that they feel they own the organisation and that their way is the only way.

Give public recognition when a volunteer's term ends. This is an appropriate reward for service; it is also a signal to all your volunteers that their efforts and contributions are valued and worthwhile.

#### **2. Replacement**

Can you fire a volunteer? This question is often raised. The answer lies in what is best for the organisation. If someone can't do a job, the solution is usually training. If someone won't do a job, it is an attitude issue and a process must be followed Use the process on page xx of this guide.

If a volunteer doesn't fit in, discuss the matter early. Don't let it become a major issue.

### **Exit Interviews**

You might also introduce a system of exit interviews for volunteers to find out how volunteers viewed the organisation and its treatment of unpaid staff. Keep the interview brief and the responses anonymous. This could be a job for your organisation's volunteer co-ordinator. Combine the answers so you build up a general picture. Use these questions as a guide:

- How have you enjoyed your time as a volunteer?
- How did your actual experience as a volunteer compare with the expectations you had before starting work?
- How well do you think our organisation treats its volunteer workers?
- What would you suggest we do differently?

## *Sample Exit Questionnaire for Outgoing Volunteers*

### **How well do we manage volunteers?**

1. We have a clear statement of the purpose of using volunteers.  
 Yes    No
2. We have a volunteer management policy covering recruitment and selection, roles and relationships, supervisory responsibilities, reimbursement policies, other personnel policies for volunteers, and retirement/replacement policy.  
 Yes    No
3. We have job descriptions (and person profiles) for all volunteer positions in the organisation.  
 Yes    No
4. Our volunteer recruitment policy is non-discriminatory and we try to reflect the diversity of our membership and the community at large  
 Yes    No
5. We provide volunteers with orientation, information and training to help them carry out their roles and activities.  
 Yes    No
6. We respect the abilities of our volunteers and their commitment of time and energy. We do not ask volunteers to undertake tasks which we would not assign to paid staff.  
 Yes    No
7. We plan and review the performance of our volunteers and let them know regularly how well they are doing. We also seek the views of volunteers on their own performance and on how the organisation could improve what it does.  
 Yes    No
8. We have policies and programmes for recognising the contributions of our volunteer workers.  
 Yes    No
9. We have a process for soliciting, reviewing and responding to suggestions, ideas and comments from volunteers.  
 Yes    No
10. We maintain records of the work done by volunteers, and the time they invest, and take this into account in our planning.  
 Yes    No

## *People Decisions*

### **10 ways to make them better**

1. Make sure you know what your organisation is trying to achieve and what it believes in. Then make sure everybody in the organisation knows about it.
2. Work out what results you want people to achieve and then tell them. Let them contribute to that process. And change it, if a change makes sense.
3. Write down the results of your analysis in 1 and 2 above, and make sure you review and, if necessary revise them at least once a year.
4. Make sure you select the right people for the jobs that have to be done.
5. Make your selection process for all positions, paid and unpaid, open, fair and honest.
6. Reward people for the results they achieve.
7. Make sure you tell people what is happening in the organisation. Never assume people either know or will find out.
8. If you take the organisation seriously, so will other people. If you don't, then neither will other people.
9. Set high standards for all staff, paid and unpaid, and expect people to perform.
10. Don't ask what people can do for your organisation. Ask what your organisation can do for them.

**Martin Stewart -Weeks**

**Managing Organisations Conference**

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## 9. Relationships between paid and unpaid leaders

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Tension between volunteers and paid staff often starts at the top! Many organisations have moved their administration from the kitchen table to the boardroom – but their people relations have not moved on at all. Some volunteer leaders will try to treat a highly-qualified chief executive the same way they did the long-suffering (and volunteer) committee secretary.

The tension between a volunteer leader and a paid chief executive is similar to that which exists between the board chair and the chief executive of a commercial organisation. The ideal solution is to have the board stick to governance issues and not get involved in management. But keeping the two separate is not that easy.

Successful managers in commercial organisations will tell you is that it is critical to have a good relationship with the boss – whether that person is chair of the board or another company executive. Here are some for managers/chief executives:

- Recognise that you (as chief executive) and your boss (the national president or the head volunteer you report to) have a mutually dependent relationship. Neither of you can be effective without a positive and supportive relationship.
- Your relationship must be that of adults, not of parent and child. You should share the responsibility for managing the relationship – but recognise that you probably have more time and information to invest in managing the relationship.
- From the outset, invest time and energy in developing a relationship that suits each person's style, makes best use of their talents, and meets their respective needs.
- Your boss (together with the other members of the executive committee or board) depends on you for information and informed advice. Other people can offer their opinions, but you should be the most reliable and regular source. Be generous and open with your information: managing the news may keep you powerful, but has a nasty habit of rebounding later.

- Ask what the boss wants – don't assume. Some will spell out their expectations in detail and you might want to discuss them. But most of your volunteer leaders will be nervous of their relationship with paid staff. Discuss with them what you consider to be the respective roles of volunteer leaders and paid staff – and seek their agreement. Write it down so that everybody knows.
- Your boss is a busy person, with only limited time and energy for your organisation. Every request you make uses up some of that time and energy. So be selective in calling on those resources. Don't waste them on trivia. An early discussion of your respective roles and relationships – and your boss's expectations – will help you decide what is important.
- Remember that other people will be watching the relationship between you and your boss. If they approve of what they see, people are more likely to agree to take on the role of volunteer leader – making your job easier.
- Expect to be around longer than any of your bosses. This might give you comfort in those moments of sheer frustration.