

Equestrian Australia Club Admin Manual

V1 September 2013

A complete manual of guidelines, references and tips to assist club administrators in delivering and growing equestrian sport in Australia.

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Acknowledgements

EA would like to acknowledge the following organisations that have been referenced in this Club Admin Manual:

- Australian Sports Commission
- Australian Sports Foundation
- Campaign Monitor
- Clubs Online
- Coyote Communications
- Equestrian Queensland
- Gow Gates Insurance Brokers
- Grants Link
- Horse SA
 - Australian Horse Industry Council
 - South Australian Endurance Riders Association
- NSW Sports and Recreation
- NSW Sports Federation
- Our Community
- Parliamentary Library
- Play by the Rules
- Pony Club Australia
- Safe work Australia
- Sponsorship unit
- Vic Sport
- Work Safe Australia

1. Administration

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Equestrian disciplines are major participation sports that are largely accessed via a network of community based clubs / groups run by volunteers and some commercial centres. Therefore it is essential that sound administration supports members and volunteers who form the lifeblood of the club and equestrian sport.

1.1 Affiliation

Club Affiliation

EA Club Affiliation is managed by the respective Equestrian Australia State Branch office and incorporates affiliation with Equestrian Australia at a national level. Each State Branch office will send out notifications for renewal of Club Affiliation. Affiliation is required annually and without a current affiliation the club is not permitted to use EA's rules or access club benefits and insurance.

Club Benefits

Clubs can access a range of national and state specific benefits as part of their affiliation. At the national level, affiliated clubs receive the following benefits:

- The right to use EA rules and regulations and appoint EA-accredited Officials for their events
- Access to manuals and other reference material that to support club and event conduct
- [Access to the EA Club Insurance program](#)
- By affiliation, clubs are covered by the member protection policy and other relevant policies of EA

Each State Branch also offers a range of benefits, services and programs to their clubs. Please contact your Branch for more details.

Club Insurance

The EA Club Insurance program is managed by Gow Gates Insurance Brokers. As a benefit of your Equestrian Australia affiliation, you have the option to take out the insurance cover which provides the following;

Personal Accident (Injuries)

Public & Product Liability (Third Party Personal Injury and Property Damage)

Professional Indemnity (Errors & Omissions)

Management Liability (Administration)

These policies cover the following insured persons of the club:

- Administrators, Directors, Officers, Employees
- Voluntary Workers
- Selectors
- Medical Officers
- Officials

Policies provide protection whilst the above persons are **engaged in all organised activities connected with the sport for and on behalf of the Insured club.**

The Insured Persons listed above are covered under the Personal Accident Policy whilst acting for and on behalf of the club. This does NOT include Club Members who are not EA Members, whilst riding/competing. The Policy is designed to provide protection to volunteers and officials working on behalf of the club.

For further information on the insurance policy please refer to the [EA Club insurance overview](#) or visit www.gowgatessport.com.au/equestrian

1.2 Boards and Committees

A board may also be referred to as a committee and is the group of individuals who are responsible for the management and conduct of a club or organisation.

Responsibilities

The role and responsibility of the committee is to:

- Coordinate the planning of activities in a manner which ensures the *aims and objectives* of the club are *fulfilled*
- Carry out the recommendations of members as expressed at the annual general meeting
- Provide members with *detailed information* regarding the running of the club
- *Monitor the performance* of the club officials (according to their job descriptions) to see they are carrying out their functions. Also it monitors the performance of any sub-committees or club employees
- Ensure that all committee members are well-versed in past activities and the reasons for previous decisions, making sure any deviations from these are fully considered
- Negotiate training opportunities for Administrators and Coaches, provide detailed written and oral records and job descriptions to a newly elected committee so they can settle into their duties quickly
- Planning and budgeting for the future
- Ensure that all members of the committee are role models in the area of leadership.

A committee should operate as a team, draw on the skills and talents of each member, and work toward common goals that ensure the club/groups success.

The size and structure of a committee will vary according to the size, location, function and type of the organisation. However, the rules as stated in the constitution prescribe:

- How the committee should function
- How it is elected or appointed
- How often it should meet
- How long members should serve
- Who is eligible to serve.

The organisation should also try to ensure that the committee's composition is balanced in terms of age, gender and ethnic and cultural background.

Board recruitment

You should look to attract skills based people when recruiting for your committee. Before a vacancy arises, proactive committees/boards look for potential candidates to fill those positions. They have conduct a skills audit, identify where the current skill sets lie and identify any gaps to match the work that is forecast for the coming year. They then approach those people who possess the required skills directly to invite them to nominate for the vacant position.

Information on good governance for clubs can be found [HERE](#)

Board elections

Elections don't just happen. If your club is serious about ensuring smooth transitions, effective committee functioning and the best long term outcomes for members, then the election process must be carefully planned.

An example of a suitable nomination form can be found in [Appendix A](#).

Changing Committees

One of the easiest and most preferred ways to ensure succession planning is to have what is termed as a 'rolling' committee structure. This means that only some, not all, committee members stand down at once (usually after a set period to enable fresh input from new members). In these situations, there is less potential for information and experience to be lost from the club.

An example of a rolling committee may be:

Position	In	Out
President	2000	2002
Secretary	2001	2003
Registrar	2001	2003
Treasurer	2000	2002

It is important for outgoing committee members to pass on as much knowledge as possible. Clubs can manage this 'information' change by including the training and recruitment of helpers within the overall club plan.

- All new committee members should be given a written job description outlining their roles and responsibilities. Briefings from the previous office holder are also important to clarify these issues.
- New committee members should be welcomed and encouraged to contribute.

Sub-Committees are usually appointed at the request of the main committee to do detailed investigations into specific issues or complete specific tasks e.g. fundraising events. People sit on your committee with a variety of responsibilities. The aim is to get them to do their work outside the actual meeting and bring their findings to the meeting (not debate them when they arrive).

Sub-committees need to have an accurate task description and should consist of members who have the right skills to get the task done. Ensure the sub-committee is aware of its level of decision making autonomy as well as the reporting procedures members are expected to follow.

If there are any conflicts of interest by members on a committee or board it is important they:

- Disclose the conflict of interest
- Do not take part in discussions on the issue/s
- Do not receive papers on the issue/s
- Do not vote on the issue/s
- Leave the meeting when the issue/s is/are being discussed
- Ensure the conflict of interest is reflected in the minutes

For more information consult the [EA conflict of interest policy](#).

Roles within a Committee

Every position on the committee is important to the effective running of the club. The traditional committee structure includes a President (usually the Committee Chairperson), Treasurer and Secretary, each with defined and distinctive roles. As this structure does not suit all clubs, each club should be sufficiently flexible in its approach so that the committee can be structured around the plans of the organisation and the skills of its members.

An ideal Committee/Board:

- Displays Leadership, Integrity & Good Judgement
- They use these three attributes to ensure more effective decision making
- They ensure the club demonstrates transparency, accountability and responsibility.

The Chairperson/President

The Chairperson (usually the President of the organisation) is the principal leader and has overall responsibility for the organisation's administration.

Responsibilities and Duties

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

Knowledge and Skills Required

- Can communicate effectively
- Informed of organisation activities
- Aware of future directions and plans of members
- Has good working knowledge of constitution, rules and duties of all office holders and sub-committee
- Supportive leader for all organisation members.

Secretary

The Secretary is the chief administration officer of the organisation. This person provides the coordinating link between members, the management committee and outside agencies.

Ideally an effective Secretary is someone who can:

- Communicate effectively
- Think clearly and positively
- Maintain confidentiality on relevant matters
- Manage and supervise others (in relation to secretarial duties)
- Organise and delegate tasks.

Treasurer

The Treasurer is the chief financial management officer for the organisation.

The Treasurer's tasks include:

- Preparing the annual budget
- Planning for the club's financial future
- Regularly monitoring revenue and expenditure
- Helping other committee functional areas with financial matters.

Members assisting in the area of financial management should have the necessary skills to complete the tasks. If not, the club must ensure that they are provided with training relevant to their area of responsibility.

A Finance Report should:

- Explain and encourage questions
- Tell the story and let the numbers prove it.
- A picture paints a thousand words, so use graphics if you can.

An effective Treasurer needs to be:

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

More information on Position descriptions and Duties can be found on the [Australian Sports Commission Website](#).

Keeping Records

All records should be accurate, current and readily accessible. It is recommended that organisations retain records for 10 years, as some legislation requires that records be kept for a minimum period.

A wide range of computer packages are available to help keep records. However, if the organisation does not have access to a computer or the appropriate programs, the following will be required:

- A book or a set of cards for the register of members
- A minute book and notebook or pad for taking notes at meetings

- A filing system suitable for keeping records
- Stationery
- A book to record assets and liabilities
- Membership application forms and other standard forms (e.g. committee nominations)
- A calendar for recording dates of meetings, activities and deadlines
- Accounting records – the Treasurer takes charge of these
- A manual of procedures – this can be the organisation's most valuable asset. Many tasks have to be completed at the same time each year and should be recorded in standard form.

All clubs are required by their constitution to hold an Annual General Meeting (AGM) of all members.

Items that must be included on the agenda of the AGM include:

- Minutes of the previous AGM are circulated and read
- The President presents the Annual Report (possibly via Secretary if chairing the meeting)
- The Treasurer presents a bank statement and balance sheet
- Elections for incoming office bearers
- Motions related to changes to the Constitution

More information on Committee Management can be found in the [EQ Club Manual](#)

The Australian Sports Commission's Good Club Health Check

The Club Health Check is an online self-assessment tool aimed at helping clubs examine how they are operating. The checklist looks at a number of different factors that are crucial to success at club level and together these factors are used to build an overall picture of the way your club carries out its operations.

The assessment should take no more than 30 minutes to complete. Once you have answered all questions, a detailed report will be emailed to you which will identify improvements and growth areas for your organisation.

It is recommended the assessment be completed by 2 or 3 people within your committee and preferably 'key' people who have an overall perspective of the club's operations and activities.

You can complete the Club Health check online [HERE](#)

1.3 National Policies and codes

Equestrian Australia develops national policies, rules and regulations and codes of conduct that all members and affiliates, including clubs must abide by. Visit the [Equestrian Australia Website](#) for the most up to date policies.

1.4 Planning

Planning is essential to the continued success and stability of a club. Planning is a key function of the management committee and should involve representatives from various stakeholder groups. Organisations need to plan long-term viability and sustainability in order to grow and continue to service members

Planning is simply 'a process of setting objectives and deciding how to accomplish them'.

The various levels of planning include Strategic and Development Planning, and Operational & Action planning.

Strategic Planning focuses on direction, taking into account the internal strengths and weaknesses plus the external opportunities and threats to the organisation, and details strategies to address or build on these.

Operational Planning is derived from the strategic plan. It is a detailed action plan designed to help accomplish the objectives of the club. It outlines who is responsible to carry out tasks, time frames, costs for each year of the plan's duration and performance indicators.

The main aim of planning is to maintain a positive relationship between the organisation and its environment. Specifically, planning enables an organisation to:

- Become proactive rather than reactive
- Initiate and influence outcomes in favour of the organisation
- Exercise more control over the club's future by having goals and action plans in place in order to achieve them
- Adopt a more systematic approach to change and reduce resistance to it
- Improve financial performance and use resources effectively
- Increase awareness of the operating environment (e.g. competitors, government policy, threats)
- Improve organisational control and coordination of activities
- Encourages a team approach to club management.

While planning is ultimately the responsibility of the management committee, successful planning is often characterised by its collaborative nature. Involvement by all stakeholders (especially those affected by the plan or responsible for implementing it) is vital for success.

By including various members in the club planning process, members have a sense of ownership and commitment to the plan are more likely to help.

Developing the Plan

Someone from the planning committee or a trusted club member is given the task of writing up the plan. The plan only needs to be simple and should contain the following headings:

- Mission
- Organisation Goals
- Objectives
- Actions
- Responsibilities
- Timeframes
- Resources

Responsibilities for Planning

While planning is ultimately the responsibility of the management committee, successful planning is often characterised by its collaborative nature. Involvement of all stakeholders is vital for success. In other words, all members have some responsibility for planning. The planning process itself, especially involving stakeholders, is just as important as the actual plan that results from the process. Without being involved, members may not have a

sense of ownership and commitment to the plan and could feel that something has been imposed on them. This type of situation makes successful implementation difficult.

For more information on planning see the [EQ Club Manual](#)

Constitution

The Constitution is the system of fundamental laws and principles that prescribe the nature, functions, and limits of your club as lay down by the registering body.

Incorporation separates the individual person (member) from the entity and makes the group (body) a single entity with certain rights and legal protections as well as some additional obligations.

Other matters relating to day to day issues on how the committee operates, how the organisation functions and the policies are best separated and placed in a:

- Committee Charter
- Operations manual
- Policy Manual
- Committee Policies (internal)
- Operational Policies (internal)
- Sport Policies (Public documents posted on your web site).

All clubs, except the most informal, should set out their basic structure and methods of operating in writing. The product of this process is called a constitution. A club's constitution should:

- Outline the club's purpose;
- list all of the rules of operation; and
- set out the members' rights and responsibilities

Not-for-profit sport and recreation clubs generally incorporate under State or Territory legislation known as the Associations Incorporation Act. To become incorporated a club must, among other things, lodge a set of rules, commonly referred to as a "constitution". The model rules are not identical in each State or Territory. The model rules are intended as a guide only and clubs can adopt, or change the rules to suit their needs so long as the basic requirements are met.

You should refer to the relevant legislation in your State or Territory. Information on the relevant legislation is usually available from departments of fair trading or their equivalents in each State and Territory.

More information on forming a constitution can be found [HERE](#).

Why do we need a constitution?

Constitutions:

- Explain to members and non-members what your group is about
- Provide guidelines for the daily running of your group
- Help to sort out internal problems
- Is a legal necessity if your group wishes to become incorporated

- Can help in seeking resources from other organisations, such as a government agency.

What level of detail should you include?

A constitution can be extremely simple, containing only the basic outline to explain who you are, what you are set up for and important management matters. The extent to which you add detail in the rules depends on the needs or formality at the time of setting up the group, and on your group's thoughts about the projected needs of the group as it grows. Many details relating to minor management matters are best included within by-laws, regulations or policies thus keeping your constitution flexible and easy to operate within.

What to avoid

A constitution can be made up of two parts; the rules which include the basic principles of the group and can be changed only by a general meeting; and the regulations or by-laws which can be changed by the committee.

You can place almost anything within a constitution, however many aspects of your club's operation are more easily handled outside the formality of the rules. For instance, you would not include the membership charges or club colours in the rules. The rules in your constitution should relate to the administration of the club. They should not relate to the conduct of the activities of the club. Additional non-administrative rules should appear in regulations and by-laws. A clause in the rules empowering the committee to make, alter or delete regulations or by-laws should appear in the constitution.

For further information establishing a constitution please see [Clubs Online](#).

2. Risk Management

- 2.1 Risk Management Process
- 2.2 Risk management Plan
- 2.3 Medical emergencies

Risk can simply be defined as: *'The potential to lose something of value.'*

Risk Management is: *'The culture, processes and structures that are employed to assist in achieving objectives while reducing loss, injury or liability.'*

There is no avoiding responsibility or dangerous activities in equestrian sport. But what one person considers dangerous another believes is a minimal risk. Therefore, at an organisational level, all clubs need to ensure that every effort is made to protect participants, supporters and the general public. The process described below is not a substitute for a well-planned, coordinated and communicated risk management strategy. However, it does provide an indication of the steps that should be considered to assist in protecting your club.

2.1 Risk Management Process

Risk management is a five step process. The five steps are:

1. Establishing the context
2. Identify the risks
3. Assess the risks
4. Treat the risks
5. Ongoing monitoring and review.

Establishing the Context

The first step in the risk management process is to establish the context. It is important to understand and define your club and its current operation. It is equally important to understand and define the intended objectives of your club. You must identify the aims and objectives of your own risk management program in relation to your club. Determine the criteria for treating or accepting risks and define the extent and comprehensiveness of your risk management activities.

Identify the Risks

Conduct a review of your premises, financial procedures, equipment, human relations practices, and client operations to identify any risks, risky behaviour or practices. Determine the sources of the risk and identify exactly what is at risk and the effect. Ask what could go wrong and what protections you have in place against them going wrong. It's important to get everyone involved to discuss any possible flaws in your practices and procedures.

Risks come in two kinds; standard risks that apply to every workplace or organisation, and risks that come from doing the particular work or activity you do. Equestrian clubs face unique risks due to the nature of the sport and working with horses.

Potential risks can be identified through various methods such as:

- Experience and records
- Brainstorming

- Systems analysis
- Personal reports
- Audit and other recommendations
- What can happen – list events that might happen
- How and why it can happen – list the possible causes and scenarios.

A useful tool to help a club identify risk is an event day checklist. It should be completed at the start of each day, at each venue. It is designed with amateur sports volunteers in mind, to assist with identifying risks present on the day and the steps involved to prevent injuries to participants and others at the venue, which may result in Public Liability claims.

To ensure you are prepared for your event Gow Gates Insurance Brokers have developed an [event day checklist](#).

Assess the Risks

After identifying the risks you must evaluate the importance and likelihood of each risk occurring. On that evaluation, prioritise them in order of most to least likely. The severity of the resultant injury caused by each risk must also be considered in prioritisation.

See [Appendix B](#) for tables.

Treat the Risks

Based on the above evaluation and prioritisation of the risks you must change your systems, procedures, equipment or attitudes to address the major risks. Have the Risk Manager or the Risk Management Committee: check that the changes have been made; evaluate the effect of the changes; review them regularly and modify them when needed. Remember too, that your liability for whatever happens is going to be affected by whether or not people think that you've done all you reasonably could have to avoid it.

There are five treatment options:

- Avoid the risk
 - To avoid the risk you would cease conducting activities or using facilities that were the source of the risk.
- Reduce the risk
 - Through a selective application of appropriate practices and management principles, you reduce either the likelihood of an occurrence or its consequence, or both.
- Transfer the risk
 - This usually takes the form of insurance or some other contractual agreement (eg. disclaimers, waivers, leases, tickets, warning signs, etc) to transfer the risk to another party. It is important to remember that these methods are usually only a partial transfer.
- Finance the risk
 - A form of self-insurance where your club may choose to set aside funds to offset the likely cost of an event. This is not really an option for most non-profit/volunteer based organisations.
- Retain the risk
 - You may decide that the likelihood or the consequences do not warrant any action. You should however still consider these types of risks in the risk analysis of your club.

Monitor and Review

It is important that you continue to monitor your exposure to risk, especially when there are any changes to your context that may have an impact on the significance of any risks. Conduct regular reviews of your risk management policy so that you; keep abreast of new risks, are able to detect any changes to existing risks, and are able to evaluate the effectiveness of your risk management plan. Potential risks can be monitored and reviewed through risk reviews, claims performance reports, audit reports and an evaluation of the progress of your risk treatment plan.

More information on Risk Management can be found on the [Australian Sports Commission Website](#)

2.2 Risk Management Plan

The “Safe Equestrian” plan developed by Gow-Gates in conjunction with EA and the State Branches, now provides a uniform approach and resources to assist the equestrian community in assessing and managing the risks associated with the management of equestrian clubs.

The objective of ‘Safe Equestrian’ is to provide a pro-active approach in ‘Raising the Awareness’ of these risks and to provide a practical framework for your club to minimise or manage these exposures.

The plan is based on the general principles behind a club’s ‘duty of care’ responsibilities to the equestrian community and the general public such as:

- provide a safe place for recreation/equestrian
- provide a safe system of rules
- provide safe and adequate equipment
- provide the participant with competent fellow participants
- provide adequate instructions and supervision for equestrian.

It is further recommended that a designated ‘Responsible and/or Risk Management Officer’ is appointed, within your club’s organisational structure, to ensure this information is made available to all club directors, staff, participants and volunteers. The material has been specifically tailored for ‘amateur equestrian clubs’ and has been primarily based on many years’ experience in these areas, around the world.

Safe Equestrian Induction Program

The safe equestrian plan incorporates an online tutorial that has been developed and provided as an induction program for equestrian clubs. The aim of this induction program is to quickly and easily provide practical and valuable knowledge to all participants as a guide on how to assess and manage potential hazards and areas of risk that may be an exposure for serious injuries in and around your club.

This tutorial is designed to highlight the importance of being ‘aware’ at all times that potential dangers exist and that by having a ‘pro-active’ approach and culture throughout your club will assist in the prevention of the exposures that equestrian clubs face.

It is strongly recommended that this resource is highlighted, as often as possible, and made available to all past and present club directors, staff, participants and volunteers.

On completion of this tutorial, a ‘Certificate of Accreditation’ will be provided immediately for persons who participate in the short tutorial.

Please [click here](#) to participate in the safe equestrian induction program.

2.3 Medical Emergencies

Accidents can and do happen at equestrian events. If they do, they have the potential to expose organisers to risk and liability. For instance if it can be shown that a competition was permitted to proceed in bad weather or if the first aid procedures in place were insufficient and therefore contributed to the severity or complications of an injury the club may be liable. From a public liability standpoint and to protect the club and its members, the organising committee should have specific guidelines in place that can deal with situations that could lead to accidents and procedures set in place for deciding who is to render medical care. This is not an issue that can be set in stone, rather guidelines that should be followed.

First aid responsibilities required for EA event organisers are spelled out in [First Aid Requirements Policy](#)

3 Horse Welfare

In all equestrian sports the horse must be considered paramount. The well-being of the horse shall be above the demands of breeders, trainers, riders, owners, dealers, organisers, sponsors or officials. The highest standards of nutrition, health, sanitation and safety shall be encouraged and maintained at all times.

EA adheres to the FEI code of conduct for National events. It is the responsibility of the club to ensure its members practice safe horse welfare.

THE FEI CODE OF CONDUCT for the Welfare of the Horse

- 1 The Fédération Equestre Internationale (FEI) expects all those involved in international equestrian sport to adhere to the FEI's Code of Conduct and to acknowledge and accept that at all times the welfare of the horse must be paramount and must never be subordinated to competitive or commercial influences.
- 2 At all stages during the preparation and training of competition horses, welfare must take precedence over all other demands. This includes good horse management, training methods, farriery and tack, and transportation.
- 3 Horses and competitors must be fit, competent and in good health before they are allowed to compete. This encompasses medication use, surgical procedures that threaten welfare or safety, pregnancy in mares and the misuse of aids.
- 4 Events must not prejudice horse welfare. This involves paying careful attention to the competition areas, ground surfaces, weather conditions, stabling, site safety and fitness of the horse for onward travel after the event.
- 5 Every effort must be made to ensure that horses receive proper attention after they have competed and that they are treated humanely when their competition careers are over. This covers proper veterinary care, competition injuries, euthanasia and retirement. The FEI urges all involved with the sport to attain the highest levels of education in their areas of expertise.

More detail on the FEI Code of Conduct can be found [HERE](#).

Bio-security Action Plan

It is the responsibility of all equestrian event participants to contribute to the welfare of horses and their biosecurity. The impact of biosecurity and infectious diseases is the greatest during horse events and gatherings. Horses at events have the potential to allow the spread of infectious disease. Equestrian events act as multipliers for the spread of infectious diseases should an outbreak occur. The primary responsibility for biosecurity at equestrian events lies with the horse owners and riders – well before they even come to the event.

Prepare and implement a bio-security plan

Preventing the introduction of an infectious disease at a horse event is vital. A biosecurity plan outlines the precautions taken to minimise the risk of introducing an infectious disease into an animal population.

Event organisers must be prepared at all times to apply and action the appropriate contingency plans in the event of clinical disease(s) being found in participating horse(s).

A bio-security plan should include:

1. A veterinarian to be on call during the event
2. A method of making emergency phone calls or alternative communication

3. A plan to minimise public access to stable areas
 4. Separate vehicle parking for competitors and spectators
 5. Single entry and exit to grounds
 6. Adequate hand-hygiene facilities especially in eating and horse-handling areas
 7. Designated isolation area (or stable) for sick horses
 8. Good hygiene practice between horses for officials/stewards
 9. A contingency plan in the event a stock standstill is declared.
- Keep event records – these records are recommended.
 - All horses:
 - Name, identification (brand/microchip number, sex, colour), PIC (property identification code), location where the horse came from as well as the location of where the horse is going.
 - All competitors and people in charge of horses:
 - Name, address, phone numbers.
 - Event organisers have a duty of care to participants and their horses. Event organisers should keep event attendance records for six months.

*“Horses that are suspected of suffering from infectious or contagious diseases or have been in contact with other animals suffering from such diseases, and horses which are not free from infectious or contagious diseases or come from places or establishments which are not free from such diseases **MUST NOT** be allowed to take part in EA events”*
(FEI Vet Regs)

A sample Equestrian Australia Bio-security Plan can be found [here](#).

More information on Bio-security can be found [here](#).

4 Member Services

- 4.1 Membership Management
- 4.2 Member recruitment
- 4.3 Member retention
- 4.4 Member education

The servicing of club members in a not-for-profit organisation can be difficult, particularly in a changing community. As part of the club's risk management, communication, marketing and strategic planning, the committee should understand the rate at which it is growing. Understanding why people join, continue or leave the club is vital information when developing the way the club operates. This information also feeds back to medium and long term financial planning, facilities planning and volunteer planning as it impacts on the clubs capacity to service its members.

Aspects that should be considered include:

- How are you promoting your club?
- Are you talking to the right audience?
- Is the club offering the right services?
- What is the competition for the club? ie other clubs with similar programs.

For more information on membership visit the [Australian Sports Commission website](#)

One Sport, One Membership.

The new Equestrian Australia national membership structure came into effect on 1 July 2013.

Membership categories previously differed from State to State, with more than 45 membership categories existing around the country. This new unified approach makes it easier to understand the equestrian sport system in Australia and is designed to make it simpler for new members interested in being involved in the sport.

There are now six national categories that will accommodate everyone. These being:

Individual

1. Competitor
2. Participant
3. Supporter

Groups

4. Clubs
5. Sport Affiliate
6. Commercial

For more information visit the [Equestrian Australia Website](#).

4.1 Membership Management

Member Protection

Member protection is a term used by national sporting organisations (NSO's) to describe the practices and procedures that protect an organisation's members – both individual members such as riders, coaches and officials, and the member organisations such as clubs, state associations, other affiliated associations and the national body. Member protection involves:

- Protecting members from harassment, abuse, discrimination and other forms of inappropriate behaviour
- Adopting appropriate measures to ensure the right people are involved in an organisation, particularly in relation to those involved with juniors
- Providing education
- Promoting and modelling positive behaviour.

Click on the link to access the [EA member protection policy](#).

Child Protection

As in a range of other social environments, the issue of child abuse is a complex problem that affects everyone, including those who participate in sporting and recreational activities. Children and young people have a right to be safe from abuse. All people looking after children and young people have a responsibility to provide a safe environment for them - including those in the sport and recreation industry. Abused children can suffer from low self-esteem and have difficulty with personal development and forming relationships. The impact and consequences of abuse can also affect the child's family and the general community. National and State and Territory Sports Organisations have developed child protection guidelines. These guidelines can help you put policies in place to protect your club and your members. For additional information on required checks for people working with juniors, please contact your State or Territory department of sport and recreation.

For more information on Child Protection Visit the [Australian Sports Commission Website](#).

Strategies for Clubs

- Appoint a child protection representative. This person should be the first point of contact if a child, parent or other member of the club or association becomes concerned about an incident.
- Have the child protection representative appropriately trained and their details and role well advertised within the club and association.
- Your policy should include a complaints process and codes of behaviour for all roles within the sport, stating what is acceptable behaviour.
- Adopt thorough recruitment and selection practices for paid and voluntary positions. These practices should include job descriptions, interviews, checking references and where appropriate, conducting police checks.
- Promote the policy and procedures to all members, particularly coaches and make them easily accessible.
- Ensure clubs and associations meet any relevant state child protection legislative requirements.
- Respond to suspected, allegations and complaints of child abuse. Where there is an incident of suspected child abuse, the child protection representative for the club or association should immediately make contact with EA and/or the relevant authorities to seek advice.

- Ensure there is no harassment and victimisation of the child or the person who made the allegation on behalf of the child.
- Use accredited coaches and officials and check that their accreditation is current via the [EA website](#).
- Provide information to coaches and others working with children about how to recognise child abuse and give them directions on what to do if abuse is reported or suspected.
- Conduct an education and training program to increase awareness of child abuse (various agencies in each state that can assist with this).

For more information visit [Play by the Rules](#).

Taking images of children

EA requires that individuals, affiliations and associations, wherever possible, obtain permission from a child's parent or guardian before taking an image of a child that is not their own and ensure the parent/guardian knows the way the image will be used.

Sample Photo Release Form [Appendix D](#)

EA will only use appropriate images of a child, relevant to equestrian sport and ensure that the child is suitably clothed in a manner that promotes the sport. EA requires its members, State Branch affiliates and clubs to do likewise.

4.2 Anti-Discrimination

Discrimination has various forms and it happens every day. Discrimination involves making choices about how we treat other people. Those choices can be made using real and relevant information or they can be based on prejudice, stereotypes and bias. Some is unlawful (for example, sexual harassment and racial discrimination) and some is not (for example, a coach who shows favouritism towards their child over other riders).

All discrimination is undesirable if it leads to unfair treatment of athletes, members and other participants in recreation and sport.

What is Fair Discrimination?

A good example in sport relates to team selection. If you are a coach/selector, and you have more riders than you can fit in your team, you must discriminate between the available riders. You must choose who will be in the starting team and what positions they will play, to arrive at the best possible team. In junior sport you have the additional responsibility to ensure fair participation.

Those choices should be based upon relevant criteria such as ability, attitude, effort, and attendance at practice. These are all fair and legitimate criteria to apply to team selection.

What is Unlawful Discrimination?

In sport, this is not easy to define. Equal opportunity laws make discrimination on various grounds unlawful. For example: race, sex, age, disability, pregnancy, sexuality and marital status. Some behaviour is also unlawful, including sexual harassment and victimisation.

However, things like age, gender and disability can have very significant effects on sporting ability. These differences are most evident at the elite sport level. For example compare the power of the best male tennis players with the power of the best female tennis players.

To take into account these differences, and to make sure there is fair competition, the law allows for teams to be organised into groups such as age groups, or single sex groups.

Here are some examples of unfair and possibly unlawful discrimination:

- Sex Discrimination
- Racial Discrimination
- Age Discrimination
- Marital Status Discrimination
- Pregnancy Discrimination
- Sexuality Discrimination
- Impairment or Disability Discrimination
- Sexual Harassment
- Victimisation

4.3 Member recruitment

Recruiting new members

When considering your membership it must be remembered that retaining your current members is your number one priority! They are likely to be your best advocates and are essential in making new members feel welcome.

Your club's success in attracting new members will depend on how well you present the club's services to potential members. You need to develop a clear written plan to make your search for new members more efficient and effective. It should not be just a once-off recruitment drive but a strategy that will take you from where you are now, a club with a need for new members, to a club that has a constant supply of new members.

The planning process

The first stage of the planning process is to ask yourself the following questions:

- Goals
 - Why do you want or need members?
 - How many and what kind do you need?
- Strategies
 - Who is going to do the recruitment?
 - Where should they look?
 - When should you recruit? Is there an ideal time?
 - How should you approach potential members?
- Evaluation and improvement
 - What could you have done better?

Practical strategies for member recruitment

- Host an open day – This is a great way to give potential members a chance to get a taste of what your club offers. Make the day fun by staging demonstrations which get people active and socialising with one another. Consider putting on a free barbeque and offering a lucky door prize as an incentive to get members of the public to come along. If you have a high profile athlete associated with your club ask them to attend and sign autographs. Open days can be promoted through the media (see chapter 7.5).
- Become a Ready Set Trot delivery centre – Ready Set Trot is the new participation program developed for young horse lovers without a horse of their own. It is a fantastic recruitment program for clubs to increase their membership and junior numbers.

Benefits of becoming a Ready Set Trot Stable Skills Delivery Centre:

- All the work has been done for you! Every delivery centre receives fully prepared lesson plans, a delivery centre starter pack including handbooks, branded merchandise, signage for your centre and access to the Ready Set Trot online program management system enabling participants to search and register for a program at your club
- Reach a new market and have potential new members/clients knocking on your door
- Be a part of a national campaign promoting and growing the equine industry using provided marketing tools and templates.

To learn more about the Ready Set Trot program visit the [Ready Set Trot website](#)

- Have a presence at your local community fair or school fetes – this is a great way to attract juniors to your club as well as volunteers. Setting up a stall at a public event where there is high foot traffic can be a great way for you to promote your club and what it offers. Rally up a few club members who would be good spokespeople for the organisation. Stand out from the crowd and capture people’s attention by taking a pony along (you will of course need the permission of event organisers to have a pony in attendance).

Create an Inclusive Club

Clubs can increase their membership and their social standing in the community by creating inclusive and safe environments through the following strategies:

- Finding out which people in their community need them – targeting women, juniors and/or people with disabilities
- Developing specific programs which encourage participation
- Utilising their club rooms and facilities as a place for people to meet socially after events or on specific days many people meet members of the local community by participating in the social events put on by their sporting clubs
- Schedule events so the whole family can attend on the same day and then enjoy refreshments together at the end
- Involve more juniors at the club – more juniors means more parents, which results in a vibrant community atmosphere and increases the pool of potential volunteers for the club
- Get involved with local schools to recruit junior members
- Welcome new mums back to the sport by providing informal child care, and scheduling events at family-friendly times.

More information on creating an Inclusive Club can be found on [Play by the Rules Website](#)

4.4 Member retention

Retaining members

Once you have your members you need to keep them - keep your members happy, give them a voice and as a committee listen to your member's needs. Happy members will tell their friends and family how great your club is. This is the most effective type of promotion, and best of all it's free! Try to show each existing member how you value them and get them involved.

To succeed, treat your club as a business, take your committee role seriously and have an understanding of where you are going and how you are going to get there and you will reap the benefits and become a successful and thriving sports club.

Make the most of your people

Your current members, and their skills and knowledge, are probably the most valuable asset your club has. They act as ambassadors and have a great influence on the atmosphere and people's first impression of your club.

Don't focus on who can help, but also what they can do. Learn about specific skills of your members. Have they got skills in IT or carpentry? Don't ask people to do too much, unless they ask to do more. Limit the amount of time they spend helping out to avoid them burning out.

To see more information on volunteers visit section 6 of this document on 'Workforce development'.

Keep in touch with your members

Build and keep an updated database to enable you to personally communicate important club information to your members. While creating a database think about the sort of information that will be helpful. It will probably be a simple list of details such as members' names, addresses, telephone numbers, email addresses, children's ages, type of activity required and willingness to be contacted by you from time to time.

Distributing a newsletter by email is an effective, low cost and immediate method of staying in touch with your members. The key is to have an up-to-date list of all your members and their email addresses.

Some points to remember:

- Send the newsletter from a legitimate email address which your members can reply to
- Make the subject line clear
- Keep the amount of content to 1000 words or less, otherwise it becomes tiresome to read online
- Include stories that will be useful and of interest to a large proportion, if not all your members
- Add graphics that relate to the stories to help break up the text
- Add contact details, in more than one place if possible.

Give your members a voice

Members are the lifeblood of your club. Making a decision to change something about your club that your members do not like could spell disaster. There is a way of preventing this – ensure you involve your members when it comes to decision making.

If your members are not happy, they will leave. It is your job to keep members happy and keep them involved and engaged. Remember they joined voluntarily for enjoyment. Keep that in mind when making decisions that will affect your member base. Asking for input or advice from your members makes them feel more valued and involved; it promotes ownership and pride in their club.

Get people thinking about ideas for improving the club. Ask the committee to draw up some proposals, or invite the whole membership along to a brain storming session. Don't criticise each other or reject anything at this stage – the aim is to get creative juices flowing. Give people who might not speak up in a meeting other ways to make suggestions, in writing for example.

Later you can discuss each idea to see if it's right for your club. Make a short list of the best (and most practical) ones. You will never get everyone to agree on your plans or proposals but by inviting feedback and involving your members in the decision making you will be ensuring that you cater to your majority. Decide what has to be done to get started and who will do it.

For more information on creating inclusive clubs visit [Australian Sports Commission](#)

4.5 Member education

Learning is a lifelong process, which is one of EA's educational philosophies and visions. EA's education policies and structures aim to provide all EA members with a platform by which they can increase their participation in equestrian activities. This is done through the continual improvement and expansion of member education opportunities and training services.

EA education opportunities

Equestrian sports are dynamic activities that involve blending knowledge and experiences. Equestrian Australia offers certificates and accreditation courses in three areas:

1. General education
2. Coaching
3. Officiating

To find out more on the courses offered visit [EA Education Programs](#)

Skills Recognition

Equestrian Australia is making it easier for individuals to count prior qualifications and experience toward gaining accreditation as an EA National coaching accreditation scheme (NCAS) coach. As part of EA's new skills recognition policy, current coaches or those individuals wishing to enter the program may use formal training, work and life experiences as well as competition results toward upgrading or attaining their coaching qualifications.

For more information visit [Skills Recognition for EA Coaches](#).

Presenter, Assessor and Mentor Training.

The quality of education for coaches and officials relies on trained presenters, assessors and mentors to deliver, assess and develop coaches and officials. The Australian Sports Commission provides a range of programs to assist in the training of presenters, assessors and mentors.

EA offers these courses once a year to interested parties, alongside some events or training days. Dates are regularly added to the [Education Calendar](#) on the EA website.

Safe Horse Communities Kit

The Safe Horse Communities Kit has been developed by Equestrian Australia and Pony Club Australia to provide concepts and resources for interactive sessions to educate and benefit equestrian members and volunteer groups.

For a guide on how to best present these interactive sessions the Safe Communities Kit can be found in [Appendix J](#).

Club education opportunities

The NSW Sports Federation provides education and training services to share best practice industry wide. Training takes the forms of accredited courses, workshops, seminars focused on building capacity and performance of member organisations, their affiliates and individuals. Affordable workshops and webinars are held throughout the year for members of sporting organisations to assist in better developing your club. Contact your State Branch or Equestrian Australia for more information.

Workshops such as:

- Marketing your club
- Managing volunteers
- Resolving conflict in your club
- Member protection information courses
- Writing winning grants
- The role of the board and effective meetings.

To view any upcoming workshops in NSW visit [Workshops for Sporting Organisations](#)

Officiating in Equestrian Sport

An official is a person who oversees a competition, or aspect thereof, by applying the rules of the sport. There may be rules directly relating to judgments on performance, time, score and/or upholding the principles of fair play and welfare of the horse. EA trains and accredits officials at national level across a variety of disciplines. EA also liaises with the FEI in regards to international officials.

The [Australian Sports Commission](#) defines the role of officials along the following lines:

An official is any person who controls the actual play of a competition by applying the rules and laws of the sport to make judgments on rule infringement, performance, time and score.

Officials play a key role in ensuring the spirit of the game and/or event is observed by all.

Officials also ensure that all athletes develop through their chosen sport and guarantee the competition is conducted within the spirit of the rules.

It is essential that officials provide all people of varying ages the best possible sporting experience, which will ensure their continued participation and development in sport.

5 Event Management

Event management refers to the planning and management of events which:

- May be staged only once by a particular event organiser, annually, or on a more regular basis
- They are open to the public or a specific interest group
- They have pre-determined opening and closing dates
- Do not necessarily require permanent structures owned by organisers.

Planning

It is important when planning an event to be clear about why the event is being held. Having a list of event objectives is essential. Among the potential reasons for running an event are to:

- Help the local community
- Inform/educate the community about an activity
- Promote an activity to newcomers
- Provide an avenue for competition
- Deliver benefits to sponsors and members
- Obtain media coverage of an activity
- Raise funds.

There are four simple steps that can be used as the process through which to develop and run a successful event or program.

1. Planning – Think it through
2. Preparation – Organise all that is needed
3. Presentation – Conduct the event
4. Evaluation – Be aware of your successes and/or failures.

At least 80% of the work in any project is in the planning and preparation stages. The time spent on evaluation will ensure that future projects run smoothly and successfully.

For more information on event management visit the [Australian Sports Commission – Event management](#)

Step 1 Planning – Think it through

- Bring the ideas together
- Know the purpose of the exercise
- Time line the procedure
- Identify resources
 - Manpower
 - Equipment
 - Facilities
- Examine the costs
- Know your goals
- Consider evaluation methods
 - What is to be achieved?
 - Who is it for?
 - Who can help?

- What is it called?
- How much?

You can find a sample event management plan [HERE](#)

Step 2 Preparation – Organise all that you need prior to the event

This is the long and tedious part of the exercise where all the work is done. Attention to detail during the "preparation" stage will give your event the best chance of running smoothly.

- Make the bookings
- Make the phone calls
- Write the letters
- Confirm all bookings and arrangements
- Confirm all manpower - staff and volunteers
- Work to a budget
- Confirm
 - Facilities
 - Equipment
 - Transport
- Guest and VIPs, PR and promotion.

Step 3 Presentation – Conduct the event

At this point the event should run smoothly because time and effort has been put in during planning and preparation. Minor problems do arise, however these will be insignificant and should have little effect on the presentation of the event.

Step 4 Evaluation – Be aware of your successes and/or failures

It is necessary to evaluate all aspects of the project and to make recommendations for future events.

- Where did you go wrong?
- What were your successes?
- How can you improve it?
- Did the event achieve its goals?

More information on event planning (including planning and budget templates) can be found in the Australian Sports Commission [Event management Document](#).

Information on [Bio-security](#) and [Horse Welfare and well-being](#) specific to equestrian events in Australia can be found on the [Horse SA website](#).

Venue

A site plan needs to be prepared outlining the event facilities such as stables, yards and exercise areas. These areas need to be planned out and managed to ensure you meet the rulebook requirements and manage to avoid horse health, environmental and neighbourhood issues which may form part of the hire agreement such as:

- Excess noise (potential concern to neighbours)
- Traffic
- Off-street parking
- Camping/cooking (campfires may not be allowed in certain seasons)
- Waste management
- Management of people/crowds
- Plan to minimise dust/mud
- Plan to avoid pollution of water resources from 'dirty' water runoff
- Other compliance requirements of the hire agreement.

Councils or recreation ground management committees often have quite strict requirements about how event infrastructure is put into place. You may be asked to provide evidence on how you will comply with state or local legislation.

A site plan helps the "look and feel" of an event, setting the all-important atmosphere that people will remember it for. A site plan can help reduce costs, for example through strategic placement of marquees near existing power sources. A site plan helps share information amongst key volunteers about traffic management, event safety, emergency access and helping meet the rule book requirements for the conduct of the event.

Plans can be drawn up on paper which is useful for site meetings and group planning. Information can then be placed onto electronic maps (e.g. Google maps), which can be used for emailing to council or the venue manager. Electronic maps may also go to competitors, contractors, form part of a trade fair or sponsors sales kit and versions placed in the program or on the website.

The first step is to visit the site and undertake a preliminary evaluation. Mark key areas down on the map:

- Entry & Exit points. Note what type, if they have gates
- Capacity of each area within the venue to handle the number of horses, people or vehicles expected for that part of the event or time of day
- Emergency routes
- Are there parts of the site that emergency vehicles cannot currently access?
- Site safety risks (e.g. dams, wells, rubbish dumps, broken fencing)
- Service points (water, power)
- Lighting - existing and proposed
- Toilets, showers – existing and proposed
- First Aid and veterinary sites in relation to the event & other venue services
- Note nearest watercourses, native vegetation or other aspects of the environment to include in event management considerations
- PA system location and expected coverage of the site
- Existing spectator infrastructure (grandstands, seating)
- Note flat areas, slopes, mud holes, useful observation points
- Note noise from other sources, noise the event might make, and are there any close neighbours?

Go through your infrastructure checklist prior to visiting the site and note on the map:

- Proposed food area & marquee sites (in relation to power/water / level site)
- First Aid and veterinary sites in relation to the event & other venue services
- Horse related infrastructure e.g. stabling
- Camping
- Where overhead wiring or additional piping is expected to run
- Sight lines needed for competitors, stewards and officials
- Enquire as to if other events will be occurring nearby , e.g. another sporting event
- Will the site plan need to be altered if temperature extremes occur e.g. heavy rain, heat.

Be flexible with early plans, as volunteers responsible for other areas of the event will also need to work with the group to have their section needs met. It will pay to discuss plans with neighbours and if there are any issues, aim to negotiate a solution that is reasonable and meets everyone's needs.

More information on event planning and management can be found in the [Horse Event Organisers Tool Kit](#) from the South Australian Endurance Riders Association.

6 Workforce Development

- 6.1 Workforce Management
- 6.2 Recruitment
- 6.3 Recognition
- 6.4 Training
- 6.5 Workplace Health and Safety

The term 'Workforce' refers to all volunteers, administrators, coaches and officials who contribute to the running and management of a club.

Because volunteers are such an integral part of the sport it is important that they are managed in ways that make them feel valued and part of the organisation. Volunteers who feel that they have made a worthwhile contribution to their organisation, have been appropriately rewarded and recognised, and feel respected are more likely to contribute again.

Visit the Australian Sports Commission website for their [Volunteer Good Practice Policy](#)

6.1 Workforce Management

A volunteer is "a representative from the community who freely chooses to give their time, skills and experience to support club activities."

Volunteers fill many roles within your club or organisation. Here are a few areas in which you might recruit a volunteer for:

- Organise fundraising events
- Maintain care of equipment and building maintenance
- Head judge or official
- Club committee member eg. President, Secretary, Treasurer
- Help run an event
- Membership Officer
- Team Manager
- Volunteer Coordinator

Volunteers should enjoy the same sense of support and accomplishment in their voluntary roles as they do in their paid work.

Volunteers need to be aware of their rights as well as their responsibilities to their club. They are engaged to perform a specific job and the club agrees to provide the volunteers with a worthwhile and rewarding experience. Each has the right to some basic expectations of each other.

Volunteers have the right to:

- Orientation to the club and their role

- A clear job description
- Support and respect from the club, no matter how small their role
- Guidance from a supervisor or club member in charge
- Access to training
- Insurance and feeling safe while volunteering
- Know who they are accountable to and have clearly defined communication channels
- Know what is expected from them.

Volunteers have the following responsibilities:

- To make sure they have the time to take on the role
- To be loyal and offer suggestions
- To be willing to learn the skills needed, and to update training as required
- To speak up – ask about things they do not understand
- To be dependable and deliver on what they said they would
- To be a team player, respect other volunteers and what they are meant to be doing
- To be willing to provide feedback.

6.2 Recruitment

To find volunteers you need to have a clear understanding of why you want volunteers. You need to start planning what the club wants to achieve for the year (eg. events, fundraisers, competitions), and whether your club will need volunteers to assist on those projects, how many and the time frame.

Neither volunteers nor yourself want to be hanging around at an event, not knowing what to do or not enough work to go around. At the same time volunteers do not want to be given so many tasks that they cannot possibly cope. If you are clear as to why you want someone to help and are organised as to what department or area you need assistance with, people are more likely to step forward to offer assistance.

Your club may believe finding volunteers is important enough to appoint someone for that specific task. Ideally one of your members should take charge to serve as the volunteer coordinator. This person needs to be a good organiser with plenty of time and energy to recruit and look after volunteers.

Below are some questions that will aid in determining what your volunteer need is:

- What duties do you need volunteers for?
- How many volunteers do you need?
- When do you need them?
- For how long?
- What demands will be made on the volunteer?
- By whom?
- What authority will the volunteer have?
- Who is the volunteer answerable to?
- What support is there for the new volunteer?
- Is there time and resources available to train the volunteers?
- What skills are you looking for in a volunteer?

Retention

Many organisations are successful in attracting volunteers to their organisation. Reasons for this may be that the activity or organisation is exciting, glamorous or challenging, but sometimes these organisations do not retain the volunteers for long periods of time. Volunteers want to feel needed, useful, part of the team and feel welcomed into the organisation. A simple but effective way to ensure you will retain your volunteers is an orientation period before commencement of position. Even in a small organisation an introduction to your club and its key members will encourage volunteers to stay involved.

Checklist for Recruiting, Retaining and Managing Volunteers

- Decide why your organisation needs volunteers
- Appoint a volunteer coordinator
- Develop a recruitment strategy in alignment with the club's planning process
- Work out specific job requirements for volunteers
- Write job descriptions for each job
- Start recruiting
- Interview and choose your volunteers
- Orientate them to their new job
- Identify training needs, then provide the opportunity for training
- Ensure communication is clear and the volunteers are informed of all matters
- Supervise and evaluate the volunteer
- Reward and recognise volunteers appropriately
- Make necessary changes in jobs and volunteer programs
- Review these steps regularly.

6.3 Recognition

Recognition is a very important factor to volunteer retention. To retain your volunteers you must recognise their efforts. Remember volunteers are a very important part of the successful running of your organisation as without their efforts many clubs would cease to exist. Ensure your volunteers receive the support and recognition they deserve. You can recognise your volunteers through the following ways:

- VIP recognition certificates
- Offering personal praise to the volunteers while on the job
- Writing letters and postcards of thanks
- Giving away shirts to remember the event
- Acknowledging them in club newsletters
- Presenting volunteer awards at club AGM's
- Giving complimentary tickets to special events and functions
- Holding social events in honour of volunteers
- Volunteers can be nominated for EA State Branch Awards

[Lend your hands to horse events](#) is a joint initiative of Equestrian Australia and Pony Club Australia. As well as recognising the ongoing efforts of hard working helpers the initiative includes a recruitment tool which has been created to allow you to promote new volunteers to your club.

6.4 Training

Appropriate training is an essential part of running an efficient and effective company. The same principal should apply to volunteers in your organisation/club. Training can be directly linked to volunteer retention.

Many local organisations and governments offer a variety of training opportunities. Your volunteers should be encouraged and supported to attend. If your club has specific needs, organise your own special training program. Your own membership will have many skilled people who are often extremely willing to provide training for others.

There are many positions and duties that can be filled by volunteers. Often volunteers get recruited into positions for which they do not have the necessary skills and experience. To avoid creating a negative experience because of misunderstandings relating to what is expected and required from the volunteer, develop an appropriate job description.

The job description should include the following:

- Job title
- Immediate supervisors name
- Duties and responsibilities
- Hours and dates volunteer is required for
- Qualifications (if needed)
- Special skills or training (if needed)

For more information on managing volunteers visit [NSW Sport and Recreation](#)

6.5 Workplace Health and Safety

Everyone has the right to be safe at work. This includes the paid and volunteer workers who contribute in many different ways to your sporting organisation or club. New work health and safety (WHS) laws may mean that the responsibilities and duties of your sporting club have changed.

Under the WHS laws, some sporting organisations and clubs may need to take new actions to comply with the WHS Act and their state and territory WHS Codes of Conduct and Regulations.

The Australian Sports Commission has developed a guide to be used in conjunction with your State or Territory's approved WHS Codes of Practice. This guide can be found [here](#).

For details on individual States and Territory's regulations, visit the [Safe Work Australia Website](#).

What your organisation needs to do

If the work health and safety laws apply to your organisation it must ensure, so far as is reasonably practicable, the health and safety of all its workers, including volunteers. This means that the organisation must provide the same protections to its volunteer workers as it does to its paid workers. The protection covers the physical safety and mental health of all workers, including volunteers.

The primary duty of an organisation includes ensuring, so far as reasonably practicable:

- The provision and maintenance of a work environment without risks to health and safety
- The provision and maintenance of safe plant and structures and safe systems of work
- The safe use, handling and storage of plant, structures and substances
- The provision of adequate facilities for the welfare at work of workers, including volunteers, for example toilets. First Aid facilities
- The provision of information, training and instruction or supervision that is necessary to protect all persons from risks to their health and safety arising from their work.

Managing health and safety risks

A safe and healthy workplace does not happen by chance or guesswork. You have to think about what could go wrong at your workplace and what consequences could be. You must do whatever you can – whatever is reasonably practicable – to eliminate or minimise the health and safety risks arising from the work your organisation undertakes.

The process of eliminating or minimising health and safety risks is called risk management. More information on this can be found in chapter 2 - Risk Management.

Providing information, training and instruction to volunteers

Volunteer workers must be provided with information, training, instruction or supervision so they can carry out their work safely. Training and information should be tailored to the type of work your volunteers do and where they work.

Talking about health and safety

The Work Health and Safety Act requires organisations to consult with workers, including volunteers, so far as reasonably practicable, about work health and safety matters that affect them.

Talking to your volunteers and other workers is a good way to ensure they contribute to the identification of hazards and the assessment and control of any risks they face when they carry out their work.

The aim of the consultation is to ensure that volunteer workers are given an opportunity to provide ideas about how to do their work safely. The organisation must take volunteer's ideas into consideration when making decisions about safety in the workplace. Discussions about work health and safety can be carried out in various ways. How your organisation does it will depend on factors like:

- The nature and size of the organisation
- The type of work that is carried out
- The current engagement arrangements of workers, including volunteers.

Finding the right consultative arrangements

Your club might already have established ways of talking to its workers, including volunteers, about work health and safety. This can continue under the WHS Act if your organisation and its workers, including volunteers are happy with this arrangement. Ways you might consult with your volunteers:

- Sending out regular newsletters via mail or email which feature work health and safety news, information and updates

- Regularly updating the volunteer section of the notice board or website with information, including its latest safe work policies and procedures
- Having a 'suggestions' email box for workers to send suggestions to about ways to work safely and other matters
- Holding regular meetings to talk to volunteers about the work they do and how to do it in the safest way
- Through Health and Safety Representatives (HSRs), if requested by volunteers.

Notifying serious incidents

Your club is required to let your state or territory work health and safety regulator know if any notifiable incidents occur as a result of the work of the club as soon as it is reasonably able.

A notifiable incident is a serious incident that relates to the work the club or organisation carries out and involves:

- The death of a person
- The serious injury or illness of a person, or
- A dangerous incident.

To help determine what type of incident must be notified, 'serious injury or illness' and 'dangerous incident' are defined in the model [WHS Act](#).

To ensure your club satisfies this duty, you could require your volunteer workers to inform your club immediately of any incidents that occur. While only incidents that cause serious injury or illness will be considered notifiable, being informed of any other incidents may help your organisation to comply with its duties under the WHS Act. Your Club may even create and implement a policy or procedure for reporting of incidents. Talking with volunteers about the less serious incidents that might arise from the work of your club may also help to prevent more serious incidents from happening in the future.

EA incident report for can be found in [Appendix C](#)

Resolving issues

The WHS Act outlines a process for the resolution of issues about work health and safety arising out of:

- Work carried out at the workplace, or
- From the conduct of the organisation.

The issue resolution process applies after a work health and safety matter is raised but not resolved to the satisfaction of any party after discussing the matter. All parties involved in the issue must make reasonable efforts to come to an effective, timely and final solution of the matter.

If a work health and safety matter cannot be resolved by talking with all involved parties, then your organisation needs to follow the issue resolution process set up in the WHS Laws.

For more information on issue resolution and the WHS laws contact your [work health and safety regulator](#).

7 Communications and Sponsorship

- 7.1 Member Communication
- 7.2 Online Media
- 7.3 Fundraising and Grants
- 7.4 Sponsorship
- 7.5 Media
- 7.6 Event Promotion

Effective Communication

The area of communications, marketing, promotions, sponsorship and media is vitally important to the success of a club, its member servicing and the event's clubs run. It is often overlooked in today's ever evolving social media society.

Effective marketing and communication can attract members, sponsors, volunteers and funders. The more people know about your club, the more opportunities that might come your club's way. Marketing and communication initiatives are also a good way to promote (and thank) your sponsors, funders and other community partners.

Effective marketing and communication means both doing more with less, but also ensuring your messages are being seen and heard by the appropriate audiences.

Promoting your club can include events, activities and advertising, however proactively sharing stories of success and highlights can be just as effective. The club should also ensure information is made available for people wanting to get involved as participants, coaches, officials, volunteers or supporters.

There are a number of ways to deliver these messages, including club networks and meetings, noticeboards, newsletters, emails, SMS, media releases, local and community newspaper and radio, school newsletters, web posts, YouTube, Facebook, Twitter, other community forums and event calendars etc.

The key is for communication to be regular, in order to retain interaction with your members and stakeholders, but also ensure your community is aware of your club and activities. The simple task of ensuring the club's contact details are listed in the phone book and local directories is also important but can often be overlooked.

Another important consideration is for the club to meet the needs of their members, by understanding WHAT people want to know about, and the WHEN and HOW they want to receive that information. This is particularly important when needing to deliver messages to members about events, competitions, facilities or club announcements.

For more information on effective marketing and communication visit the [Australian Sports Commission website](#).

7.1 Member communication

E-Newsletter service providers such as [Campaign Monitor](#) or [MailChimp](#) provide an easy to use avenue for member communication.

- For up to 2000 subscribers it is a free service, allowing you to send up to 12,000 emails per month
- It provides editable templates, in which the header can be changed so a graphic (such as your club banner) can be added to maintain a familiar look
- Allows you to design a subscriber button which can be placed on your website and also on Facebook
- Provides reports on recipients of your emails, allowing you to keep an up-to-date database
- Track click-throughs and report back to sponsors.

Email Marketing Plan

An email marketing plan can be put together in five simple steps:

- Define your readers
- Determine your purpose
- Outline your goals
- Determine your frequency
- Create a timeline

Mailchimp's email marketing e-book can be found [HERE](#)

Common Email Marketing Mistakes

Common email-marketing mistakes include:

- Not having permission to email your recipients
- Confusing transactional emails with email marketing
- Assuming people remember who you are
- Writing like a used-car salesman
- Ignoring campaign reports
- Sending with personal reply-to address

Mailchimp's marketing mistakes e-book can be found [HERE](#)

A Guide for non-profit organisations

Mailchimp provides information to assist not for profit's:

- Creating a list
- Creating groups
- Sending your first campaign
- Sharing your newsletter
- Reports and analytics
- Integrations

Mailchimp's e-book for not for profit organisations can be found [HERE](#)

7.2 Online media

Club website tips

Traditionally communication with members has been via hard copy materials, application forms, event information, newsletters, renewal reminders etc. Producing and distributing this information can be costly, time consuming and the material is at risk of becoming out of date quickly. Moving this sort of communication to online can cut costs as well as allow you to keep your members up-to-date with the most recent information. Web based communication provides a highly accessible marketing option.

A few things to remember when updating your website:

1. Update your website at least once a month
2. Make sure all your departments are using the one web site to communicate
3. Have a place on the home page for important announcements and upcoming events so that the visitor can immediately see what's new
4. Create a subscription based email newsletter to promote updates on your website. Always link the newsletter to your website to direct subscribers there.

Suggestions on marketing your website can be found at [Coyote Communications Free Tips](#).

Social Media

Social media gives individuals, groups, organisations and businesses the opportunity to share and connect like never before. Social media sites have become virtual communities which allow for the instant exchange of information, whether it is written or visual. If used responsibly social media can be a great way for clubs to increase member satisfaction through greater engagement, issue important notices, promote events and service sponsors.

EA Social Media Policy can be found [here](#).

Social media sites that your club might consider using:

- Facebook – the world's largest social network – connect with fans and share information
- Twitter – an information network made up of 140 character messages from all over the world
- You Tube – video sharing service, upload and host videos which you can share on Facebook and Twitter
- Flickr – photo sharing service, create virtual photo albums which you can share on Facebook and Twitter
- Instagram – Upload images to your account and instantly share from your mobile device

Ways in which social media can benefit clubs

- Use Twitter to quickly advise members of a last-minute change of venue or cancellation due to rain
- Let committee members know via Facebook when and where the next meeting will be held through the event feature. You can see who is attending through the RSVP option.

- Get on Twitter and report live from events, especially to fans, members and sponsors who can't be there. Post videos of match highlights on YouTube for everyone to see (with permissions of course) and then share the link to the video on Facebook and Twitter
- Market club/event merchandise online via Facebook
- Use a photo sharing application like Flickr to post a selection of good quality club photos and share the link to the album on Facebook and Twitter
- Recognise your sponsors
- Put a call out for volunteers at upcoming club days
- Let fans know when entries to an event are opening or closing
- Use Facebook to start a discussion about a particular topic or issue at the club
- Ask a question – use this Facebook feature to find out what your members might think of a particular initiative you're thinking of implementing – ask for their input and you'll make them feel included.

Remember, social media offers two-way communication. Be prepared for positive and negative feedback and use it to improve your club.

Social Media Do's and Don'ts

Do...

- Use image or video based content whenever possible – visual content is more likely to be shared
- Provide content that people will want to share – you want your messages to be spread as widely as possible and having your fans share your club's posts will help to increase your fan base
- Champion others – share your members' posts, like and comment on their news feeds and they'll return the favour
- Follow other clubs and events, and retweet their posts – they'll do the same for you
- Add social media links to your website
- Tailor you posts to the channel you're using – it's ok to repeatedly tweet but you only want to keep your Facebook posts to a minimum
- Follow the most popular pages (Facebook) and tweeters to see what they do well and then copy them
- Have a dedicated social media volunteer – a University student or someone wanting to gain experience in this area would be a great choice
- Tags your friends in photos and videos in which they appear
- Use #hashtags on twitter as a way to categorise your tweets. As an administrator this will make it easy for you to search and retweet mentions related to your club
- Cross promote your social media channels across all your platforms
- Personalise your social media pages – make them unique, easily identifiable and interesting to view
- Create a Facebook *page* rather than a *profile* – Pages allow anyone to like your account, an unlimited number of fans and page insights such as reach and audience figures (which can be useful when reporting back to sponsors). Profile accounts allow for greater privacy which is good for personal accounts but can be restrictive to clubs who want to grow their fan base and access audience data.

Don't...

- Tweet, post or share in the first person – always take on the club's persona

- Neglect your accounts – the only way to build an online presence is with regular posts
- Over post on Facebook – too many posts from the one group can be bothersome on Facebook. Spread out your Facebook posts and keep information such as score updates for Twitter
- Be offensive
- Make spelling and grammatical mistakes
- Reveal too much information – remember this is not a personal account
- Fail to acknowledge people when they respond to a post or ask a question
- Target children under the age of 13 – Facebook restricts the use of its network to those under this age

7.3 Fundraising and Grants

What is Fundraising?

Fundraising is a systematic process designed to secure additional funds to the club's operating budget.

Ideally, there should be a separation between the operating budget and funds required for project/capital/events expenditures. In most circumstances fundraising should not be used for operational expenditure. It is also critical that fundraising plans are linked to the overall goals and strategies of the club.

A key consideration in fundraising is the efficiency of the process. It is important to recognise that fundraising involves costs to the club. Sport and recreation organisations need to ensure that the real cost of raising additional revenue does not outweigh the amount of funds raised. One of the most critical costs is labour. It should always be remembered that most people join the club to participate in the activity, not become full-time fundraisers. It is important not to over-rely on a small group of volunteers for fundraising. Ideally, the workload should be evenly dispersed.

Sport and recreation organisations can generate funds from four main sources:

- Internally
- Grants from government
- Sponsorship from business
- Donations from trusts, foundations, businesses or individuals

It is essential that your club carefully considers each of these sources and develops fundraising strategies aimed at achieving maximum benefits from each (where appropriate to the organisation). There are established fundraising principles that you should follow to help in this process. The organisation should:

- Determine why the funds are required - there must be a clearly defined purpose that drives the rest of the process
- Set objectives – these should be SMART (specific, measurable, achievable, realistic, time bound) objectives which detail what needs to be done and by when
- Assess the resources available (people, equipment, facilities, money, commitment) and develop a budget – this establishes the limits that the organisation can go to secure more assistance and helps identify the real costs to the organisation

- Develop strategies – these detail how the required funds will be raised
- Establish priorities, implement and monitor strategies
- Past success – Review past fundraising activities. If it has been successful before then there's probably no reason to change the activity
- Enthusiasm counts – Discuss what you would all enjoy selling or participating in. If you're all enthusiastic about something, you'll be more motivated to sell and get people involved.

Fundraising Alternatives

When discussing fundraising activities, many people will tend to think about the usual tried (but not always true) traditional approaches. These normally include such things as raffles and fundraising events. However, there are a number of alternatives to these traditional approaches that clubs may wish to consider as part of an overall strategy:

- Creative management of the organisation including sharing some costs. By sharing or pooling costs, the organisation may reduce its need for additional funds. Examples of this approach include bulk purchasing large items and sharing multipurpose facilities with other organisations.
- Some clubs may also consider accessing additional funds through commercial borrowing. Borrowing usually means that the project or facility can be introduced earlier than if 'normal' fundraising activities were conducted and this also means that additional revenue streams may be accessed earlier. However, clubs should: be careful not to over commit; match the term of the loan to the life of the facility; be realistic in cost and revenue projections; and consider staging large projects in order to spread the risk. Furthermore, it is inadvisable for individuals to take out loans on behalf of or to act as guarantor for the organisation, or loan money to the organisation.

More fundraising ideas can be found on [NSW Sport and Recreation Website](#)

Grants

Grants are funds received from statutory, voluntary or philanthropic agencies that have often been established with grant giving as one of their primary purposes. Grants are usually given by such agencies in order to pursue their own objectives and strategies (eg government policy, community development, meeting the needs of youth).

Therefore, the chances of obtaining a grant often depends on how a sport and recreation organisation's project fits into the overall philosophy and specific criteria and conditions established by the grant agency.

In most cases, demand for grant monies exceeds supply, so it is advisable to hold discussions with a representative of the grant agency so that the agency's priorities and conditions are known and understood prior to applying.

Sources of Grants

A number of different grant sources are relevant to sport and recreation organisations. The most common grant agencies include government, charitable trusts and foundations, and corporate foundations.

Equestrian Australia

The [EA Club development program](#) will allow clubs to apply for funding to assist in the areas of facility upgrades, purchasing of new equipment, membership recruitment programs and volunteer programs.

Grants are awarded yearly and winners will be judged by an Equestrian Australia selection panel made up of national and state representatives.

The **International Competitions and Development Fund (ICDF)** supports projects and events that either clearly fall into the International competition category or can be demonstrated to further the development of the sport in general or a particular discipline. Development predominately denotes workshops and seminars for the training of judges and officials, and other activities carried out for the development of competencies, including opportunities for skill practice. The ICDF policy and the application procedure are included in the application forms which can be downloaded [HERE](#).

Government

Sport and recreation related projects can be funded at the local, state and Commonwealth levels. Local government may help groups at club level while state government grants and subsidies are available for local and state sport and recreation organisations.

- The [Australian Sports Commission](#) offers a number of opportunities for funding for individuals.
- The [Australian Sports Foundation](#) (ASF) is a non-profit organisation set up by the federal government to assist not-for-profit groups raise money for eligible sports projects. The ASF is listed in the Income Tax Assessment Act 1997, which enables donations to be tax deductible under certain conditions.
- The Australian Government provides a wide range of financial assistance across all portfolio areas. The website www.grantslink.gov.au provides an online database service to identify sources of Australian Government funding.
- Additional government information can be found through the [Parliamentary Library](#).
- [Our Community](#) – strengthens 700,000 community, education and non-profit groups by providing funding advice, a free online donations portal, volunteers service and practical information.

There are a variety of areas in which sport and recreation organisations may receive assistance via government funded grants. They include:

- Administration support
- Employment of personnel
- Travel subsidies
- Organisational development
- Coaching development
- Staging of events
- Capital works
- New initiatives

Although government is a significant contributor of grants to sport and recreation organisations, there are also other sources.

Charitable Trusts and Foundations

Most charitable trusts and foundations also provide financial assistance but only to those sport and recreation organisations that can offer the trust or foundation a tax deduction and which help disadvantaged groups (eg sporting organisations for people with a disability). Most local libraries are likely to contain directories of philanthropic trusts. Alternatively, the Australian Directory of Philanthropy is available from Philanthropy Australia Inc on (03) 9620 0200 or email pa@philanthropy.org.au or www.philanthropy.org.au. Checking in a directory should be the first step in determining whether there is a match between the interests of the sport and recreation organisation and the funding agency.

Corporate foundations

Some corporations like BHP, AMP, Sony and Westfield have established foundations that provide grants for particular causes. These foundations cannot be used to promote the business interests of the specific corporation, nor can they seek sponsorship benefits like signage or naming rights. Benefits to the corporations are public recognition that in turn helps build their reputations in the community. Information about major companies is easily available through websites, business magazines, journals and newspaper articles. Annual company reports also provide information about the nature and extent of a company's involvement in this area of activity.

Preparing Grant Applications

Whichever type of grant agency is targeted there is almost always require an application is almost always required to be submitted. From an overall perspective, grant applications usually have to demonstrate that the project in question is feasible and meets the appropriate policy goals or priorities of the particular grant agency.

Preparing grant applications is an exacting and time-consuming process. However, a well-prepared and well-written application, that is clear about its objectives, budget and processes, will help considerably in winning grants from government, trusts and corporations.

Good grant applications take planning, time and considerable effort. It is rare that applications put together in a last minute panic are successful. Furthermore, in the past few years expectations about the quality of presentation and the sophistication of grant applications have gradually increased.

After developing the project concept and identifying suitable granting agencies, the grant application should be initiated. Letters of enquiry should be written to each potential funding source (newspapers often carry advertisements for grant programs) requesting necessary materials to prepare the proposal. Try where at all possible to include all information requested in the application.

Although specific criteria may vary with each grant scheme, most grant applications require similar types of information:

1. Contact information
2. The program/project description
3. A brief description of the organisation applying
4. The program/project budget
5. The amount of assistance requested

6. All other sources of funding for the project
7. How the applicant organisation meets the grant criteria
8. A guarantee that the program will proceed and monies received will be spent on the purpose for which the money was given
9. Copies of the latest annual report and a copy of the audited financial statements.

After developing the grant application, it must then be 'marketed' to the appropriate bodies. Personal communication with the funding organisation may help with this process. Discussing the priorities of the granting agency, the types of projects previously funded, and asking how the sport and recreation organisation's application can be improved, are all ways of getting the granting agency involved and increasing awareness about the intended project.

Organisations that are successful in attracting grants usually:

- Prepare a yearly calendar of closing dates for all funding sources
- Request application forms well before the closing date
- Prepare the application well in advance
- Pay careful attention to the details required and presentation quality
- Clearly outline the goals and objectives of the project
- Describe why the project is needed and support this with facts and figures
- Detail the methods used to conduct the project
- Indicate the expected outcomes of the project
- Consult advisory officers in relevant trusts and departments where appropriate
- Submit applications before the closing date.

7.4 Sponsorship

What do you want sponsorship for?

Decide what it is you want the sponsorship to achieve. Also decide what the best arrangement for your club is.

Which of the following do you want sponsorship to cover?

- Your entire event/activity
- Parts of the event and therefore the possibility of more than one sponsor
- Purchase of uniforms or equipment
- Hire of equipment/grounds/facilities
- Travel/accommodation costs
- Advertising/promotional costs
- Development programs.

Clearly define who your members are, the program or activities your club offers and the people you are trying to attract to the event.

This information is important to sponsors; it allows them to decide whether or not your members or the people you want attending your event are in the sponsors "target market". When approaching sponsors it

helps to develop information about members and people that attend your functions, what gender they are? What age? Are they family groups? Where do they live?

More information on sponsorship can be found with the [NSW Department of Sport and Recreation – \(Sponsorship\)](#)

Who are likely sponsors?

All sorts of companies are prepared to provide sponsorship; you just have to show them how they will get value for money.

Discuss potential sponsors with other people in your club/group. The information you have collected on your members and those who attend your functions will be a big help. Think about which companies or organisations would like to advertise or promote their products and services to these people.

Gather information from media services. If an event is being advertised on TV, who are its sponsors? Local newspapers may list events sponsored by companies that want to deal with the people in your suburb.

Don't overlook the possibility that small companies may be interested. Too often we think only to ask the big corporations who get regular approaches for sponsorship.

If one smaller company is unlikely to be able to afford your package, consider the possibility of breaking the package into smaller lots and offering them to a number of smaller companies.

If most of your members live in one area, you have a reasonable chance of picking up a local sponsor – they might be literally on your doorstep.

There are no limits when it comes to sponsorship, you just have to remember to make your sponsorship proposal relevant to each company. Companies don't like to think that they are just one in a hundred companies being approached on a 'mass' basis - tailor your proposal to them. Demonstrate that their objectives align with yours.

Once you have a list of potential sponsors, do a little research on them. Does the company have policies about sponsorships, e.g. do they only sponsor state-level riders? Perhaps they don't go for cash sponsorships, preferring to supply equipment. If possible find out when the company prepares its annual budget so your proposal can be considered for the coming year.

What are sponsors looking for?

Sponsors are looking for people who are potentially in the market for their products and services. Sponsors are looking for opportunity; remember that you might offer them an opportunity they never thought of (that's why they haven't called yet).

Sponsors will be looking to see that sponsoring your organisation will be more effective than spending money on some other form of promotion or advertising. Sponsors want to be associated with success. They are also looking for a professional performance from you.

What can we offer?

The following is a list of the types of ideas that could be included in a sponsorship proposal (it's a big list and you normally wouldn't include them all). Once again, don't restrict yourself to this list if you can think of other ideas.

Consider offering:

- Area and perimeter advertising space
- Promotion in your member or event newsletter – either online or printed
- Promotion on your social media pages
- Website integration with logos, advertising, maybe a story provided by the sponsor
- Signage and banners
- Invitations to events
- Free tickets or free admissions to events
- Opportunity to host associated lunches, dinners etc
- Placement on official guest lists
- Opening functions
- Presentation of awards
- Name and logo on program; invitations; other printed posters; flyers; newsletters; e-newsletters; and website
- Name and logo on media release letterheads and media packages
- Name and logo on newspaper and/or television advertisements
- Name mentioned on community service radio announcements and/or radio advertisements
- Clothing opportunities e.g. caps, shirts or shorts
- Name and logo on awards and trophies
- Possible introduction to other organisations/people that potentially might buy their product/service
- Naming rights to event/s
- On-site displays and/or sales opportunities
- Opportunities for company staff involvement e.g. discount tickets.

Always remember that you should cost anything that you agree to supply sponsors. There's no point in having sponsors that cost you as much or more than you can receive from them.

Sponsorship Types

- Naming rights sponsorship
- Naming rights of a class
- Naming rights of an equestrian discipline, a particular event or division, or a team
- Naming rights of a day, weekend, at the event
- Naming rights of an award, trophy, or scholarship
- Supporting sponsorship
- Official product
- Preferred supplier

Preparing your proposal

There is no single way to present a successful proposal and there is a lot to be said for an original approach. A starting point, however, might be along the following lines:

- Call the potential sponsor first and start building the relationship. Introduce yourself, your club/event and start finding out a bit about them. Ask for the best person to address the proposal and remember to include details from your phone call in your proposal – it shows them you were listening to what they were looking for.
- A covering letter thanking the potential sponsor for taking the time to look at your proposal. Make sure you address this letter to the manager/owner or marketing manager.
- A title page with important facts about your organisation’s event/program is next and might look something like this:
 - title of event/program
 - proposal to
 - sponsorship coordinator
 - name
 - address
 - telephone (H) and (W)
 - date/s of event/program
 - signed
 - date
- Provide details of the types of people you expect to attend your event, and the types of people who make up your event, as an opportunity to gain exposure for their goods and services. Some sponsors may look towards selling their goods and services at your event. Try to define what sort of sales they might make and include that in your sponsorship, offering them exclusive rights of sale.
- List exactly what it is you will provide to the sponsor and the value of each item (some you may know because it is a direct charge that you will have to pay, others such as signage, you may have to estimate). It is a good idea to match this against the sponsorship amount you are asking for.

A budget of this type is an excellent idea because it makes it clear to the sponsor that it is not a donation and reinforces in your mind that you have something to sell. Too many times we give up control of our event to a sponsor because we don’t outline what we will give them for their money.

Remember to value items not at what they will cost you on the day, but at what you might reasonably expect to pay if someone sold it to you. For example, if the ingredients for a ham and salad roll cost you \$2.00 but you know that the shops usually charge \$4.00, then charge \$4.00.

The following is a sample of how a sponsorship budget might appear:

\$5,000 sponsorship	
Naming rights to event	\$2,000
Advertisements in community newspaper featuring the sponsor’s name	\$750
20 VIP tickets (includes entry, seating, breakfast and lunch)	\$400
Signage on arena	\$1,000
Logo on volunteer clothing	\$450

Trade stand space	\$400
TOTAL VALUE	\$5,000

Have a clear definition of what you are offering a sponsor. In the above example the word signage appears, leading to two possibilities:

- Space will be allocated for the sponsors to put up their own sign
- Space will be allocated and we will have a sign made and placed in the appropriate spot.

If you require the sponsors to supply their own sign, but the sponsor thinks that you are going to supply a sign, relationships can become strained. Worse still, your club could be out of pocket.

Once you have a proposal and a list of potential sponsors, talk to them.

For more information on planning your proposal visit [NSW Department of Sport and Recreation – Sponsorship Proposal](#)

Selling Your Sponsorship

This is a critical phase in the sponsorship process. In this phase, your club makes its initial contact with potential sponsors and the nature of this contact establishes the climate for subsequent negotiations and relationships. Because first impressions count, it is important to ensure that this step is carried out professionally.

Presenting a Sponsorship Proposal

Most sponsorship proposals require a verbal presentation (although not all, so the written proposal must also be able to 'stand alone'). This is a key component of the selling phase and is where organisations can encounter difficulties. Many clubs assume that because they have now finished the hard work, the proposal will sell itself, or because their program is so 'worthwhile' the sponsor will naturally support it. This is far from the case and the importance of the actual presentation should not be underestimated. Professionalism is vital so the organisation should carefully consider who should make the presentation. If there are members who have the necessary experience and skills, then perhaps it would be best if they presented the proposal rather than the president. Dress and appearance are also key considerations.

Other issues to consider in this phase include:

- Find out who to send the proposal to (i.e. the decision maker) and ensure that the name and address is correct. Make an appointment to present the proposal in person. Face-to-face communication greatly enhances the likelihood of success.
- Find out the company's sponsorship criteria and history – what does the company want out of a sponsorship relationship?
- The proposal should be prepared to a professional standard (eg typed and well laid out).
- Information must be relevant, accurate and precise.
- Being well prepared when presenting the proposal is critical. The presenters should ensure that they have appropriate supplementary information to support the proposal and try to anticipate (and plan answers for) questions that may arise.

- Follow up after the meeting – thank them for the opportunity to present the proposal and then maintain contact.

A sample sponsorship proposal can be found in [Appendix F](#)

Handling rejection

Even rejection of the sponsorship proposal can be used as an opportunity. First, you should acknowledge the rejection and thank the potential sponsor for their consideration. Then a meeting should be arranged with that organisation's contact to discuss:

- What caused the proposal to fail? (eg was the proposal written clearly enough?)
- In what ways could the proposal have been improved?
- Would the company consider a modified request?
- What actions could the organisation take to enhance its chances next time?
- Given the nature of the sponsorship request, does the contact know of any other corporations that would be more receptive? If so, would they agree to help in the initial contact?
- This information may facilitate a second chance initially, and will at the very least keep the potential sponsor informed and involved, potentially increasing the likelihood of future sponsorship success.

Servicing Your Sponsor

It is good business practice to have a formal agreement or contract in place and is a necessity for significant funding. Lack of a written contract increases the potential for misunderstandings and the relationship turning sour. A change of personnel can mean the intent of an agreement is lost, unless the agreement is in writing.

If unsure, consult with a lawyer to ensure the agreement is sound.

Never assume you will get certain rights. Clearly state the rights agreed to or commitment in the contract.

A sample sponsorship agreement can be found on the [Vic Sport website](#). More information including a sponsorship [checklist](#) can be found at [sponsorshipunit.com.au](#).

A sponsorship agreement template can be found in [Appendix I](#)

Once the sponsorship contract has been signed, in some respects the hard work has just begun. You should try to develop and maintain a long-term relationship with the sponsor. Developing a committed and consistent supporter should be the aim as it is far more efficient to maintain a relationship with existing sponsors rather than continually seeking new sponsorship arrangements.

At the event things to consider:

- Make sure someone is available to meet with them, explain what is going on at the event, ensure they have their tickets, program and know where they should be
- Give them a tour of the event – show them around, introduce them to key officials and riders, and give them a 'behind the scenes' special treatment that is only reserved for sponsors.

- Make sure the sponsor signage and other event deliveries are on display in prominent locations so the sponsor can see their investment in action
- Touch base with them throughout the day
- Involve them in presentations, perhaps give them a course walk/stable tour as well
- Acknowledge them in any official VIP functions
- Ensure they have somewhere they can sit to watch the event – whether that is a VIP marquee or simply a designated area for them.

Maintaining the Sponsorship Relationship

The relationship that is established between your club and a sponsor should not be neglected after receiving the assistance. You should maintain your efforts to ensure a positive relationship with the sponsor, with ongoing communication being a key component. There are a variety of ways to keep your sponsors informed and involved:

- **Thank-you Letters.** All funding should be acknowledged with a personal thankyou letter that appreciates the support and reiterates the need, intended use and sponsorship terms, signed by the management committee chairperson or executive director.
- **Press Clippings.** Copies of articles appearing in the press publicising any aspect of the project and that make reference to the sponsor should be forwarded to that organisation. A letter that indicates the general content of the article should be included.
- **Regular Written Progress Reports.** Reports documenting the progress of your club, project, or team should be sent regularly to the sponsor (include photographs where appropriate).
- **Personal Visits and Invitations.** Representatives of the sponsor should be invited to participate in your ceremonies and events (eg facility openings) and the sponsor should be kept informed of all milestones.
- **Telephone Calls.** Committee members should be available to respond to calls from sponsors, and to initiate calls. It is important that you are responsive to questions that show continued interest.
- **Take An Interest In Your Sponsors.** Acknowledge their success even if they are unrelated to the sponsorship agreement.
- **Newsletters.** Sponsors should be placed on your club's mailing list, and be acknowledged in the newsletter where appropriate.
- **Recognition.** Sponsors like to be recognised for the contributions they make. Linking a corporate sponsor to well-publicised successes is highly prized by corporate marketing departments.
- **Request For Continuing Funds.** This is an important part of the sponsorship process. You should explicitly identify relevant progress and accomplishments and outline opportunities for continuance and expansion. The sponsor may decide to continue sponsoring the organisation in other areas. Always remember that sponsorship is a business deal and the company wants to get value for its investment. You should continually look for further avenues to promote sponsors.

After the event

You should provide your sponsors with a brief report, which would include information such as the following:

- Attendances with a breakdown of males, females, adults and children. Consider (don't overdo the workload though) the possibility of conducting questionnaires or interviews with attendees. This information can help to give a profile of the sort of people who attend your events.
- What were your successes?
- How can you improve in the future?
- How the sponsorship goals were met, include images showing examples (e.g. signage).
- Did your sponsorship get value for money?

7.5 Media

Publicity and Media

Publicity is free promotion for your sports club, most commonly obtained through the media. When done well, it can bring many benefits to your club. However be aware that you have no control over what form the publicity takes. In dealing with all media have a clear idea of what message you wish to convey.

How to get publicity

Get to know the local journalists who write the sports sections for the free newspapers or report for the radio stations. Find out what they're interested in covering and how you can give them the information. Check their deadlines and requirements.

Attract attention

The media is more likely to publish or broadcast news or human-interest stories that will appeal to their audience. Check the local papers and listen to the radio to find out what types of articles interest the editors, readers and listeners. Work out ways to make your information more interesting. Find an angle that will attract attention. Examples are: three sets of twins competing at the same event, a celebrity is opening your fundraiser or a member of your club has achieved a significant result against the odds.

All media have different needs, styles, deadlines and only they know what will appeal to target audiences. There is no guarantee that your activity will secure media coverage but you can maximise your chances by:

- Researching a range of sports and lifestyle media, getting an idea of what makes a good story, and what the angles are
- Asking yourself what is newsworthy about your event or activity before contacting the media
- Getting to know the media personally if you can; phone in advance and sound them out regarding stories and angles
- Checking their deadlines and working in with them. Find out any other requirements – do they require photographs or will they send a photographer?
- Remembering that the media are in the business of entertaining and informing, not providing free publicity for your club

- Treating the media as your club's VIP's. Invite them to special events or openings and provide for their special needs with background and information, tickets, interview room and access to phones etc.

Who are your local media outlets?

1. Weekly newspapers and/or
2. Regional radio and TV stations and/or
3. Community newsletters and/or
4. Websites or blogs promoting events and activities in your community

How to approach local media

Media outlets are really supportive of local sporting organisations but you need to provide them with time to prepare. Contact them by phone first to tell them about your event and then send them a media release.

A sample can be found in [Appendix G](#) and a template can be found in [Appendix H](#).

For newspapers, ask to speak to the editor. If you're calling the local television station, ask to speak to the chief-of-staff and for radio, you need to ask for the producer of the specific show you're after.

For websites and blogs, simply send the owner or author an email with the information you would like them to publish.

Tips when communicating with the media:

Keep your chat short and snappy, limiting conversation to the exciting event you have planned. At the conclusion of the conversation ask for their email address and confirm your conversation with them in an email.

When explaining your project to the media, assume that the person you are speaking to knows nothing about it, use simple language and avoid technical terminology.

The media will want lots of colour and activity so make sure that you have a planned activity in mind before promoting it.

A note on images

Don't despair if the local newspaper is not able to cover your story before hand. They may prefer to run the story once the program has started because then they can use images from the event. Providing local newspapers with great photo opportunities or sending them a good quality image can greatly increase your chances of securing a story. Make sure you provide high-resolution photos (at least 1MB in size) and remember to provide the newspaper with the full name of everyone in your photos, along with your contact details should they wish to obtain a comment from you. You should also ensure that permission is sought from the parent/guardian of each child which appears in the image by having them complete a photo release form which can be found in [Appendix D](#).

Guidelines when young people are involved

1. Permission: Ensure children involved in any activity with local media have permission to be filmed or appear in photographs. Make sure the photo release form is completed for each child who is going to appear in the photograph or on the television

2. Dress to impress: Children who are going to take part in any promotions should wear their helmet and should be dressed suitably for the activity they are performing. The coach or member who is interviewed should also wear suitable attire. Ensure your member or coach is wearing your club uniform (if applicable).

3. Ready, set, go: Local news crews and photographers have to cover multiple stories each day so their time is limited. The easier you make the experience for them, the more likely it is your club will end up in the paper or on the nightly news. Make sure you select and brief your spokespeople and members before the event so they are prepared for possible interviews and photo shoots on the day.

A sample Press Release can be found in [Appendix G](#). A template for your own Press Release can be found in [Appendix H](#).

7.6 Event Promotion

Promotion of your club's activities and services can take many forms. Promoting your club is not just about an advertising campaign and it's not just about using the media, although both of these approaches can help you. Promotion is a way of creating a positive image for the general public and greater member awareness of your club and its activities.

Developing a Marketing Plan

The Marketing plan is simply a written document outlining:

1. What you need to do to make your club successful (identifying goals and objectives)?
2. How you intend going about it (developing strategies and tactics)?
3. Who is going to do it (allocating roles and responsibilities)?
4. By when (deadlines)

Remember a good plan is always flexible. It should also include budgets and a summary of costs of each activity and possible sources of funding, such as sponsorship, fundraising or government or other funding.

Key Steps in Developing your Plan

- Defining who you are
- Defining your product/service
- Identifying your target groups
- Setting goals and objectives
- Develop the strategy

For a guide to a marketing and public relations plan select the link [Australian Sports Commission](#)

Critical Success Factors of Successful Promotions

1. Use the best medium for your target group and the event, such as direct mail, radio, banners, advertising, posters or speeches
2. Include all the necessary information (who, what, when, where, why) and make the communication as exciting, attractive and easy to read or assimilate as possible
3. Use the right language and tone, with words people can understand, and a call to action that will make them want to participate. Tell them why they won't want to miss your event. In other words, what's in it for them.

Market Research: Learn about your Members

Market research should form the basis of all marketing activities. It helps you to get to know who your members are, and why a person would want to become a member or attend an event. It also helps you understand the environment you're operating in and about your competitors.

Existing information - Where to look?

- Membership database
- Registration figures
- Geographic area
- Australian Bureau of Statistics

New research – Ideas for your club

- Interview existing members
 - Why did they join?
- Interview lapsed members
 - Why didn't they renew?
- Research other clubs
 - Do they have different members to you?
- Interview potential members
 - What would get them to join?

Target Market

Market research helps define your target market. Target marketing focuses your marketing activities on groups of people most likely to become a member. You are looking to define who are your current target markets to help make your marketing strategies more effective. You also want to look at marketing to potential new target markets, to grow your membership in the future.

Competitors

Here are some questions to help position your club in the market:

- How does your club compare with other organisations?
- What makes your club different to other clubs?
- What are parents looking for in an activity?

- What do participants want in an event?
- What would a potential sponsor look for?
- Does your sport have the right image to recruit new members?

Marketing Mix (the 5 P's)

1. Product – Having or producing a product or service required by others
2. People – Customers or the people who use the services or products on offer
3. Price – Pricing the product or service at market price
4. Promotion – Ensuring the potential customers are aware of your product
5. Place – Where the product is bought.

Marketing Ideas

- Websites
- Newsletters
- Signage
- Club Logo
- Flyers and Brochures
- Merchandise and Uniforms

A more in-depth look into these marketing ideas can be found on [NSW Sport and Recreation website](#).

Direct Marketing

Direct marketing allows you to communicate straight to your members or potential members. Whether you're promoting an event or maintaining strong relationships with your existing members, direct marketing is a great way to make a more personal approach. This can come in the form of SMS, email, mail, letter box drop or social media invitation.

Start by building and maintaining a database. This will enable you to personalise your member communication to let members know of new committee members, new equipment, events and other important updates. You could also target 'lapsed' or infrequent members to encourage them to return.