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

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
| 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 |  |