



# **Volunteer Involving Organisations:**

# Comparing the management of volunteers in Western Australia in 1994 and 2009

# **Initial Report**

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MURDOCH BUSINESS SCHOOL

This project was funded by a 2009 Strategic Research Fund Grant from Murdoch Business School, and supported by Volunteering Western Australia.

**Acknowledgements and special thanks:** To the volunteers, members and staff of volunteer involving organisations who participated in this research.

Assistance provided by:

Kim Yue – Research Assistant - Murdoch University

Denise Bertilone – Volunteering WA

Sallie Davies - Life member Volunteering WA

Published May 2010

ISBN 978-1-875793-23-5

TITLE: Volunteer Involving Organisations: Comparing the management of volunteers in Western Australia in 1994 and 2009 - Initial Report

Authors: Paull, Megan; Holloway, David; Burnett, Hermina

Published by Volunteering Western Australia.

This study was funded by a Strategic Research Fund Grant from Murdoch Business School, Murdoch University, with assistance provided by Volunteering Western Australia,

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## **Foreword**



Essential for the fulfilment of the organisational objectives of many in the third sector are volunteers. This report investigates the trends about the management of volunteers by comparing the results from a study (completed by Dr. Megan Paull in 1994) with one completed recently online. This initial research report is part of a larger project, which examines the management of volunteers, governance issues and social entrepreneurship issues in the volunteering sector.

Volunteering WA has supported this research and encouraged member organisations to participate because the findings will enable organisations to better understand their own people and their volunteers. The need for greater accountability from donor bodies and government also provides an impetus to ensure that our member organisations are achieving their goals in an effective and caring way.

The report first sets out to identify the approach used to collect information as well as explaining the main purpose of the research. The idea was to identify what changes had occurred over time. The report identifies the profile of the respondent organisations. The main part of the report identifies and analyses the main practices for the management of volunteers ranging across such important issues as recruitment, training, feedback, recognition and dismissal. Changes from the results obtained in 1994 are an essential part of this analysis.

The report findings are relevant to all our members and I would recommend the report to you. I would like to thank all those who have been involved in this project. The need for organisations to learn and improve is a vital part of this type of research.

Mara Basanovic CEO Volunteering WA



Murdoch University is a research intensive university with a commitment to innovation, equity and sustainability. Community engagement and social justice have been hallmarks of our profile since our establishment in 1975.

Murdoch Business School is proud of its growing focus on research in the areas of volunteering, nonprofit organisations and social entrepreneurship.

This report is the result of a small grant made to the research team by Murdoch Business School as part of the Strategic Research Fund programme at Murdoch.

On behalf of the School I extend my thanks to Volunteering WA, and to the respondent managers and volunteers for their input into this research. I look forward to a continued association.

Professor Manzurul Alam Associate Dean – Research Murdoch Business School

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## Volunteer Involving Organisations: Comparing the management of volunteers in Western Australia in 1994 and 2009

### **Initial Report**

## At a glance:

In the last 15 years:

- The Volunteer Centre of Western Australia now operates as Volunteering WA
- Numerous Volunteer Resource Centres and referral services have been established around the state
- Volunteering Western Australia published standards in the mid 1990s
- The National Standards for Involving Volunteers in Not-for-Profit Organisations were developed an issued in 1997, revised in 2001 and reviewed in 2009.
- 2001 was the United Nations International Year of Volunteers which raised the profile of volunteering
- Western Australia became the first state to appoint a Minister with responsibility for volunteers in 2001
- Research interest in volunteers has grown across the range of sectors and funding opportunities now exist for such research e.g. Lotterywest Social Research Grants.

## This research has found that:

- Word of mouth is still the most common method of recruitment.
- Referrals from VWA and the VRCs have increased as a source of recruitment.
- Organisations are much more aware of the importance of training for volunteers.
- Performance management and dismissal are still areas of concern.
- Grievance processes and their communication to volunteers are in need of some attention.
- Reimbursement of expenses continues to be something which organisations need to consider.

The companion report which is due out later in the year will address the areas of governance, social entrepreneurship, inclusion and valuing managers of volunteers.

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## Introduction

#### **Purpose**

This report compares two studies conducted in Western Australia separated by a fifteen-year period which explored the application of management theory in the management of volunteers. The purpose of the 1994 study was to gather preliminary data. The 2009 study aimed to find out what, if anything, had changed.

#### Methodology

In 1994 a survey questionnaire was mailed to a sample of the organisations registered with the Volunteer Centre of Western Australia, for completion by the volunteer manager or co-ordinator, or equivalent, in each organisation.

In 2009 the survey was administered by way of an online survey. Participants were recruited via Volunteering WA by way of an online link being sent to members in an email encouraging them to respond.

#### **Samples**

1994

Fifty (50) organisations registered as members of the Volunteer Centre of Western Australia were selected to receive the survey. The selection of the sample was determined as follows:

All organisations receiving volunteer referral from the Volunteer Referral Service (VRS) of the Volunteer Centre of Western Australia receive details of such referrals from the Service on a regular basis. In addition, all notices of meetings are mailed out to members. All the organisations to which referrals had been made in the preceding period were selected for the sample. As these numbered 38, an additional 12 organisations were selected by taking the bottom address label from each sheet of addresses for the notice of the general meeting, which was also being sent out. Thirty two (32) useable responses were returned to the researcher.

2009

Organisations were invited to participate by way of an online invitation sent out to member organisations, which provided a link to the survey instrument. The invitation was not targeted to any specific participants. Those who elected to click on the link were registered as a login, but were not obliged to continue with the survey. It was not possible to identify who elected to click on the link. One hundred and fourteen (114) logins were registered, with 64 respondents going on to complete the survey.

#### **Instruments**

In 1994 the survey instrument consisted of a multiple choice questionnaire containing questions on recruitment and selection, induction, performance assessment, job descriptions, feedback, discipline and dismissal practices in the organisation being surveyed. Some demographic information about each organisation was also sought. Space was provided at the conclusion of the questionnaire for respondents to express an opinion on "the application of business principles in the management of volunteers" and to comment on any question they wished. Apart from this optional question, the questionnaire relied on organisational knowledge and did not survey

opinion except when the judgement of the respondent was required to classify elements of the management of performance in their own organisation according to the choices provided.

In 2009 the same basic questionnaire was used with a small number of additional questions on governance and income included (these are not covered in this comparative report). Some variations were added to the original questions to recognise changing circumstances. An example of this is the inclusion of web based recruitment options such as Go Volunteer to the question on recruitment methods.

#### Limitations of study

In both versions of the data collection processes there were limitations, which need to be acknowledged. In both the data collected is limited to organisations who were contacted via Volunteering WA. In 2009 the same basic questionnaire was used and so at times while modifications were made to the survey to insert additional elements and additional questions; improvements which would have otherwise been included were left out so as to provide easier comparison with the earlier version. This has meant that some of the areas which would have benefited from more in depth investigation have not been pursued.

A further limitation to this study is its confinement to Western Australia, and the apparent lack of responses from organisations such as sporting organisations, play groups and other all volunteer organisations. These limitations will be pursued in the more in-depth work to follow this preliminary investigation.

# **Profile of Respondent Organisations**

This section of the report provides a quick overview of respondents. More detailed reports on governance, funding and management structures derived from the data collection in 2009 will appear in subsequent data analysis. This section uses data collected in 1994 and 2009 to allow a comparison between the two datasets.

#### **Organisation types**

The 33 respondent organisations in 1994 were largely service delivery organisations, and the same was true of the sample in 2009. Despite its shortcomings, for comparative reasons the same categories of organisation type were used, with an additional category of environmental organisation added in for 2009.

Table 1: Respondent organisation types

	1994	2009
Service delivery	22	35
Recreation/leisure	2	5
Campaign/lobby/action	0	0
Self help/mutual support	3	2
Research	0	0
Environmental	na	5
Other	5	11
Total	33	58

The category "other" in 1994 generated responses of *Education, Family Support, Fundraising, Resource Centre/Library and* Service <u>and</u> Recreation/Leisure

This same category in 2009 generated responses of Government agency, A large annual festival, Office works, Raising awareness, providing support, raising funds, Project delivery to member organisations, Community group support organisation, Community service, Fundraising, Child care, Opportunity Shop, Health based

#### Age of organisations

The age of the organisations which responded in 1994 ranged from just under 1 year to over 25 years of age. In 2009 the age question was changed to be a free response question which was later categorised to reduce identifiability of data. This generated data which showed one organisation was over 160 years old, with seven organisations 99 to 163. Of the 22 organisations over 25 years old, 15 were aged 26 to 50 and seven 99 years or older. No respondent organisations were between 50 and 99. Figure 1 shows the comparison of age of organisations.

35 31 30 25 22 20 13 15 11 7 10 7 5 1 0 0 Under 1 1 to 3 4 to 10 10 to 25 Over 25 **■** 1994 **■** 2009

Figure 1: Age of respondent organisations

#### Numbers of volunteers

Numbers of volunteers in respondent organisations in 1994 ranged from one organisation with none at present to ten with over 200 volunteers. Numbers of volunteers in respondent organisations in 2009 presented a different profile. Once again there were organisations with 0 volunteers, but this time there were indications of organisations with volunteer numbers in the thousands. Figure 2 below compares the two sets of data. Given that the number of respondents in 2009 is almost double those in 1994, comparisons should be made on that basis. The over 200 figure in 2009 includes 7 of 201 to 500, 1 of between 510 and 1 000, 2 of over 1 000 and two which provided answers of "hundreds" and 16 000 respectively. This latter figure comes from an organisation which appears to be part of a large festival and has a large board. Further information in this area cannot be provided in order to prevent identification.

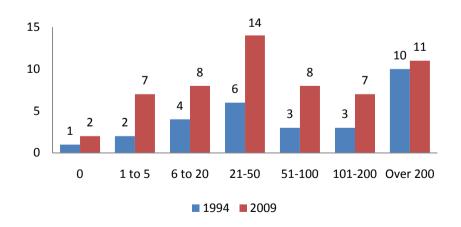


Figure 2: Numbers of volunteers

#### Length of Service of Volunteers

Information was sought regarding the length of service of volunteers. In 1994, one respondent indicated that this is dependent on the type of volunteer: field volunteer, office volunteer, committee member. Figure 3 below shows the average length of volunteer service. Two organisations indicated that volunteers either departed within the first six weeks or stayed on, in one case for up to fifteen years in the other for six to ten years. In 2009, eight organisations indicated varying lengths of service which were categorised as "varies". The answer to this question elicited some commentary including the following: 5 plus years some vollies [sic] there 25 years; anything from 1 day to 20+ years; Between 1 and 18 years, between 2-5 years but some have been here for over 25 years; From 1 to 10 years; Not available - Varies from more than 30 to less than 1 depending on circumstances of why they are volunteering.

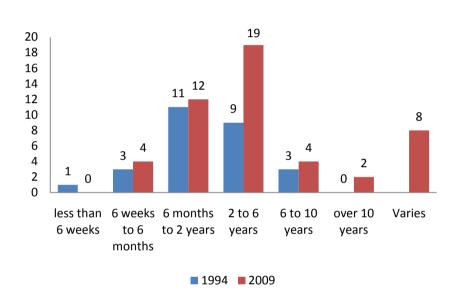


Figure 3: Average length of volunteer service

The information gathered also provided some interesting insights regarding the various patterns of retention of volunteers in organisations, and into the issue of volunteer 'turnover', which could be further investigated. Research on volunteer motivations, retention and turnover has provided evidence about a range of motivations to volunteer. Volunteers report that their reasons for volunteering include altruism and obligation as well as self improvement, social contact, or family or personal involvement (Australian Bureau of Statistics, 2007; Clary, Snyder & Ridge, 1992; Clary, Snyder, Ridge, Copeland, Stukas & Haugen, 1998). The work of Clary et al in the development of the Volunteer Functions Inventory (VFI) has divided motivations to volunteer into six groups: i. Personal values; ii. Enhancement (such as learning); iii Social (including contact); iv. Career associated with skills and networking; v. Protective (such as confidence building); and vi. Understanding (which includes personal growth). Given that motivations to volunteer include both instrumental and altruistic reasons it has been argued that self reported motivations to volunteer may not be as accurately measured as the VFI would suggest.

It has also been argued that retention of volunteers is about managing expectations of volunteers. Research into the expectations of volunteers, and the associated psychological contract has indicated that where volunteers' expectations are not met there is an increased likelihood of turnover (Colomy, Chen & Andrews 1987; Farmer & Fedor, 1999; Liao-Troth, 2001).

Respondents were asked whether they seek reasons for leaving from departing volunteers. In 1994, 28 respondents indicated that they did. In 2009, 49 organisations sought this information. The most commonly cited reason in 1994 was work commitments, with a further 6 indicating that they had gained employment in the category "other" boosting this number to 18. In 2009 family commitments was the most commonly cited reason for volunteer turnover. This was followed by work commitments, and incapacity or health reasons.

Negative responses such as *Dissatisfaction with the organisation* and *did not meet expectations* were not commonly cited reasons for leaving the organisation, but this figure is likely to be distorted as many of those who leave may choose not to declare the real reason for leaving. If a volunteer is dissatisfied or their expectations are not met, they may not divulge this to the manager or co-ordinator of volunteers.

Table 2: Reasons for leaving

	1994	2009
Family commitments	11	37
Work commitments	12*	30
Dissatisfaction with organisation	0	3
Personality conflicts	0	2
Need to move on to other activity	9	11
Retiring	6	11
Age	6	12
Incapacity/health	6	25
Not what they expected	4	5
Volunteered for set time/project ended	6	11
Other	12	5
<ul> <li>Moving away</li> </ul>	3	2
Time pressures	1	
<ul> <li>Gained employment</li> </ul>	6*	
Overload - need a break	1	
<ul> <li>Studies, job, going overseas</li> </ul>	1	
Event is over		1
Prac placement for students		2

<sup>\*</sup>NOTE: In 1994 one respondent ticked "work commitments" but indicated that this usually meant that the volunteer had gained full time employment. Thus the figures for work commitments could include other figures for gained employment added as an "other" category by 6 respondents in several different forms.

## **Volunteer Management Practices**

This section of the report follows a pattern associated with the human resource management cycle adopted for paid employees. The debate about whether the same management practices should be applied has been one which has extended over a more than twenty year period. It has, however, become reasonably well accepted that whilst there needs to be some recognition of the voluntary nature of the relationship between volunteers and their organisations, there are benefits to be gained from adopting and *adapting* human resource management practices. In the National Survey of Volunteering Issues for 2009, 70% of respondent organisations identify with having a manager of volunteers, while 17% report having no manager of volunteers (VA, 2009, p. 14). Despite this the majority of organisations report having management systems in place for their volunteers (p, 13). The debate about "managing" volunteers is further discussed in the comments section of this report, and is the subject of further consideration in the companion report to be launched later in the year.

#### **Job Descriptions**

The development of job descriptions, duty statements and other instruments such as procedures manuals which outline for the volunteer just what they are expected to do while volunteering with the organisation have developed out of a dual need to clearly communicate expectations to volunteers. In addition, these protect both the volunteer and the organisation from the inevitable fallout should the volunteer either do something which exposes the organisation to a legal problem, or fail to do something which has the same result. Whilst there is volunteer protection legislation in Western Australia (*Volunteer (Protection from Liability) Act 2002*) which offers some protection to the volunteer, and many organisations have limited liability due to associations and incorporations frameworks (e.g. *Associations Incorporations Act 1987*), there is still a need to take reasonable steps to adequately brief the volunteer. The use of job descriptions and similar instruments are not simply to provide legal protection, but also to facilitate good communication and enhance the ability of the volunteer to do what they have been recruited to do.

The question on job descriptions was included in the survey document with questions relating to feedback on performance. Respondents were asked if their organisations use "job descriptions, task lists, duty statements, assignment outlines or similar" for their volunteers. In 1994 five respondents failed to answer this question. Nevertheless the responses which were recorded for this question indicated that 19 organisations (67 %) claim to have job descriptions of one sort or another, seven (7) do not and two (2) organisations have them for *some* of their volunteer positions. In 2009, 57 responses were recorded, with 48, or just over 84% of those, indicating that they do use "job descriptions, task lists, duty statements, assignment outlines or similar" for their volunteers. Nine (9) respondents do not.

This increase in use of job descriptions or similar instruments is in line with the need promoted by Volunteering Australia and Volunteering WA, for volunteers to be given clear outlines of what it is that they are required to do. (See VA, 2001). In 2009, however, only 38 organisations indicated that they provided their volunteers with a copy of the relevant document. Of course, job descriptions and instructions can be verbal depending on the nature of the work, and such verbal instructions may not be

recognised as fitting that which is contemplated by these questions. This needs to be taken into consideration. At a national level 42% of volunteers reported not having been given a job description, but 93% reported having a clear understanding of what is expected of them (VA, 2009, p. 15).

#### Recruitment

In 1994 respondents were asked to rank sources of recruitment from one to five on a list provided. In 1994 many only indicated two sources of equal significance. The results indicated that word of mouth closely followed by Volunteer Centre Referrals were the two main sources of recruitment. Several agencies ranked two sources equal first.

The question was modified for 2009 in two ways. Additional sources of volunteers were included to reflect both advances in technology, and the creation of Volunteer Resource and Referral Centres other than The Volunteer Centre of WA (now operating as Volunteering WA). An additional category was added, that of media stories. Anecdotal evidence (e.g. from Wheatbelt study) as well as advice from Volunteering WA had indicated this was a valuable source of new recruits. The second modification to this question was to remove the complex ranking arrangement from the 1994 survey and simply ask the respondents to select up to three sources. In the preparation of Table 3 below, only the top 3 ranked choices from the 1994 survey have been counted, in order to allow a reasonable comparison.

Table 3: Sources of recruitment

	1994	2009
Word of Mouth	24	47
Volunteering WA (formerly the Volunteer Centre)	19	29
Volunteer Resource Centre Referrals		28
Media Advertising	13	14
Media stories		13
Community Information Services	7	8
Annual Recruiting Drive	5	4
Libraries	3	1
Medical Professionals	0	0
Newsletter	10	9
Your website		23
Other websites		
<ul> <li>Seek/go-volunteer (www.govolunteer.com.au)</li> </ul>		9
<ul> <li>Facebook</li> </ul>		1
Other 1994		
<ul> <li>Received service (perhaps as client)</li> </ul>	2	
Other 2009		
<ul> <li>TAFE/University</li> </ul>		3
<ul> <li>Other state and community volunteer agencies</li> </ul>		1

As can be seen from the table above "word of mouth" recruitment is still the highest ranked source in 2009 as it was in 1994. That being said, however, the combined total of referrals from Volunteering WA and Volunteer Resource Centres (which have been set up in numerous locations in the interim period) exceeds the "word of mouth" total. Fifty seven (57) respondents have included these in their top three sources of recruits. It should be noted, however, that this is not surprising given that the survey

was promoted to VWA members, including via the Volunteer Resource Centres. The use of websites to recruit volunteers is evident in that 23 respondents included their own website as a top three source, and a further nine (9) included the Volunteering Australia service which is promoted through VWA – Seek/Go-Volunteer. Media stories are ranked in the top three sources of volunteers by 13 agencies who responded to this survey.

The strength of "word of mouth" recruitment is that the volunteer passes on their passion to the new recruit they are encouraging to join, and data from elsewhere suggests that non-volunteers are more likely to volunteer if they are asked (ABS, 2000, Paull, 2009). Research in Canada has reported that nearly 90% of all volunteers were asked by someone to volunteer (Hall, Lasby, Gumulka, & Tryon, 2006). A weakness of over-reliance on 'word of mouth' recruiting is the failure to diversify the pool of potential volunteers and capture new ideas, new approaches and new sources of recruits. New forms of word of mouth recruiting, however, include those based on websites and portals such as *Facebook* recorded by one respondent to be one of their top three sources of volunteers. These newer forms of recruiting will reach the younger potential volunteer, and help to increase the diversity of the recruitment pool. There are other creative methods of recruiting on the net which are emerging, and an example of this is the Starbucks V2V partnership, information about which can be found by using a search engine with the company name and V2V (V2V Global Volunteer Network, n.d.).

#### Application/Registration Forms

In 1994 just over 70% of respondents (n=23) indicated that they "require potential volunteers to complete an application or registration form" with a further two (2) organisations. Yes "for office volunteers, not for support group volunteers"; and Yes, "usually". There did not appear to be any pattern regarding type or size of organisation. In 2009, the percentage of respondents who answered this question in the affirmative was just over 80%. With the increasing need for organisations to keep good records this increase is not all that surprising. What may be more surprising is the 20% of respondent organisations who do not seek such information, especially given the increased requirements from funding bodies and insurers, and for legal purposes such as police checks. In the VA National Survey there is evidence of an increase in the use of police checks, some of which is reportedly due to the requirements of funding bodies (VA, 2009, p. 23). The matching of names and declarations on application and registration forms makes processes such as police checks and working with children checks something which can be part of registration or application.

#### Selection and Placement Procedures

Further to the discussion earlier about 'expectations', there is a need to match new volunteers with volunteer activities. Respondents were asked whether they interview potential volunteers. Those who responded "Yes" were then asked a series of questions regarding who conducted the interviews, the format of the interviews, the purpose of the interviews and the action taken if a potential volunteer was found to be unsuitable.

In 1994, only two (2) respondents indicated that they did not "interview potential volunteers". Of the remaining 31, 25 indicated that interviews were conducted by a paid staff member, two (2) by a volunteer, two (2) by a panel of two (2) or more staff members, one (1) by a paid staff member and a volunteer together, and one (1)

commented that often the potential volunteer was interviewed by "often more than me but not in panel".

The interview format was varied, with 6 using a standard interview guide, 10 using a free ranging interview or chat, and 15 using a combination of these. The format does not appear to be dependent on the position of the person who conducts the interviews. In the two agencies that use volunteers to conduct the interviews, one uses a standard guide and the other a combined format.

The purpose of the interviews was indicated by 19 agencies to be a combination of: "suitability or otherwise of the volunteer", "record keeping", and "appropriate job placement". However, five (5) agencies indicated that the interview was to determine suitability alone, one to effect job placement alone, and none for record keeping alone. Three agencies indicated that the purpose was for the determination of suitability and job placement. Two agencies indicated that there was an additional purpose in conducting interviews: "to create good feeling", and "accountability".

In 2009, of the 59 who answered this question, only 49 conducted interviews for potential volunteers.

The responses relating to format for the interviews indicates that 11.1% use a standard interview guide, 33.3% use a free ranging interview or chat, and the largest proportion 55.6% use a combination of the above. Twenty four (24) organisations have interviewers who are trained in interviewing.

The purpose of the interviews was indicated by 70% of respondents to this question to be a combination of: "suitability or otherwise of the volunteer", "record keeping", and "appropriate job placement". However, eight (8) agencies indicated that the interview was to determine suitability alone, three (3) to effect job placement alone, and one (1) for record keeping alone. Three responses in the "other" category indicated: *The process has been very informal in the past - I'm planning on changing the current practices; in-office administrative roles are interviewed but event based roles do not have an interview, and It is more of an induction than interview.* 

In 1994, when a potential volunteer was found to be unsuitable 15 respondents referred the volunteer to another agency or the Volunteer Centre and 4 do both. Two (2) respondents indicated that they have not encountered this situation, and 1 failed to respond to this question. In 2009, the numbers of referrals to VWA, a VRC or another agency was high, with the numbers being turned away without a referral being proportionately low. Table 4, see over, sets out the responses for this question:

In 2009 only one respondent indicated that they had not encountered this situation. This person added in commentary to indicate *Have not had this issue*, *would probably not contact them for their help with further activities or explain to them that their work is not needed by our organisation but perhaps better suited to another organisation*.

What is important for the manager of volunteers, and for the recruitment of volunteers in general is that unsuitable recruits are not placed in positions to which they are unsuited, and the referral to Volunteering WA, to a Volunteer Resource Centre or to another agency will help to prevent some of the issues associated with accepting a volunteer just because they are willing.

Table 4: Unsuitable recruits

	1994	2009
A: Find them a minor position in your agency	2	5
B: Turn them away	2	6
C: Refer them to Volunteering WA	10	17
C1:Refer them to a Volunteer Resource Centre		9
D: Refer them to another agency	5	17
E: Take other action:1994		
• - A or B	1	
• - A or C	1	
• - C or D	4	
<ul> <li>"Find another position - no position minor"</li> </ul>	1	
<ul> <li>"Tell them, show them around, let them decide"</li> </ul>	1	
No action is taken		1
<ul> <li>so far normally [seek] a mutual understanding that this isn't the organisation for them</li> </ul>		1
Not Encountered		1
No response	1	

#### Signed Agreements

Respondent organisations were asked to indicate whether they required their volunteers to sign agreements. In 1994, just over half of the respondent organisations indicated that they did not have this requirement (17 of 33). Thirteen (13) respondents indicated yes, and 3 respondents indicated that this was dependent on some factor or another, including the position in the organisation.

Of the 16 who required that an agreement was to be signed by at least some of their volunteers, only 3 did not include confidentiality in the content of the agreement. Additional content of agreements included rights of the volunteer (1), insurance (1), personal details (1), a review period (1), registering on and off (1), police clearances (1), and a registration to volunteer.

In 2009, 41 of 59 (or 70%) of respondents to this question indicated that they require signed agreements from volunteers. Ninety percent (90%) of those included confidentiality as one of the aspects of this agreement, just over 80% included responsibilities or duties, more than 50% included performance expectations and just over 22% included notice on leaving. Other matters about what types of signed agreements were sought included codes of conduct (2), police checks (2 – including working with children checks), occupational health and safety (2), media permission (1), complaints procedures (1), medical conditions and emergency contacts (1), and privacy information.

Table 5, see over, sets out comparative information for consideration.

Table 5: Content of agreements

	1994	1994	2009	2009
Confidentiality	81.25%	13	92.7%	38
Responsibilities or duties	43.75%	7	82.9%	34
Performance expectations	25%	4	56.1%	23
Notice on leaving	6.25%	1	22.0%	9
Other (see above)	43.75%	7	19.5%	8

Indications of increased requirements for signed agreements should be considered in the light of the information presented earlier on job descriptions.

#### Induction/Orientation

Respondents were asked whether they conducted a formal induction or orientation programme for volunteers. This was referred to as "one that is written or established so that all volunteers receive the same or similar information".

In 1994, ten respondents indicated that they did not. The remaining 23 indicated that they had programmes which ranged from a one hour group session with a handout or reading material, to "twelve sessions of group training plus a practicum." Both of these examples are from service delivery organisations. The organisations which do not have an induction programme included 6 service delivery organisations, 3 self help organisations and a library/resource centre. Of the 12 agencies which indicated that their induction involved group work, only 6 also indicated some other process.

In 2009, 75% or 44 of the 59 agencies which responded to this question, indicated that they do have an induction or orientation programme for their volunteers. Eleven (11) comprised of a one hour session, nine (9) of one work session, 13 of several sessions and four (4) indicated that the volunteer is provided with a handout. Other forms of induction or orientation included buddy sessions, three days of training, formal and informal supervised sessions, on-the-job training, 6 hours over one day and a run down of procedures. Some of the responses in this section allow the organisation to be identified and cannot be included in this summary. It is important to note that in some organisations the orientation or induction varies with the type of role the volunteer will be undertaking, and whether or not they will be directly supervised in that role (e.g. on home visits or in schools).

A further question on orientation and induction in the 2009 survey revealed that group induction/orientation was conducted in more than 30% of respondent organisations, and a combination of methods was employed in many roles.

Responses to the 2009 National Survey of Volunteering Issues indicated that 93% of organisations reported having an induction/orientation process, and 81% of volunteers indicated that they thought this was in place in their organisation (VA, 2009, p. 13). The responses to the current survey would indicate that comparatively speaking, less WA organisations have orientation/induction programmes.

#### **Training**

Two questions were asked about training. The first sought yes/no responses to statements regarding policy on training, and the second sought details regarding practice. Table 6 below shows the responses regarding training policy.

Table 6: Training Policy

	1994	2009
Training is ongoing	*	44
Training is unnecessary	3**	3
Training is compulsory prior to placement in a job	17	22
Training is a reward	5	6
Training is used to assist a volunteer with difficulties	18	22
Training is optional for volunteers who wish to pay	1	2
Training is optional prior to placement	8	2
Other	5	9

Notes: \*this option was not provided in 1994

In 1994 responses regarding policy indicated that three (3) organisations considered training to be unnecessary. Other responses indicated that in 2009, 75% of organisations had a policy of ongoing training. This option was not offered in 1994 but was added in to "other" by three respondents with various wording "as required", "continuous on job". "Other" responses in 2009 included

- There is no training policy
- Volunteers receive the same training as staff in relation to OSH.
- quided as needed
- Training is important for skill and knowledge development
- proper briefings and training is a must for all volunteers in any sector
- Training is offered in a range of areas through [identifier deleted] should the volunteer wish to and is free. Training is also carried out on the job
- Training is learning or regaining skills
- Some training is compulsory prior to placement, again this depends on the position. General training is offered to all volunteers either as part of their role or for their own personal benefit
- Training is on the job

In addition to data being collected about training policy, data was sought on the regularity of training (see Table 7 below). This question overlapped with the previous one and with that on induction to some degree.

Table 7: Regularity of training for volunteers

	1994	2009
On Joining (Induction)	18 (33%)	33 (58%)
Unnecessary	1 (3%)	5 (9%)
Change or poor performance	8 (24%)	26* (35.5%)
Change		16
Poor performance		10
Regularly (once or twice a year)	9 (27%)	15 (26%)
Frequently (more than 6 times per year)	4 (12%)	6 (10.5%)
Constantly (on the job all the time)	16 (48%)	24 (42%)

<sup>\*\*1</sup> indicated that this did not apply to all volunteers, was contingent on the type of work

No details were sought on the content of training or on the qualifications of those designing or delivering the training.

The most notable change in this arena is in the percentage of organisations offering training as part of induction. Other types of training remain relatively constant, although in 2009 there shows an increase of training offered in the event of change or poor performance, with the detail of these being separated in 2009.

Training and skills development is considered to be a very important issue at a national level, with training being part of many requirements of the environments in which organisations operate. For example health and safety requirements, demands of funding bodies or accreditation agencies. There is evidence too that organisations can feel a drain on their resources when they continually train volunteers who subsequently take their new skills elsewhere (VA, 2009, p. 16), and there are also volunteers who are unwilling to be trained, believing that they already bring with them all the skills and experiences needed for the job (VA, 2009, p. 16).

#### Reimbursement

In 1994 the subject of reimbursement was a stand alone question which sought to discover the organisation's policy regarding making it possible for volunteers to offer their services at little or no personal cost. Two (2) organisations did not respond to this question. Of the 31 who did, 23 (75%) offered reimbursement for out of pocket expenses, with one indicating that approval must be given in advance. Fifteen (15 or 48%) have a petrol subsidy system, and 12 (38%) repay the cost of phone calls. Some organisations selected all three responses, but most selected only two. Three (1%) organisations offer an honorarium, and 2 more do so "rarely" and "at the committee's discretion".

In 2009 this question was more sweeping, and included a range of additional items, but for the purposes of this report only those which were in the 1994 data have been included. Of the 59 respondents to this question, 36 (or 61%) offer reimbursement of out of pocket expenses, 15 (25%) offer a petrol subsidy, and 19 (32%) repay the cost of phone calls. An honorarium is paid by just three organisations in 2009 (5%). The items which fall into "other" in the 2009 question which are relevant to reimbursement include discounted fees (1) and transport to and from the volunteering venue (2).

The apparent drop in reimbursement of \volunteering expenses is interesting in the light of findings that only 17% of volunteers who responded to the National Survey of Volunteering Issues (VA 2009, 21) reported that their organisation offered "full reimbursement of out of pocket expenses", a small increase on 2008. That report offered evidence that the increased and ongoing costs of reimbursement can be a detriment to overall program budgets (p. 21). The recent Productivity Commission report on the not-for profit sector also discusses the issue of out of pocket expenses (Productivity Commission, 2010).

#### **Grievance Procedures**

Organisations were asked if they have "a written procedure or policy for volunteers to have their grievances or problems heard". In 1994, 25 organisations indicated that they do **not**. One organisation indicated that this is currently being drafted. Of the eight organisations who indicated that they do have a written policy, five supply all volunteers with a copy and three do not. In 2009, 42 organisations (or 71%) indicated

that they **do** have such a policy, and 32 supply a copy to all volunteers. This is a significant increase, and reflects quite a change in organisational approach. At a national level approximately one third of volunteers reported not having or not knowing whether they have access to a grievance procedure (VA, 2009, p. 15).

In the current study, further details were sought as to who heard grievances. In 1994, only three (3) organisations had the paid supervisor hear grievances. In 2009 it is the paid supervisor who hears grievances in 31 (56%) of organisations.

#### Performance and Feedback

Two blocks of questions were asked about performance and feedback for volunteers. One question asked whether respondent agencies have a written policy related to feedback on performance for volunteers. In 1994, only three agencies indicated that they had a written policy, and of these two supplied a copy to all volunteers. No further details on the content of the policy were specifically sought. In 2009, 16 or 28% of respondents to the question indicated that they had a written policy, and of these 13 supply a copy to volunteers.

On the provision of feedback to the volunteers, 21 (63%) respondents in 1994 indicated that feedback is provided whilst one (1) indicated "if requested" and one (1) "not in a formal sense". Feedback was mainly provided by the paid supervisor (11), or the paid supervisor and/or another paid staff member (4). Two organisations had a volunteer supervisor provide feedback, and one (1) either a paid supervisor or a volunteer supervisor. One (1) respondent indicated that feedback is provided by a paid supervisor or another paid staff member or by "clients". One of the 21, whilst indicating that feedback is provided, did not specify by whom. In 2009, of 56 respondents to this question, 47 (84%) indicated that volunteers are provided with feedback on their performance, with 23 (47%) having the paid supervisor offer this feedback, closely followed by 19 (39%) by a volunteer supervisor. This increase in feedback provision is likely to be a reflection of a range of initiatives, including legal requirements and increasing liability for organisations where poor performance may lead to undesirable consequences for organisations. There is also some possibility that training on managing poor performance by volunteers has had an impact here (e.g. VA, 2001; Paull, 2000 and subsequent seminars).

54% of the volunteers in the National Survey reported no performance management process available "in spite of feedback being important to them to feel valued" (VA, 2009, p. 15).

#### Recognition

In 1994, the most favoured recognition was for length of service, with 15 organisations recognising this. Ten organisations recognised outstanding achievements, nine retirement, six completion of a special project and six "other" events - "Special luncheon for all", "annual event", "Xmas", "Everyone", "At the end of course [training] and ongoing service" and "volunteer of the year".

In 2009, it was 'outstanding achievements' which had become most recognised, with 32 (74% of those who answered the question) selecting this choice and one writing in "LG outstanding achievements" to the "other" category". Length of service was still a close second (29 – 67%), despite evidence suggesting that length of service recognition means less when organisations reward length of service regardless of performance, commitment or other factors (Paull, 1994). A number of organisations

recognise volunteers on retirement (18) and on conclusion of projects (11). Four further respondents selected "other": *encouragement, participation, conclusion of festival* (1 each) and one indicating "currently developing this process, it has been identified as an issue with us".

In 1994 recognition of volunteers was most often given through certificates (15) and banquets or receptions (14). Internal publicity ("newsletter", "Bulletin") (11), media publicity (19), bouquets or badges (6 each) and 5 "others" - "special luncheon", "party", "trophy presented at AGM", "morning tea", "present at Christmas".

Most organisations recognised more than one event in more than one way whilst some of the 21 organisations who acknowledged their volunteers, hold an annual event such as a Christmas party. One organisation indicated that they presented certificates on retirement, and one indicated that they held a reception, present certificates, and have internal and external publicity.

In 2009, the most common form of recognition was a certificate (39), followed by internal publicity (26). In addition, recognition was often in the form of a reception/banquet/luncheon/morning tea or breakfast. This category was offered as banquet/reception in the questionnaire and then clustered with "other" responses which indicated other functions of a similar nature. The total number of responses was 19 in this expanded category. Other forms of recognition media publicity (16), bouquets (14), badges (9) provided in the list of choices were added to by respondents indicating "honorary life membership"(2), "day trip out", "meals together", "gifts", "nominations for awards", "gold medal", and "informal rewards and support methods". Recognition and inclusion are important, and will be further explored in the companion report to be released later in the year.

#### Poor or Non Performance

In both surveys there was a question which sought data on the action taken "in the event that a volunteer either does not perform their required duties [non-performance], or does not perform them to the standard required by the organisation [poor performance]. Ten (10) options were offered plus one "Other" category seeking specification. Table 8 below sets out the responses.

Table 8: Organisational Responses to Poor or Non performance

	1994	2009
Spoken to by a paid staff member	24	27
Counselled by a paid staff member	11	11
Spoken to by another volunteer	4	3
Counselled by another volunteer	2	3
Provided with an assistant or supervisor	5	3
Asked to leave with explanation	5	1
Moved to another task	7	4
Given less responsibility in the hope that they will leave	1	0
Asked to leave	2	0
Left to handle the situation themselves	0	0
Other -	2	4
"advice sought from Volunteer Centre	1	
"training"	1	
"spoken to by relevant manager who is another volunteer"		1
"differs depending on which group they are with"		1
"given further training"		1
"not invited back for the next event"		1

Most organisations with several options indicated that this depended on the type of task, the type of volunteer or the type of poor or non-performance. The use of feedback to manage poor performance of volunteers has been explored elsewhere (Paull, 2000), and it is apparent that this is an area where managers of volunteers, both paid and unpaid, are responsible for this task. In both 1994 and 2009 the most prevalent course of action was a paid staff member speaking to or counselling the poor or non-performing volunteer. Other options of having a volunteer undertake this task, providing assistance or moving the volunteer to another task were selected by a few organisations. The option of asking the volunteer to leave seems to have diminished, but this information is further explored in relation to the responses on dismissal (below). There is recognition that action needs to be taken, with no respondents selecting the option of "left to handle the situation themselves" in either respondent group.

The types of performance which would be considered to be "poor or non performance" were explored in 2009 as an additional question. Forty seven (47) respondents provided in excess of 146 examples of poor performance for this question. These have been analysed and clustered to show 34 of these were for breaching confidentiality, significantly higher than any other response. Further work is being done on this section of the data, but other examples provided were absenteeism (9), and stealing (6). There were also examples of drug and alcohol consumption (5), smoking (1), breaches of codes of conduct(5), abusive language (5), Misrepresentation of the organisation (3), dangerous driving (3), and variations on unsuitability for the role, or inability to carry out tasks, and inappropriate behaviour with clients. These later examples were expressed in a variety of ways and have yet to be further explored.

#### Dismissal

Both versions of the questionnaire asked if a volunteer had ever been dismissed from their organisation and, if so, for what reason. Table 9 (over the page) provides the details from these responses.

In 1994, 14 organisations indicated that this had not occurred, 2 that they did not know or were unsure, and 1 did not respond. Of the remaining 16 respondents who indicated that there had been an event of dismissal of a volunteer 1 did not specify the reason, and 1 indicated "theft (community service order)". As the latter response is unclear (did the theft result in a community service order, was the volunteer assigned on a community service order or did the theft take place within the organisation?) it was excluded from the results.

In 2009, 29 out of 52 organisations had dismissed a volunteer. This represents a small increase. Examination of the reasons for dismissal showed an increased range of reasons, and free response data to accompany this group of questions showed a willingness to dismiss which was greater than in 1994. The free response data also indicated a willingness to try to help a volunteer before dismissal:

Only one in the last 13 years. Inappropriate behaviour and language that did not improve after several counselling sessions.

Table 9: Clusters of Reasons for Dismissal

1994	Examples			
complaint (6)	client complaint			
inappropriate behaviour (3)	<ul> <li>standard of behaviour less than acceptable</li> </ul>			
	<ul> <li>requested payment for service in addition to voluntary service</li> </ul>			
	verbal abuse of client			
unsuitable for position (3)	<ul> <li>client placed by social worker [in volunteer position] but</li> </ul>			
	unhappy here			
	<ul> <li>inappropriate behaviour - unreliable, uncommitted, not</li> </ul>			
III. (0)	listening			
personality (2)	personality clash			
confidentiality (2)	breach of client confidentiality			
financial/stealing (1)	financial unreliability			
2009				
inappropriate behaviour (7)	Inappropriate previous complaints about manner and			
	treatment to fellow staff/volunteers			
	<ul> <li>sexual harassment Inappropriate behaviour towards female</li> </ul>			
	volunteers			
	<ul> <li>Verbal abuse of staff and clients</li> </ul>			
confidentiality (5)	Breaching confidentiality			
financial/stealing (4)	<ul> <li>Stealing, misuse of public funds, not keeping accurate records</li> </ul>			
	and not providing those records to the organisation when			
	requested to do so			
complaint (3)	client complaint			
breach of code of conduct (2)	<ul> <li>unwilling to work w/i[within] established guidelines, practices and polices</li> </ul>			
crossing boundaries (2)	<ul> <li>Volunteer became too close to the client and visa versa [sic]</li> </ul>			
	and the volunteer was asked to be the power of attorney for			
	the client			
personality(2)	Personality clash			
racism (2)	•			
"fit" (2)	inability of volunteer to fit into [identifier deleted] environment			
unsuitable for position (2)	unable to perform duties			
health (1)	increasing age and subsequent health issues of volunteer			
driving (1)	review by staff and decision made			
drug and alcohol usage (1)	drugs and alcohol			
misdemeanour (1)	•			
motivation (1)	lack of ability to support our clients beyond their focus on their			
	own needs and desired from the camp setting			

Discipline and dismissal of volunteers has been an area of contention, which parallels some of the discussion earlier on whether volunteers should be managed. The argument that volunteers are giving a gift of their time and therefore should not be performance managed or dismissed is one which is made clearer by an examination of the reasons for dismissal cited above. Clearly behaviour such as theft, sexual harassment, racism and verbal abuse of others need to be addressed by organisations because of the legal situation in which the organisation might find itself. Breach of confidentiality could also be put in this category but no data is available as to whether these breaches were unlawful or simply viewed as breaches by the organisation. As with the management of poor or non performance these are consistent with earlier

research in this area by one of the authors (Paull, 2000), and will be further explored in the follow up work to this report.

#### **Comments Section**

At the conclusion of the questionnaire respondents were provided with space to comment on the application of business principles to the management of volunteers and to comment on any of the questions or answers in the questionnaire. In 1994, 18 respondents used this space (just over half), some to comment on the questionnaire itself, some to wish the researcher luck, and others to elaborate on their answers to some of the questions. There was also a level of support for the type of research being undertaken, and for the issues raised by the questionnaire. Comments included the lack of time, funding support or otherwise available to the person allocated responsibility for management of volunteers to enable the systems of Human Resource Management to be implemented.

In 2009 the space was used by only ten respondents, some to offer support for the research, and some to offer specific comments which would identify their organisation. The remaining comments have been de-identified and are presented here:

#### Valuing volunteers - valuing managers

It would be nice to have a title and pay award for managers of volunteers as a guideline for organisations and individuals. Accredited training for the manager.

This comment lies at the heart of an area dealing with the ambiguous status of volunteering. In the early 1990s English researcher Roger Hedley (1992) observed that the management of volunteers is far more complex than that of managing paid staff. Despite efforts by peak organisations to increase the recognition of this role, many of those who occupy this important position are still referred to as "volunteer co-ordinator" or some derivative of this title, and very few are paid at a rate comparable to the managers of paid staff. The somewhat ambiguous nature of the value placed on the manager of volunteers will be explored in the companion report due out later in the year. This may be a result of the apparent contradiction in the social construction of volunteering. On the one hand we value volunteer activities as altruistic and vital to a healthy community, and afford it a status above that of paid work. On the other hand we often resource volunteer activities poorly, and those with the responsibility for managing volunteers are often isolated, inadequately rewarded, under-resourced and comparatively underpaid.

#### Volunteering, clubs, associations and sport

More training and support for sporting based organisations there seems to be a lot of focus on corporate volunteering but little information on dealing with sporting volunteers and club culture.

This comment highlights an area where research is growing (e.g. Cuskelly and colleagues 2005, 2006); but which provides an avenue for further investigation and research. The research team will be following up on this topic in the future.

#### Partnering and collaboration between volunteer-involving organisations

Volunteer involving organisations need to work more together to build sustainable programs/organisations within each community. The need to partner to obtain joint funding for projects/programs that could grow together to benefit the whole community.

This comment highlights one of the recommendations from the Better Connections project conducted by Volunteering WA with the Wheatbelt Development Commission:

Community leaders should get together and meet with members of local government or CEOs to required support for volunteering across the community. Creating a united front and listing strategies and requirements makes it easier for local governments to understand the need in their community (Spencer, Bertilone, Barnard, 2009, p16).

"Better Connections" are needed between organisations as well as between the organisations and their community. This too is an avenue for further exploration.

#### Can we/Should we "manage" volunteers?

I think that it is important that the organisation be run in a friendly informal matter with a complete absence of public service type bullshit. A small organisation needs to focus on the job in hand rather than trying to run a beauracracy [sic]. People who are given an opportunity to use their particular skills with a minimum of supervision will be happy to contribute for an extended period.

This comment goes back to debate about whether we should manage volunteers as if they were employees. The evidence in the literature is clear – volunteers expect their contribution to be well structured, well organised and appreciated (Farmer & Fedor, 1999). Whereas past debate has focussed on whether or not volunteers should be managed at all, more recent discussion has been on applying management theory to volunteer management. Dartington (1992), for example, embraced the application of management theory but cautions that, in welcoming it, volunteers, and those who "manage" them, need to ensure that they do not lose those qualities which make volunteering "special".

Research has identified that there are unique elements to volunteering which make managing volunteers as if they were employees both impractical and unwise (Paull, 2000). Well known management author, Peter Drucker (1989, pp. 89, 91) states that these organisations "have learned that [they] need management even more than business does, precisely because they lack the discipline of the bottom line", and that "volunteers must get far greater satisfaction from their accomplishments and make a greater contribution precisely because they do not get a pay check". Drucker (1990, p. 181) also argues that "...in no area are the differences greater between businesses and non-profit institutions than in managing people and relationships". According to Drucker, the management of the people and the relationships in an organisation which has both paid staff and unpaid staff, puts greater pressure on the manager to apply good management practices. Researchers investigating the management of volunteers

cannot afford to ignore the literature on the management of paid staff. At the same time they should expect to find elements particular to the management of volunteers, which recognise their volunteer status. The set of expectations volunteers bring to the organisation (Lie & Baines, 2007) is made more complicated by the many and varied reasons they have for undertaking volunteer activity (Dolnicar & Randle, 2007). Recent work in this area has found no significant decline in the demands or expectations volunteers place on their managers (e.g. Barnes & Sharpe, 2009; Craig-Lees, Harris, & Lau, 2008, Kim, Trail, Lim & Kim, 2009). The need to find a balance between "formality and informality" when developing the practices associated with volunteer management (Lynch & Smith, 2010) is one which continues to require exploration.

## Findings and Conclusion

The preliminary results of this study indicate that some respondent organisations are applying Human Resource Management theories developed for managing paid employees. Further there appear to be some recurring themes and issues which have emerged besides the direct results. These include the effect on the organisation and its policies of the job seeking volunteer, the contingent nature of the management of volunteers - dependent on many factors including the type of organisation and the position held by the volunteer, and the varied levels of policy development and implementation, as varied as in business. An examination of the results cannot draw any conclusions due to the sampling bias mentioned earlier, the limitations of the instrument and the exploratory nature of the study. However, some observations can be made about various aspects of the policies in use in respondent organisations.

#### Limitations

The findings of this research cannot be regarded as conclusive. This is due in part to the size and biases of the sample studied, and to the issues and questions raised by the study itself. However, there is evidence that Human Resource Management Theory is being applied in the management of the performance of volunteers. The application of the theories varies between organisations, and the success or otherwise of such application, is unknown because little evaluation has been conducted. Volunteer managers, co-ordinators and administrators have a great deal of experience and knowledge to offer, and their opinions and experiences in applying Human Resource Management theory to managing the performance of volunteers are many and varied. The study has highlighted both the need, and the support, for further research.

#### **Implications for Practice**

Discussion of the implications for practice is somewhat restricted at this stage due to the preliminary nature of this document. It is clear that some changes have occurred between 1994 and 2009. Further work will need to be done to establish what the data tells us about what we should be doing in organisations at a more strategic level, and at the sector level, both within the peak bodies, and across the networks of managers and organisations. That being said, at the organisational level, managers of volunteers, management committees and boards and those interested in the management processes can contemplate some of the findings and relate them to their own organisations. For example, that word of mouth is still the biggest method of recruitment of volunteers is useful knowledge. Firing up volunteers to spread the word is still working. Knowing, however, that volunteer referral services are being used by larger number of organisations is likely to increase interest in these services. Similarly recognition that grievance procedures and job descriptions are useful tools in organisations can also provoke/promote consideration of how these are working for volunteer involving organisations. Dialogue about performance management, including managing less than desirable performance, dismissal of volunteers, and placement of unsuitable recruits, while sensitive subjects, can only serve to benefit organisations in their pursuit of better outcomes for their organisations. Organisations where such dialogue is taking place will also offer better volunteering experiences for their volunteers, if those volunteers are engaged in the conversation.

#### Further Analysis and Research

Examination of the question "are we?" has in part been answered in relation to managing volunteers - we return to the question "should we?" Not, this time, from the philosophical or ideological perspective of Harrison (1994) and others, but from the perspective of demonstrated effectiveness. There is only a relatively small selection of empirical evidence that it is the absence or application of these theories that influences the effectiveness or otherwise of an organisation in either meeting or satisfying its mission or goals, or in recruiting, retaining, and satisfying its volunteers. The anecdotal and descriptive evidence of many experienced in the management of volunteers will continue to be an important source of data. In addition, such qualitative research would gather some of the wealth of knowledge and experience which the volunteer co-ordinators, managers and administrators in the field have gained. Documentation of such knowledge would provide a basis not only for further research but for the enhancement of training packages and manuals already available, and for the examination of issues and trends which are important to volunteering.

The area of volunteers and volunteering continues to be an area of interest to the student of management because of the diversity and complexity of the relationships and the absence of the much debated motivator, money. It continues to be an area of interest to those working and researching in the third or nonprofit sector due to the major contribution this sector makes to the economy and to the social fabric of our society.

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