volunteering
VICTORIA

VOLUNTEER
MANAGMENT
TOOLKIT   2020

CONTENTS

Volunteers are the lifeblood of many organisations in Australia. According to a study in 2011 contribute approximately 29.3 billion to the Australian economy on an annual basis[1] .

Managing volunteers can be different to managing employees for several reasons. If you are stepping into a volunteer management role for the first time this toolkit aims to give you some hints and tips for establishing best practice at your organisation, as well as some handy downloadable tools.

This toolkit should be read in conjunction with:

• The National Standards for Volunteer Involvement which provides information about the Australian best practice standards for organisations. This toolkit is aligned to the National Standards for Volunteer Involvement, and for ease we have provided guidance at different stages of the volunteer lifecycle.

• The National Volunteer Guide produced by Justice Connect's Not-for-profit Law service (with input from Volunteering Australia) which provide guidance on the legislation that affects volunteering.

1   Ironmonger, D 'The Economic Value of Volunteering in Victoria' 2012

1.1 THE VOLUNTEER LIFECYCLE

The volunteer lifecycle is a common way of thinking about the stages of volunteer management. For volunteer managers there are often defined processes at each stage of the volunteer life cycle. By dividing it into stages you can ensure that your organisation is adhering to best practice at all stages.

Though there are some variations to the names of each stage of the lifecycle, the model we will be using in this guide is:

1. Organisational infrastructure
2. Roles recruitment & interviews
3. Registration & screening
4. Induction, Orientation & OHS
5. Training, development & support
6. Acknowledgement & recognition
7. Performance management
8. Exiting volunteers

The National Standards for Volunteer Involvement cover the volunteer lifecycle but also cover other critical success factors for best practice volunteer management such as leadership and management, commitment to volunteer involvement and continuous improvement.

1.2 A NOTE ON BEST PRACTICE VOLUNTEER MANAGEMENT

Best practice volunteer management is guided by legislation, organisational policies and procedures, risk assessments and, of course, the relationships you build with your volunteers!

For information about the main pieces of legislation that are relevant to engaging and managing volunteers, see National Volunteer Guide. Organisational policies and procedures vary between organisations and can depend on several different factors, such as the size of your organisation and the composition of your workforce (i.e. number of paid and unpaid roles). Your role as a volunteer manager may see you guiding and/or creating organisational policy relevant to volunteers.

For those new to influencing and guiding policy and procedures the section below gives some ideas about how to get started.

1.3 POLICIES AND PROCEDURES

WHAT IS THE DIFFERENCE?

A policy is generally described as a statement of intention that guides consistent actions within the organisation and supports decision-making at all levels e.g. a charity may have a volunteer reimbursement policy that sets out and clarifies what costs volunteers may be eligible to claim (for example, mileage reimbursement). This makes decisions about reimbursement straight forward and consistent regardless of who is making the call. The policy does not usually spell out what actions will be undertaken to carry out the intention but concentrates on the intention and why. A procedure outlines what actions will be undertaken, and by whom to carry out the intention of the policy.

Written policies and procedures are good practice for volunteer-involving organisations. They provide clarity about rights, responsibilities and expectations for volunteers and organisations.
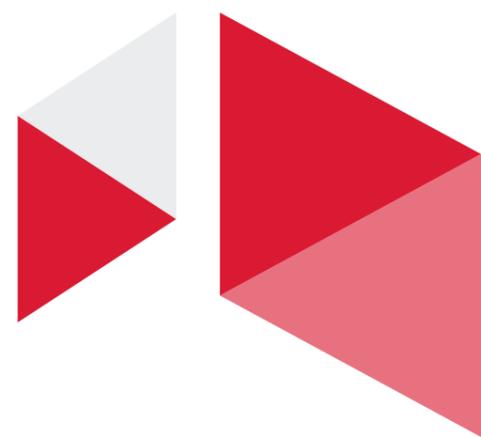
MAKE POLICIES AND PROCEDURES WORK FOR YOU

Volunteer groups and organisations of any size can benefit from writing down their policies and procedures. Such documents do not need to be long or cover every aspect of what you do. Rather, for key issues, think about:

- Your overall approach to the issue
- Who the issue affects
- Who is responsible for dealing with it
- What processes should be followed

Write your policies in clear, simple language, and make sure everyone involved understands that they exist and where to locate them.

WALK THE TALK

Beware of leaving policies and procedures to languish in your files – if they are not being used, they are probably not useful.

Conduct regular reviews with input from the people they most affect to ensure your policies and procedures hit the mark.

You should also make policies and procedures generally available to stakeholders – volunteers, staff and even clients where appropriate. By highlighting your policies, you not only remind stakeholders of their contents, but reassure people that the organisation has thought through its response to issues that affect them and the work they do.

1.3 POLICIES AND PROCEDURES

STEP

01

DEFINE THE ISSUE, PROBLEM OR IMPROVEMENT

The process of policy development begins with recognising the need for written policy. The board or committee is not alone in defining needs; your board or committee may highlight the need to develop policy, but you may also initiate policy based on an incident, feedback from volunteers and staff, for example.

STEP

02

GATHER INFORMATION

• Does another organisation already have a policy or an example from another organisation?

• Look at your existing documents to see that the intentions are consistent with your rules
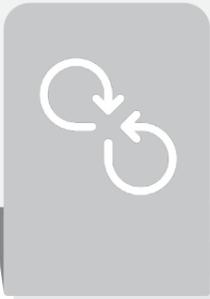
STEP

03

DISCUSS AND DEBATE AT COMMITTEE / BOARD LEVEL

STEP

04

DRAFT POLICY

After consensus on policy content, develop a draft, with consideration for the procedures that would need to accompany

05 GATHER FEEDBACK & MAKE REVISIONS

Distribute to all affected by the new policy/ies and collect their feedback.

06 ADOPT THE POLICY / DEVELOP PROCEDURES

Your organisation should adopt the policy formally. This may need approval by your manager, CEO or the board or committee. Once adopted, the procedures need to be developed, preferably by the most hands-on to the issue/improvement measure.

07 DISTRIBUTE AND COMMUNICATE

To ensure that policy becomes practice, it must be communicated in practical terms as broadly as possible.

08 OVERSEE & REVIEW

How well is the policy being implemented? Are there procedural changes or additions needed? Is it being communicated to the people who count? Set a date to review all policies?

EXTRA INFORMATION

For further information see Volunteering Victoria's guide the principles of involving volunteers

ORGANISATIONAL INFRASTRUCTURE

02

This section refers to the overall "lifespan" of the volunteer and the policies, procedures and documents that may be required over the entire course of the volunteer's involvement with your organisation.

When recruiting a volunteer, it is important to think about how long they will be around for and what jobs they will be doing.   Too often volunteer-involving organisations can set themselves up for failure by not thinking this through.

2.1   BUILD INFRASTRUCTURE TO HELP SUPPORT YOUR TEAM

Before you start recruiting volunteers to your organisation make sure that you have thought through how your organisation supports them in full. If there is one volunteer coordinator, what is the contingency arrangement in case of sickness or leave? Do you have desk space or enough tools to support them?

Make sure you have a clear and dedicated volunteer policy and volunteer agreement worked out to establish expectations for the duration of the volunteer's involvement.

In order to manage your volunteers well across the lifecycle, it is important to have systems to manage and keep track of them. You might have a customer database, an excel spreadsheet or a specific volunteer management system. If you don't have access to a larger system to keep track of important volunteer information such as contact details, emergency contact details, shifts, and screening info etc, Volunteering Victoria has created a spreadsheet which will help you get started. Click here to download our spreadsheet. For more information about volunteer management systems check out Better Impact or VIRA.

2.2   MAP YOUR VOLUNTEER TEAM

Before planning any new volunteer roles for your organisation it's important to ask yourself whether there are any volunteers that assist your organisation that you might be unaware of? Do you have a clear picture of who assists and where?

Volunteering Victoria has created a resource to help you to map your volunteer team(s) to ensure everyone has been captured. After having mapped your volunteer workforce you can use the table to map any additional needs.

2.3 RISK ASSESSMENT

While mapping your needs it is important to think through and identify any risks associated with volunteering opportunities. Risk management is not just about avoiding penalties or legal action – it's about doing what you do with care and forethought to ensure that no-one is injured or harmed. Under the Occupational Health and Safety Act 2010 (VIC), Organisations are expected to ensure that volunteers are not exposed to risks to their health and safety when performing their duties; both physical and psychological health needs to be considered.

Volunteers may cause harm to themselves or others so it's important for organisations to ensure that they plan ahead and assess each role to identify potential risks before a volunteer is engaged in the activity.

For example:

> Will the volunteer be working unsupervised in a location away from other staff?

> Is any special equipment required (for example, Personal Protective Equipment, sunscreen etc) or safety briefings?

> Will volunteers be exposed to traumatic material which will potentially affect their psychological safety?

As an organisation you need to take steps to mitigate risk; this begins with proper recruitment process as well as orientation and ongoing training and support.

For more on risk assessments please see Volunteering Australia's resource on Risk Management.

ROLES

RECRUITMENT & INTERVIEWING

03

3.1 ROLE DESCRIPTION

Once you have worked out your organisational needs you will need to write a role description for each volunteer role or position before you begin the process of recruitment. Creating meaningful role descriptions for all volunteer roles will help you and your organisation understand and better manage the volunteer throughout their involvement. Role descriptions should be reviewed on a regular basis.

A role description for volunteers should include the following:

Role/Title

Approximate number of hours required

Location

Tenure

Purpose

Supervision

Volunteer duties/responsibilities

Skill/qualifications/knowledge required or desired

Background checks (Police Check, Working with Children Check, references)

Please see www.nfplaw.org.au/national-volunteer-guide-templates for a nationally consistent downloadable Word template that your organisation can use for free (developed by Justice Connect's Not-for-profit Law).

3.2 ADVERTISING YOUR ROLE

Once you have your role description you may want to advertise the role online or show it to volunteers. If you are going to advertise online using a volunteering website, you will be asked to write an advertisement to accompany the role description. The catchier and more appealing your role is the more likely you will be to attract good quality volunteers.

An advertisement should not be too long, but it should include the following points:

- Title of the role
- Brief description of the organisation
- We are looking for …. (very brief overview of the role and tasks)
- What's in it for you (why you should apply)
- How to contact us to apply for the role or for further information

Some rules to remember for writing a good ad include:

- Create a catchy title – the first line is the most important otherwise no-one will read the second line
- Use humour if appropriate
- Be clear and direct about what is required

Some websites where you can advertise your roles:

- Your local Volunteer Support Service http://volunteeringvictoria.com.au/for-volunteers/volunteer-support-in-your-region/
- GoVolunteer https://govolunteer.com.au/
- SEEK https://www.volunteer.com.au/
- Good Company https://www.goodcompany.com.au
- Be Collective https://www.becollective.com/
- Communiteer https://communiteer.org/
- Goodie https://www.goodie.org.au/
- Vollie https://www.vollie.com.au/

On-line advertising is very effective, but it may not be appropriate for all types of agencies or volunteer programs so you may like to think about other ways to recruit volunteers.

> Did you know word of mouth is one of the most powerful recruitment tools? According to The Australian Bureau of Statistics Voluntary Work Survey (2006), over 64% of volunteers first became involved through someone they know or because they were asked to volunteer.

Click here for Volunteering Victoria's Guide to Recruiting Volunteers.

3.3 INFORMATION SESSION

Some groups find it useful to require potential volunteers to attend an information session to learn more about the organisation before they can apply for a volunteer role. This can assist with setting expectations about the type of volunteer roles available and familiarise potential volunteers with what the organisation does.

3.4 INTERVIEWS

Develop of list of questions so that each interview has a consistent format. These questions should focus on the skills needed for the volunteer role, to clarify expectations and organisational fit. We have provided a template for you as a suggestion of the type of questions you may like to ask here.
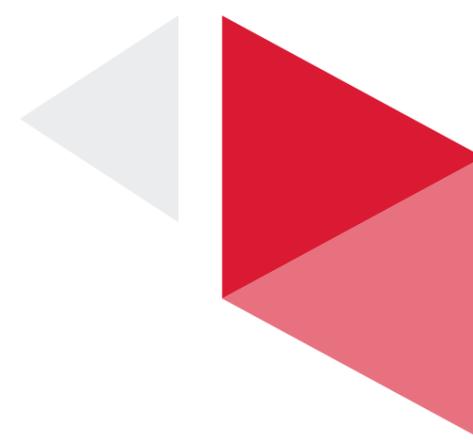
3.5 DIVERSITY OF VOLUNTEERS

Do you actively encourage a mix of ages, backgrounds, populations and abilities into your volunteer group?

Look at your organisation's current volunteers in terms of ages and specific population groups and ask yourself the following questions:

Are they representative of the surrounding community?

Is the group as diverse as it could be?

Are your policies and procedures inclusive and do they allow for diversity?

Is your committee/board representative of your members?
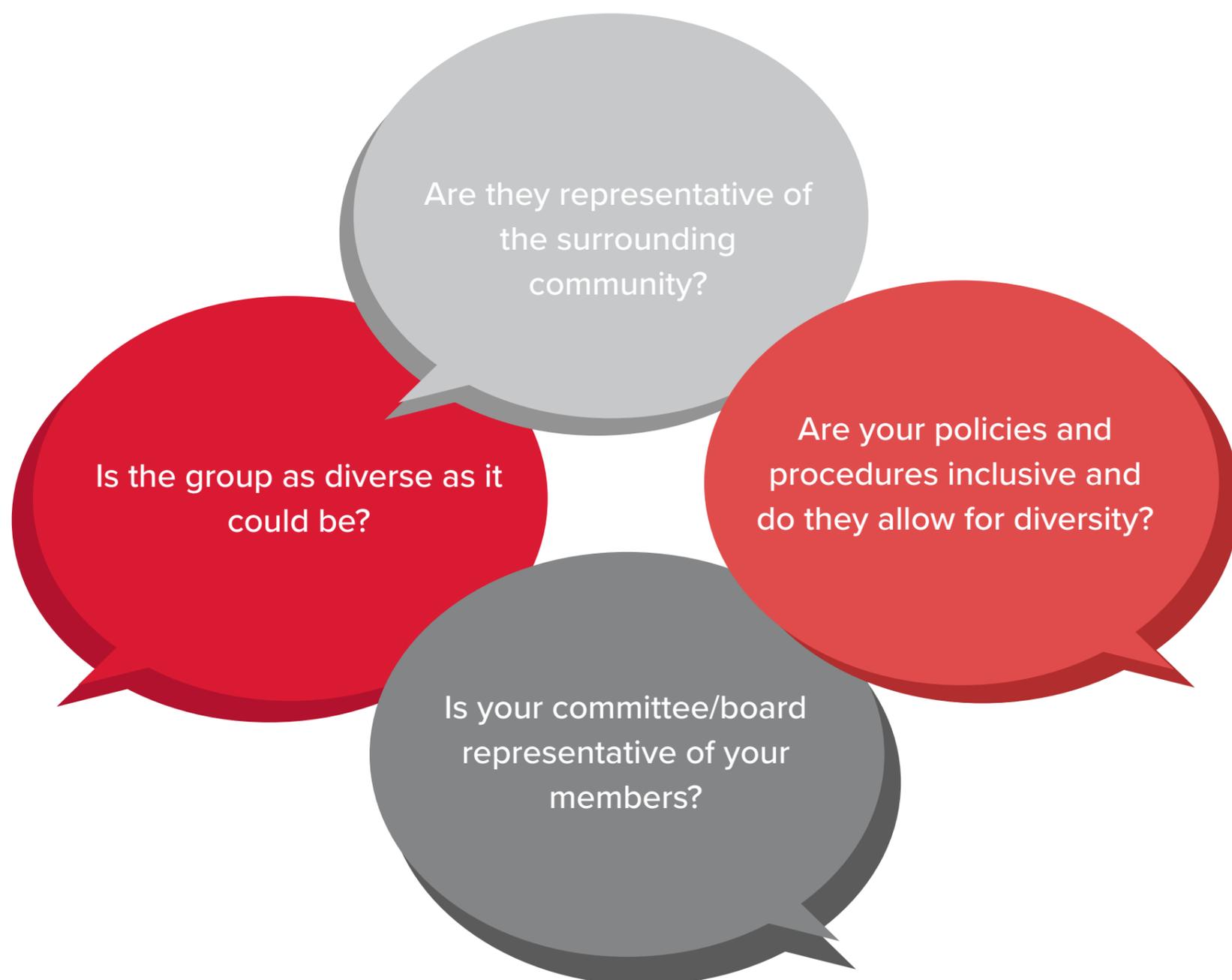
People volunteer for different reasons and being able to target specific groups and focus on their skills and motivations to volunteer is important in getting them involved with your organisation.

Volunteering Victoria has produced a range of guides and resources to assist organisations to involve diverse groups of volunteers and to assist them with recruitment. They are available here.

REGISTRATION SCREENING & APPOINTMENT

04

After you have advertised your roles, the next steps are to recruit, screen, register and officially appoint volunteers. This is important for a volunteer's legal rights and protections as well as your organisation's protection and for insurance purposes. Establishing a transparent recruitment procedure and screening requirements for each volunteer role is one of the most important steps your organisation can take to ensure a safe, enjoyable environment and to help protect your volunteers, staff and stakeholders from inappropriate behaviour and possible harm.

> *Some of the steps involved in recruiting, screening and registering volunteers may happen in a different order according to your organisation's process. There is no golden rule about what happens first, but its important to understand all the elements involved in effective recruitment, screening and registering of volunteers, and to document your process*

Screening your volunteers appropriately is extremely important. Your organisation will benefit from screening potential applicants by:

Creating and maintaining a safe environment

Identifying skills, experience and qualifications to match the applicant to the task(s)

Providing an opportunity to learn more about the applicant's motivation, suitability and prospects

Determining the screening requirements for each volunteer role is guided by legislation, organisational policy and a risk assessment based on the role. Each role may require a different level of screening or you may have an organisational policy to screen all volunteers in a consistent way, regardless of their individual role.

4.1 APPLICATION / REGISTRATION FORM

It is useful to have a standard form for all roles, which collects basic information, e.g. name, address, contact number, emergency contact, referees etc. We have provided a sample application/registration form available here for you do adapt to your organisation's needs. Some organisations find it useful to have an on-line enquiry form, rather than asking potential applicants to complete a lengthy on-line registration or application form.

4.2 REFERENCES

Your Application Form should include a section where potential applicants provide referee contact details. Follow up with referees, particularly for positions where your volunteer will be involved in finances, working with vulnerable people or children. Maintain a record that referees were contacted following the interview process and record those details. A list of example volunteer referee check questions can be found here. Please note these are suggestions only and you may wish to tailor these according to the volunteer role.

Other useful documents include:

- A letter to confirm the appointment and welcome the new volunteer

- A volunteer agreement (prepared by Justice Connect's Not-for-profit Law)

- A guidebook outlining the rights and responsibilities of volunteers, plus any other information relevant to your organisation (values, mission statement, history etc)

- A letter to decline an unsuitable volunteer

At this time, it would be advisable to enter the volunteer's details on your database; it is also best practice to enter and retain the details of any volunteer that you decline with reasons for the refusal.

4.3 WORKING WITH CHILDREN CHECKS / POLICE CHECKS

A Working with Children Check (WWCC) and Police Check are not the same.

WORKING WITH CHILDREN CHECKS

Under the Working with Children Act 2005, if you are engaged in child-related work and not exempt, you must have a WWCC even if you have undergone a Police Check.

The WWCC is an ongoing assessment by the Department of Justice of a person's suitability to work with children, examining relevant serious sexual, physical and drug offences in a person's national criminal history and, where appropriate, their professional history.

The Department of Justice, State Government of Victoria Working with Children Check website provides extensive information, including:

- How to apply for a Check
- Information about who requires a Check and who is exempt
- How much a Check will cost
- Updating requirements

POLICE CHECKS

It is important to note that unlike a WWCC, a Police Check does not involve an **assessment** by a government agency; It is only a list of offences at a point in time and the responsibility for assessing someone's suitability as a volunteer (based on the outcome of the police check) rests with individual organisations.

Some organisations need the list to help them assess a person's suitability for other kinds of work, e.g. an accountant or treasurer, where they would be looking for any fraud offences. It's important that you have a process at your organisation for making decisions around a person's suitability for a volunteer role based on their criminal history. If you are unsure of your organisation's process be sure to raise this with your board or committee or HR manager.

For more information about applying for a Police Check, go to Victoria Police or contact Crimcheck.

INCLUSIVE SCREENING

Some members of the community may face barriers in accessing suitable volunteer roles (eg CALD communities, people with a disability, recently arrived migrants, etc) so it is important to consider whether there is anything in your screening process that is making it inaccessible for potential volunteers. Think about what you can do to make the process more inclusive, including but not limited to:

- ☑ ensuring the room you are interviewing in is accessible

- ☑ ensuring you have information for how to involve support workers

- ☑

- ☑ ensuring volunteers are given multiple ID options for police and reference checks, particularly if they have recently immigrated from overseas

- ☑ ensuring you have no excessive or unnecessary screening requirements

- ☑ ensuring you have easy English options for those who may have low literacy

ORIENTATION INDUCTION & OHS

05

Proper orientation and induction for volunteers enables them to perform their role as required and ensures they understand their responsibilities and their rights within your organisation. It is a crucial part of risk management for volunteer programs. It defines the expectations of the volunteer relationship on both sides and prepares the volunteer to perform their role. If a volunteer acts against policy or regulation, the organisation may well be responsible because of a failure to properly induct, train or supervise. Potential performance issues and sources of conflict can be significantly reduced with a thorough orientation and induction.

It is important to cover different aspects of a volunteer's engagement with your organisation – the "big picture" stuff as well as the individual volunteer's role. For example, orientation should include information on the organisation's history and philosophy, its purpose, mission and values, as well as an overview of organisational policies and regulatory requirements (eg sexual harassment, discrimination, grievance procedures etc). Induction is more role specific, and will include an introduction to relevant staff, the physical environment, equipment and facilities, but it's also important to ensure that the volunteer understands how their role fits into the organisation and the services it provides.

▶ Induction checklist (prepared by Justice Connect's Not-for-profit Law)
▶ Orientation guide for new volunteers

5.1 HEALTH & SAFTEY

Volunteer involving organisations have a duty of care to ensure the health and safety of its volunteers as well as other stakeholders (eg staff, clients and customers). Relevant legislation includes The Victorian Wrongs Act (1958), and the Victorian Occupational Health and Safety Act (2004). For further information Download the Health and Safety for Volunteers fact sheet from Volunteering Victoria

5.2 VOLUNTEER INSURANCE

It is critical that if your organisation involves volunteers, you have adequate insurance. Volunteers often fall between the gaps as they are not covered by an organisation's insurance policies when they suffer injuries in their role unless the organisation holds specific insurance for this purpose – such as volunteer personal accident insurance. It is important to remember that:

Workers' Compensation insurance is for employees only and does not cover volunteers (except in rare circumstances), and

public liability insurance will usually cover injuries a volunteer causes to others (eg. clients, customers or other third parties) but may not cover injuries caused to volunteers.

Volunteer personal accident insurance will cover members and volunteers of a community organisation for expenses incurred in the event of accidental injury, disability or death which occurs while the volunteer is doing work for the community organisation. The insurance is usually (but not always) extended to include cover for loss of income if the volunteer is unable to work as a result of an injury sustained when volunteering for the community organisation.

Unlike Workers' Compensation for employees, it is not compulsory for a community organisation to take out personal accident insurance for volunteers. However, because volunteers are a central part of many not-for-profit community organisations, it is useful to ensure that both the organisation and the volunteers are protected in the event of an accident.

For your information, some common types of insurance products are listed below. Your organisation may have some or none of these. If you are unsure what insurance your organisation has, the first step is to check with your insurer or board, committee of management or HR manager.

> ▶ Volunteer personal accident insurance – generally covers volunteers for out of pocket medical expenses and loss of income
> ▶ Directors' and officers' liability insurance – volunteer committee members or directors
> ▶ Public liability insurance – covers injury etc to members of the public
> ▶ Professional indemnity insurance – covers experts or advisors
> ▶ Building and contents/occupiers/fraud insurance – covers property and assets
> ▶ Motor vehicle insurance – covers vehicles[2]

HINTS AND TIPS

Ensure that orientation and induction is engaging and appropriate to the role

Ensure you have conducted a risk assessment of all volunteer roles

Ensure that your volunteer records and database are up to date in case further information is required by the insurer to support a volunteer's claim

If your volunteer program is spread across multiple locations, it may be possible and more cost effective to consider different ways to manage recruitment processes, orientation etc. by using online tools

2 Based Justice Connect's Not-for-profit Law National Volunteer Guide (part 3) www.nfplaw.org.au/volunteers

TRAINING DEVELOPMENT & ONGOING SUPPORT

06

6.1 TRAINING, DEVELOPMENT & ONGOING SUPPORT

Providing ongoing training and support to volunteers is crucial. Ongoing training and support requirements may differ depending on the type of position and the responsibilities of the volunteer. For example, if the volunteer position is supporting vulnerable people such as palliative care services or people at risk, it may be important to check in formally and informally on a more frequent basis.

Responsible organisations ensure that their staff have access to appropriate training, and this should include volunteers. As well as orientation and training before they commence, you should plan for a volunteer's ongoing training and development's needs. Changes to the program or organisation may require volunteers to update their knowledge either through formal training or via newsletters, posters or briefings. It is useful to monitor how volunteers are performing in their role and provide them with regular feedback, such as positive reinforcement and where improvements can be made. This can take the form of a regular structured discussion or something less formal; regardless of the approach, it provides the volunteer with an opportunity to have their say and to identify any additional support or training they might require, or to share any concerns they might have.

Organisations should also consider having a policy related to volunteer welfare. Many organisations have an employee assistance program (EAP) in place, but not all EAPs are available to volunteers. Depending on the nature of the volunteer role, it may be appropriate to expand the EAP to include access for volunteers.

Some volunteers see volunteering as a pathway to paid employment and may be keen on pursuing job opportunities within your organisation. It is good practice to circulate vacancies to all team members across the organisation and to ensure that volunteers know how to apply. Some organisations have a policy of interviewing all volunteer applicants for a role and providing constructive feedback, if the application is unsuccessful.
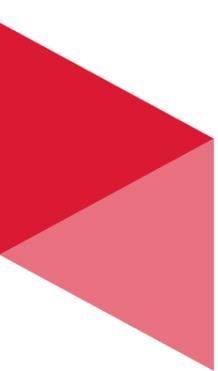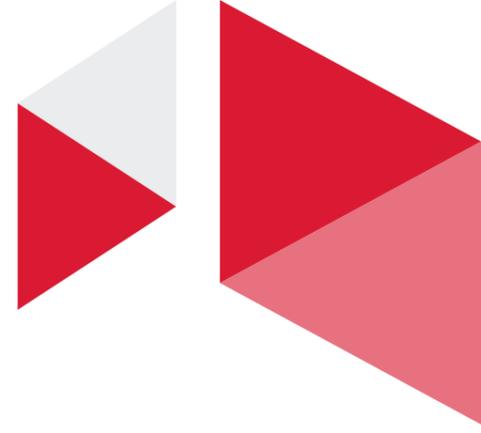
ACKNOWLEDGEMENT & RECOGNITION

7.1 ACKNOWLEDGMENT & RECOGNITION

Volunteers need to feel both valued and valuable, and to understand how their role contributes to the organisation's goals and mission. Volunteers who feel valued are more likely to be loyal to the organisation and to become long-term volunteers.

Acknowledgement and recognition of volunteers is therefore a crucial part of retaining volunteers and is most effective when there is a combination of ongoing, on-the-job (informal) recognition and larger (formal) recognition events.

The following provides examples of both – what you do will depend on the size of your organisation and the volunteer program, and the budget available. Many informal strategies are either no-cost or low-cost but are just as vital as larger events.

- Acknowledge volunteers at the beginning of their volunteer shift or roster - a simple hello and thanks for being here is enough
- Send welcome letters when volunteers are first recruited
- Provide volunteers with a guidebook outlining their rights and responsibilities and other appropriate information
- Provide adequate orientation and induction
- Give personal praise to volunteers while they are on the job
- If you are holding an event, use the public address system to acknowledge the support of the event volunteers at a venue
- Consider having blank cards printed with your organisation's logo on front, that you can personally handwrite for a number of different purposes (eg if the volunteer is unwell or undergoing medical treatment, or has been bereaved)
- Ask staff to thank the volunteers personally
- List active volunteers on your organisation's notice board in a public show of thanks
- Develop a 'years of service' list of volunteers to display on your website
- Include volunteers in decisions that affect them - invite them to meetings/planning days

- Have a volunteer newsletter and invite volunteers to make contributions to the newsletter
- Set up a formal recognition program based on length of service and/or other criteria
- Acknowledge volunteer efforts at the AGM, presentation evenings etc.
- Nominate outstanding volunteers for community-based recognition awards (or even state or national awards)
- Write an article in your organisation's staff newsletter about the outstanding efforts of volunteers and include stories about their impact
- If you have the resources, consider reimbursing volunteers for their travel expenses or provide catering for them while they are volunteering

- Consider honoraria or gifts for those who contribute large amounts of their time
- If possible, invite volunteers to attend any relevant training offered to staff (eg first aid)
- Encourage volunteers to include their volunteering on the CVs
- Name an event after an outstanding volunteer
- Organize morning teas throughout the year for no particular reason
- Offer reductions in fees or entry to events for volunteers
- Provide volunteers with a uniform where appropriate (eg aprons,t-shirts, hats etc)
- Encourage and influence a culture within your organisation that truly values its volunteers – it begins at the top level
- Ensure volunteer contribution is included and highlighted in your organisation's annual report
- Check that volunteers are included in your organisation's strategic plan
- Recognize your volunteers during National Volunteer Week
- Celebrate International Volunteers Day – December 5

PERFORMANCE MANAGMENT & DISMISSAL

Performance management is one of the more challenging tasks that you can face as a volunteer manager, but there are mechanisms that you can put in place which will help to make it a less stressful and emotional experience. A planned approach to handling disputes will lead to better resolutions and reduce the fallout for your organisation.

8.1 ESTABLISH A PROCESS

It is important that you establish a process and stick to your policy for managing or reviewing volunteer performance and dismissal of volunteers. If your organisation does not have an established policy and procedure, a sample policy and procedure for performance managing volunteers is available here or you can ask other organisations if they are willing to share.

There is no legislation to guide you in managing volunteer issues or ending the volunteer's relationship with your organisation or to prevent you from unfairly dismissing a volunteer; however, it is best practice to follow the Principles of Natural Justice and manage it as carefully as you would for a paid staff member. That means your policy should include the following principles:

All parties have the right to a fair hearing regardless of the behaviour	The person who conducts the investigation, mediation etc should have no bias	Performance management (and if necessary, dismissal) should be based on evidence, not hearsay
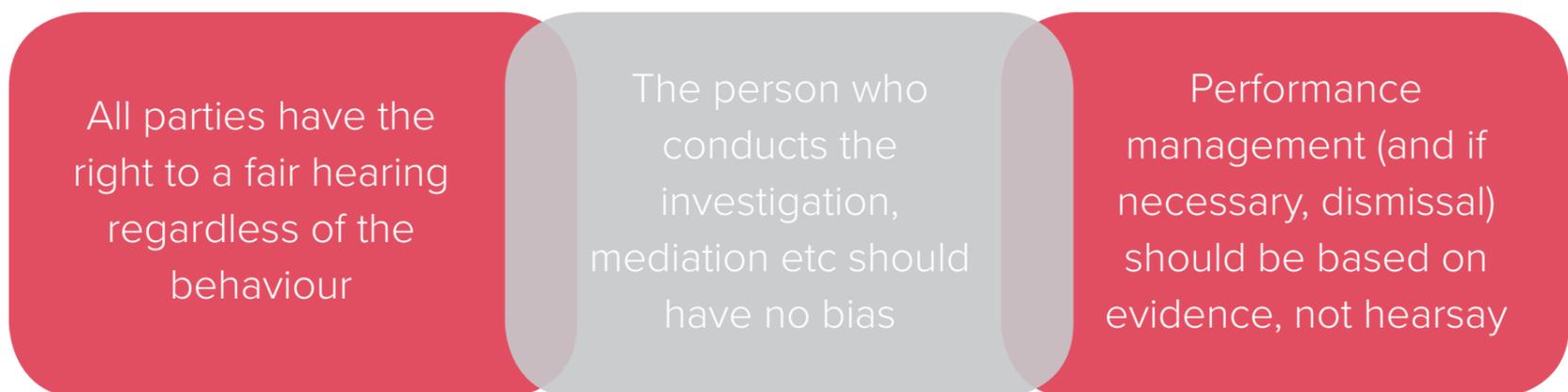
8.2 INFRASTRUCTURE CAN SUPPORT DIFFICULT CONVERSATIONS

Following the advice in this toolkit to establish infrastructure for your volunteers such as role descriptions, thorough interview and screening processes, a procedure for declining unsuitable volunteers, a volunteer agreement, strong orientation and induction processes and regular check-ins can hopefully help you avoid the need to performance manage your volunteers.
Even if you do end up in a performance management situation these documents are very helpful as they speak to expectations about the volunteer role, and ongoing conduct of volunteers. It is therefore much easier to talk about problematic behavior.

8.3 TIPS FOR HAVING A PERFORMANCE CONVERSATION WITH A VOLUNTEER

Sometimes a problem can be resolved by having an informal conversation with the volunteer and by using documents such as a code of conduct as a basis for the discussion. This will depend on what has taken place and the seriousness of the issue.

Occasionally an event will occur which is serious enough to warrant formal meeting with the volunteer(s) involved. In this instance, the volunteer(s) should be invited to a formal meeting and encouraged to bring a support person. The following tips might prove useful:

- Outline the problem and ask the volunteer how they will solve the problem
- Use open questions
- Practice active listening
- Use silence to enable them to respond
- Ask them for specific details for an action plan
- Focus on work-related issues – never provide psychological advice

8.4 DISMISSING A VOLUNTEER

Some organisations opt to include instant dismissal in a policy and procedure, if an event is serious enough to justify this, while others opt for suspension, followed up by a formal meeting with the people involved. Whenever a volunteer is dismissed, it is important not just to deal with the issue at hand, but to look at what took place leading up to the event and regard it as a learning opportunity (look for the root cause by performing a root cause analysis). (For example, the organisation may not have a process for declining unsuitable volunteers). This may help prevent similar occurrences in the future.

EXITING
VOLUNTEERS
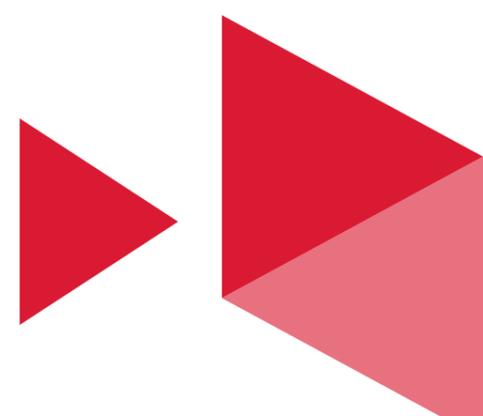
Saying goodbye to your volunteers is sometimes a sad but very natural part of the volunteer lifecycle. Their departure may be voluntary or involuntary (due to conflict etc – see Section 7). Regardless of the circumstances, it is important to:

1

RECOGNIZE THEIR CONTRIBUTION TO THE ORGANISATION

2

RECORD THEIR EXIT IN WRITING

3

HEAR WHAT THEY HAVE TO SAY

9.1 RECOGNISE THEIR CONTRIBUTION

When a volunteer finishes up it is important to recognize their contribution to the organisation. This can be as simple as an email to say thank you, a notice in your organisation's newsletter or a speech at a goodbye party.

9.2 RECORD THEIR EXIT

When exiting volunteers, it is extremely important to officially end their involvement with your organisation and to make sure that this is recorded somewhere. In this best-case scenario this is good record keeping practice and means you have an up to date and accurate picture of your volunteer team. In the worst-case scenario, it could protect you from future liability. This may be a note in the volunteer management system, or a letter stating that their volunteer involvement has ended and ensuring that you get any organisation equipment and keys back. If your volunteer has an organisational email it may be a good idea to cancel their email address or change the password.

9.3 HEAR WHAT THEY HAVE TO SAY

It is best practice to send a letter formally acknowledging a volunteer's departure from your organisation and at the same time can be an opportunity to gather feedback on reasons for the departure, as well as other useful information. A volunteer exit survey (which can be included with the letter or e-mailed as a link to a formal survey) is a useful method of collecting information and provides the opportunity to identify patterns, for example, or improve or review volunteer retention practices and strategies. You may also want to offer a departing volunteer the opportunity to have a one-on-one exit interview, if you have the resources to do this.
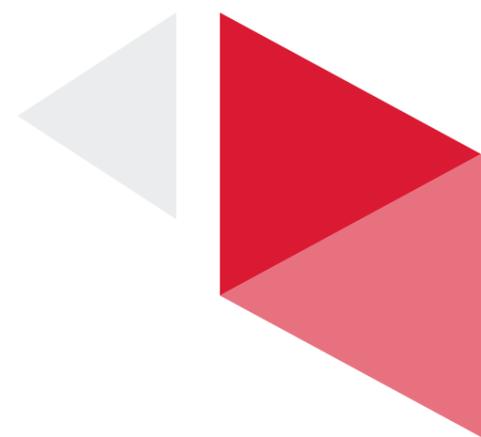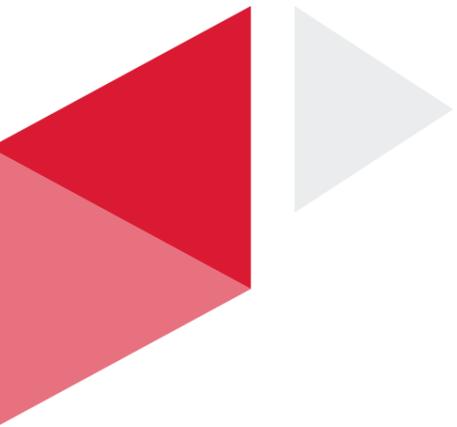
OTHER
RESOURCES

10

10.1 FROM VOLUNTEERING VICTORIA

Getting started with volunteers

▶   The Principles of volunteering
▶   Essential volunteer policies and procedures

Legal considerations

▶   Organisations and Legal Structures
▶   Insurance and Liability
▶   Sexual Harassment
▶   Health and Safety for Volunteers
▶   Protecting Privacy for Volunteers

Recruiting volunteers

▶   Recruiting Volunteers
▶   Orientation for New Volunteers
▶   Designing a Volunteer Role

Managing a volunteer program

▶   Managing Volunteers for Retention
▶   Dealing with Conflict
▶   Money and Volunteers

10.1 FROM VOLUNTEERING AUSTRALIA & STATE PEAKS

Volunteering Australia also has a number of resources including:

◄   Key Facts and Statistics about volunteering in Australia
◄   The National Standards of Volunteer Involvement

The other state peak bodies have a range of resources:

◄   Centre for Volunteering
◄   Volunteering and Contact ACT
◄   Volunteering Queensland
◄   Volunteering South Australia/NT
◄   Volunteering Tasmania
◄   Volunteering WA

OTHER RESOURCES

Justice Connect's Not for Profit Law service has 300+ free resources including videos and web apps dedicated to the legal considerations of working with volunteers including the National Volunteer Guide.

The Victorian Equal Opportunity and Human Rights Commission provides information and resources about discrimination in the workplace.

Worksafe Victoria has produced a resource on volunteer health and safety available here.

The Victorian State government has information about involving volunteers here.

Youth Affairs Council Victoria (YACVIC) has a range of resources for involving young people available here as well Volunteering is Catching: a Study into Young Peoples Volunteering in Victoria.