



Riding for the Disabled Finance and Governance Review

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Disclaimer

This document has been prepared for the benefit of Riding for the Disabled and is based on the information derived from a wide variety of sources. To the extent permitted by law, we do not accept liability for any loss or damage, which any person may suffer arising from any negligence on our part. No person should rely on this document without conducting his or her own investigation or analysis.

Executive Summary

The following Executive Summary provides a brief outline of the findings and recommendations from the report in line with the specific terms of reference that were prescribed in the consultant brief. It is recommended that readers take the time to read the greater detail that is provided within the report and gain a deeper understanding of the review process and the interrelationships between the factors investigated.

The Office for Recreation and Sport (ORS) engaged PKF Organisation Development to undertake a voluntary Governance and Finance review of Riding for the Disabled (RDA). The review was one of a number that were commissioned within sporting and recreational organisations for those with a disability. The broad terms of reference of the project were *'to engage an appropriately qualified and experienced independent contractor, to implement an independent review of Riding for the Disabled and provide recommendations to guide the Board in taking the organisation forward'*.

The project commenced on February 4th 2008, and the methodology of the review process involved a number of concurrent streams of activity, designed to ensure that the information gathered was valid and robust. The activities undertaken involved meetings with members and stakeholders, a meeting with the RDA Board members and staff, literature and web reviews, and a 'desk-top audit' of systems within the organisation.

The consulting brief prescribed a number of areas for review and these are presented below along with a summary of the consulting teams observations and findings;

Review the Strategic Plan – RDA SA currently operates to an effective plan however it could be enhanced by better defining the future vision for the organisation and making sure that it is communicated to centres and those involved.

Review the Role and Structure of the Board of Management, Portfolios and Operational Committees - The current board comprises 6 members and according to self reports, feedback from staff and independent analysis it appeared to perform its role professionally. It would benefit by increasing in size in order to get greater numbers to meetings as well as defining its charter and goals as well as undertaking periodic performance review. Three sub-committees operate to the Board – Coaching and Safety, Dressage and Promotion and Fundraising, with each operating to clear terms of reference. Given the importance of Finances within organisations of this kind consideration should be given to the establishment of a committee in this area to provide review, advice and direction.

Review the relationship between the Board of Management (BoM) and the membership and the organisations affiliated with RDA. – The BoM deals most directly with Centre managers rather than members or users however it was recognised that every effort is made by Board Members to attend centre functions. Although the RDA SA appears to be one organisation, it operates like a franchise with a central corporate function and 13 largely independent locations. The RDA SA state office has developed a very effective Resource Manual to assist Centres and this ensures a high level of consistency of operations however more could be done to define and align the goals of the centres in order to build cooperation and resource sharing.

Review the human resource management processes in place for both paid and voluntary staff, the staffing structure and the effectiveness of this structure AND make recommendations regarding these. – The RDA SA Resource Manual is one of the better documents of this kind seen by the consulting team as it covers contemporary HR and other policies and practices in easily understood language, however its content and application are not regularly reviewed. Staffing levels and skills are adequate for the current operations but consideration could be given to a full time Finance position and dividing the Volunteer and Coaching Coordinator role into two part-time positions. In addition operational benefits would likely flow by placing more structure around team meetings in order to enhance information flow and communication within the state office.

Human Resource practices are sound within RDA SA with staff operating with employment contracts and job and person specifications however given the reliance on volunteers in centres there did not seem to be a concerted plan to attract and retain this group . A formalised performance development system does not operate and this would be beneficial to maintain workplace focus and information flow.

Undertake training needs analysis for staff and key volunteers to guide RDA SA in the future. – The staff of RDA SA indicated that they were equipped to perform their current roles however they also explained that it was difficult to access formal training programs due to work demands and a small staff pool.

Assess and make recommendations regarding the financial and risk management systems within the organisation.-. In September 2007 the Board undertook a risk management workshop and is in the process of developing a formal risk management framework. A roll out of the risk management workshops is commencing across the Centres. These workshops are designed to increase awareness and to formalise the risk framework at a local level although this process is seen as “big brother” intruding into local operations.

There is a 5 year financial plan for RDA SA. The plan factors in grant funding from each source and then looks forward and sets out strategies for how RDA can continue to provide services should one or more of the grant revenues cease to be provided. Each centre maintains its own financial records and forwards quarterly financial data to the state office. The Finance Manager then prepares a consolidated Profit & Loss Report and Balance Sheet for the Board. Consolidated financial statements are prepared on a financial year end. Management reporting is conducted monthly to the Board and accounts are audited annually including those for each centre. Asset registers exists for central office and each riding centre and are updated quarterly.

Assess and make recommendations regarding the constitution- The RDA currently operates under a Constitution updated in 2000. In broad terms the document appears to provide an effective framework for the governance and operations of the organisation. Despite this it was the view of those Board members that the consulting team met with that it was in need of updating in order to allow for an increase in the number of Board members to 12 to ensure sufficient attendees at meetings, redefine the role of membership and knit the RDA SA into a more unified whole rather than a somewhat loose federation.

The review process included assessing the current business operations against the Australian Business Excellence Framework (ABEF), as well as undertaking both a SWOT and PESTEL analysis. – Using all of these frameworks it is evident that the organisation is functioning well with some aspects (eg Operations Guide) serving as a valuable benchmark for smaller sporting, recreation and not for profit organisations. Nevertheless there is scope for improvement in areas such as customer satisfaction, operating as a unified organisation, engaging the organisation with the strategic plan and developing a consistent “pipeline” of volunteers.

Review the business operations and development of new operational models. – As indicated, RDA SA is functioning quite well however its performance and operations could be further enhanced by building closer connections with the centres and working to build a stronger cooperative culture between the local sites.

Develop a change management strategy for RDA SA, outline recommended directions and the context within which the recommendations have been made. - The operations of RDA SA and the services to its clients will be best off by continuing on its path of continuous improvement. With this in mind the following enhancements are proposed over the coming 6-9 months

Remainder of 2008

- Increase the board size to its maximum of 12.
- Identify accounting/treasury skills + promotional expertise.
- Commence redrafting of constitution including defining the nature and role of members.
- Revisit Strategic Plan to sharpen future vision.
- Involve centres in planning process to build the sense of “one organisation” and culture.
- Promote plan to centres.
- Promote vision to community to raise awareness and attract “support”.
- Commence audit process of centres to ensure compliance with operating standards.
- Encourage all centres to develop formal volunteer recruitment plans.

First half of 2009

- BoM to develop KPI's.
- Subcommittees to meet regularly with charter + KPI's.
- Centres to replicate state planning process locally.
- Provide greater structure to fundraising and promotion.
- Enhance customer service ratings.
- Finalise refresh of job and person specifications.
- Continue promotion of risk management to centres.
- Fine tune financial management practices.
- BoM to communicate regularly to centres.

It would be beneficial for research work to continue regarding the possible benefits of small sporting, recreation and even not for profit organisations to “coalesce” in one form or another so that there could be synergies and savings in areas such as accommodation, IT, HR and even purchasing rather than continue to function in a somewhat hand to mouth existence and where long term operational and service planning becomes nearly impossible as the focus is driven by short term imperatives to remain viable.

In many respects “reviewing” RDA was a pleasure as it operates with sound systems, is overseen by a committed BoM and SM who in turn support centres who are “staffed” by volunteers who are passionate, caring and careful in their work with those with a disability. Scope does exist for operational and psychological connections with the local centres to be tightened to achieve a greater sense of one organisation as well as enhanced use of human, equine and material resources.

Introduction and Overview

The roots of Riding for the Disabled (RDA) can be traced back to be 1950s and 60s whereby countries such as France, Belgium and Germany provided assistance to patients using horses as a "platform" for education, therapy and rehabilitation.

RDA commenced operating in Australia in Queensland in the early 1960s and started providing services to those with a disability in South Australia in 1971. The Australian Council of Riding for the Disabled Association was formed in 1975 and the first national conference was held in 1976. Since this time services operating along similar lines to RDA have evolved throughout the world to the point where an international association was formed in 1980. It is based in Nunawading, Victoria and comprises 48 full members across 31 countries with a further 180 associate members across a further 49 countries. The Australian headquarters is also based in Victoria at Werribee.

Riding for the Disabled Association Australia Limited is a public company limited by guarantee. It currently has six executive directors and delegates from each state. Some of the primary objects of the company are to:

- encourage, promote, support and assist members to provide Riding for the Disabled and to foster opportunities integration within the broader equestrian community
- support the State associations, centres and individual members in the furtherance of these objects
- be the national governing body for Riding for the Disabled and be recognized as such
- determine standards in safety, training, horse management and Riding for the Disabled
- endeavour to conduct Riding for the Disabled in a manner which is safe for participants, officials, spectators and horses

Riding for the Disabled South Australia comprises a state office that provides a centralised administrative and coordinating function in support of 13 centres. The latter facilities are entirely run by volunteers with the aim being to provide services to their local communities.

Methodology

PKF was invited by the Office for Recreation and Sport to submit a proposal for the governance and operations review of a number of State Sporting Organisations for People with a Disability (SSOD). PKF were successful in winning the tender for the review of RDA SA and the contract between PKF and the Office for Recreation and Sport was signed on 7 August 2007. The project formally began with a meeting between the State Manager of Riding for the Disabled (RDA), Ms Kay Milton on February 4th 2008. The project team included Mr Scott Way, Ms Angela Haydon, and Mr Alastair White.

The terms of reference for the project were to *'engage an appropriately qualified and experienced independent contractor..... to implement an independent review of RDA and provide recommendations for the consideration of RDA.'*

To this end the consulting team worked with individuals from all levels within and external to the organisation, including staff, Board Members, members and stakeholders to gain a high level of insight into the operations and governance of the organisation. The process was highly consultative, and was deliberately kept open and transparent to ensure that the information gathered was valid and reliable, and also that the consulting team did not appear to have any hidden agenda. The approach used by the consulting team involved;

Observation of Board Meetings

Initially a member of the PKF consulting team attended a Board Meeting to be introduced and to establish the parameters of the review process. Additionally, the October Board Meeting was attended by a member of the consulting team to gain an insight into the functioning of the Board.

Individual Meetings

Individual meetings were held with Board Members (both current and relevant past members), key stakeholders, associated organisations and staff. These meetings provided insight into the operations, direction and governance of the organisation.

Literature and Web Review

As part of the governance review a literature and web review was undertaken to gain an insight into, and benchmark against, the operations and governance structures of other similar not-for-profit organisations both with South Australia and interstate.

Desk Top Review

The human resources systems and procedures, strategic and other plans, and financial and risk management systems were examined in a desk top review.

Prescribed Areas for Review

Review the Strategic Plan

RDA currently operates to a strategic plan that is dated 2005 – 2009. This document defines the vision of the organisation “...Towards personal achievement through Equestrian Activities...”. Much debate exists regarding nomenclature in the field of strategic planning however it is the reviewing team’s perspective that although positive, this global statement does not define where RDA in SA is heading and what it is trying to achieve in the foreseeable future. Once defined this goal (or goals) can then be communicated to office staff, volunteers and users as well as stakeholders and current and potential sponsors with the aim being to increase and sharpen the focus for activities and to provide motivation.

The RDA strategic plan also describes a mission;

“...Riding for the Disabled Association enables people with disabilities and volunteers throughout Australia to experience enjoyment, challenge and a sense of achievement through participation in horse riding and associated activities, resulting in the development of life skills; improving quality of life and the attainment of personal goals.

We are dedicated to providing these services through an organisation which is:

- Relevant, innovative, effective and rewarding.
- Operated by trained and caring people, committed to our aims now and in the future.
- Recognized as having active involvement in the equestrian and general communities.”

The mission for RDA in SA is derived from the national body and appears to be appropriate and clear however it is worth noting that there is no mention of sport or recreation.

In addition to the above the plan defines 6 Key Result Areas (KRA’s) with associated sub goals and actions. Intentional or otherwise this framework is consistent with the framework advocated by Peter Argenti¹ whose work has become a standard for many organisations. The 6 KRA’s are:

- Services to Clients
- Finances
- Communications and promotions
- Support and Training
- Safety
- Corporate Governance

These elements reflect a "balanced" approach to the management of the organisation consistent again with the philosophy advocated by Kaplan and Norton². In addition performance targets have been identified and responsibility and completion dates are also noted.

It is the consulting team’s perspective that the plan is of a high quality based on its structure and content and covers many of the critical elements necessary to the successful running of RDA SA.

¹ Argenti, P – *The Strategy System* in Quinn et al 1988 , *The Strategy Process* , Prentice Hall

² Kaplan,R and Norton, D 1996 – *The Balanced Scorecard* – HBS

Minutes of the RDA Board Meetings over the past 12 months indicate that the strategic plan is now reviewed monthly, as reports are required in relation to each of the nominated key result areas. This practice was also observed by members of the consulting team, reinforcing the perception that the strategic plan is in fact a living document and serves to guide and focus the organisation on those areas that have been deemed to be critical for its future success. Minutes beyond this time suggest that Board Meetings did have a strong operational focus which has since been corrected.

The only query in relation to the RDA strategic plan involves the appearance of an undated document in the November 2007 Board meeting records which nominates additional areas of attention such as maximising revenue, reducing costs, number of lessons and board meetings. In fact the last item notes the need for board meetings to become more strategic in orientation with less orientation to operational matters. The connection of this document to the strategic plan remains unclear as it appears to be an addendum identifying issues that had emerged in the recent past.

When issues of strategic planning were raised with participants to the two focus groups convened with volunteers, members and users there was an understanding that a plan existed “somewhere” and “that it must be working” as the organisation appeared to be well run and administered as it had grown in recent years and there were known to be plans for future growth. Centre Managers were aware of the plan and could recall it being discussed at manager forums but they did indicate that their primary focus was on their local centre rather than on strategic or organisation wide issues. In fact it appeared that there was a willing “delegation” of responsibility for these matters to head office and the board.

Board Members spoken to indicated that there was some “tension” between the degree to which RDA Centres could be “directed” by state office and how much they could operate independently. Each Centre operates by a clearly defined set of policies and procedures to ensure consistency and quality however some indicated a concern over the extent to which Centres were aligned to the organisational goals.

Recommendation

- Recast the Vision statement to describe the holistic goals or outcomes that are being targeted by the organisation during the life of the plan.
- Summarise the plan into a simple form to allow for ready communication to centres, their volunteers and users
- Reinforce the plan at all levels of the organisation and the fact that centres are part of a larger entity (RDA – SA) in order to support and supplement the strong local focus.
- Ensure that changes or addenda to the strategic plan are formally documented and the version number and date of the plan be noted.

Review the Role and Structure of the Board of Management, Portfolios and the Operational Committees of RDA SA.

The association is run by a Board of Management comprising between 4 and 12 volunteer directors who meet monthly. It is indicated in the RDA – SA Resource Manual³ that the role of this group is to “ensure the associations legislative requirements and strategic goals are established and being met, and that its financial obligations are covered”. Board members are elected by a postal vote of financial members for a two year term however there is scope to appoint others with special skills required by the organisation or to fill casual vacancies. The positions of President, Vice President and Treasurer are defined however it was noted that the latter role was vacant.

The current board comprises 6 members (Jill Ribbons, Carol Bradley, Julie Burnes, Melissa Kaharevic, John McDiarmid and Dennis Hall) with the addition of the State Manager (SM) as an *ex officio* member. In discussion with the board it was felt that the current group functioned well in part due to their commitment to RDA but also because there had been efforts over the past 12-18months to expand the age range and skills sets. Both the SM and Board Members felt it would be good to increase the current board size to 12 members (as allowed by the constitution) in order to ensure an adequate cross section of skills at each monthly meeting as the RDA had struggled to get sufficient numbers (ie more that 4) to ensure broad and maximally productive discussions. It was also felt by those Board Members spoken to that the organisation would benefit from someone with marketing/promotional experience to assist with the raising of the RDA profile which would aid with fundraising as well as the inclusion of a rider/consumer.

It is worth noting that although the Board is clear in its role and function as defined by the Constitution it does not appear to have established and hence operate by agreed performance indicators. In addition the Board has not had a review of its performance either through self assessment or by an external “expert”.

It was also indicated that the Board needed to maintain a balance between those with a “horse orientation” and those with a “disability orientation” as it was essential to blend the two to achieve the desired operational and client outcomes.

The SM and the Board indicated that as the group becomes more professional in its practices and adopts a greater strategic orientation then it may be possible to move to bi-monthly meetings with committee meetings on the alternate months. This would reduce the workload on the office staff when preparing for Board meetings without a diminution of functionality.

It was indicated that Board Members are inducted into the association and then records are maintained to track their attendance at meetings. In addition to this an annual form is signed by the same that acknowledges the RDA code of conduct and their responsibilities as Board members. This simple form is expressed in straightforward terms and is readily understood ensuring that those who commit to this role understand the requirements and obligations. This is a very good process.

The RDA SA operates with 3 Sub-committees each comprising 5-6 members and overseen by a Board Member. The Coaching and Safety Committee as the name suggests ensures that the coaches that operate in each centre are trained and equipped to manage the complicated and potentially risky combination of volunteers, horses and users. This group meets monthly and operates to terms of reference but apart from a general charter does not have key performance indicators. Some did suggest that given the obvious importance of this group that it can on occasion serve as a secondary Board offering direction to Centres without reference to the overall Board of Management or the organisation as a whole.

³ RDA SA Resource Manual – Version 2007

A Dressage Committee is also operational and its primary function is to arrange a competition in May/June of each year. Although it is newly formed there are high hopes that this group will be effective given its focus and membership. The third committee looks at Promotion and Fundraising however consideration is being given to altering its focus to events. Terms of reference exist for all groups.

A view was expressed by both the Board and the SM was that there would be benefit in establishing a Finance Committee to work with the Treasurer to bring an additional level of skill and scrutiny to the finances and financial operations of the organisation. This is not to suggest that there is currently a weakness however it was felt that more could be done in a proactive manner to manage the financial affairs of the organisation.

Recommendations

- The Board of Management (BoM) to undergo an annual performance assessment process to ensure that it is operating effectively and achieving its stated goals.
- RDA Board to agree on a set of KPI's and monitor its performance to such.
- All three sub-committees establish terms appropriate KPI's and report on such on a bi-monthly basis.
- RDA to establish a Finance Sub committee to oversee the management of the finances within the RDA office as well as centres.
- RDA to seek out a Board member with marketing and promotion skills.

Review the relationship between the Board of Management and the membership and the organisations affiliated with RDA and the effectiveness of these relationships.

In some respects RDA SA is not one organisation but 14 organisations – 1 x State Office , 13 x Operating Centres and 1 x Mobile Unit. The reason for this view is that when meeting with the Centres, albeit only two, it was clear that although there was acknowledgement of the BoM and an overall entity of RDA SA, most focus and attention was on the local issues such as services to clients, care for horses, development of premises and simply staying “afloat”. Some suggested this local orientation led to a degree of territoriality and a sense of competition between a small number of Centres. When asked if they knew the strategic direction of RDA it was very broadly summarised as “to grow” and “deliver services to clients” but there were few specifics. Neither centre visited was able to provide a strategic document that detailed its direction other than “day to day” operational plans covering such things as programs, maintenance and finances.

Representatives of volunteer staff, members and users spoke positively of the Board and their efforts to come to functions and get to know the operations however it was conceded that there was no real “relationship”. The two centre directors and several coaches spoke in greater detail about the Board as they indicated they were involved in twice yearly “Centre Managers Forums” that were run over 1-2 days. These forums provided an opportunity to learn more about the operations of RDA (SA and nationally) and to network with other centres but it was felt that more could be done in this area.

There was comment made about the growing “requirements” placed on Centres brought about by safety and legislative issues and again praise was given to the State office for providing a comprehensive operations manual and supporting training⁴.

⁴ RDA SA Resource Manual – Version 2007

This view is supported by the consulting team as the operations manual is one of the most up to date and comprehensive kits of its kind they we have seen. It is also presented in such a way that it can be readily navigated and applied independently by the respective centres.

Similar praise was given to the current SM who was felt to have the experience, skills and passion to successfully manage the RDA operations. Comments were made regarding her efforts to visit and maintain communications with Centres as well as parents and users and the regular email updates were acknowledged as very informative and useful.

Recommendations

- Greater efforts to be invested by the Board and the organisation to build an understanding that RDA is more than just the local centre.
- Centres to have local goals as well as understand and work towards RDA SA goals
- Given the pressure to maintain a volunteer service explore ways and means for greater cooperative efforts across centres.

Review the human resource management processes in place for both paid and voluntary staff, the staffing structure and the effectiveness of this structure AND make recommendations regarding these.

Policies and Procedures

The formalised Human Resource (HR) practices are largely documented in the Resource Manual⁵. This document outlines the key policy and procedural guidelines for both paid staff and volunteers within RDA SA. The policy manual was updated by RDA SA in 2006/2007 and now provides quite a comprehensive guideline regarding the practices of the organisation. Whilst the areas that this policy manual covers are quite broad, a small number of policies are planned for inclusion, such as those relating to animal welfare, and it is intended that the policy manual will eventually include cross-references between policies. Policies included in the manual apply to both staff and volunteers, and distinctions are made where policies differ in their application to each group (e.g. Recruitment policy).

At the National level, a draft form of RDA Australia policies has been distributed to the States for review. This National policy manual covers aspects such as Governance, Equal Opportunity, and Human Resources. It is understood that the original plan was for this National manual to be rolled-out in June 2007, however this has yet to occur and a revised roll-out date was not known at the time of writing.

It terms of accessibility to the Resource Manual, each Centre is required to have two copies, one being accessible to all volunteers. The manual is also available to staff and volunteers through the RDA website.

It appears that the policies are generally applied within the State office, however it is unclear whether they are followed consistently within all Centres. A manual documenting standard operating procedures for the State Office is planned for RDA SA.

Recommendations

- Ensure that the policy manual is reviewed as planned in 12 months time to maintain its relevance.

⁵ RDA SA Resource Manual – Version 2007

- Ensure that the policy manual is implemented consistently within the State Office and the Centres.
- Consider undertaking a brief 'audit' of the understanding, and adherence to, the manual within the Centres.

Staffing Structure

The State office of RDA SA currently employs eight staff members on a full-time or part-time basis. The current staff structure is:

- State Manager (F/T)
- Finance Manager (0.8 FTE)*
- Administration/reception (F/T)
- Project Officer - Coaching (0.4 FTE)
- Volunteer and Coaching Coordinator (0.8 FTE)
- Project Officer - Fundraising (contract – as required)
- Administration Assistant (0.6 FTE)
- Doorknock Co-ordinator (0.2 FTE)*
- Grants Officer (contract – as required)

**The Finance Manager and Doorknock Coordinator positions are currently held by the same incumbent.*

Based on the staffing structure outlined above, three staff members are currently employed by RDA SA on a full-time basis, with the remainder of staff employed part-time or on a contractual arrangement. Staff interviews revealed that whilst part-time employment was a suitable arrangement for some staff, the requirements of some positions within RDA SA warrant additional hours. This appears to be the case particularly for the individuals employed in the Finance Manager/Doorknock Coordinator and Volunteer and Coaching Coordinator positions. These two individuals are currently performing two roles for the organisation, which results in additional demands and additional time spent. As a result, the objectives for each position may be difficult to achieve and it may be useful to consider separating or having clear distinctions for each of these positions.

It appears that the administration support is adequate, and it seems that the administration staff can provide some relief for the 'dual' positions noted above. However the skills and training necessary for these positions, particularly the Finance Manager role, raise questions regarding the suitability for administrative staff taking on these responsibilities.

Whilst the Project Officer – Fundraising position is a contractual arrangement with the current incumbent, there was some suggestion the fundraising and grants applied for could be approached in a more proactive way. This role was previously undertaken on a part-time basis, and more fundraising activities were held at this time. The same was said for the Doorknock Coordinator position, as it appears that doorknock fundraising is not as planned or systematic as it could be if there was an individual dedicated to this (as opposed to the current arrangement with the Finance Manager having this responsibility).

During individual staff interviews, some staff members commented that communications between staff (part-time staff in particular) are difficult, especially in terms of organising staff meetings where all staff members are present. Whilst it appears that the part-time arrangements may be suitable for some positions as well as the staff members, it may be useful to implement a meeting structure that either enables all staff to be present, or ensures that the information discussed at the meeting is effectively relayed to all staff.

All staff indicated that they felt the leadership and management they received from the State Manager was good, albeit that it is generally informal. Some suggested that a more structured arrangement may

be of use, such that they have a better understanding of what is expected of them and when. Improved linkage between the State Office staff and the Board was also suggested as an area for improvement, such that the Board could provide the organisation with a clearer indication of their expectations.

RDA SA staff were asked to comment on the effectiveness of the team within the State Office. Comments suggested that the team generally gets along well and works quite well together. Despite this, some comments were made that the difficulties in communication/knowledge transfer between part-time staff (as discussed above) impact on the teams effectiveness at times. Additionally it was commented that the State Office could have more direction as a team, rather than individuals working towards their separate objectives.

When asked about the culture of RDA SA, staff indicated that the organisation operates for a great cause. It was suggested that the culture within the State Office is generally positive, however the “divisions” between the State Office, the Centres and the Board impacts to dilute this culture overall.

Recommendations

- Consider changing the structure of the Finance Manager role to a Full Time position
- Consider dividing the Volunteer and Coaching Coordinator role into two part-time positions.
- Implement additional structure around fundraising, including applications for grants and doorknock activities, to ensure that RDA SA is taking advantage of all possibilities and opportunities. This may occur through the development of a permanent part-time position, or an annual fundraising plan for the organisation.
- Develop a formalised meeting structure, that includes agendas and minutes, and ensure that if staff are not present at a meeting, they are provided with the information discussed.
- Consider implementing a formalised meeting timetable for quarterly meetings to provide staff with sufficient notice of the meeting to enable them to attend (particularly for part-time staff).
- During team meetings discuss team and organisational objectives and ensure staff are aware of what they are working towards as a group, and how their individual roles contribute to this.
- Consider methods to better involve the Board with the State Office, and likewise involve the State Office with volunteers, in an attempt to promote a more consistent culture.

Human Resource Practices

In terms of documentation, all staff members sign a contract at the commencement of their employment. The contract outlines the terms of employment and the position title of the employee. The contracts are kept on-site at the RDA SA State office. One staff member in particular suggested that they were ‘out of contract’ and it is important to ensure that all staff have a current, signed, contract of employment.

Job Descriptions have been developed for most positions within RDA SA however many of them have not been reviewed for some time. It has been indicated that a review of Job Descriptions is underway, and a small number of these revised descriptions are available in draft format. Analysis of the current and draft job descriptions found that the descriptions are quite prescriptive and detailed. Despite most staff members claiming to be unaware of the job description for their role, most indicated that they had a clear understanding of what was required of them.

Formalised performance reviews are not currently undertaken by RDA SA. Performance feedback is generally provided to staff on an informal and ad hoc basis. Whilst staff tended to indicate that they are satisfied with the informal feedback they receive, most suggested that a more structured and formalised process would be of benefit. This may assist the staff member to set individual goals with their manager, and gain a better understanding of whether or not they are meeting their expectations.

Recommendations

- Ensure all staff members have a current, signed, contract of employment.
- Ensure that all position descriptions for roles within RDA SA are consistent and relevant and have a clear connection to the strategic plan.
- Consider simplifying the format, prioritising the key responsibilities of the role and establishing key performance indicators.
- Work with staff to develop and implement the desired format for a formalised performance development system.

Undertake training needs analysis for staff and key volunteers to guide RDA SA in the future.

The training needs analysis undertaken with staff did not reveal any significant 'gaps' in the current knowledge of staff and the knowledge required for them to perform their role. Staff tended to indicate that training for their role within RDA SA was largely 'on the job' however all staff indicated that they felt they had the necessary skills to perform their function within the organisation.

Some suggestion was made that the induction process for new staff members and volunteers could be improved, with greater emphasis on procedural knowledge and providing staff with adequate training initially to ensure they understand what is required of them in their role.

Whilst there is no immediate or urgent need for training of RDA-SA staff, it was noted that the opportunity for staff to attend 'specialised' courses on occasion to enable them to build their skills and knowledge would be beneficial. Some examples of this were MYOB training, attendance at professional development seminars, and receiving updates in areas relevant to their position. In particular, the State Manager indicated that she may benefit from some training in the area of HR Management.

Current barriers to regular staff training appear to be funding restraints and a perceived lack of time for staff to attend formalised training sessions.

Recommendations

- Develop a structured induction process for new staff that includes time devoted to training the employee in the relevant procedures and practices of the role.
- Review the training needs of staff on a regular basis and develop an annual 'training plan' that takes into account the professional and developmental needs of staff.
- Consider funding allocations for staff training and development and for these to be included in the annual planning process.

Assess and make recommendations regarding the financial and risk management systems within the organisation.

Risk Management Systems

RDA SA is in the process of developing a formal risk management framework. The Board now includes risk planning in the annual strategic planning process each September. In September 2007 the Board undertook a risk management workshop. A roll out of the risk management workshops is commencing across the Centres. These workshops are designed to increase awareness and to formalise the risk framework at a local level.

The Board prepares the risk management plan for RDA SA. This includes the Board identifying and prioritising each risk. The impact is assessed however no likelihood of the risk occurring is assigned.

The Board forwards the risk profile to each Centre for input. The Centres review the risks as part of their centre management committee meetings held every six months.

Risk management is now a standing agenda item for each Board meeting. In addition, a risk reporting mechanism for the RDA web site is being developed. This provides a mechanism for identifying and reporting risks for action.

Key risks for RDA SA include:

- Safety around horses especially for disabled children.
- Volunteer safety is of equal importance, particularly as not all volunteers have experience in leading horses. Training for volunteers is key mitigation strategy.
- Maintaining and attracting new volunteer numbers.
- Back up and support in central office.
- Reliance on continued grant funding

With regard to Risk Management in the centres, each centre has a qualified coach who is required to maintain a current first aid certificate. A first aid box is required to be within 50 metres of an event. Risk assessment for specific projects is currently undertaken by the centres on an informal basis.

It was noted that there is a cultural issue involving volunteers seeing risk management as being forced upon them by "big brother" (State Office) rather than understanding the organisational and operational importance of such.

RDA SA is covered by public liability insurance and clients are required to pay a membership fee for insurance purposes.

Recommendations

- Formalise the risk management software package and involve all stakeholders in its development and review.
- Identify an annual risk management plan and strategies to manage and mitigate these risks.
- Continue the education and communication with centres regarding the local and organisational importance of effective risk management.

Financial Management Systems

The sources of revenue for RDA SA are as follows:

- State Government grants from Sport & Recreation (10%), Department of Families and Communities provide (30%).
- Variety the Children's Charity provides (20%).
- Fundraising events and merchandise sales provide (10%).
- Donations provide (10%).
- Annual membership fees and riding fees (10%).
- Individual centres also undertake own fundraising events (10%).

There is a 5 year financial plan for RDA SA. The plan factors in grant funding from each source (as outlined above) for the period of the grant. The plan then looks forward and sets out strategies for how RDA can continue to provide services should one or more of the grant revenues cease to be provided.

Consolidated financial statements are prepared on a financial year end. Management reporting is conducted monthly to the Board. Accounts are audited annually including each centre.

MYOB is the accounting software package used by RDA SA. The external auditors report recommended each centre use MYOB. This is being implemented. Currently one centre maintains all financial record manually using Excel. The other centres, while using MYOB, have different versions of the software.

The financial delegations within RDA-SA are as follows:

Central Office

Only the State Manager and two Board members can authorise payments. Payments are made by cheque or EFT. The constitution requires referral of payments of more than \$1,000 to Board members. This is impracticable as regular payments well in excess of this are made to centres for HACC and Variety reimbursements; to RDAA for rider registrations, etc.

Riding Centres

Centres are required to have all expenditure approved by their management meetings. As part of RDA's constitution, the Centres are required to minute the approval of all expenditure and forward copies of minutes to the State office. Should expenditure be required in the case of an emergency eg: vet care, the expenditure can be incurred and then formally approved and minuted.

Payment of Invoices

When an invoice is received the Finance Manager reviews for appropriateness and prepares and signs a payment requisition. The State Manager reviews the payment requisition and if correct signs. The requisition is passed to one of the two authorised Board members for signature. The signed requisition is then returned to the Finance Manager to process payment.

As noted above, for the riding centres all expenditure is to be minuted and copies of the minutes provided to central office.

For procurement of goods and services

For operational matters the State Manager can authorise the procuring of goods and services. For larger capital items, procurement requires Board approval. There is no minimum amount identified that requires the riding centres to refer expenditure to state office for approval. A formal tender process is not considered appropriate given the size of RDA. The Board does require for significant expenditure 3 or 4 quotes are received. This is not formally documented.

All balance sheet accounts are reconciled monthly. A "cash at bank" reconciliation is performed monthly. In addition, after each fundraising event reconciliation is undertaken.

Each riding centre operates its own bank account. Each centre receives their own donations and conducts their own fundraising events. The centres make payments for their ongoing operations including horse feed, vet expenses, equipment maintenance etc. The centres perform their own cash at bank reconciliations and central office receives a copy of all bank statements on a quarterly basis.

Reconciliations are prepared by the Finance Manager and audited annually. BAS Statements are prepared by The Finance Manager.

With regard to financial reporting, each month the Board receives a Profit & Loss Report and Balance Sheet for head office operations. In addition the Board receives monthly reports from the State Manager, riding coordinators, coaching and volunteer reports.

Each centre maintains its own financial records and forwards quarterly financial data to central office. The Finance Manager then prepares a consolidated Profit & Loss Report and Balance Sheet for the Board.

A financial report is completed for each fundraising event by the volunteer who organised the event. The format and analysis varies. The report compares actual to budget and an explanation of variances. No forecasting is undertaken.

Asset registers exists for central office and each riding centre. These are updated quarterly. Each centre forwards their updates to head office. A stock take is performed annually.

A stock movement advice form is used to record the purchase and sale of assets. For expenditure <\$500 is expensed.

Annual budgets are prepared by the Finance Manager. The State Manager reviews and approves the budget for presentation to the Board. The Board approves the budget as per minutes of the meeting.

The Finance Manager reviews each invoice for appropriateness and prepares and signs a payment requisition. The State Manager reviews the payment requisition and if correct signs. The requisition is passed to one of the two authorised Board members for signature. The signed requisition is then returned to the Finance Manager to process payment.

RDA has a small number of debtors. These arise when an external entity requests an invoice for tax purposes. Invoices are also sent to the riding centres for coaches registration fees.

In order to protect financial information, the server is backed up nightly by the State Manager. The previous nights back up tape is taken home. This leaves a gap of one days work that could be lost. In addition the Finance Manager backs up on USB all finance data on a daily basis.

There is currently no procedure for managing financial knowledge within RDA SA.

Recommendations

- Ensure that each centre uses the same MYOB operating version.
- Include in finance policies the need to refer procurement of goods and services above a minimum amount to the Board for approval.
- Include in finance policies the need for any individual to disclose any connection they have with an entity providing a quote to RDA.
- Develop a financial management report for the funding providers in addition to the newsletter they currently receive.

Constitution

The RDA currently operates under a Constitution updated in 2000. In broad terms the document appears to provide an effective framework for the governance and operations of the organisation. It defines the purpose and intent of the RDA as well as the role of the Board and the State Manager along with the nature of membership. Despite this it was the view of those Board members that the consulting team met with that it was in need of updating in order to allow for the following;

- Expand the number of Board members up to the maximum of 12 - members of the board felt that the usual quorum of 4 or 5 was too small for fulsome discussion and debate and so a larger pool of people would likely increase the chances of getting more attendees per month.
- Redefine the role and function of membership – perhaps one of the anomalies with RDA is the position of “member”. Apart from a small annual fee of \$20 from a relatively small group of 220 and the right to vote membership does not offer any special privileges. More could be done with membership (ie increase the fee plus increase benefits) which in turn may see greater engagement of this group to the operations of RDA as a whole,
- Refine the “influence” that the SA Board has over local sites – bringing centres closer to RDA-SA will facilitate greater flow of information and greater connection to the whole which in turn will likely increase the amount of positive influence the office can have over centres.
- Remove some internal anomalies in the constitution – here again this refers to people becoming involved in centres but not becoming members as well as the process of becoming a member requiring nominees to be proposed and seconded by an existing member.

Best practice governance processes have been set out by the Australian Sports Commission⁶ to assist small organisations such as RDA adopt principles and practices that will enable them to function effectively. In the recommendations for best practice approach, the main principles to be adhered to are as follows. PKF used this framework to “assess” the governance processes within RDA.

- Clear delineation of governance roles (*the structure should be clearly documented, with responsibilities and powers clearly delineated*). The role of the board is clearly delineated and its powers are clearly defined however both the Board and the SM suggest there could be greater definition to focus the former on strategic issues and the latter on operational matters.
- Effective governance processes (*a Board should have a clear set of governance policies and processes that are agreed upon and documented*). As indicated above over the past 12 months the board has become increasingly professional in its conduct with agendas and minutes circulated in a timely manner and committees convened with terms of reference supported by sound meeting procedures.
- Effective governance controls (*the Board should clearly define its role in determining the success of the organisation*). Operationally controls would seem to be in place with regular meetings and minutes however as indicated the board itself does not operate to performance

⁶ Australian Sports Commission, 2007 - *Principles for Good Governance*, www.ausport.gov.au.

measures of its own. The SM reported that she has not had her performance reviewed in recent times.

- Governance improvement (*a Board should ensure that there is an appropriate and regular assessment of Board performance and provide Board members with induction and ongoing training*) Performance assessment of the board has been mentioned several times already however although there is induction of members it is unclear whether the current amount is adequate to cover all aspects of governance, the business along with the services to users across a range of locations.
- Member responsiveness (*a Board should have a thorough understanding of the interests, aspirations and requirements of members and stakeholders and respond to these with an appropriate strategic plan*). Members of RDA have a broad understanding of the direction of the organisation and an annual report is produced that summarises the achievements for the year gone. It appears that financial information is available to centre managers but the primary focus again appears to be on the local operations rather than the organisation as a whole. Because of this there did not seem to be a sound understanding regarding how to remove a board member although the provisions are spelled out appropriately in the constitution nor were they able to determine the effectiveness of board members.

Recommendations

- The Board and SM to review their roles to ensure greater delineation and clarity.
- Increase the size of the Board to its full complement of 12 to ensure an adequate quorum each month.
- Review the role and function of members to ensure that there is increase involvement of this group
- Increase the membership fee to better reflect the value of services delivered.
- Tighten the formal relationship between the State Office/BoM and the centres to better manage risk and possible synergies
- Board member induction to be “refreshed” to cover all aspects of operations and governance.
- RDA to provide regular quarterly communication to members regarding the performance of the board.

The review process included assessing the current business operations against the Australian Business Excellence Framework (ABEF)⁷, as well as undertaking both a SWOT⁸ and PESTEL⁹ analysis.

Clear Direction – As indicated above RDA SA currently operates by a strategic plan and checks its performance to this on a regular basis through the operations of the Board of Management. This document does provide the necessary focus and details key result areas that are being pursued. The organisation does have a stated vision but this is largely operational and not “visionary” in the sense that it does not describe the “end state” or overall goal that the organisation is working towards.

Agreed Plans –RDA SA has a set of plans that it works to and it is evident from the Board of Management minutes that they are agreed to by those in this forum. This is a positive sign and

⁷ Australian Business Excellence Framework – SAI Global Limited – www.sai-global.com

⁸ Harvard Business Review 1960 cited in Public Sector Management Program – Unit 4 – Centre for Governance and Public Policy – Griffith University - 2005

⁹ Johnson and Scholes, 2002 – *Exploring Corporate Strategy*, 6th Edn, Pearson Education

suggests that the group is working collectively to reach the intended outcomes and that there is little or no disharmony. Beyond this group it is difficult to determine if the plans are agreed by centre managers and staff or users/caregivers, however those involved in the meetings with the consulting team from the two centres visited did not seem to have an understanding of future plans yet this group was charged with the delivery of the service on behalf of the board.

At a local level centres are required to operate by a detailed operations/resource manual that clearly defines and operationalises the full suite of elements to run a sound “business”. One of these is the need to form and operate by a suitable committee and to develop annual plans for the site and to ensure they are communicated to users, volunteers and stakeholders.

Customer Focus – The Board and senior staff indicated a high degree of care and concern for their “customers” namely users of the RDA centres and their respective parents/caregivers. This concern has been formalised through a customer services survey that is required by Home and Community Care (HACC), RDA’s major funding organisation. Although the responses to the most recent survey (2006)¹⁰ were low at 14.8% they nevertheless show that RDA is attempting to be customer oriented by circulating such a document. The results although far from conclusive given the small sample size and the addition of several new questions however it is fair to suggest that the results are similar to previous years or falling slightly as determined by averaging the scores to all services quality questions asked –(2005 ~ 69%, 2006 ~ 60%). In addition to this only 3 out of 11 areas meet the HACC service quality requirements. Despite this 95.8% of users enjoy riding with RDA.

It is important to note that the Resources manual devotes an entire chapter (Topic 6) and numerous other references to the importance of “client service delivery”, the expectations placed on centres and the users as well as the right to appeal decisions or outcomes. This is certainly good practice and was well understood by the centres that were visited and those involved.

Improve Process – Although the Board and centres were aware of the need to continually improve processes and some cited their efforts to do so there was not a plan or concerted focus on this item across the organisation. At this point it is also worth noting that there was some concern regarding the operations of RDA Australia and its inability to provide clear and spirited direction. This concern was exacerbated by a query over the use and value of funds paid to the national body. For this reason the states are said to have good relations and attempt to work together to enhance services with the national body functioning, unfortunately, as a blocker.

Involve People – One of the strengths of RDA, both the state office and centres is that paid staff and volunteers are involved in the operations of the organisation and the delivery of the services to clients. This is done formally by way of regular newsletters, emails, meetings and training sessions as well as informally through the high level of commitment shown by paid and volunteer staff. The clear majority of this involvement would appear to be on operational matters and despite efforts to involve a broader group in planning processes there is minimal “connection” to the overall goals of the organisation.

Continual Learning – Although RDA could not be classed as a typical “learning organisation” it demonstrates a strong commitment to providing the materials to develop its people through such items as a detailed operations manual that is provided to all centres, extensive training for potential and current coaches and ongoing forums for centre managers. Because for this framework along with clear state office and centre structures it is evident that paid and volunteer staff are aware of their roles, responsibilities and importantly their limitations.

Systems Thinking – Understandably given its size and level of sophistication the RDA has little formal appreciation of systems thinking and processes however operationally it is evident that through many of the mechanisms mentioned above it does try to establish a degree of consistency across its various centres. In part this is to establish sound business practices for the benefit of the association and its

¹⁰ RDA Service Quality Report – 2006 – authors unknown

“customers” however it also understands that this serves as a form of Risk Management to manage its exposure to legislative and legal threat.

Each of the policies reviewed (37 in total) identified the date of development, date reviewed and the anticipated next review time. The policies were numbered and signed by the SM and for the most part were written in clear and practical terms that could be readily understood by those in centres.

Importantly RDA does not see itself as a “unified” whole organisation but more as federation or franchise and hence this also reinforces the view that there is minimal understanding of systems thinking.

Use of Data and Information – The various policy, procedure and planning documents suggest that over time the RDA has become better at the collection, use and understanding of data in areas such as attendance of clients, horse usage, equipment registers, fees collected and costs. Similarly the current strategic plan details a number of key performance indicators that are regularly monitored although it was the view of the board that this is an area that they would like to enhance their own performance. Many of these same indicators are also seen in operation at centres. As a requirement of its funding the RDA SA also collects information on Service Quality¹¹ as well as Volunteer Satisfaction¹².

Understand Variation – As suggested above RDA is maturing with regard the collection and understanding of data and information but they are not at a point where they use this to manage and control variation. Having said this, the organisation ensures that variation at centres is minimised due to the development and application of the aforementioned resource guide and the regular assessment to such.

Community Impact – Although not an item that is formally measured or managed there was clear evidence from both centres visited that there was an understanding of the impact of the RDA on the community as a whole and more specifically the “disability community”. The many stories and examples recounted by staff and volunteers reinforced the very positive role performed by the RDA for those with a disability by providing a leisure and learning environment as well as participation pathways that culminate at an elite level.

Increasing urbanisation and the resultant pressure on open space was indicated as a factor impacting on RDA (and other equestrian pursuits) with the effect that it was becoming harder to manage facilities and maintain harmony with urban neighbours. The alternative was to move further to the urban fringe but then this impacted on volunteers and users having to travel longer distances to participate with the associated cost.

Stakeholder Value – In some respects the RDA is a complex organisation as it comprises a state office with 13 centres/sites across SA. It has a small number of paid employees (6 amounting to 5 FTE) and much larger group of volunteers (500). It provides services to a range of clients with a range of disabilities and in the process attracts those with an interest in horses, disability or simply community service. As a consequence there are many stakeholders who are looking for value. Direct reports from representatives of all groups indicated that they did indeed receive value.

Role Model Leadership – Given the form of RDA it appears that leadership is a distributed quality rather than the province of one or a small group. This is a result of the centres largely operating autonomously with the centre managers having significant influence and control in their local areas. This is not to imply that there is a lack of leadership however as indicated above it is the view of the

¹¹ RDA Service Quality Report - 2006 – Authors unknown.

¹² RDA Volunteer Satisfaction Survey – 2006/2007 combined – Authors unknown.

RDA Board that the organisation would benefit from a somewhat more holistic and even directive approach to leadership.

An environmental analysis was also conducted using the PESTEL framework. This involved looking at contextual pressures that are impacting on the environment in which RDA is operating.

Political	
→	Stable State political environment
→	New Federal government
→	ORS developing new strategic plan
“Environmental”	
→	Growing concern regarding pressures on open spaces.
→	Growing concern regarding demands and cost of water and other services
→	RDA relations with other equestrian activities is harmonious but little direct assistance
Social	
→	Continued growth in understanding of disability needs
→	Volunteer numbers are static but harder to retain or commit
→	Demand for services such as RDA on rise
Technology	
→	IT advances provide increased passive leisure options for disabled eg web, social networking
→	Greater acceptance (even demand) for high quality IT infrastructure
→	
Economic	
→	Sound State and Commonwealth economies
→	Reduced funding to special schools for services such as RDA
→	Growth of user pays orientation of services
Legislative	
→	Increasing regulatory demands on all orgs/NGO/NFP such as RDA
→	Legislative demands impact on volunteers and willingness to assist
→	Legislation and Regulation create risk averse culture bordering on fear

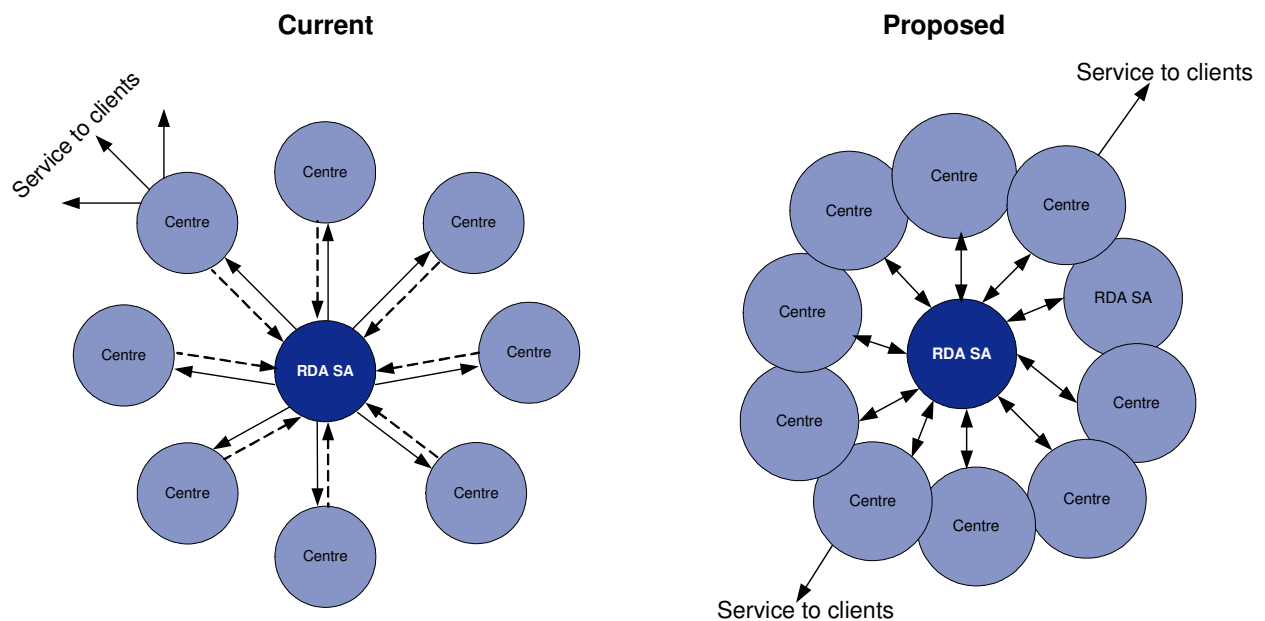
A SWOT analysis has revealed the following key issues:

	Strengths	Weaknesses
Internal	<ul style="list-style-type: none"> → Committed BoM → Capable and competent SM → Sound systems and practices → Resources manual → Stable staffing → Sound centre infrastructure → Good brand 	<ul style="list-style-type: none"> High % of government funding Centres dependent on volunteers Demand for services exceeding capacity Low engagement with RDA state plan Low engagement with service plan Centres focussed on local issues
	Opportunities	Threats
External	<ul style="list-style-type: none"> → Demand for services is high and rising → Work more effectively with other equestrian activities → Greater promotion as recreation → Sound procedural base that could be applied to other organisations → Provide services to other disadvantaged groups 	<ul style="list-style-type: none"> → Greater pressures on open space → Small Organisation → Fragile funding base → Increased urbanisation → Increasing legislative demands → RDA is very dependent on volunteers yet hard to find and retain → Cost of travel to centres

Review the business operations and development of new operational models.

Based on the information identified through this review it would seem that the RDA in SA is functioning effectively and in some respects (eg Resource Manual) could be considered a “best practice” organisation that other smaller sporting and recreation organisations could use as a model. For this reason there seems little need to recommend wholesale or drastic changes to its structure or operations.

If there were to be suggestions offered they would focus on “knitting” the various centres with the state office to produce a greater sense of “one organisation”. These efforts would also benefit from supporting activity to foster a greater sense of a single culture across the entire organisation.



By undertaking a range of activities in these two areas it is anticipated that benefits will flow in the following areas;

- Greater interest and understanding of the whole organisation among members
- Strengthened collective efforts in areas such as resource sharing and state-wide branding and promotion
- Enhanced risk management practices
- Improved involvement and engagement of members
- Reduced focus on solely local/centre issues

Although the focus of the review was on matters emanating from SA there was also evidence that “National issues” were impacting on the performance of services in all states to the point where there was significant frustration among SA Board members regarding direction, promotion, fundraising and the use of funds. By “tightening” the SA operations it may also be possible to galvanise enough interest in national matters to assist with agitating for change. At the moment national matters are a very distant issue for local users.

Develop a change management strategy for RDA SA, outline recommended directions and the context within which the recommendations have been made.

Based on the above comments RDA SA will be best off by continuing on its path of continuous and incremental improvement rather than undertaking immediate and wholesale change. With this in mind the following enhancements are proposed in order along with the implications of such;

Remainder of 2008

- Increase the board size to its maximum of 12 (advertise on Seek Volunteers + Volunteer SA)
- Identify accounting/treasury skills + promotional expertise (relevant professional associations)
- Commence redrafting of constitution including defining the nature and role of members (specialist legal assistance - \$5000)
- Revisit Strategic Plan to sharpen future vision(facilitated workshop - \$3000)
- Involve centres in planning process to build the sense of “one organisation” and culture (as above)
- Promote plan to centres (production of tri-fold A4 brochure + dialogue at centre managers forum)
- Promote vision to community to raise awareness and attract “support” (fundraising committee + board)
- Commence audit process of centres to ensure compliance with operating standards (centre managers)
- Encourage all centres to develop formal volunteer recruitment plans (state office + centre managers)

First half of 2009

- BoM to develop KPI's (SM + Board Members)
- Subcommittees to meet regularly with charter + KPI's (SM + Board Members)
- Centres to replicate state planning process locally (SM + Centre Managers)
- Provide greater structure to fundraising and promotion (Fundraising Manager + sub committee)
- Enhance customer service ratings (SM + Board Members)
- Finalise refresh of job and person specifications (SM + all staff)
- Continue promotion of risk management to centres(SM + Board Members)
- Fine tune financial management practices (SM + Treasurer)
- BoM to communicate regularly to centres (SM + Board Members)

Conclusion

In many respects “reviewing” RDA was a pleasure as it operates with sound systems, is overseen by a committed BoM and SM who in turn support centres who are “staffed” by volunteers who are passionate, caring and careful in their work with those with a disability. Other similar sized recreation, sporting and welfare organisations would do well to observe and refer to RDA in order to develop their own systems and culture. Therefore the recommendations offered above are best seen as “enhancements” that will support the ongoing growth and development of RDA in SA.

Some questions do remain regarding the operations of the individual centres that are the public face of the RDA. These “concerns” focus on the local focus of these operations and their capacity within the federated system of the RDA to do their own thing , at least in the short term, and in so doing endanger the organisation as a whole as well as tarnish the goodwill associated with the brand. The local centres were not part of this review but the audit process mooted in this report will serve to enhance alignment and consistency.

Another factor that was not “within scope” of this review was the purpose, role and performance of the national RDA body. The palpable frustration expressed by the SA BoM regarding the lack of direction , use of funds and absence of united promotion and fundraising combine to make a tough job even harder for the SA State office and the local centres. This is despite growing demand for RDA services and a Federal government committed to the support of those with a disability.

Finally, having undertaken several of these “Finance and Governance Reviews” for small sporting and recreational organisations the consulting team continues to muse over the possible benefits if these micro businesses were to “coalesce” in one form or another (merger, takeover, shared functions, shared back office) so that there could be synergies and savings in areas such as accommodation, IT, HR and even purchasing. All of these options can allow for the retention of individual services and identity whilst at the same time beginning to break free of the tenuous existence that many have due to uncertainty over finding and fundraising.

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