

Online Membership
System
**Club Personnel
Guide**

Introduction

Volunteers are at the heart of Swim England. Without them, our affiliated clubs and events would simply not function.

However, it is essential that we have a clear picture of who is actively volunteering in our clubs, irrespective of their membership category. To achieve this, we have introduced a way for clubs to record all roles of members.

This will help support the club to plan recruitment and training and will provide us with invaluable information on the support we should be delivering.

The number of individuals involved in clubs is significant so we have introduced an online process to list volunteers in smaller, manageable groups. These are:

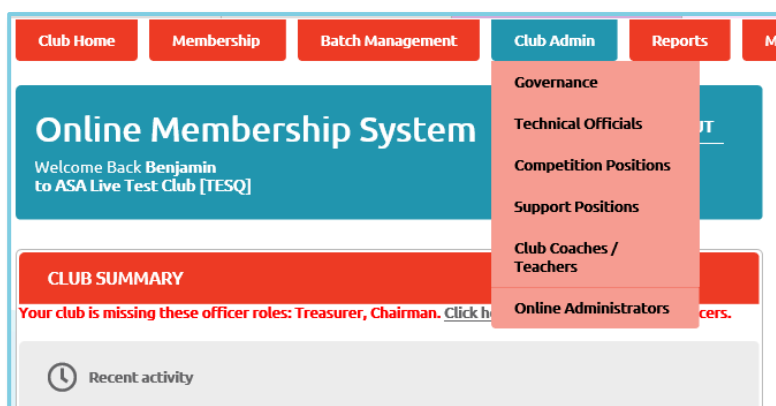
- Governance - this covers six roles on the committee. Clubs need to list, as a minimum, a chairperson, secretary and treasurer.
- Technical officials - this is an opportunity to indicate who is an ACTIVE technical official
- Competition roles - vital roles such as team manager and chaperone at clubs will be covered under this section
- Support positions - this list is aimed at capturing every other volunteer in the club.

This user manual will guide you through the process of adding personnel to the club list.

Club Admin

To assist you adding and viewing your club personnel we have split the roles into separate areas; Governance, Technical Officials, Competition Positions and Support Positions.

Below are the roles listed under each area.



Governance	Technical Officials	Competition Positions	Support Positions
Paid/Vol Chairperson	All Qualified Officials	Paid/Vol Chaperone	Paid/Vol Admin
Paid/Vol Membership		Paid/Vol Club Captain	Paid/Vol Competition Sec
Paid/Vol Other		Paid/Vol Other	Paid/Vol Fundraising
Paid/Vol Secretary		Paid/Vol Poolside Helper	Paid/Vol Head of Swim School
Paid/Vol Treasurer		Paid/Vol Team Manager	Paid/Vol Marketing
Paid/Vol Volunteer Coordinator			Paid/Vol Other
Paid/Vol Welfare			Paid/Vol PR & Media
			Paid/Vol President
			Paid/Vol Rankings
			Paid/Vol Swim Mark Coordinator
			Paid/Vol Vice Chair

- ★ Initially only the Online Administrator will have access to these areas. To set up your clubs Deputy Online Administrators with access to these areas you will need to edit their permissions from the Online Administrators section
- ★ The following roles can only be listed once for each discipline Chairperson, Secretary, Treasurer, Welfare and Membership

When adding a position to a member you must also select a discipline for the position. For example if your member is the volunteer secretary for your swimming committee you list them as Vol – Secretary Swimming. If they are the main club secretary you should list the discipline as Organisation.

- ★ Swim England will only send out general information to the position marked as Organisation. Where information is specific for a discipline, Swim England will send

it to the 'Organisation' and the relevant Discipline contact i.e. Synchronised Swimming Secretary

Adding a New Member

When adding a new member enter the member's details and select 'Continue' or 'Save and add a Family Member'

Swim England privacy policy

Here at Swim England we take our members privacy seriously and will only use their personal information in accordance with our Privacy Policy. Please ensure your members have read the policy and understand how their personal data will be used.

Address is a mandatory Field so Please enter an e-mail address if 18
if member is under 18 then a parent e-mail needs to be added

If the member is over the age of 14 you will be prompted to indicate if the member holds a workforce role.

If they don't hold a personnel role select 'No' and then either 'continue' or 'Save and add a Family Member'.

ADD NEW MEMBER

Does this member hold a paid or volunteer position within your club?

Yes ☐ No ☒

If they will be holding a personnel role select 'Yes' and then either 'continue' or 'Save and add a Family Member'.

When selecting 'Yes' you will be taken to the personnel section, select the tab the role relates to. The tab selected will be highlighted in red.

GOVERNANCE TECHNICAL OFFICIALS COMPETITION SUPPORT COACH / TEACHER

Select the position from the drop down list

Select the discipline. You can add more than one discipline for each position if required.

To add role click on

You are adding the Workforce roles for new member: **Test Langham**
Add an Competition position to this member:

Position

Discipline

☐ Diving
☐ Masters Diving
☐ Masters Open Water
☐ Masters Swimming
☐ Masters Synchronised Swimming
☐ Masters Water Polo
☐ Open Water
☐ Para-Swimming
☐ Swimming
☐ Synchronised Swimming
☐ Water Polo
☐ Organisation

The role(s) will then be listed under Positions & Disciplines at the bottom of the page.

You can then move to another tab to add additional roles.

To remove a role click on the red cross icon.



Once you have added all the roles click on 'Save'

If you do not wish to save any of these roles click 'Cancel' this will remove all officer roles you have added.

Adding a Role to an Existing Member

To add a role to an existing member hover over the 'Club Admin' tab and the list of workforce areas will show. Select the personnel section for the position you wish to add.

All members currently holding positions within this area are listed.

SUPPORT POSITIONS					
Membership No.	Name	Email	Positions & Disciplines		Detail
1128812	Villa Borghese	emma.langham@swimming.org	Paid - Swim Mark Coordinator	Organisation	

Click on 'Add Member to Role'.

Enter the members membership number, first name or surname click 'Find Members' this will bring up a list of possible members.

Membership No.	Name	Date of Birth	
516115	John Test2	04/02/1965	
1170631	Test2 Test2	14/10/1987	
1170629	Test3 Test3	13/10/1963	
1170630	Test4 Test4	10/02/1912	
1170632	Test5 Test5	07/04/1995	
1393096	Test Tester	04/10/1997	
946955	Jack Testi	01/01/2000	

Select the member you wish to add the role to.

Select the Position and discipline and click 'Add New'. This will add the role to the member.

Viewing and Amending Roles

From the 'Club Admin' Tab select the area you wish to view or make amendments to. This will show a list of members who currently hold positions.



- ★ You will notice that in the Governance and Competition areas DBS and Safeguarding expiry dates are listed. Swim England understand that for certain roles members will not have a DBS or Safeguarding listed as it is not required for that role.

To change the discipline for the position click on the green pencil icon and select the new discipline from the dropdown menu. To save the change click on the blue tick icon.

To add another position to the member within the workforce area click on the green plus icon.

To view a members details and all roles they currently hold click on the red arrow icon. To View their roles select the 'Workforce' tab.

To delete a role from a member click on the cross next to the role this will remove the role.

Renewals

During the renewals process all clubs will be required to indicate if a member who has turned 14 years in the previous membership year holds a workforce role.

From the Member List page and the renewals batch list you will be able to indicate if the member holds a position or not, for those members over 14 years you must indicate 'Yes' or 'No'. You can do this by clicking on the radio buttons under Workforce

Gender	Join Date	Action	Renew	Lapse	Workforce	Detail
M	20/07/2019		<input type="radio"/>	<input type="radio"/>	<input type="radio"/> Yes <input checked="" type="radio"/> No	
F	04/10/2018	Renew	<input type="radio"/>	<input type="radio"/>	<input type="radio"/> Yes <input checked="" type="radio"/> No	
M	24/09/2019		<input type="radio"/>	<input type="radio"/>	<input type="radio"/> Yes <input checked="" type="radio"/> No	
M	10/10/2018	Renew	<input type="radio"/>	<input type="radio"/>	<input type="radio"/> Yes <input checked="" type="radio"/> No	
M	27/06/2019		<input type="radio"/>	<input type="radio"/>	<input type="radio"/> Yes <input checked="" type="radio"/> No	
M	15/05/2019		<input type="radio"/>	<input type="radio"/>	<input type="radio"/> Yes <input checked="" type="radio"/> No	

GOVERNANCE TECHNICAL OFFICIALS **COMPETITION** SUPPORT COACH / TEACHER

You are adding the Workforce roles for new member: **Test Langham**
Add an Competition position to this member:

Position	Discipline
<div><div>Paid - Chaperone</div><div>Paid - Club Captain</div><div>Paid - Other</div><div>Paid - Poolside Helper</div><div>Paid - Team Manager</div><div>Vol - Chaperone</div><div>Vol - Club Captain</div><div>Vol - Other</div><div>Vol - Poolside Helper</div><div>Vol - Team Manager</div></div>	<div><div><input type="checkbox"/> Diving</div><div><input type="checkbox"/> Masters Diving</div><div><input type="checkbox"/> Masters Open Water</div><div><input type="checkbox"/> Masters Swimming</div><div><input type="checkbox"/> Masters Synchronised Swimming</div><div><input type="checkbox"/> Masters Water Polo</div><div><input type="checkbox"/> Open Water</div><div><input type="checkbox"/> Para-Swimming</div><div><input type="checkbox"/> Swimming</div><div><input type="checkbox"/> Synchronised Swimming</div><div><input type="checkbox"/> Water Polo</div><div><input type="checkbox"/> Organisation</div></div>

ADD ROLE

If you select 'Yes' this will take you to the Roles page where you can select the workforce area, position and discipline. Once you have selected the role click 'Add Role'

This will add the role to 'Positions & Disciplines'. You can then continue to add

further roles from other areas. Once you have finished click 'Save'.

Competition Positions

Positions & Disciplines

Paid - Chaperone	Swimming	
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SAVE CANCEL

If you don't wish to save these roles click 'Cancel'.

If you have assigned a role incorrectly you can remove this role by clicking the red cross icon next to the role

When submitting the renewal batch any members over the age of 14 years which you haven't indicated 'Yes' or 'No' will be listed in an error file, click on this to see which members need updating.

Once these members have been updated submit the batch again.

The batch was not submitted because of the following errors:

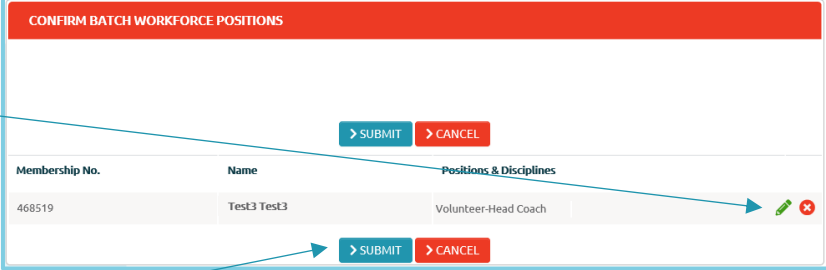
All members 14 years and over must have their workforce option set to either "Yes" or "No"

[Click to view a list of members in error.](#)

Please correct the errors and resubmit the batch for processing

When all your members have a workforce 'Yes' 'No' marked and you have submitted your batch you will be asked to confirm any existing member's holding a role.

You can change the discipline by clicking the green pencil icon and selecting the new discipline from the drop down menu and saving by clicking the blue tick icon.



The screenshot displays a web interface titled "CONFIRM BATCH WORKFORCE POSITIONS". It features a table with columns for "Membership No.", "Name", and "Positions & Disciplines". The first row contains the values "468519", "Test3 Test3", and "Volunteer-Head Coach". In the "Positions & Disciplines" column, there is a green pencil icon for editing and a red 'X' icon for deleting. Above and below the table are "SUBMIT" and "CANCEL" buttons. Blue arrows point from the text on the left to the pencil icon and the bottom "SUBMIT" button.

Membership No.	Name	Positions & Disciplines
468519	Test3 Test3	Volunteer-Head Coach

Once you have made any changes required click 'Submit'