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How to get co-planning conversations right as an organisation with volunteers



This document is divided into sections based on where you are in the volunteer process. Simply jump to the part that best fits your current stage or your organisation's needs.

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1 About this document ★

This resource has been developed by co-designers in Sunbury and the Macedon Ranges. The co-designers were:

- People with disabilities or disabled people
- People who care for and support people with disability or disabled people
- Organisations that use volunteers and have an interest in improving their capacity to provide meaningful volunteer opportunities to people with disability or disabled people.

The Volunteer Partnerships Project at Sunbury and Cobaw Community Health led the co-design and creation of this resource. Any errors or omissions are the result of resource support and interpretation attempts by the Volunteer Partnerships Project.

Principles of this project

This resource, as well as the complementary resource developed for people with disabilities or disabled people, is guided by the following core principles that were developed during the co-design process.

- **The greatest share of benefits** in providing meaningful volunteer opportunities to people with disabilities or disabled people **is to the organisation with volunteers.**
- **Collaboration** between the organisation with volunteers, and the individual with disability or the disabled person **is the key to success.**
- Before a person with disability or an organisation with volunteers commits to register and screen the volunteer, **it is always best practice to have a trial experience of the volunteering opportunity.**
- **All volunteers benefit** when organisations with volunteers have a culture that allows individuals to be honest about their strengths and what they need to succeed.

Purpose of this resource

There continue to be barriers to meaningful volunteer opportunities for people with disability or people who are disabled. Through a co-design process, this resource has been developed **for organisations with volunteers** who are keen to improve their capacity to provide meaningful volunteer opportunities to people with disability or disabled people.

The focus of this resource is on the stage in the volunteer lifecycle that relates to **recruitment and interviews of prospective volunteers.** Where relevant, links have been provided to resources for other stages of the volunteer lifecycle.

How language is used in this resource ★

This resource is guided in the use of language by the Disability Messaging Guide, By Us, For Us:

<https://www.australianprogress.org.au/resources/disability-messaging>



As stated in By Us, For Us...

“

In this project, we often use the term “disabled people” to highlight that we have been disabled by others’ decisions – by how they’ve set up the world and how they treat us. However, we recognise people’s right to choose the terms they use to describe themselves and their communities. We also note that equally, some people prefer the person-first language of “people with disability”. In this guide, we therefore use a mix of “disabled people” and “people with disability”.

”

This resource also uses a mix of the terms “disabled people” and “people with disability”.



Structure of this resource ★

The next section is the core part of this resource, and it is titled the [co-planning conversation](#). This section details a step-by-step guide from an expression of interest from a potential volunteer to the potential volunteer being onboarded. Included in this section is a template that can be used by any organisation with volunteers to understand the individual who wishes to volunteer.

The third section of this resource, titled ['common questions'](#) provides short answers and useful resources to support challenges reported by organisations when trying to create meaningful volunteer opportunities for volunteers who are disabled. The final section is for organisations that are ready to go ['beyond co-planning'](#) and remove barriers to meaningful volunteer opportunities for disabled people in other stages of the volunteer life-cycle.





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2 The co-planning conversation - resource and template ★

Best practice when considering how anyone could volunteer with an organisation is to match the organisation's needs with the interests, strengths, and abilities of the **individual** who is interested in volunteering with the organisation.

For some organisations, this may require a change in mindset from an interview to a co-planning conversation mindset.

This resource is here to help. It outlines four steps to improving all volunteer recruitment regardless of who the potential volunteer is.

[Step 1: Getting your head in the right place](#)

[Step 2: Preparing for a co-planning conversation with a prospective volunteer](#)

[Step 3: Having the co-planning conversation](#)

[Step 4: Moving from potential volunteer to onboarding a new volunteer](#)

1

Step 1 – Getting your head in the right place



Watch this video on Volunteering Queensland Video 03 – Induction and Onboarding for volunteers with disability

Scan the QR code or visit this link:

<https://youtu.be/TNtELEjvFL8?si=WtXkZ--cdcOISZMq>

Read through the [co-planning conversation template](#) at the end of this resource and refine for any pieces of information relevant to your organisation.



It is best practice that this template **be provided to any potential volunteer PRIOR** to having a co-planning conversation.

Key considerations from this step ★

- ★ All volunteers have individual strengths and individual ways of contributing meaningfully. Ask what will work best for them.
- ★ All volunteers should be provided with all the information they need to successfully start a new role.
- ★ People who are disabled do not have to disclose this information to organisations; it is their choice.



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Step 2 – Preparing for a co-planning conversation with a prospective volunteer

Before meeting with any prospective volunteer, ★ communicate with them on the following key matters:

- Your organisation's commitment to **diversity and inclusion**.
- Provide **accessibility options that your organisation can accommodate** for the co-planning conversation, such as:
 - online.
 - face-to-face.
 - over the phone meetings.
 - meeting at a public location other than where the organisation operates, such as a library or community centre.
- Confirm the **communication preferences** of the potential volunteer and let them know that **they can have someone they choose at the interview** if they wish to have support. Communication preferences may include:
 - phoning rather emailing to arrange meetings.
 - slowing down your speech.
 - politely asking someone to repeat what they have said.
 - communicating through an interpreter.

Other communication preferences are discussed at the five-minute mark of this great video from Purple Orange called Demystifying Diverse Communication.




Scan the QR code or visit this link:

<https://vimeo.com/369237672>



- Let the potential volunteer decide the way that the conversation would work best for them.**
- If the prospective volunteer has chosen to disclose information about their disability, you can ask if there were any resources they would recommend you review to improve your understanding of their disability before your conversation. **Review before the conversation.**
- Provide as much detail as possible for the role.** Outlining what the role is and the organisation's commitment to flexibility in the role.
- Provide the [co-planning template](#) for the potential volunteer** a few days before the conversation, advising them that they do not have to answer any or all these questions ahead of time.
- Ask the potential volunteer if they need any more information:**
 - about your organisation
 - to support them in demonstrating their strengths
 - to support them in demonstrating their needs to be a great volunteer for your organisation

Key considerations for this step

-  Frame the first discussion with a potential volunteer as a collaborative co-planning conversation rather than a formal interview situation.
-  Centre the potential volunteer as a person, not a person who is disabled, so that they, and your organisation, have the best opportunity to succeed.
-  If in doubt, ask the potential volunteer what would give them the most chance to succeed in this co-planning conversation.

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Step 3 – Having the co-planning conversation

The co-planning conversation is the key step to ensuring success. Below are our best tips to keep in mind during the conversation and a template for any organisation to use with prompts.

Tips for the organisation that has volunteers when having a co-planning conversation

- Restate the **organisation's commitment and understanding of inclusivity and diversity.**
- Talk about the **potential volunteer's strengths, skills, and capabilities.**
- Talk about the essential requirements of any role being considered and **ask the potential volunteer about what parts of that role they are comfortable** with, being open to ideas put forward about how the role could be modified to ensure success.
- Do not talk about or ask direct questions about disability**, this is intrusive and inappropriate. Instead, ask questions about any access needs the individual may have and how they can be supported to get the best out of the volunteer experience.
- It is OK to say you do not have an answer** to a question or need to consider a suggestion.
- Ask if there is **anything else that the potential volunteer would need to succeed in the position.**
- Complete the conversation **summarising the main points** about:
 - The potential volunteer's **strengths, skills, and capabilities.**
 - **Outcomes** from co-planning about changes to the role that may be considered.
 - **Expected timing of next steps.**

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Step 4 – Moving from potential volunteer to onboarding a new volunteer

Once the co-planning conversation has been completed, **it is the responsibility of the organisation to consider how, and if, the potential volunteer may volunteer with the organisation.**

The information gathered during the co-planning conversation is the key source of this consideration. It is also important to consider the views of the individuals representing the organisation in the co-planning conversation and how the role can be shaped to the individual's strengths, experience, and needs.

To complete this step, consider the following activities



Allocate time (15–30 minutes) as soon as possible after the co-planning conversation **to review and make a decision.**



During that time, consider:



Are there any outstanding considerations, and where can you get information to address these?



Can the individual visit the organisation and trial the volunteer experience (under full supervision of a staff member or other volunteer) before the decision is made?



What capacity does the organisation practically have to make adjustments like: splitting one role into multiple roles, creating a new role, or utilising volunteers with tasks you haven't previously used them for?



What is the decision and next steps?



How and who will communicate the decision and next steps to the potential volunteer?



Get back to the potential volunteer in a timely manner respecting their stated communication preferences

Key considerations from this step ★




- ★ Make all attempts to keep to organisational commitments that were made in the co-planning conversation. If these commitments cannot be kept to, communicate with the potential volunteer in a timely and respectful manner, being conscious of their communication preferences.
- ★ Best practice is to organise a trial shift or experience so the potential volunteer can experience what the role would be like, whilst being supervised by another volunteer or staff member.
- ★ There is support available in this resource, as well as from your local volunteer resource centers and state and national volunteering bodies, to find answers to [common organisational concerns](#).



Co-planning Conversation Template

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|  Co-planning item |  Some example responses |  Individual responses |
|--|---|--|
| Preferred name of potential volunteer | | |
| Pronouns | <input type="radio"/> She/Her <input type="radio"/> She/They <input type="radio"/> They/Them <input type="radio"/> He/Him <input type="radio"/> He/They <input type="radio"/> Xe/Xem | |
| I want to volunteer with your organisation to: | <input type="radio"/> Help others <input type="radio"/> Build skills towards getting a job <input type="radio"/> Share my skills, experience, and interests <input type="radio"/> Meet new people <input type="radio"/> Support an important cause <input type="radio"/> Have fun and enjoy myself <input type="radio"/> Get out into the community | |

 **Co-planning item**

I am good at and enjoy:




 **Some example responses**




- Working with computers and other technology
- Talking with and listening to people
- Getting tasks completed
- Working independently
- Working as part of a team
- Cooking
- Gardening
- Reading
- Helping people
- Watching movies, shows, or online content
- Dancing or other artistic expression
- Creating or crafting




 **Individual responses**

I have formal and informal study and experience that may be relevant to volunteering

- | | |
|---|--|
| Formal study and experience: | Less formal experience: |
| <input type="radio"/> Paid work experience | <input type="radio"/> Planning |
| <input type="radio"/> Previous volunteer experience | <input type="radio"/> Problem solving |
| <input type="radio"/> Attended high school | <input type="radio"/> Working with others |
| <input type="radio"/> Attended TAFE or University | <input type="radio"/> Budgeting |
| | <input type="radio"/> Home duties |
| | <input type="radio"/> Helping to organise an event |
| | <input type="radio"/> Understanding disability |

|  Co-planning item |  Some example responses |  Individual responses |
|--|---|--|
| <p>I will be a great volunteer when communication involves:</p> | <ul style="list-style-type: none"> <input type="radio"/> Speaking one-on-one <input type="radio"/> Someone interpreting for me <input type="radio"/> When I have a record of what is discussed that I can keep <input type="radio"/> Images more than text <input type="radio"/> Text is clear and not too dense <input type="radio"/> Plain English language is used <input type="radio"/> When I can ask follow-up questions or for the instructions to be repeated or rephrased | |
| <p>When interacting with me, it is inappropriate for others to:</p> | <ul style="list-style-type: none"> <input type="radio"/> Speak louder to me than others <input type="radio"/> Assume they should assist me with my tasks unless I have asked them <input type="radio"/> Speak to my support person rather than me | |
| <p>I know I learn things best when:</p> | <ul style="list-style-type: none"> <input type="radio"/> Information is broken down into small sections <input type="radio"/> I am given information to look at first, and the chance to ask questions after I have looked at the information <input type="radio"/> I have digital resources <input type="radio"/> I get the chance to practice <input type="radio"/> I can go at my own pace <input type="radio"/> I have visual reminders | |

|  Co-planning item |  Some example responses |  Individual responses |
|--|--|--|
| <p>I know I can concentrate best when:</p> | <ul style="list-style-type: none"> <input type="radio"/> I'm in a quiet space <input type="radio"/> I have frequent breaks <input type="radio"/> I can move around <input type="radio"/> I use a fidget toy <input type="radio"/> I wear headphones <input type="radio"/> I have earplugs in | |
| <p>Physical spaces that work best for me are ones that are:</p> | <ul style="list-style-type: none"> <input type="radio"/> Quiet <input type="radio"/> Bright <input type="radio"/> Low lit <input type="radio"/> Free from fragrance <input type="radio"/> Accessible for my mobility aids <input type="radio"/> Fitted with tactile indicators <input type="radio"/> Suitable for charging adaptive technology or mobility aids <input type="radio"/> Suitable for my support animal | |
| <p>Other things about me that are important for you to know, so I can be a success:</p> | <ul style="list-style-type: none"> <input type="radio"/> I am allergic to... <input type="radio"/> I sometimes need unexpected breaks <input type="radio"/> I can get overwhelmed when too many people are talking at the same time. | |

|  Co-planning item |  Some example responses |  Individual responses |
|--|---|--|
| <p>I have the following questions for you:</p> | <ul style="list-style-type: none"> <input type="radio"/> Do your volunteers catch up regularly? <input type="radio"/> Can I try volunteering (as a visitor) first? <input type="radio"/> Do you have a buddy system to support new volunteers? <input type="radio"/> Are there any stairs or steps I need to be aware of? <input type="radio"/> Are there transportation options available close by? <input type="radio"/> Can I complete some or all my tasks at home? <input type="radio"/> What screening documents are required to become a volunteer? | |
| <p>I understand this information could help others to interact with me, and I'm okay with it being shared with relevant staff and volunteers:</p> | <ul style="list-style-type: none"> <input type="radio"/> Yes <input type="radio"/> No <input type="radio"/> On the following conditions | |

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Common ★ Questions

For more information, contact your local volunteer resource centre, as well as state and national volunteering bodies. Peer organisations with volunteer programs are also a great resource.

- Improving attitudes, behaviours, and assumptions of other volunteers, staff, and clients of the organisation
- Privacy of information and equal opportunity
- Insurance
- Support People

Improving attitudes, behaviours, and assumptions of other volunteers, staff, and clients of the organisation

There is help available to improve organisational understanding of greater involvement of people with disability. A great place to start is on the VolunteerAbility website:



 <https://volunteerability.com.au/i-am-a-volunteer-manager>

Privacy of information and equal opportunity

Maintaining privacy and confidentiality is a common priority for organisations. Here are some general guidelines based on respecting the individual.

- Disability is a protected attribute under equal opportunity legislation in Australia.
- People do not have to disclose disability information to organisations; it is their choice.
- It is inappropriate to communicate with others about someone's disability without their consent.

Great resources on privacy, confidentiality, and equal opportunity can be found at the Not-for-Profit Centre of Justice Connect; their website is:




 <https://www.nfplaw.org.au>

Insurance

Did you know if the potential volunteer is a participant in the National Disability Insurance Scheme, this may provide an additional layer of insurance for that volunteer while operating in your organisation?



For unbiased, currently free information on general insurance, consider the Not-for-Profit Centre of Justice Connect. Their website is:

 <https://www.nfplaw.org.au>



A good insurance resource is their free National Volunteering Guide Part 4, page 57, available here:



<https://www.nfplaw.org.au/free-resources/managing-people/managing-volunteers>

Support People ★

Some people with disabilities may have support people to assist them; **never assume that all people who are disabled need or use a support person.** The role of the support person is to support the person with disabilities; they are not a volunteer themselves. All communication should be directed to the person, not the support person. For more understanding, follow this link to read “The Role of the Support Worker” developed by EV Strengthening Communities:

Scan the QR code or visit this link:



<https://www.volunteeringvictoria.org.au/vma-resources>





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Beyond ★ co-planning

If your organisation is ready to do more than co-plan the volunteer experience with the individual volunteer, then the topics below are great options for other steps your organisation can take.

- Understand why including people with disability is good for your organisation
- Learn from someone with disabilities about what your organisation can do better
- Improve your documentation
- Embed inclusivity in other stages of the volunteer lifecycle
- Understand the evolution of the models of disability
- The use of language

Understand why including people with disability is good for your organisation ★

Organisations gain greatly from inclusive volunteer management, ensuring their team matches the community. This is vital in Australia, **with one in five people in Australia having at least one disability**. For more information on the many other benefits, here is a link to the [Volunteerability webpage](#) on the topic:



Q <https://volunteerability.com.au/i-am-a-volunteer-manager/getting-everyone-onboard>

Learn from someone with disabilities about what your organisation can do better ★

Many individuals with lived experience provide disability advocacy services and can conduct audits and training. **It is always appropriate to pay people who are advising you on their lived experience for their services and their time, as they are the experts.** A good place to start finding someone with lived experience is with your local disability service provider. Further sources can be found at the [Disability Australia Hub webpage](#)



Q https://www.disabilityaustraliahub.com.au/organisations/?cat_id=88

Improve your documentation ★

Complicated, jargonistic, and convoluted language can disable people.

Also, how documents are presented and formatted can reduce accessibility. Many document applications have built-in accessibility checks to make sure more participants can use them. But if you want to go further [Australian Government's Disability Gateway webpage](#) is a good place to start. Visit this link:



Q <https://www.disabilitygateway.gov.au/print-digital-document>

Embed inclusivity in other stages of the volunteer lifecycle ★



Other areas to focus organisational effort is included in the Disability Inclusive Volunteer Management Guide created by Volunteering SA&NT (VSA&NT) in partnership with JFA Purple Orange. The pdf of the Guide is available via the QR code or link:

<https://volunteerability.com.au/wp-content/uploads/2024/05/Disability-Inclusive-Volunteer-Management-Guide.pdf>

Understand the evolution of the models of disability ★

This resource is based on a **social model of disability** where social barriers such as inaccessible environments, attitudes, and organisational structures are the cause of disability rather than the outdated and discriminatory medical model of disability.



A model of a disability is the lens through which disability is caused and the key issues to be addressed. For more information, a summary is in the Disability Inclusive Volunteer Management Guide created by Volunteering SA&NT (VSA&NT) in partnership with JFA Purple Orange. The pdf is available the QR code or link:

<https://volunteerability.com.au/wp-content/uploads/2024/05/Disability-Inclusive-Volunteer-Management-Guide.pdf>

The use of language ★



Person-first language (people with disability) and identity-first language (disabled people) are both used in Australia.

Just like getting someone's name correct, people with disability often have strong preferences on how to refer to them. Ask the individual how they want to be referred to and **put it into action**. Visit the People with Disability Australia webpage to learn more:

<https://pwd.org.au/resources/language-guide>



This resource is guided by the Disability Messaging Guide, **By Us, For Us** (downloaded via the link below). This Guide was produced in a partnership with the Disability Advocacy Network Australia (DANA) and Australian Progress.

<https://www.australianprogress.org.au/resources/disability-messaging>

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ACKNOWLEDGEMENT OF COUNTRY

We acknowledge the Traditional Owners of the land on which we work and live. We pay our respects to Elders past, present and emerging, and extend that respect to all Aboriginal and Torres Strait Islander people. We recognise, celebrate and respect Aboriginal and Torres Strait Islander people as the First Australians. We acknowledge their unique cultural and spiritual relationships to the land and waters, as we strive for equality and safety in community services and health care.



STATEMENT OF DIVERSITY

Omnia Community Health is committed to improving the health of our community and being accessible to all, including people from culturally and linguistically diverse communities, those from Aboriginal and Torres Strait Islander background, people with a disability, lesbian, gay, bisexual, transgender, intersex and queer people and other socially vulnerable groups and supporting their communities across the lifespan from birth to older age.

Funded by the Australian Government
Department of Social Services



Australian Government
Department of Social Services