Start Smart Toolkit

A toolkit for developing effective volunteer policies and procedures in not-for-profit organisations

For managers and organisations wanting to develop, implement and review policies and procedures

national **volunteer** skills centre

volunteering australia

FESTA - Participants receiving brief on weekends activities from FESTA Director, Michael Blaseotto

HOW TO USE THIS KIT

Start Smart aims to help you understand and meet Standard 1 of the *National Standards for Involving Volunteers in Not-for-profit Organisations*.

These National Standards outline a 'best practice' approach to running a volunteer program. The first step on that path – Standard 1 – recommends that organisations put in place policies and procedures that will support their volunteers and the work they do.

Writing policies and procedures for your volunteer program can seem like a difficult and time consuming task but *Start Smart* shows you how to develop policies and procedures that will be relevant to the specific needs and situation of your organisation and the volunteers who work with you.

It explains the three stages of the policy process, answers some commonly asked questions, and provides a step-by-step guide to get you started.

The toolkit also features 'template' policies and procedures that can be modified to suit the particular requirements of your volunteer program, as well as handy tips and advice from people who have been through the process with their organisation. These modifiable templates can be downloaded separately from the Volunteering Australia website, www.volunteeringaustralia.org

Finally, it includes a selection of valuable reference documents from Volunteering Australia:

• Definition of Formal Volunteering and the Principles of Volunteering

• Volunteer Rights

• Model Code of Practice for Organisations Involving Volunteers

Think:

Policies and procedures help your volunteers to understand the workplace and their job. They make your organisation more efficient in delivering services to the community. And they can reduce the potential for things to go wrong.

WHY DO WE NEED POLICIES?

The environment in which not-for-profit organisations operate is changing rapidly and volunteer work is becoming increasingly sophisticated and complex.

If volunteers play a part in your organisation, then you have a responsibility to look after them. Good policies provide the foundation for your entire volunteer program.

They are a statement to volunteers that your organisation values the contribution they make. They explain how you will support them in their work, how they will be managed and how decisions that affect them will be made. They also help volunteers to do their job properly.

Effective policies and procedures also help your organisation to operate more efficiently. They provide you with a practical tool to manage people and respond to challenging situations.

Helen sings at an aged care home every Saturday afternoon. When she arrives at the centre she finds that some of the residents have not been brought to the activities room by the paid staff. This isn't the first time this has happened. Helen goes to help one of the residents from his room – a 'regular' at the singing group – but in doing so she slips and injures her knee. Helen needs physiotherapy for six weeks to recover from the injury.

Peter loves his soccer and was enthusiastic about coaching the Under 14 team, which his son plays for. However, some of the parents can be very aggressive towards Peter, especially when they think their own sons are spending too much time on the sideline. They accuse him of being biased. Peter feels bullied but doesn't know how to respond. He plans to give up the coaching role at the end of the season.

Margaret is a chartered accountant and has volunteered with her local art gallery. She was told that she would be helping the managing director and the board to develop a new business plan for the gallery. However, when Margaret starts work she is asked to do the gallery's books and prepare the annual tax return. She's told that they'll get around to doing the business plan 'soon'. Margaret feels conned.

↗ 1.   Would any of these scenarios happen if the organisation had relevant policies and procedures in place? Why / why not?

↗ 2.   In what way could policies and procedures help the organisation to address the issues raised in these scenarios?

Of course, not-for-profit organisations face many pressures on their time. Most are trying to do more and more with less and less. In the midst of all this, it can seem hard to make 'extra' time available to define and document the organisation's policies and procedures.

The obvious question, however, is: can you afford not to make time?

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What are the benefits?

Everyone benefits when an organisation has clear policies and procedures in place to support its volunteer program.

Your volunteers benefit

↗ Know their rights

↗ Understand their role

↗ Feel valued

↗ Enjoy their work

A comprehensive set of volunteer policies shows that your organisation has put thought and planning into establishing a professional and supportive volunteer program. It demonstrates to volunteers that you value the time, effort and skills they contribute.

A general volunteer policy helps volunteers to understand their rights and responsibilities. It also explains how your organisation will involve them in its work and how they will be managed.

Workplace policies and procedures help volunteers to understand their role in your organisation – what they are expected to do, how they show they do it and the 'boundaries' they should observe. This gives them the confidence to get on with doing the work they volunteered to do.

Good policies also promote fairness and consistency. Volunteers know that decisions will be made following the same process, rather than in an arbitrary, ad hoc fashion.

Your organisation benefits

↗ Operating efficiently

↗ Setting expectations

↗ Minimising risks

↗ Managing change

Developing a general volunteer policy provides an opportunity for your organisation to be clear about the fundamentals of your volunteer program – why you involve volunteers in your work and the principles that will underpin the program.

Workplace policies and procedures define the specific roles that volunteers will carry out, how they will work and the standards that are expected of them in the workplace. This helps your organisation to operate efficiently and deliver a quality service to the community. It can also address concerns or questions that paid staff may have about the role of volunteers.

Effective policies and procedures help you to identify potential risks and put in place strategies to avoid or minimise those risks. It can also reduce your liability if things go wrong.

They also provide your organisation with continuity and consistency when management changes.

If your policies and procedures are reviewed regularly, then a new management group has a solid foundation from which to work. It also means there's no need to spend precious time and resources 'reinventing the wheel'.

Your stakeholders benefit by

↗ Delivering quality service

↗ Attracting new volunteers

↗ Enhancing funding applications

A volunteer program that operates smoothly and professionally will, invariably, deliver a quality service to the community. This helps build your community profile and word-of-mouth reports mean others seek out your services.

Having a comprehensive set of policies in place demonstrates that your organisation takes its volunteer program seriously. It shows the professional approach that guides your organisation and its work.

This can be an important tool for attracting new volunteers. It can also help to attract support and assistance from donors and government agencies.

HPLC lawyer Alison Corcoran pictured advising an HPLC client at the Mission Australia Cafe Clinic in Brisbane's Fortitude Valley.

WHAT ARE THE NATIONAL STANDARDS?

The *National Standards for Involving Volunteers in Not-for-profit Organisations* set out eight priority areas where organisations can strengthen their volunteer program.

Volunteering Australia has developed these *National Standards* to help not-for-profit organisations put in place a 'best practice' approach for running their volunteer program.

Put simply, the *National Standards* describe the different elements of a quality volunteer program – one that protects the rights of volunteers, improves the services that volunteers provide and enhances the satisfaction they gain from their work.

The philosophy behind the *National Standards* is straightforward: if not-for-profit organisations have management systems in place that meet the needs of volunteers, then volunteers will be better able to meet the needs of those to whom they provide a service.

The starting point is to put in place effective policies and procedures.

Standard 1 says:

↗ An organisation that involves volunteers shall define and document its policies and procedures for volunteer involvement and ensure that these are understood, implemented and maintained at all levels of the organisation where volunteers are involved.

The standard describes the types of policies and procedures that organisations should consider developing to meet 'best practice'.

The activities and exercises in this Toolkit have been designed to help you understand and meet Standard 1, taking into account the size, needs and circumstances of your organisation's volunteer program.

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GETTING STARTED

There can be a lot of confusion about what policies and procedures 'are', what information you need to include, and the steps you should follow to put in place effective volunteer policies and procedures.

Here are answers to some commonly asked questions.

What is a policy?

A policy sets out an organisation's values or position on a particular issue. It is a statement or guideline that says how the organisation intends to operate and how it expects its staff to act.

In general, a policy should tell people 'why' the policy has been developed and 'what' should happen in a particular circumstance.

A good policy should be clear and concise. It should make a positive statement, be free of jargon and be easily understood by everyone involved with the organisation.

Here's an example.

Policy: Reimbursement of expenses

↗ Our organisation recognises that volunteer staff should not be out of pocket because of the work they do on our behalf.

↗ Volunteer staff who incur expenses in the normal course of their volunteer work are eligible for reimbursement when approved in advance.

↗ Reimbursement for travel to and from our centre is not provided. However, additional travel costs incurred while carrying out volunteer work will be reimbursed.

spells out the 'why'

spells out the 'what'

What is a procedure?

A procedure describes actions. It provides a clear step-by-step guide to help people put into practice an organisation's policy on a particular issue.

In general, a procedure tells people 'how' to do something. It sets out what needs to be done, who needs to be involved and the order in which different tasks will be completed.

A good procedure document should be clear and unambiguous. People should be able to understand what they need to do after reading through it the first time.

Here's an example.

Procedure: Reimbursement of expenses

↗ 1. The Program Coordinator will advise volunteers of the type of expenses that will be reimbursed and the procedure for claiming them.

↗ 2. Volunteers are required to keep a vehicle or public transport log of expenses to be claimed.

↗ 3. Other claimable expenses such as parking expenses, telephone or postage for work done at home or money spent on clients, will need to be approved by the Program Coordinator in advance.

↗ 4. Appropriate records and/or receipts are to be attached to the Claim Form and given to the Supervisor when submitting a claim for reimbursement.

spells out the 'how' – who does what, and in what order

What policies and procedures should we have?

There is no fixed rule about the exact set of policies and procedures that your organisation should have. Each organisation is different – and that means you need to decide what policies and procedures will be most relevant for the needs of your particular volunteer program.

For instance, the policies developed by a local sporting club will be quite different to those of a community legal service or a wetland conservation group.

A good way to work out what policies and procedures you might need is to ask the question: what will help support our volunteers and improve the services that we deliver? You can answer this question by looking at the sort of work you do, how you involve volunteers in your organisation, the activities that volunteers carry out, the expectations of your clients, potential areas of risk, and so on.

The *National Standards* give not-for-profit organisations guidance about the types of policies and procedures that will help their volunteer programs be more effective.

They include:

↗ a general volunteer policy,

↗ management system policies, and

↗ operating procedures.

What information goes into our policies and procedures?

Simply borrowing the policy manual from another organisation and changing the name and the logo is not going to be of much help to your volunteers. Investing the time upfront to tailor policies and procedures to the specific circumstances of your volunteer programs actually saves you time later on because you have a framework in place to respond effectively to any issues that might arise.

That's why it's so important that your volunteer policies and procedures reflect your organisation's unique goals and values. They need to be grounded in the work that you do and how you do it.

Here's an overview of the type of information you should consider putting into your policies and procedures, as recommended by the *National Standards*.

The general volunteer policy:

↗ says why you involve volunteers in your organisation;

↗ says how you will involve volunteers in your organisation;

↗ says how the volunteer program will be managed;

↗ is a general statement; and

↗ should be no longer than one page.

Management system policies:

↗ set out the objectives for the key management areas of your organisation's volunteer program;

↗ direct people to other useful reference documents, either internal documents (e.g. the organisation chart) or external documents (e.g. *National Standards*, relevant legislation);

↗ reflect the values of the general volunteer policy; and

↗ should be no longer than one page for each policy.

Operating procedures:

↗ say what steps staff (paid and volunteer) should follow to carry out a particular task;

↗ say the order in which things should be done, and who should do them;

↗ direct people to relevant work forms (e.g. travel reimbursement claim form);

↗ should be as short as possible, based on the task being described; and

↗ should be no longer than one page for each procedure.

2005 NAB National Volunteer Awards State Winner – Benalla SES (VIC)

The Policy Tree

The 'policy tree' shows how the three levels of documents are connected. What joins them together is a shared set of values.

The general volunteer policy sets out your organisation's guiding principles. Your management system policies and operating procedures show how these values and commitments will be put into practice.

The content becomes more specific in each level – general at the base, specific at the top – as the focus moves from describing 'what' and 'why' in the general policy, to explaining 'how' in the operating procedures.

From general to specific

Operating Proceedures

Management system policies

General volunteer policy

The branches – describe how all the various activities of the volunteer program will look in practice

The trunk – sets the direction and objectives for the key management areas of the volunteer program

The roots – set out a strong foundation of values and principles for the volunteer program

What process should we follow?

There are three key stages in the 'life cycle' of policies and procedures.

These separate stages – development, implementation and review – form a continuous process that helps keep your volunteer policies and procedures relevant and useful.

As soon as you stop following the cycle, your policies and procedures quickly go from being 'live' documents to dusty pieces of paper cluttering up your filing cabinet.
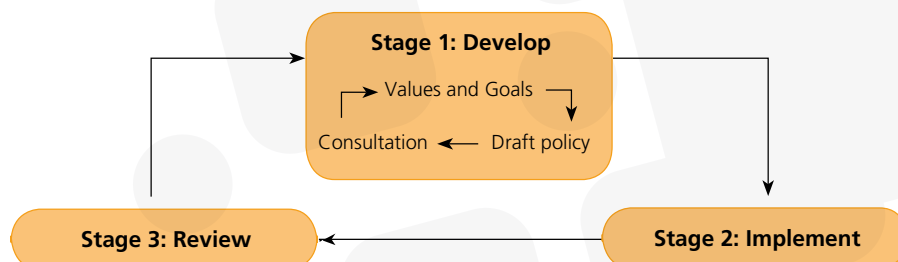
1: Develop

This is where you decide what will go into your policies and procedures. They should reflect your organisation's values and help your volunteer program run as effectively as possible. Ask for ideas and comments from a wide range of people. It's likely to take a few rounds of drafting and consultation before you get things right.

2: Implement

The next step is to put your policies and procedures into action. It is important that everyone in your organisation is familiar with the new policies and procedures and understand how they will affect how they do their work. The important thing is clear and regular communication.

3: Review

Policies and procedures are only useful if they stay relevant. Your organisation's volunteer program can change over time and that means your policies and procedures will also need to change to stay relevant. That's why it's important to review them regularly – at least once a year – and update them as necessary.

Service with a smile at Melton Visitor Information Centre (VIC)

STAGE 1: DEVELOPING YOUR POLICIES AND PROCEEDURES

DEVELOPING A GENERAL VOLUNTEER POLICY

The general volunteer policy is the foundation document for your volunteer program. It sets out why and how you will involve volunteers in your work.

The policy is a practical statement of intent – so while it is general in nature, it should contain some objective goals or standards that the organisation is committed to meeting.

The general volunteer policy also explains to volunteers their rights and responsibilities in your workplace and how they will be managed. It is an agreement between your organisation and individual volunteers that you will support them to do their job.

Most importantly the general volunteer policy needs to 'match up' with how your organisation runs its volunteer program in practice. If the two are markedly different – that is, if you don't do what you say you do – then you have a problem that needs to be sorted out.

The secret of a good volunteer policy is to refrain from lofty ideals and flowery language and instead ground the document in the values, goals and circumstances specific to your organisation.

Step 1: Identify

While there is no blueprint for writing the perfect volunteer policy, there are certain issues that you should address.

The following worksheet sets out a range of questions that ask you to think about your organisation and the volunteer program that you run.

In answering these questions, you will identify the important elements that make up a general volunteer policy.

You may choose to put together a project team – for instance, someone to represent volunteers, paid staff, management and so on – that can work together to answer these questions.

Having a diverse range of ideas and opinions can help you see the 'big picture' of the organisation.

The information that you collect in this worksheet – the ideas, the words and the phrases – can then be used to complete a 'model' general volunteer policy.

Volunteer Mary provides service with a smile at Melton Visitor Information Centre (VIC)

Worksheet 1: Describe Your Organisation and the Volunteer Program

Key questions	To get you thinking	Your Answers
1. 'Who' is your organisation?	• What is your organisation's mission or vision? • Who does your organisation represent? • What makes your organisation unique?	
2. What is your organisation's role?	• What do you do? • What do you aim to achieve for your clients/cause? • What do you aim to achieve for the community?	
3. Why do you involve volunteers in your organisation?	• What skills or experience do volunteers provide your organisation? • How does this benefit your organisation? • How does this benefit your clients/ cause or the community?	
4. What are the rights of volunteers that your organisation will protect?	• Does your organisation support *Volunteer Rights* and the *Principles of volunteering*? (See References) • How will you protect the rights of volunteers?	
5. How will you involve volunteers in your organisation?	• Will volunteers be treated any differently to paid staff? • Will they be consulted about changes that affect their work? • Will they be asked for feedback about their work or their performance? • Will volunteers be involved in the decision making of your organisation? • Does your organisation support the *Model Code of Practice for Organisation's Involving Volunteers*? (See References)	
6. Who will be responsible for managing your volunteer program?	• Who has overall responsibility for managing the volunteer program? • Who has day-to-day responsibility for supporting and supervising volunteers?	
7. How will your volunteer program be organised and managed?	• Does your organisation have relevant policies and procedures in place? • Who will be responsible for developing and maintaining them? • Who will be involved in reviewing them? • How often will they be reviewed? • Do they meet the *National Standards for Involving Volunteers in Not-for-profit Organisations?*	

Step 2: Draft

Once you've answered the questions in Worksheet 1, you have the raw material to begin drafting your organisation's general volunteer policy.

To make it easier to put together your first draft, this toolkit includes a 'model' general volunteer policy. This 'model' policy provides a useful framework that you can adapt to meet the specific needs and circumstances of your organisation.

Completing the template is easy – it explains where you should include the information that you collected in Worksheet 1.

Of course, you may choose to draft a general volunteer policy that has a different structure, or one that is more suited to the specific needs of your organisation.

The most important thing to ensure is that it provides a clear statement about how your volunteer program will run and how volunteers will be involved, managed and supported by your organisation.

General Volunteer Policy

Our organisation is _____

_____

_____

> This is where you say who your organisation is and what its mission is. Use the information you collected in answering **Question 1** of Worksheet 1.

Our role is to _____

_____

> This is where you describe the goals or objectives of your organisation. Use the information you collected in answering **Question 2** of Worksheet 1.

We are a not-for-profit organisation that involves volunteers in our work. We adhere to the *National Standards for Volunteer Involvement in Not-for-profit Organisations* and comply with the Australian definition, principles and model code of practice for involving volunteers.

> Is your organisation familiar with these documents? You can find them at the back of this toolkit.

Our organisation involves volunteers in its work because

_____

The community benefits from their contribution because

_____

> This is where you describe why you involve volunteers in your organisation. You can also describe the benefits that volunteers bring to your clients/cause and/or the community through the work they do. Use the information you collected in answering **Question 3** of Worksheet 1.

We will promote and protect the rights of volunteers who work in our organisation, as set out in Volunteering Australia's statement of *Volunteer Rights*.

> You may choose to include a list of some of the key rights from the statement on *Volunteer Rights*, such as the right to a healthy and safe work environment, the right to adequate insurance, and the right to fill a 'volunteer only' position. Add any other relevant information you collected in answering **Question 4** of Worksheet 1.

Volunteers are an integral part of our organisation and will:

↗ _____

↗ _____

↗ _____

↗ _____

↗ _____

> This is where you describe the way in which you will involve volunteers in your organisation and the support they can expect to receive. Use the information you collected in answering **Question 5** of Worksheet 1.

Volunteers receive orientation and training so they can fulfil the goals of their designated volunteer position.

_____

is responsible for managing the volunteer program within our organisation.

> This is where you state who will be responsible for managing the volunteer program. Use the information you collected in answering **Question 6** of Worksheet 1.

_____

is responsible for supporting and supervising volunteers on a day to day basis.

Our volunteer program is supported by appropriate policies, which have been approved by senior management.

> This is where you describe the way in which you develop and implement policies and the support volunteers can expect to receive. Use the information you collected in answering **Question 7** of Worksheet 1.

_____ has the responsibility and authority to organise, implement and maintain the policies and procedures of our volunteer management system.

(Sample wording: Our staff – paid and unpaid – are given responsibility and authority to identify problems, identify opportunities and, after appropriate consultation, implement solutions to those problems.)

We will review and update our policies every _____ months to ensure we meet the *National Standards for Volunteer Involvement in Not-for-profit Organisations.*

> Having the policy signed by your organisation's CEO or Chairperson gives the document more weight. It shows that the organisation recognises the importance of its volunteer program, as well as the contribution of individual volunteers.

Chief Executive Officer/Chairperson _____ Date _____

Last reviewed: Month/Year _____

> It's important to keep a record of when policies are updated and reviewed. It shows that the policy is up to date.

Step 3: Consult

A crucial part of getting your general volunteer policy right is to consult widely.

The more input you receive, the more relevant the policy will be – and the more likely that people will take ownership of it.

Make sure that colleagues from all parts of the organisation are invited to have their say, by collecting ideas at the start and asking people to comment on a draft.

Hold a staff meeting, collect responses by email, open up a suggestion box – there are many different ways you can get people involved.

This policy is about volunteers so make sure they have opportunities to play an active role. This will help them to feel that they have contributed to the policy, rather than it being imposed on them.

It's also important to match up your words with your actions. If your policy says that you involve volunteers in your work, then it follows that they should be involved in developing any policy that applies directly to them.

Involving paid staff is equally important, particularly if your organisation is planning to involve volunteers for the first time. Paid staff may be concerned about what this means for them, so involving them in the process will help clarify the role that volunteers will play in your organisation.

Getting feedback and support from senior management is crucial. It means that your volunteer policy will be consistent with the goals and objectives that management have set for the organisation as a whole.

Step 4: Revise and finalise

Don't be surprised if you need a couple of drafts to get the policy right. It takes time and effort to collect, distil and integrate the ideas and perspectives of a broad of people into a single statement.

At this stage, you will also need to fine tune your policy to make sure that it's easy to read and understand.

Once the policy has been revised in plain language, it should be approved by senior management and carry the signatures of your organisation's Chief Executive Officer and/or Chairperson or President.

This endorsement gives the policy 'teeth' and shows that the whole organisation recognises the contribution made by volunteers and is committed to supporting the volunteer program.

CHECKLIST FOR A GENERAL VOLUNTEER POLICY

☐ Is it clear and concise?

☐ Does it give a strong commitment to volunteers and a quality volunteer program?

☐ Does it include specific goals or objectives to which your organisation can be held accountable?

☐ Does it say how you will involve volunteers in your organisation?

☐ Does it say who has day-to-day responsibility to ensure the volunteer program runs smoothly and efficiently?

☐ Do the principles and values 'match up' with how the volunteer program operates in practice?

☐ Do your volunteers support the policy?

☐ Is it a credible 'stand alone' document? Could it be used in a range of different contexts, such as marketing or recruiting volunteers?

☐ Is it reader friendly? Does it avoid jargon and explain things in easy-to-read language?

☐ Does the statement have the commitment of the whole organisation? Is it presented on official letterhead? Does it have the signature of the Chief Executive Officer?

2005 NAB National Volunteer Awards
State Winner - Kanyana Wildlife Rehabilitation
Centre (WA

CASE STUDY:

Heide Museum of Modern Art

Opened in 1981, Heide is one of Australia's leading public art museums. Located in Bulleen, close to the centre of Melbourne, it stages exhibitons of modern and contemporary art and design and runs an extensive program of public talks, tours and off-site visits. A number of school groups take part each year in Heide's education programs.

Heide Museum of Modern Art has 25 paid staff, 10 casual staff and 150 volunteers. In 2007, Maria Davies is the Visitor and Membership Services Manager.

About the volunteer program

"Our volunteer program includes 20 volunteer guides, 10 volunteers who present the education programs and about 120 visitor services volunteers. "

Developing policies

"Heide's volunteer policies used to operate mainly as "understandings". However we needed written policies to support a major recruitment of volunteers in 2006, when the museum re-opened after an 18 month redevelopment. We asked for input from paid staff and existing volunteers and put together a detailed policy handbook."

Implementing policies

"New volunteers receive an orientation program made up of 11 modules – one hour per module. One of the modules – Volunteering at Heide – introduces our policies and procedures to volunteers and explains their rights and responsibilities. All volunteers receive a copy of the policy handbook."

Reviewing policies

"We review our policies regularly – and always before each recruitment stage. We ask volunteers for their feedback so we can improve our policies, procedures and training programs."

Hurdles

"Making time in a busy schedule is always an issue."

Benefits

"Good policies help clarify the role and expectations of volunteers. They answer small questions volunteers may have – like dress code – and help them do the day-to-day work with confidence. This helps the organisation to support and retain volunteers and to head off potential problems."

Good advice

"Don't reinvent the wheel. Talk to other people, attend seminars, get support from your state volunteer association and adapt what you learn to your own situation."

Think:

What is the ideal management system for your organisation's volunteer program?

Does it match the structure set out by the National Standards?

DEVELOPING MANAGEMENT POLICIES AND PROCEDURES

If the general volunteer policy provides the 'big picture' commitments of your organisation to its volunteer program, then it is the management policies and procedures that are reccommended by the *National Standards* demonstrate how you will put those committments into concrete action.

This section shows you how to combine the key elements of both into one simple and consistent format.

What are management systems?

A management system is usually defined as a set of related activities – also known as core processes – that are undertaken by an organisation to help it achieve its objectives.

For instance, some organisations have an environmental management system that will set out all the key activities they will undertake in order to reduce their waste, pollution and energy consumption.

Your organisation's volunteer program is made up of a number of management systems that help it to work smoothly and efficiently.

The *National Standards* identify eight management system areas that are typically displayed in most volunteer programs.

They include:

↗ developing and maintaining volunteer policies and procedures

↗ assigning responsibility and resources to managing volunteers

↗ recruiting, selecting and orienting volunteers

↗ managing the work and workplace of volunteers

↗ training, developing and recognising volunteers

↗ planning, monitoring and reviewing the way volunteers deliver services

↗ developing and maintaining volunteer documents and records

↗ continuously improving the way volunteers are managed.

What are management system policies?

Management system policies set out the broad goals for each of the key management areas that make up your volunteer program. They set out 'what' you hope to achieve and 'why' this is important.

What are operating procedures?

Operating procedures naturally follow on from management system policies. They provide clear instructions about 'how' the policy should be implemented in the day-to-day work of the organisation.

The amount of information that you should include in the operating procedures will depend on the size of your organisation, the complexity of the activities being undertaken, the resources you have available and the skills and experience of your volunteer staff.

When do we document our procedures?

An important point to remember is that you do not need to write procedures for each and every activity carried out in your organisation's volunteer program.

Over-documenting your activities can take up valuable time and resources.

There are many tasks that may not need written procedures. For instance, the tasks may be quite simple, your volunteer staff may be very experienced or there may be a generally accepted understanding about 'how things are done'.

The decision to create a formal written procedure should be based on whether it will help paid and volunteer staff in your organisation to do their work more effectively and minimise potential risks.

If something were to go wrong what do your volunteers do? If something were to go wrong while they were doing these activities, what would be the:

↗ implications for volunteers?

↗ implications for clients?

↗ health and safety implications?

↗ environmental impact?

↗ time needed to put it right?

↗ cost of putting it right?

If the answer to any of these questions is 'substantial' then you should consider writing a formal procedure for that activity. If the answer is 'minimal' then it's likely that a formal procedure is not required at this stage.

Step 1: Identify

Management policies and procedures are only useful if they help address the specific issues and requirements of your volunteer program.

The first step is to identify the goals and needs of your volunteer program.

The following worksheets will help you gather the information that will form the basis of your organisation's management policies and procedures.

Worksheet 2

will help you to identify the goals and objectives of each of the key management system areas of your volunteer program.

Worksheet 3

will help you to identify key reference documents (both internal and external to your organisation) that support or 'explain' the goals for each of the management systems of your volunteer program.

Worksheet 4

will help you to identify the key activities of your volunteer program that require a formal written procedure.

Worksheet 2: Identifying Goals for your Management Systems

Management System	What do we want to do? What are we hoping to achieve?
1. Policies and procedures	
2. Management responsibility	
3. Recruitment	Example only: Be fair and transparent in our recruitment process; attract volunteers from diverse backgrounds and with appropriate skills; recruit the best person for the job; meet our legal responsibilities under relevant anti-discrimination laws; have position descriptions for each volunteer role.
4. Work and the workplace	
5. Training and development	
6. Service delivery	
7. Documentation and records	
8. Continuous improvement	

Tip: Look at the goals that you have established for each management area. Now go back and look at your general volunteer policy. Are there are any goals that are not consistent with the general volunteer policy? It's important that the objectives of your management systems 'match up' with the principles and commitments that you've made in your general volunteer policy.

Worksheet 3: Identifying Supporting Documents for you Management Systems

Management System	What documents help explain 'how' we will manage our activities?
1. Policies and procedures	
2. Management responsibility	
3. Recruitment	Example only: Organisation chart; *National Standards for Involving Volunteers in Not-for-profit Organisations* (Standard 3); relevant state and federal anti-discrimination legislation (including the *Human Rights and Equal Opportunity Commission Act 1986; Racial Discrimination Act 1975, Sex Discrimination Act 1984, Disability Discrimination Act 1992* and relevant state legislation.
4. Work and the workplace	
5. Training and development	
6. Service delivery	
7. Documentation and records	
8. Continuous improvement	

Worksheet 4: What Procedures Do We Need?

1. Policies and procedures
☐ Developing policies and procedures
☐ Reviewing policies and procedures
☐ Other? _____

5. Training and development
☐ Training opportunities for volunteers
☐ Appraising work performance
☐ Recognising volunteers
☐ Other? _____

2. Management responsibility
☐ Managing risk
☐ Reviewing management systems
☐ Budget planning and preparation
☐ Other? _____

6. Service delivery
☐ Developing and maintaining service standards
☐ Conducting service evaluations
☐ Handling client complaints
☐ Maintaining equipment and facilities
☐ Other? _____

3. Recruitment
☐ Recruiting volunteers
☐ Interviewing and selecting volunteers
☐ Conducting police and reference checks
☐ Orientating and Inducting Volunteers
☐ Other? _____

7. Documentation and records
☐ Establishing personnel records
☐ Storing and accessing volunteer records
☐ Reviewing documentation system
☐ Other? _____

4. Work and the workplace
☐ Reviewing volunteer roles
☐ Ensuring volunteer occupational health and safety
☐ Insuring volunteers
☐ Reporting accidents and injuries
☐ Handling volunteer grievances
☐ Debriefing critical / stressful incidents
☐ Other? _____

8. Continuous improvement
☐ Collecting and analysing information
☐ Making system improvements
☐ Other? _____

Step 2: Draft

Once you have collected the information in Worksheets 2, 3 and 4, you are ready to start drafting your management policies and procedures.

The first step is to write a policy statement for each management system area of your volunteer program. This is where you describe 'what' you aim to achieve.

Using the example from Worksheet 2, a policy statement for 'Recruitment' might read as follows:

> Our organisation encourages the participation of volunteers from a diverse range of backgrounds. Our recruitment process is open, transparent and consistent with federal and state anti-discrimination legislation. Volunteers will be recruited on merit, based on the skills and experience required for the particular position.

This policy statement – along with the reference documents identified in Worksheet 3 – will apply to each of the procedures you develop in the area of 'Recruitment'.

By including the relevant policy statement and reference documents with each procedure, it helps everyone to have a clear idea about why the procedure has been developed and how it fits with the broader goals of the volunteer program.

The procedures that you will be developing – identified in Worksheet 4 – are all about helping your paid and volunteer staff to work more effectively and minimise the potential for things to go wrong.

When drafting procedures, you should include enough detail so people are confident that they know what to do, how to do it and the order in which things need to be done.

Your procedure document should also include a list of any relevant work forms that will be needed to complete the task.

Tips for writing effective procedures include:

↗ use simple and direct language;

↗ avoid long sentences and 'jargon' words;

↗ have one instruction for each sentence; and

↗ have one activity/theme for each page.

FESTA - Participants receiving brief on weekends activities from FESTA Director, Michael Blaseotto

Step 3: Consult

Once you have drafted your volunteer management policies and procedures it is important to get feedback from a wide range of people in your organisation.

Senior management, for instance, should be invited to review the policy objectives for each of the management system areas. Their input will ensure that there is consistency between the management system policies that guide the volunteer program and those of the broader organisation.

You should also consult with the paid and volunteer staff who will be required to carry out the particular tasks set out in your draft procedures. They can review the draft procedures to make sure that the information and steps are clear, logical and help them to do their job effectively.

In reviewing the procedures, paid and volunteer staff can draw on their experience to identify how some of the tasks could be completed in a more simple way or using a smaller number of steps.

It is also important to consult with your organisation's clients. By collecting their feedback and ideas, you can develop strategies to maintain or improve the quality of services you provide.

Step 4: Revise and finalise

Once you have comments and feedback from all the relevant people in your organisation, you can revise your policies and procedures accordingly.

When you are revising these documents make sure that they are consistent in expression, presentation and the way in which different terms are used.

Also check that the language is simple, free of jargon and easy to understand.

The end result will be a set of management policies and procedures that will form a robust and useful support for the day-to-day work of your volunteer program.

2005 NAB National Volunteer Awards
State Winner – Benalla SES (VIC)

CHECKLIST FOR MANAGEMENT POLICIES AND PROCEDURES

☐ Are the policy objectives or 'goals' for each management system clear and easy to understand?

☐ Do the goals of the management system policies 'match up' with the values set out in the general volunteer policy?

☐ Are there reference documents to support each management system policy?

☐ Do the procedures clearly describe the steps that must be followed to complete the task?

☐ Do the procedures provide enough information and direction to complete the task?

☐ Are the procedures written in language that is plain and unambiguous?

☐ Do the procedures make reference to all relevant work forms?

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CASE STUDY

Fitzroy Legal Service

Established in 1972, Fitzroy Legal Service is one of the oldest community legal centres in Australia. Each year it provides a free casework service for over 2,000 clients in inner-city Melbourne, which includes both criminal and civil matters. The organisation also provides community legal education programs, runs public interest cases and contributes to law reform.

In 2007, Rachna Muddagouni is Executive Officer with the Fitzroy Legal Service, which has 18 paid staff and 174 volunteers.

About the volunteer program
"Legal volunteers – those who have been admitted as solicitors – help deliver the casework practice and non-legal volunteers provide legal and administrative support. Both legal and non-legal volunteers are represented on the management committee, which sets our strategic direction."

Developing policies
"It's a legal requirement that we have risk management guidelines – these outline how volunteers will provide legal services and advice. Since 2000 a part-time staff member has been employed to coordinate policies on recruitment, induction, training and other aspects of the volunteer program."

Implementing policies
"Induction programs are run for new volunteers in February and July each year. We explain the organisation's policies and what's expected of them. Our volunteer policies and procedures are also available on the organisation's intranet site."

Reviewing policies
"Policies and procedures are reviewed throughout the year, with volunteers and paid staff providing feedback on different policies at monthly staff meetings. A feedback form is attached to each policy on the intranet so staff and volunteers can email their comments directly to me."

Hurdles
"Policies and procedures are never going to suit everyone's needs – it's important to keep focus on the objectives of the organisation, rather the personalities involved."

Benefits
'We wouldn't exist without our volunteers. Effective policies help volunteers to get on with the job they're here to do – so it's about respecting and valuing their time. The organisation benefits from having systems in place that help us deliver a quality service."

Good advice
"It's an ongoing work – policies and procedures need to be reviewed regularly to be effective."

STAGE 2: IMPLEMENTING YOUR POLICIES AND PROCEDURES

Having developed your volunteer policies and procedures, the next step is to get them working.

The key to properly implementing your policies and procedures is to make sure that everyone understands what they are and the purpose behind them.

It is important to have a plan in place to communicate the information to people throughout your organisation.

Communicate your policies

There are a number of ways you can introduce your organisation's volunteer policies and procedures.

A staff meeting, or a series of seminars, allows you to explain what the policies and procedures cover, why they are important and how they will help paid and volunteer staff to do their work. It also provides an opportunity to answer questions or clarify any issues.

Your volunteer policies and procedures will also form an important part of the orientation program for new volunteers. They show, in clear and practical ways, how your volunteer program works, as well as its guiding values and principles. The policies and procedures also provide new volunteers with specific information that will help them do their work and address any problems they might encounter.

All new volunteers should be provided with a handbook or manual of the volunteer policies and procedures. Once the information has been explained, you may ask new volunteers to sign an agreement form that indicates that they will abide by the organisation's policies and procedures. This form may also ask volunteers to abide by the organisation's standards on confidentiality, behaviour and the like.

A formal briefing to senior management is another useful communication strategy. While they will already be familiar with the volunteer policies and procedures – having reviewed and approved the material previously – a formal briefing can clarify the main goals and set out a process and timetable for implementing and reviewing the volunteer policies and procedures.

Putting it all together

A handbook of volunteer policies and procedures provides everyone in your organisation – volunteers, employees and senior management – with an easy-to-use reference guide.

The manual should include the general volunteer policy; the management policies and procedures; and any relevant work forms.

You can also include additional materials, such as introductory information about the organisation or comments to explain how and why the policies and procedures were developed.

The general volunteer policy should be included at the start of the handbook. The procedures should follow and be grouped in their corresponding management system area, with work forms included at the back.

Image courtesy of the Asylum Seeker Resource Centre – 2005 NAB National Volunteer Awards National and State Winner (Vic.) for Community Service and Development

The contents page for your handbook might look similar to this:

Handbook of Volunteer Policies and Procedures

Promote your policies

Successfully implementing policies and procedures requires more than a one-off presentation – you need to promote them regularly to your volunteers.

How you go about this will depend on the size on your volunteer program, and how frequently volunteers attend your workplace, as well as the time and resources available.

Your volunteer policies and procedures should always be visible and readily accessible. Strategies might include:

↗ placing them on the volunteer noticeboard;

↗ creating posters and displaying them around the workplace;

↗ including a regular article in the staff newsletter or e-mail bulletin; and

↗ posting information on your organisation's intranet service.

> **Tip:**
>
> You can also promote your volunteer policies – especially your general policy – to the people who use your services. Some people may have concerns about the services provided by volunteers.
>
> A good volunteer policy will show how and why your organisation involves volunteers in its work and the high standards of service delivery that you will meet.

The format in which you present information is also very important.

For instance, if you have volunteers who speak English as a second language you might consider translating material into other languages. They might also need to be made accessible for people with a disability or those who have difficulty reading.

Advocate for your policies

Your organisation's policies and procedures are more likely to be taken up if volunteers understand why they were developed and how they will support them in their work.

In some cases, there may be initial resistance to doing things differently or to putting the organisation's policies and procedures in a formal document. A common complaint can be: "We've always done things this way – why do we need to change?"

It is important to be a consistent advocate for your organisation's volunteer policies and procedures.

Take advantage of opportunities to explain how they will benefit volunteers, clients and the organisation as a whole.

You can do this in formal situations, such as a staff meeting, or in the day-to-day work environment. There's often no better way to demonstrate the practical value of a policy or procedure than being able to quickly and effectively respond to a problem or issue.

STAGE 3: REVIEWING YOUR POLICIES AND PROCEDURES

The dynamic and flexible nature of volunteering means things will often change more quickly for your organisation's volunteer program than it might for paid staff.

That's why it is crucial to review your volunteer policies and procedures on a regular basis.

A review simply means examining the policies and procedures to make sure that they continue to meet the needs of volunteers and the organisation. Of course, during the review you might think of ways that things could be improved.

If reviews are done regularly then it is likely you will only need to fine tune your policies and procedures, rather than undertaking a major overhaul.

When do we do a review?

Many organisations choose to review their volunteer policies and procedures once every year. You can review them all at the same time, or use a staggered approach where you review one or two policies each month.

The choice of how and when you conduct your reviews is up to you. The important thing is to have a timetable in place and to keep to it.

In addition to a planned review, sometimes you may need to respond quickly when a new issue or problem arises.

How do we do a review?

A review of your volunteer policies and procedures includes three basic activities:

↗ examining the basis of the policy or procedure (is the rationale still sound?)

↗ examining the practical outcomes of the policy or procedure (has it achieved what we thought it would?)

↗ taking corrective action, when required (what's the problem and what changes do we need to make to fix the problem?)

It can be useful to have a small project team to undertake the review – and, just like the development phase, it's important that volunteers are involved. They can provide advice and feedback about how the policies and procedures have worked on a day-to-day basis.

Some questions to focus on during your discussions include:

↗ Has the organisation's volunteer program changed?

↗ Has the work we do, or the way we work, changed?

↗ Are there any new risks / potential risks we need to address?

↗ Do volunteers understand and follow the current policies and procedures? If not, why not?

↗ Have there been problems or inconsistencies with any of the policies or procedures?

↗ How can we best fix these problems or inconsistencies?

Tip:

Keep a record each time you review or update a policy or procedure. This can be as simple as recording the month and year of the most recent review at the bottom of the document. Including this information gives volunteers confidence that the organisation's policies and procedures are still relevant.

What do we do if the policy is no longer right?

You might find that a policy or procedure needs to be updated to stay relevant or to respond to a new problem. That's a normal part of the review process.

In many cases, the change will only be minor. It could be something as simple as including an extra step in a procedure.

However, sometimes a review will highlight more serious, structural issues that need to be addressed. If that's the case, then you'll need to go back to the start of the policy cycle.

By following the cycle set out in this toolkit – develop, implement and review – you have a reliable process that can help you update an existing policy or create a new one that will meet the changing needs of your organisation's volunteer program.

CASE STUDY:

Jack Young Centre

Based in Salisbury, South Australia, the Jack Young Centre provides recreation activities and support programs for a diverse range of local clients: people aged over 50, younger people with a disability and frail elderly people. Activities include arts and craft, indoor bowls and computer classes through to housing support and a home visiting service.

In 2007, the Centre has five paid staff and 100 volunteers. Jenna Harrison is the Program Coordinator.

About the volunteer program

"Volunteers deliver all aspects of the Centre's services, including running the many different programs and activities, operating the catering service, providing administrative support and maintenance, as well as coordinating fundraising."

Developing policies

"The Centre – which comes under the umbrella of the City of Salisbury – has tailored the local council's volunteer policies to meet its specific needs and services. Volunteers contribute extensively to their development and review."

Implementing policies

"New volunteers are informed about the Centre's policies during the induction and given the policy handbook to take home and read through. Changes to existing policies are explained to volunteers at regular meetings, placed on the volunteers' noticeboard and included in the newsletter."

Reviewing policies

"Policies and procedures are reviewed annually, or earlier if an issue arises. We use a staggered timetable, with one or two policies being reviewed each month."

Hurdles

"It can be time consuming to consult with so many different parties and difficult to develop policies that work for all parts of the organisation, given the broad range of volunteer roles."

Benefits

"Volunteers are aware of their rights and responsibilities, what is expected of them and what they can expect from the organisation. Customers benefit because they receive the same level of service every time they attend the centre."

Good advice

"Keep the procedures and policies workable and easy to understand – a large number of people from different backgrounds will be reading and using the information."

DEFINITION OF FORMAL VOLUNTEERING

Formal volunteering is an activity which takes place in not-for-profit organisations or projects and is undertaken:

↗ to be of benefit to the community and the volunteer;

↗ of the volunteer's own free will and without coercion;

↗ for no financial payment; and

↗ in designated volunteer positions only.

PRINCIPLES OF VOLUNTEERING

↗ Volunteering benefits the community and the volunteer.

↗ Volunteer work is unpaid.

↗ Volunteering is always a matter of choice.

↗ Volunteering is not compulsorily undertaken to receive pensions or government allowances.

↗ Volunteering is a legitimate way in which citizens can participate in the activities of their community.

↗ Volunteering is a vehicle for individuals or groups to address human, environmental and social needs.

↗ Volunteering is an activity performed in the not-for-profit sector only.

↗ Volunteering is not a substitute for paid work.

↗ Volunteering respects the rights, dignity and culture of others.

↗ Volunteering promotes human rights and equality.

For further discussion see *Volunteering: what's it all about?*
Available on the Volunteering Australia website, www.volunteeringaustralia.org

VOLUNTEER RIGHTS

Unlike paid staff, volunteers are not covered by award conditions or work place agreements.

Volunteers, however, do have rights, some of which are enshrined in legislation and some of which reflect the moral obligations of an organisation involving volunteers. The following list is the basis of your rights as a volunteer.

As a volunteer you have the right

↗ to work in a healthy and safe environment (refer to individual state Occupational Health and Safety Act[s]);

↗ to be interviewed and employed in accordance with equal opportunity and anti discrimination legislation;

↗ to be adequately covered by insurance;

↗ to be given accurate and truthful information about the organisation for which you are working;

↗ to be reimbursed for out-of-pocket expenses incurred on behalf of the organisation for which you are working;

↗ to be given a copy of the organisation's volunteer policy and any other policy that affects your work;

↗ not to fill a position previously held by a paid worker;

↗ not to do the work of paid staff during industrial disputes;

↗ to have a job description and agreed working hours;

↗ to have access to a grievance procedure;

↗ to be provided with orientation to the organisation;

↗ to have your confidential and personal information dealt with in accordance with the principles of the *Privacy Act 1988*; and

↗ to be provided with sufficient training for you to do your job.

2005 NAB National Volunteer Awards State Winner - Westbury Shamrocks (TAS)

MODEL CODE OF PRACTICE FOR ORGANISATIONS INVOLVING VOLUNTEERS

In order to enhance the volunteers' experience and comply with legislation and duty of care (name of organisation) will:

↗ interview and employ volunteer staff in accordance with anti discrimination and equal opportunity legislation;

↗ provide volunteer staff with orientation and training;

↗ provide volunteer staff with a healthy and safe workplace;

↗ provide appropriate and adequate insurance coverage for volunteer staff;

↗ not place volunteer staff in roles that were previously held by paid staff or have been identified as paid jobs;

↗ differentiate between paid and unpaid roles;

↗ define volunteer roles and develop clear job descriptions;

↗ provide appropriate levels of support and management for volunteer staff;

↗ provide volunteers with a copy of policies pertaining to volunteer staff;

↗ ensure volunteers are not required to take up additional work during industrial dispute or paid staff shortage;

↗ provide all staff with information on grievance and disciplinary policies and procedures;

↗ acknowledge the rights of volunteer staff;

↗ ensure that the work of volunteer staff complements but does not undermine the work of paid staff;

↗ offer volunteer staff the opportunity for professional development;

↗ reimburse volunteer staff for out of pocket expenses incurred on behalf of the organisation;

↗ treat volunteer staff as valuable team members, and advise them of the opportunities to participate in agency decisions; and

↗ acknowledge the contributions of volunteer staff.