Planning for Volunteer Involvement Checklist

*Adapted from a Volunteering Queensland resource*

[*https://volunteeringqld.org.au/docs/VM\_Resource\_SSV\_Volunteer\_Management\_Checklist\_Action\_Plan.pdf*](https://volunteeringqld.org.au/docs/VM_Resource_SSV_Volunteer_Management_Checklist_Action_Plan.pdf)

##### Checklist

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| --- | --- | --- | --- | --- | --- |
| Key Business Area | Description / Evidence | Status | Comments | National Standards Reference | Toolbox Resource |
| Volunteer Policies & Practices | * Do you have a general policy regarding volunteer involvement? |  |  | 1.1 |  |
| * Have you defined volunteer’s rights & are they known? |  |  | 5.1 |  |
| * Do all persons in the organisation understand the reasons & benefits of involving volunteers? |  |  | 7.1 |  |
| Volunteer Opportunities | * Do you have gaps in your management administration of the following key business areas:   + Volunteer management   + Finance   + IT   + Administration   + Sales   + HR   + Training & Development   + Marketing & Networks   + Governance & funding   + Risk management * Could volunteers potentially fulfil some of these roles? |  |  | 3.2 |  |
| Volunteer Management – Recruitment, Selection & Orientation | * Do you plan volunteer programs before you recruit, including:   + Positions, optimal numbers, alternative options for applications, selection criteria   + Looking within – examining options to align program needs with current volunteer’s skills & interests? |  |  | 4.1 |  |
| * Is information readily available to potential volunteers, in a variety of formats, and with an identified contact person? |  |  | 4.2 |  |
| * Do your selection procedures include:   + Acknowledgement of inquiries   + Screening of applicants   + Reviewing of applicants |  |  | 4.3, 4.4 |  |
| * Does a volunteer orientation happen shortly after a volunteer starts? |  |  | 5.1 |  |
| * Does the responsibility for planning & delivering the orientation sit clearly with a trained person/s? |  |  | 1.2 |  |
| * Does the orientation cover & include: |  |  | 5.1 |  |
| * + Information or references to policies & procedures, including WH&S? |  |  | 6.2, 8.1 |  |
| * + Organisation’s mission, vision & values? |  |  | 2.2 |  |
| * + Principles, Rights & Responsibilities of volunteers? |  |  | 5.1 |  |
| * + Lines of accountability? |  |  | 5.4 |  |
| * + Guided tour? |  |  |  |  |
| * Is there a Volunteer Induction & Orientation procedure to ensure consistency? |  |  | 5.4 |  |
| Volunteer Management – Work & Workplace | * Volunteer’s roles: |  |  |  |  |
| * + Are volunteers given clear responsibilities rather than a set of tasks? |  |  | 3.1 |  |
| * + Are volunteers given work that needs to be done, rather than just to keep them busy? |  |  | 3.1 |  |
| * + Are roles defined, documented & updated regularly, with feedback from:     - Current & exiting volunteers?     - Governing body & management?     - Paid staff? |  |  | 3.4 |  |
| * + Do job descriptions include area/s of responsibility, supervisory arrangements & lines of accountability? |  |  | 5.4 |  |
| * + Do volunteers understand where their work fits in with the organisation’s mission, vision & goals? |  |  | 2.2 |  |
| * + Are expectations clearly communicated and appropriate support & supervision provided to allow them to meet expectations? |  |  | 5.4 |  |
| * + Is it clear to volunteers who they go to for ‘on the job’ support? |  |  | 5.4 |  |
| * + Is a record of attendance kept? |  |  |  |  |
| * Volunteer involvement: |  |  |  |  |
| * + Are there methods to communicate & inform volunteers? |  |  | 6.1 |  |
| * + Are volunteers involved in decision making and given opportunities to contribute ideas? |  |  | 6.1 |  |
| * + Are there opportunities for volunteers to meet to discuss work issues? |  |  | 6.1 |  |
| * + Is information collected & analysed regarding volunteer’s satisfaction, challenges, etc? |  |  | 8.4 |  |
| * Risk management: |  |  |  |  |
| * + Have you identified and assessed risks for your organisation? |  |  | 1.3 |  |
| * + Are strategies in place to address risks (eg adequate insurances, security, etc)? |  |  | 6.2 |  |
| * + Are workspace facilities & resources adequate & safe for staff? |  |  | 2.3 |  |
| * + Does the workplace comply with WH&S requirements? |  |  | 6.2 |  |
| * + Are there grievance procedures in place for volunteers? |  |  | 6.3 |  |
| * + Do you have procedures for     - Identifying hazards     - Recording injuries     - Operating equipment     - General workplace health practices (breaks, etc) |  |  | 1.3 |  |
| Volunteer Management – Service Delivery & Performance Management | * Are activities generally being completed in a simple & effective manner? |  |  |  |  |
| * Are service standards for volunteers derived from:   + Customer’s requirements   + Industry standards   + Volunteer input? |  |  | 3.2 |  |
| * Does the organisation monitor outcomes of services provided? |  |  | 8.2, 8.3 |  |
| * Is there a process to review performance & provide feedback on a regular basis? Is this documented? |  |  | 8.4 |  |
| * Are changes to a volunteer’s involvement undertaken fairly (changing roles, terminating, performance managing) |  |  | 5.5 |  |
| Volunteer Management – Training & Development | * Are volunteers’ strengths, needs and aspirations discussed as part of role development? |  |  | 5.2 |  |
| * Are volunteers given adequate opportunity to develop skills in line with role, career aspirations & organisational needs? |  |  | 5.3 |  |
| * Is training budgeted and how is it coordinated? |  |  | 2.3 |  |
| * Is training aligned to organisational needs, roles & development opportunities? |  |  | 5.3 |  |
| * Is learning encouraged through team work, meetings, buddying or other ‘on the job’ methods? |  |  | 5.3 |  |
| * Are volunteers records collected and maintained, including emergency contacts, police checks, & incidents? |  |  | 1.4, 7.4 |  |
| * Are the records kept in a secure and confidential place, with procedures and authorities regarding access? |  |  | 1.4 |  |
| * Does the organisation keep policy & procedure documentation to demonstrate an effective volunteer management system? |  |  | 8.1 |  |
| * Does the organisation collect data on volunteer programs, including duration, numbers of volunteers, training & development? |  |  | 1.4, 8.3 |  |
| Volunteer Management - Recognition | * Are volunteers consulted on what recognition they find appropriate? |  |  | 7.4 |  |
|  | * Is there regular acknowledgement of volunteer’s contributions and their positive impact on the community |  |  | 7.3 |  |