

---

THE NATIONAL STANDARDS FOR  
VOLUNTEER INVOLVEMENT

# IMPLEMENTING THE NATIONAL STANDARDS: GUIDE AND WORKBOOK

---

© Volunteering Australia, 2015

#### **VOLUNTEERING AUSTRALIA**

Level 2, 202 City Walk  
Canberra ACT 2601

**T:** 02 6251 4060

**[www.volunteeringaustralia.org](http://www.volunteeringaustralia.org)**

#### **VOLUNTEERING AND CONTACT ACT**

Level 2, 202 City Walk  
Canberra ACT 2601

**T:** 02 6251 4060

**[www.volunteeringact.org.au](http://www.volunteeringact.org.au)**

#### **THE CENTRE FOR VOLUNTEERING**

Level 3, 40 Gloucester Street  
The Rocks NSW 2000

**T:** 02 9261 3600

**[www.volunteering.com.au](http://www.volunteering.com.au)**

#### **VOLUNTEERING QUEENSLAND**

Level 6, 333 Adelaide Street  
Brisbane QLD 4001

**T:** 07 3002 7600

**[www.volqld.org.au](http://www.volqld.org.au)**

#### **VOLUNTEERING SA&NT**

Level 5, 182 Victoria Square  
Adelaide SA 5000

**T:** 08 8221 7177

**[www.volunteeringsa-nt.org.au](http://www.volunteeringsa-nt.org.au)**

#### **VOLUNTEERING TASMANIA**

95-97 Campbell Street  
Hobart TAS 7000

**T:** 03 6231 5550

**[www.volunteeringtas.org.au](http://www.volunteeringtas.org.au)**

#### **VOLUNTEERING VICTORIA**

Level 2/491 King Street  
West Melbourne VIC 3052

**T:** 03 8327 8500

**[www.volunteeringvictoria.org.au](http://www.volunteeringvictoria.org.au)**

#### **VOLUNTEERING WA**

City West Lotteries House  
2 Delhi Street  
West Perth WA 6005

**T:** 08 9482 4333

**[www.volunteeringwa.org.au](http://www.volunteeringwa.org.au)**

Volunteering Australia would like to thank the many individuals, organisations and networks that gave valuable feedback during the review process. The National Standards Review Project was led by Volunteering SA&NT, with the support of Volunteering WA and Volunteering Tasmania who formed the National Standards Working Group. We commend them for their leadership role and unwavering dedication and commitment to this project. We would also like to thank the Project Reference Group which included representatives from each State and Territory. We would also like to thank Breaking New Ground as principal consultants to this project, the staff of Volunteering SA&NT, and other State and Territory volunteering peak bodies.



The **National Standards for Volunteer Involvement, 2015** represent what Volunteering Australia regards as best practice in the management of volunteer involvement.

The National Standards are primarily for the use of organisations that include volunteers in their personnel. They are not intended to apply to the activities of volunteers themselves. Groups of volunteers coming together to organise their own activities may find the National Standards useful for guiding some of their work, or for working towards a more formal organisational structure, but it is not intended that volunteer groups meet the National Standards.

This Guide and Workbook is designed as a systematic and 'user friendly' method for implementing the National Standards in your organisation. It contains a comprehensive set of instructions and resources to guide you task-by-task through the implementation process.

This resource is suitable for anyone who wants to implement the National Standards or whose job it is to involve volunteers. When used in conjunction with the National Standards, the Workbook will help you to determine where you need to make improvements in your system for managing volunteer involvement. Importantly, it will also enable you to identify your strengths – what you are currently doing well.

**Part 1** contains a step by step guide on assessing your organisation against the National Standards and then implementing improvements to meet the standards.

**Part 2** contains the Workbook and planning template for recording the outcomes of your self-assessment work.

By focusing your change management efforts around the tasks and resources contained in this Workbook, you will help protect the rights of volunteers, add value to their work and be well on the way to achieving best practice for your organisation.

## General Principles

Your success in using the Workbook to implement the National Standards will depend on the presence of three key principles — partnership, empowerment and group effort.

### Partnership

This principle requires an effective partnership to be developed between the key people involved in your organisation. Depending on the size and complexity of your organisation, this may include board or management committee members, senior management, managers of volunteers, volunteers, customers of volunteers and any paid employees. External people or agencies may also be potential partners that can provide valuable guidance or assistance. This means that:

- Communication between the key stakeholders needs to be open and effective.
- There needs to be a general acceptance of the need for change and agreement on the direction of that change.
- Volunteers, customers, employees and managers are all involved in jointly developing strategies to implement the standards.

### Empowerment

This principle requires the empowerment of managers or coordinators of volunteers and volunteers themselves. This means that:

- Management's role is to provide leadership and an environment that facilitates innovation and improvement.
- Effective top-down and bottom-up communication is an essential requirement.
- There is a strong sense of ownership of the standards and a commitment to using them to guide the direction of change.

### Group effort

Ideally, the work of assessing current practice against the standards, identifying areas for improvement and developing the organisation's policies and procedures for volunteer involvement should not be left to just one person. A self-managing and self-directing team will provide the necessary group effort to manage the project. This means that:

- Primary responsibility for implementing the standards lies with the team.
- The team is assigned sufficient authority to identify and carry out the required tasks.
- The team is adequately resourced to develop and implement strategies that reflect its specific needs and goals.

---

## Preliminary Tips

---

There is no escaping the fact that the task of improving the way an organisation operates is a challenging one. However, with thoughtful and planned application of the resources contained in this Workbook, there is no reason why your change endeavours cannot be rewarding and satisfying. Here are some useful tips.

- Articulate the need for change – constantly emphasise the benefits you expect from implementing the National Standards.
- Recognise that change can be stressful and sometimes cause conflict – deal with it as it arises.
- Start by choosing the areas where you can get some quick results – then use this momentum to tackle more difficult issues.
- Celebrate your successes – nothing succeeds like success.
- Avoid ‘quick fix’ solutions to problems – or even worse, a ‘flavour of the month’ approach.
- Acknowledge that the process will take time – Rome was not built in a day and nor are best practice organisations.

---

## Other Help Available

---

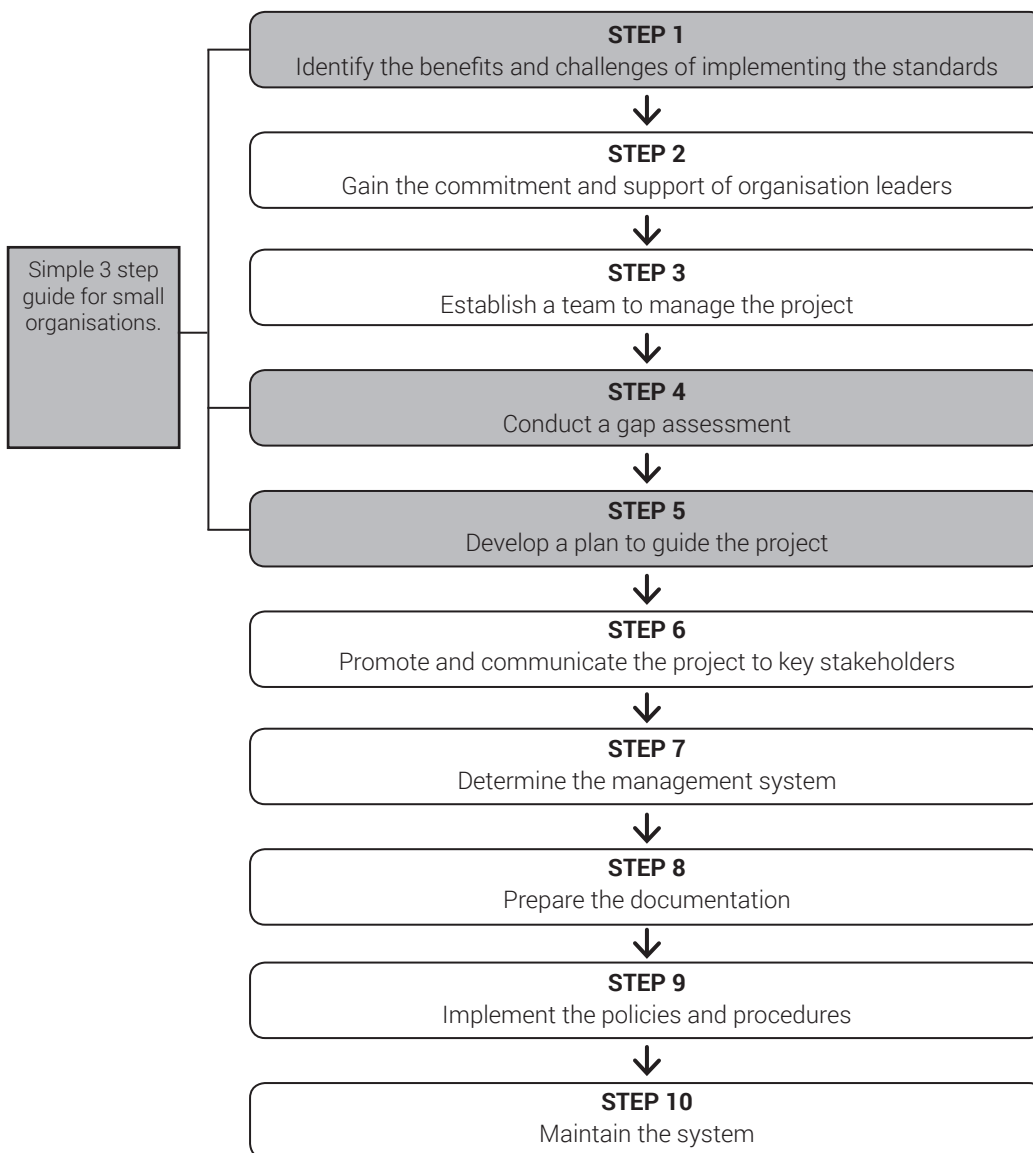
State and Territory Volunteer Centres are established throughout Australia. Among their many functions is the key role they play in promoting excellence in volunteer management. Should you want help with implementing the National Standards you may contact your state/territory centre. They can guide you to additional resources can be obtained on a range of volunteer policy and management issues.

It may also be worthwhile to ‘partner’ a similar organisation as your own, as a means of sharing expertise, resources and experience. Your state/territory resource centre can put you in touch with other volunteer organisations. A list of the state/territory centres and their contact details can be found on Page 2. You are encouraged to make use of them.

# PART 1: STEPS TO IMPLEMENTING THE NATIONAL STANDARDS

Volunteer involving organisations come in all different shapes and sizes – from local community groups with only a handful of volunteers, to transnational organisations employing thousands of volunteers worldwide. This diversity necessitates adopting a flexible approach to implementing the standards and, in particular, how the Workbook is used. The Guide and Workbook are not meant to be prescriptive. Rather, they will need to be adapted to suit the special needs and circumstances of your organisation.

There are 10 steps in this guide each with their own sequence of tasks. These steps are outlined below in the form of a flow chart and then described in detail in the remainder of this section.



Steps 1 – 6 are essential steps for any organisation wanting to fully implement the National Standards. Steps 7 – 10 are also important, but whether you include these will depend on your organisation's size and its resources. Small organisations wanting to use the National Standards as a simple guide to best practice may find it easier to work with one standard at a time, and just use Step 1, Step 4 and Step 5.

## STEP 1

### Identify the benefits and challenges

*As the lead person in implementing the National Standards (particularly if you are a manager or coordinator of volunteers), you will play a key role in getting the project started. Before anything else, you need to identify and weigh up the likely benefits and challenges of implementing the National Standards in your organisation.*

#### Tasks

1. Read the National Standards to gain an understanding of their nature and scope. Consider the overall relevance of the standards to your organisation and their potential for improving the way volunteers are managed.
2. Identify the specific benefits you think your organisation will gain from implementing the National Standards, as you will need to be able to explain these to other people involved in the project. The potential benefits may include:
  - Increased capacity to deliver on organisational mission.
  - Greater volunteer job satisfaction.
  - Volunteers treated fairly and their rights protected.
  - Enhanced customer satisfaction.
  - Increased volunteer recruitment and retention.
  - Less exposure of the organisation to risk.
  - Enhanced capacity to demonstrate 'best practice'.
  - Improved ability to innovate.
  - Increased efficiency and cost savings.
  - Increased ability to collaborate more effectively with partners.
  - Enhanced organisational credibility and community reputation.
  - Potential to attract more donor/funder financial contribution.
  - Any other likely benefits. If so, what are these?
3. Identify the specific challenges or costs you think might be involved in implementing the National Standards in your organisation, as you will need to plan how to address these. Challenges may include:
  - The amount of time and resources required.
  - Increased bureaucracy and 'paper work'.
  - Lack of a positive organisational culture for volunteering across the organisation.
  - Little or no support likely from senior management.
  - Maintaining the momentum required to complete the project.
  - Lack of appropriate skills and resources.
  - Reduced innovation and creativity due to strict adherence to procedure.
  - Loss of credibility in event of the project failing.
  - Differences in understanding and opinion about the National Standards.
  - Emergence of conflict and disagreement.
  - Any other likely challenges. If so, what are these?
4. Evaluate your capacity to lead and manage the project. If you are not confident in leading the project, identify what skills or expertise may be needed, and whether you can develop these skills, or access other support to carry out your role.
5. Familiarise yourself with the other resources and documents available to help you.

## STEP 2

### Obtain management commitment

*The lead people in your organisation (such as the management team or senior manager) need to be convinced that implementing the National Standards is worth the effort. Their active support for your endeavour is vital not only at the outset, but throughout the entire implementation process.*

### Tasks

1. To ensure that you have the support you need, make a presentation to relevant leaders in your organisation on the benefits to the organisation of implementing the National Standards.

**Tip:** *Make sure you have a good understanding of the role, scope and value of volunteers in your organisation. This will provide a sound basis upon which to base your presentation and answer any awkward questions.*

**Tip:** *Look at what external expertise might be available (e.g. volunteer peak body, experienced volunteer manager) that could form part of your team or assist with presentation.*

2. Obtain formal agreement from relevant leaders or managers in the organisation to proceed with the project.

**Tip:** *Ideally, the agreement should be written but if this is not possible or appropriate, a verbal commitment can suffice. Such an agreement will enhance the project's credibility and your authority as project manager.*



## STEP 3

### Establish a project team

*Ideally, implementation of quality standards should not be left to one person. An empowered and committed team will share the work involved and provide a range of perspectives. If you are leading the implementation of the standards, one of your challenges will be to engage other people from your organisation and assist them to form an effective well-organised team.*

### Tasks

1. Select team members on the basis of the knowledge and skills you think each can bring to the project and the team's performance. Ensure that they can commit the time needed and set expectations for their contribution upfront.

*Tip: Consider involving a skilled volunteer to support the project team.*

2. Circulate a copy of the National Standards for Volunteer Involvement to each team member. Ask that they familiarise themselves with the standards before the first team meeting.
3. At the first team meeting, introduce the standards and allow time for a general discussion.
4. Prepare a statement of the project team's purpose. This should be one of the team's first tasks so that all team members are clear about the shared goals.

*Tip: A good way of preparing a project purpose statement is to get everyone to brainstorm for ideas by asking a number of pertinent questions, such as: what is our objective, what outcomes do we want to achieve and how will we work together as a team? When all ideas are exhausted, evaluate the merit of each. The best ideas can then be used to draft a concise statement of purpose for presentation back to the team for reactions and any changes.*

5. Clarify the role and responsibilities the team will have in carrying out the project.

*Tip: You might also wish to delegate to individual team members specific team process tasks such as timekeeper, recorder and ideas generator/s. If so, some team members may need skill development in these areas.*

6. At an early stage in the team's cycle of meetings, some basic training in team building and project management may be useful.
7. After a few meetings, get the team to review its performance as a team and discuss any improvements that might be made. This task should be repeated at appropriate intervals throughout the project, for example, after steps 4 and 6.

## STEP 4

### Conduct a gap assessment

*This step involves identifying the gap between how volunteer involvement is currently managed in your organisation and how it should be managed, as required by the National Standards. This step will identify the areas where improvement needs to be made.*

#### Tasks

1. Using the Standards Workbook in Part 2, work with the project team through the National Standards and complete the rating for each criteria, discussing the reasons for the rating, the types of evidence that the organisation has to show it meets particular criteria, and identifying the areas where there are gaps.

**Tip:** *Ideally, team-rating decisions should be based on consensus. Where this cannot be achieved, it should be agreed that the facilitator (or project leader) make a personal judgement of the views expressed and decide the matter.*

2. Record any criteria that is judged by the team as not appropriate or relevant to the organisation, along with reasons or justifications.
3. Once all the standards criteria have been assessed, create an action plan using the template provided. Identifying each of the actions that need to be taken to meet the gap between current practice and practice as required by the National Standards.

## STEP 5

### Develop the project plan

*A good plan is crucial to managing the project effectively. To bring the project to a successful conclusion, you will need to consider four planning dimensions – work tasks, time, cost and responsibility.*

#### Tasks

1. To avoid the likelihood of overlooking a crucial step, divide the project into discrete steps or packages of work.
2. Using this work breakdown, estimate the time and cost (including team member time) required to complete each set of tasks.

**Tip:** *Since you may not know at this stage the full scope and complexity of the project before you, your analysis of time may well lack precision. If this is the case, it can be helpful to estimate the most optimistic (shortest) time to complete each step and the most pessimistic (longest) time. From these estimates an estimate can then be made of the most likely (probable) time.*

**Tip:** *The time involvement of your team members may well be your biggest cost item. If paid employees are involved on your project team, their labour may need to be calculated and included in the project's budget. If you engage an external consultant to help your team with the project, then this will also add significantly to the total cost. Other costs may include materials, use of equipment, facilities, office supplies, general administration etc.*

3. If you want, you could also create a chart to visually display the time relationship of the main tasks of the project. To calculate total project time, consider which steps and tasks can be done simultaneously with others.

## STEP 6

### Promote and Communicate

One of main roles of the project team is to generate an awareness of the project throughout your organisation, and keep people informed of the progress made. It is crucial that this role be done well if the project is to gain the support necessary for the team to achieve its goals.

### Tasks

1. Identify the groups, organisations or persons (i.e. stakeholders) with whom you will need to share information about the project.  
*Tip: A stakeholder is any group, organisation or person that can place a claim on your project's attention, resources or output, or is affected by that output. Typically, stakeholders include those internal to the organisation (e.g. volunteers, chief executive officer, senior management group, board of management, paid staff, functional line managers), and those external to the organisation (e.g. clients/customers of volunteers, potential volunteers, general community, media, government, funding bodies, members, advocates and donors).*
2. Advise stakeholders of the existence of the National Standards and the intention of the project team to implement them. Also, make the standards available to stakeholders for them to read if they wish.
3. Consider conducting promotional sessions for key stakeholders to generate an awareness and understanding of the standards.  
*Tip: Ensure that the message communicated to key stakeholders is consistent and presented professionally. Information to stakeholders can be conveyed by a number of means including face-to-face briefings, small group discussions or workshops, overhead presentations, etc.*
4. Canvass the views of volunteers about how they are currently being managed. This might be done by way of a confidential questionnaire, focus group discussion or even individual interview.  
*Tip: While it is not essential that all volunteers contribute (if your volunteer contingent is very large), enough volunteers need to be involved to make the feedback relevant. A minimum percentage target should therefore be set and responses followed up until the target is achieved.*
5. When the information has been gathered, it needs to be analysed and the results communicated to stakeholders in an appropriate format.
6. Prepare and distribute progress reports to stakeholders at appropriate intervals throughout the project.

## **STEP 7**

### **Determine the management system**

*This step involves the project team in defining the 'ideal' management system to support the policies, processes and procedures called for in the National Standards. If the gap assessment has concluded that there are no significant gaps between the current practice of the organisation and the National Standards, then Steps 7 and 8 will be more of a review of the existing volunteer management system.*

#### **Tasks**

1. Construct an organisation chart that shows the relationship between the various functions of the organisation and the reporting and communication lines of volunteers.
2. Review or create written job descriptions for volunteers. Ensure that these job descriptions clearly define reporting arrangements and are appropriate and consistent for all volunteers across the organisation.
3. Get the project team to identify and agree on the key activities around which the volunteer management system should be organised.

**Tip:** *A management system is usually organised around a set of key activities (often referred to as 'core processes') that interact with each other to form an integrated whole. To identify these key activities, ask the project team to imagine what they would like their 'ideal' management system to look like. The National Standards can be used to help in this regard as they embrace core processes typically present in an effective volunteer management system.*

3. Identify all the activities or tasks that need to be performed within each key activity.

**Tip:** *A simple but effective way of doing this is to get the project team to identify all the activities that come to mind within a given core process. And then check to see that there are no omissions. Use key words or short phrases to refer to the activities identified. As an alternative, or in addition to as a further check for accuracy, the project team may wish to flow chart each process. Note that flow charts are best used for depicting less complex processes and procedures.*

## STEP 8

### Document the volunteer management system

Step 8 is primarily for organisations that do not already have coherent and consistent documentation of their volunteer management system, or who wish to review their documentation in detail. Before starting to review or write new policies, procedures and work forms, allow sufficient time to plan and make choices about what, how and for whom you need to document. This will help the project team focus its thinking on the long term, and make the task of documenting less time consuming.

#### Tasks

1. Appoint an appropriately skilled person or persons to prepare the necessary documentation. Get the project team to consider the advantages and disadvantages of alternative options before deciding who should do the writing.
2. If one does not already exist, prepare a general Volunteer Policy that describes your organisation's philosophical commitment to volunteer involvement. Use the National Standards as a guide. Allow the project team ample time to consider and revise each draft. When the team is satisfied with the final version, get it checked and approved by the appropriate person or body within your organisation.
3. Get the project team to determine what policy statements are needed with respect to each of the core processes (key activities) agreed to in Step 7.

Note that policies explain the organisation's stand on a particular topic or issue. They can range from broad philosophical statements, such as those found in a general Volunteer Policy, to quite specific, for example: 'It is our practice to reimburse volunteers for all travel and out-of-pocket expenses.'

**Refer to:** Checklist of policies that may be needed.

**Tip:** Beware of thinking that you need to have policies on everything. This will only generate more paper and bureaucracy. It can also swamp those topics where policies truly serve a useful purpose. When deciding on what policies are really needed, apply the 'what's important' test by asking the question: Does this topic have an impact on volunteers or the functioning of our organisation?

4. Prepare draft policy statements for each of the processes (activities) identified as needed in task 3 above. Ensure that these statements clearly set out the organisation's views on the particular topic and follow a uniform presentation structure.

Allow the project team ample time to consider the draft policies and make any necessary changes. When finalised, have the statements checked and approved.

5. Get the project team to identify what procedures and related work forms are needed to ensure that the policies are implemented.

Note: whereas policies describe what the organisation intends to do and why, procedures explain the step-by-step method for implementing those policies.

**Tip:** A decision to create a procedure should not be taken lightly as the time and effort in developing it is considerable. A good way of determining if a procedure is needed is to ask the question: if this activity were to go wrong, would the cost or risk to volunteers, customers or the organisation, outweigh the time and effort involved in simply rectifying the problem when it occurs?

6. Prepare drafts for each procedure identified as needed in task 5 above. Use the information from Step 7 as a guide. Ensure that the draft procedures clearly outline the sequence of actions or steps required to carry them out and follow a uniform structure.

**Tip:** Allow the project team ample time to consider the draft procedures and make any necessary changes.

7. Decide on a uniform page layout for your policy and procedure documents.
8. Review all draft procedures as a final check for accuracy, clarity and readability.
9. Circulate the drafted procedures inviting comment from all volunteers and other relevant stakeholders. Request that all feedback be returned by a specified date.

**Tip:** *Most people don't like to be handed large amounts of information all at once. When circulating the documents, break them down into bite size chunks giving people time to read and digest them before receiving the next chunk.*

After all comments from stakeholders have been returned, review them and make any changes to the documentation as appropriate.

10. Once the project team is satisfied that all policies and procedures are correct and ready for use, package them (e.g. manual, guide, kit etc.) in a way that facilitates their distribution and regular use.

**Tip:** *If you are likely to have more than a few policies and procedures, consider grouping them together into a manual or user's guide. You may want to produce two separate documents – one as an organising tool or central reference for managers of volunteers and the other for volunteers as an information guide or resource kit. The information included in either document should be determined on a 'need-to-know' basis.*

## **CHECKLIST OF POLICIES THAT MAY BE NEEDED**

Consider the following when reviewing what policy statements your organisation needs:

- Assigning management responsibility and resources to all aspects of coordinating or managing volunteers, including the development and maintenance of volunteer policies and operating procedures
- Overview policy for volunteer involvement
- Recruiting and selecting
- Support and development
- Monitoring the work and the workplace of volunteers
- Transitioning and exiting volunteers, including for re-engaging volunteers after a period of inactivity
- Volunteer recognition
- Continuously improving the way the organisation manages volunteer involvement

Check the following lists to determine whether the organisation needs any specific or supplementary policies that guide the way it operates in the areas listed above:

### **Leadership and management responsibilities**

- Compliance with the National Standards for Volunteer Involvement
- Authority and responsibility for leadership and management of volunteer involvement
- Risk management
- Social and legal responsibilities to the community
- Management system review and evaluation
- Training and development in managing volunteer involvement
- Volunteer policy and procedure development, review and evaluation
- Developing and maintaining volunteer documents and records

### **Volunteer involvement**

- Purpose and planning of volunteer involvement
- Resource commitment
- Roles of volunteers

### **Recruiting and selecting**

- Legal requirements to be met (e.g. equal opportunity, non-discrimination)
- Conducting screening (such as police and working with children checks)
- Volunteer interviews and selection
- Volunteer induction and orientation

### **Support and development**

- Orientation for new volunteers
- Training and development opportunities available
- Work performance supervision and support
- Planning, monitoring and reviewing the way volunteers deliver their services

**Work and the workplace**

- The job roles of volunteers
- Managing work satisfaction and handling volunteer grievances
- Volunteer workplace health and safety
- Volunteer insurance for personal injury and liability

**Transitioning, exiting and re-engaging volunteers**

- Legal requirements to be met
- Return of organisational property
- Exit interviews/survey requirements and purpose
- Timeframes and requirements involved for reassignment or re-application

**Volunteer recognition**

- Feedback to volunteers
- Formal recognition and acknowledgement

**Continuous improvement**

- Collecting and analysing data
- Improving the quality of the management system for volunteer involvement



## **STEP 9**

### **Implement the policies and procedures**

*To successfully implement the management system for volunteer involvement you will need to get the cooperation from all concerned. Volunteers, their supervisors and any other personnel involved will all need to understand the reasons for implementing any new system or revisions to an old system, and be convinced of its benefits.*

#### **Tasks**

1. Establish a plan and timetable for releasing and implementing the documented policies and procedures.
2. Circulate the policy and procedure documentation on a 'need-to-know' basis in the form agreed to in Step 8 task 10. Where appropriate, include instructions so that volunteers and others understand how and when the new policies and procedures are to commence. In setting the formal commencement date, allow sufficient lead up time to complete task 3 below.

Establish a record of when, where and to whom the documentation has been circulated.

**Tip:** *If you produce two sets of documentation e.g. a manual and an information kit, establish a separate distribution list for each. Include a column for the document's number if you want to control the distribution by numbering each document and keeping track of its location.*

3. Arrange and conduct briefing sessions to reinforce awareness of the system for managing volunteer involvement and obtain cooperation from all concerned. This may include starting with the lead people, such as senior management, and progressing to volunteers and others at all levels of the organisation.
4. Review the policies and procedures for their effectiveness after a suitable implementation period (e.g. two or three weeks). Distribute a form that makes it easy for stakeholders to give feedback and report any problems or observations.

**Tip:** *If a policy or procedure is not being adhered to for whatever reason, take appropriate action (e.g. retraining, awareness, education) to rectify the matter.*

5. Get the project team to evaluate the project's outcomes to see what was learned, where improvements can be made and what can contribute to the ongoing success of the volunteer management system.

## STEP 10

### Maintain the System

Meeting the National Standards is an on-going process. It doesn't end when you have completed the gap assessment and implemented changes to your system for managing volunteer involvement. Regular checks should be carried out along with continuous incremental improvements.

#### Tasks

1. Bring the project to a close and formally disband the project management team. Thank the team members and other stakeholders for their contributions. Prepare a final project report for senior management and include the names of team members and their specific contributions.
2. If not already done so, get senior management to assign a suitable person to be responsible for day-to-day maintenance of the system for managing volunteer involvement.

**Tip:** *In a large organisation with many volunteers, this role might be assigned to a full-time manager of volunteers. In a smaller organisation the role might be part of one person's job or it may even be a volunteer role in an organisation that is entirely volunteer-based. Whatever the case, such responsibility should normally be assigned 'managerial' status within the organisation, and be reflected in the person's job description.*

3. Large organisations should consider establishing a standards maintenance team that meets on a regular and 'as needed' basis to address any major system deficiencies as they arise.

**Tip:** *It would be an advantage if members of the disbanded project management team were to undertake this role as team members have a sound knowledge of the requirements of National Standards, know how to satisfy them and are experienced in working together as problem-solvers.*

4. When a real or potential problem in the system for managing volunteer involvement is identified, take either corrective or preventative actions to address it. It is a good idea to keep a written record of the details of any problems and the action taken, and to take appropriate measures to eliminate their root causes.
5. Plan and carry out regular checks ('surveillance' audits) of the management system to determine the system's effectiveness in meeting stated objectives and in maintaining compliance with the National Standards.

**Tip:** *Ideally, such audits should be conducted either by a qualified person external to the organisation or a competent internal person independent of the areas being audited.*

6. Recognise and celebrate achievements at each step of the process.

---

THE NATIONAL STANDARDS FOR  
VOLUNTEER INVOLVEMENT

# **PART 2: STANDARDS WORKBOOK**

## National Standards Gap Assessment

		Met	Partially Met	Not Met
<b>Standard 1: Leadership and Management</b>				
1.1	Responsibilities for leading and managing volunteer involvement are defined and supported.			
1.2	Policies and procedures applying to volunteers are communicated, understood, and implemented by all relevant staff across the organisation.			
1.3	The organisation's risk management processes are applied to the organisation's volunteer involvement.			
1.4	Volunteer involvement records are maintained.			
1.5	Processes are in place to manage relationships with partner agencies in collaborative volunteer activities. <i>(This criteria only applies to organisations working with other organisations in a collaborative activity involving volunteers and/or sharing responsibility for particular volunteers).</i>			
<b>Standard 2: Commitment to Volunteer Involvement</b>				
2.1	The organisation publicly declares its intent, purpose and commitment to involving volunteers.			
2.2	Volunteer involvement is planned and designed to contribute directly to the organisation's purpose, goals and objectives.			
2.3	Resources (including time, funds, equipment and technology) are allocated for volunteer involvement.			
<b>Standard 3: Volunteer Roles</b>				
3.1	Volunteer roles are designed to contribute to the organisation's purpose, goals and objectives.			
3.2	Volunteer roles are appropriate for the community, service user or stakeholder groups with which the organisation works.			
3.3	Volunteer roles are defined, documented and communicated.			
3.4	Volunteer roles are reviewed with input from volunteers and employees.			
<b>Standard 4: Recruitment and Selection</b>				
4.1	If the organisation recruits volunteers, it uses planned approaches to attract volunteers with relevant interests, knowledge, skills or attributes.			
4.2	Potential volunteers are provided with relevant information about the organisation, the volunteer role and the recruitment and selection process.			
4.3	Volunteers are selected based on interest, knowledge, skills or attributes relevant to the role, and consistent with anti-discrimination legislation.			
4.4	Screening processes are applied to volunteer roles that help maintain the safety and security of service users, employees, volunteers and the organisation.			

**National Standards Gap Assessment**

		Met	Partially Met	Not Met
<b>Standard 5: Support and Development</b>				
5.1	Volunteers are provided with orientation relevant to their role and responsibility.			
5.2	Volunteers' knowledge and skills are reviewed to identify support and development needs.			
5.3	Volunteers' knowledge and skill needs relevant to their roles are identified, and training and development opportunities are provided to meet these needs.			
5.4	Volunteers are provided with supervision and support that enables them to undertake their roles and responsibilities.			
5.5	Changes to the involvement of a volunteer are undertaken fairly and consistently.			
<b>Standard 6: Workplace Safety and Wellbeing</b>				
6.1	Effective working relationships with employees, and between volunteers, are facilitated by the organisation.			
6.2	Processes are in place to protect the health and safety of volunteers in their capacity as volunteers.			
6.3	Volunteers have access to complaints and grievance procedures.			
<b>Standard 7: Volunteer Recognition</b>				
7.1	The governing body and employees understand how volunteers benefit the organisation, service users and the community.			
7.2	Volunteers are informed about how their contributions benefit the organisation, service users and the community.			
7.3	The organisation regularly acknowledges contributions made by volunteers and the positive impact on the organisation, service users and the community.			
7.4	Volunteer acknowledgement is appropriate to the volunteer role and respectful of cultural values and perspectives.			
<b>Standard 8: Quality Management and Continuous Improvement</b>				
8.1	Policies and procedures are implemented to effectively guide all aspects of volunteer involvement.			
8.2	Volunteer involvement is regularly reviewed in line with the organisation's evaluation and quality management frameworks.			
8.3	The organisation's performance with volunteer involvement is monitored and reported to the governing body, employees, volunteers and stakeholders.			
8.4	Opportunities are available for volunteers to provide feedback on the organisation's volunteer involvement and relevant areas of the organisation's work.			

## STANDARD 1: LEADERSHIP AND MANAGEMENT

### The governing body and senior employees lead and promote a positive culture towards volunteering and implement effective management systems to support volunteer involvement.

Effective leadership ensures the aims and values of volunteer involvement are promoted within the organisation, and that there is clear accountability for the implementation of volunteer involvement.

Effective management ensures that processes and systems are in place to implement positive volunteer involvement.

Meeting this standard assists the organisation to provide clear direction and guidance for the work of volunteers, as well as understand and mitigate any risks related to involving volunteers.

Criteria 1.1 Responsibilities for leading and managing volunteer involvement are defined and supported.					
Organisation's rating	Met	Partially Met	Not Met		
Evidence guide	Organisation's evidence	Gaps identified	Action	Who	When
<ul style="list-style-type: none"> <li>Specific responsibility for providing leadership and managing the implementation of volunteer involvement is assigned.</li> <li>Volunteer involvement responsibilities are documented through position descriptions, delegation authorities, policies and procedures.</li> <li>Employees and governing body members understand and action their volunteer involvement responsibilities.</li> <li>Employees with direct responsibility for volunteer involvement have relevant qualifications, skills or experience for the role.</li> </ul>					
<b>Evidence examples (These are examples only and not applicable to all organisations)</b> <ul style="list-style-type: none"> <li>Delegations chart</li> <li>Employee and volunteer position descriptions</li> <li>Documents that guide governance practice identify processes for leading and managing volunteer involvement</li> <li>Human resources policies and procedures specifically address volunteer involvement responsibilities</li> <li>Specific stand-alone volunteer involvement policies and procedures</li> <li>Processes for informing employees and volunteers of volunteer involvement responsibilities</li> <li>Processes for assessing employees' capacity to lead and/or manage volunteer involvement</li> </ul>					

Criteria 1.2 Policies and procedures applying to volunteers are communicated, understood, and implemented by all relevant staff across the organisation.					
Organisation's rating	<input type="checkbox"/> Met	<input type="checkbox"/> Partially Met	<input type="checkbox"/> Not Met		
Evidence guide	Organisation's evidence	Gaps identified	Action	Who	When
<ul style="list-style-type: none"> <li>o Employees, governing body members and volunteers receive information, orientation and training on the organisation's volunteer policies and procedures.</li> <li>o Compliance with volunteer policies and procedures is regularly monitored and improved.</li> </ul>					
<b>Evidence examples (These are examples only and not applicable to all organisations)</b> <ul style="list-style-type: none"> <li>- Documented processes for employee, governing body and volunteer orientation to volunteering policies and procedures</li> <li>- Records of volunteer policy and procedure compliance monitoring and review</li> <li>- Quality improvement action plans identifying compliance improvement strategies</li> <li>- Employee and volunteer performance reviews addressing compliance with volunteer policies and procedures</li> <li>- Processes for volunteer access to policies and procedures</li> </ul>					

<b>Criteria 1.3</b>		<b>The organisation's risk management processes are applied to the organisation's volunteer involvement.</b>		
<b>Organisation's rating</b>	<input type="checkbox"/> Met	<input type="checkbox"/> Partially Met	<input type="checkbox"/> Not Met	
<b>Evidence guide</b>	<b>Organisation's evidence</b>	<b>Gaps identified</b>	<b>Action</b>	<b>Who</b>
<ul style="list-style-type: none"> <li>o Risk management systems are in place to identify, assess and respond to risks relating to volunteer involvement.</li> <li>o Volunteer risk management is overseen by management and the governing body.</li> <li>o Volunteers are informed of potential risks and are supported to manage or mitigate risk factors.</li> </ul>				
<p><b>Evidence examples (These are examples only and not applicable to all organisations)</b></p> <ul style="list-style-type: none"> <li>- General risk management policies and procedures</li> <li>- Volunteer risk management policies and procedures</li> <li>- Risk register / records</li> <li>- Identification and documented strategies for managing specific volunteers risks</li> <li>- Delegations chart identifying volunteer risk management responsibilities</li> <li>- Information given to volunteers regarding risks, including through orientation, training, communications (newsletters, emails)</li> <li>- Training and development provided to volunteers to support them managing risks</li> </ul>				



Criteria 1.4		Volunteer involvement records are maintained.			
Organisation's rating	<input type="checkbox"/> Met	<input type="checkbox"/> Partially Met	<input type="checkbox"/> Not Met		
Evidence guide	Organisation's evidence	Gaps identified	Action	Who	When
<ul style="list-style-type: none"> <li>o Required information to be collected from volunteers is identified.</li> <li>o Information from screening checks for volunteers are documented and kept secured.</li> <li>o The organisation has documented and implemented processes that comply with privacy legislation for securely managing volunteer personal and confidential information.</li> <li>o Records of volunteer contribution, achievements and acknowledgement are maintained by the organisation.</li> </ul>					
<p><b>Evidence examples (These are examples only and not applicable to all organisations)</b></p> <ul style="list-style-type: none"> <li>- Privacy policies and procedures</li> <li>- Human resources policies and procedures</li> <li>- Volunteer policies and procedures</li> <li>- Volunteer recruitment records</li> <li>- Volunteer personnel files and storage</li> <li>- Organisation documents and promotional materials recognising volunteers</li> <li>- Reports of volunteer contribution and achievements</li> <li>- Systems for managing records that enable volunteer specific data collection and reporting</li> <li>- Testimonials from service recipients</li> </ul>					

<b>Criteria 1.5</b> <b>Processes are in place to manage relationships with partner agencies in collaborative volunteer activities.</b> <i>(This criteria only applies to organisations working with other organisations in a collaborative activity involving volunteers and/or sharing responsibility for particular volunteers).</i>		<input type="checkbox"/> Met	<input type="checkbox"/> Partially Met	<input type="checkbox"/> Not Met	
Organisation's rating					
Evidence guide	Organisation's evidence	Gaps identified	Action	Who	When
<ul style="list-style-type: none"> <li>o Agreed frameworks and practice principles for co-design of volunteer involvement are documented.</li> <li>o Expectations of volunteers and agreements about respective roles of the parties are documented.</li> <li>o Procedures for evaluating progress and outcomes are documented.</li> <li>o Arrangements and agreements are reviewed on a regular basis.</li> </ul>					
<b>Evidence examples (These are examples only and not applicable to all organisations)</b> <ul style="list-style-type: none"> <li>- Volunteer policies and procedures</li> <li>- Partnership / collaboration policies and procedures</li> <li>- Partnership agreements / contracts / memorandum of understanding</li> <li>- Examples or evaluation reports of progress towards goals</li> <li>- Testimonials from partner organisation participants</li> </ul>					

## STANDARD 2: COMMITMENT TO VOLUNTEER INVOLVEMENT

**Commitment to volunteer involvement is set out through vision, planning and resourcing, and supports the organisation's strategic direction.**

Setting out its commitment to volunteer involvement ensures that the organisation has a clear idea of why it is involving volunteers, the values and principles it will apply in its work with volunteers, and how the involvement of volunteers will enhance and support the work of the organisation.

Meeting this standard assists the organisation to approach the involvement of volunteers in a planned manner, making sure that resources are allocated and that it is accountable for the way it works with volunteers.

<b>Criteria 2.1</b>						
<b>Organisation's rating</b>		<b>The organisation publicly declares its intent, purpose and commitment to involving volunteers.</b>				
		<input type="checkbox"/> Met	<input type="checkbox"/> Partially Met	<input type="checkbox"/> Not Met		
<b>Evidence guide</b>	<b>Organisation's evidence</b>	<b>Gaps identified</b>	<b>Action</b>	<b>Who</b>	<b>When</b>	
<ul style="list-style-type: none"> <li>o A formal statement, endorsed by the governing body, articulates the organisation's philosophy, direction and broad objectives for involving volunteers.</li> <li>o The benefits to the work of the organisation of involving volunteers is recognised through its planning processes and documents.</li> <li>o The organisation's commitment to volunteer involvement complies with legislation, industry standards, guidelines and codes of practice.</li> </ul>						
<p><b>Evidence examples (These are examples only and not applicable to all organisations)</b></p> <ul style="list-style-type: none"> <li>- Volunteer policies and procedures</li> <li>- Documented volunteer objectives and plans endorsed by governing body</li> <li>- Documented role of volunteers in organisation values, plans and strategies endorsed by governing body</li> <li>- Identification of legal and good practice relating to volunteer involvement</li> <li>- Evaluation reports include volunteer outcomes or impact summary</li> </ul>						

<b>Criteria 2.2</b>		<b>Volunteer involvement is planned and designed to contribute directly to the organisation's purpose, goals and objectives.</b>		
<b>Organisation's rating</b>	<input type="checkbox"/> Met	<input type="checkbox"/> Partially Met	<input type="checkbox"/> Not Met	
<b>Evidence guide</b>	<b>Organisation's evidence</b>	<b>Gaps identified</b>	<b>Action</b>	<b>Who</b>
<ul style="list-style-type: none"> <li>o The organisation's broader planning processes incorporate volunteer involvement.</li> <li>o Volunteer involvement planning identifies strategies for recruitment, recognition, management and development of volunteers.</li> <li>o Proposed volunteer involvement is assessed to ensure appropriateness and benefit.</li> <li>o Volunteer involvement plans align to the organisation's purpose, goals and objectives and volunteer activity contributes directly to these.</li> <li>o The organisation is open to opportunities for collaborating with other agencies in involving volunteers.</li> </ul>				
<p><b>Evidence examples (These are examples only and not applicable to all organisations)</b></p> <ul style="list-style-type: none"> <li>- Resource plans for volunteer involvement – budgets, human resources, goods and equipment, time, etc.</li> <li>- Documented role of volunteers in organisation plans and strategies</li> <li>- Volunteer plans and strategies which align with organisation plans and strategies</li> <li>- Records from organisation planning events or focus groups involving volunteers</li> <li>- Assessments of planned and completed volunteer involvement identifying contribution to organisation achievement</li> <li>- Formal and informal partnerships / collaborations with other agencies for volunteer involvement</li> <li>- Volunteer testimonials</li> </ul>				

<b>Criteria 2.3</b>		<b>Resources (including time, funds, equipment and technology) are allocated for volunteer involvement.</b>		
<b>Organisation's rating</b>	<input type="checkbox"/> Met	<input type="checkbox"/> Partially Met	<input type="checkbox"/> Not Met	
<b>Evidence guide</b>	<b>Organisation's evidence</b>	<b>Gaps identified</b>	<b>Action</b>	<b>Who</b>
<ul style="list-style-type: none"> <li>o An adequate budget is allocated and used for volunteer involvement planning, operations and review.</li> <li>o Volunteer involvement costings inform volunteer budgeting</li> <li>o The governing body, employees and volunteers dedicate time to plan, discuss and manage volunteer involvement.</li> <li>o Equipment, materials, communication technology and space are provided which support volunteers to undertake their roles.</li> <li>o A policy and procedure exists for reimbursement for volunteer out of pocket expenses.</li> <li>o Staff with volunteer involvement responsibilities are provided with training, supervision and resources to effectively undertake this role.</li> </ul>				
<p><b>Evidence examples (These are examples only and not applicable to all organisations)</b></p> <ul style="list-style-type: none"> <li>- Current and previous operations budget allocating resources for volunteer involvement</li> <li>- Organisation financial plans and cost codes differentiate volunteer from paid employee costs</li> <li>- Schedule and record of governing body, employees and volunteer meetings for managing volunteer involvement</li> <li>- Governing body, staff and organisation meeting agendas and minutes with time allocated for volunteer management</li> <li>- Available volunteer involvement resources</li> <li>- Volunteer policies and procedures</li> <li>- Records of staff orientation, training, and performance development for volunteer management</li> </ul>				

## STANDARD 3: VOLUNTEER ROLES

**Volunteers are engaged in meaningful and appropriate roles which contribute to the organisation's purpose, goals and objectives.**

Volunteer roles ensure that the work done by volunteers is defined, and that it meets both the needs of the volunteer and the objectives of the organisation.

Meeting this standard assists the organisation to match volunteers with appropriate work roles, provide relevant and satisfying activities for volunteers and ensure that involvement of volunteers contributes to the organisation.

<b>Criteria 3.1</b>		<b>Volunteer roles are designed to contribute to the organisation's purpose, goals and objectives.</b>			
<b>Organisation's rating</b>	<input type="checkbox"/> Met	<input type="checkbox"/> Partially Met	<input type="checkbox"/> Not Met		
<b>Evidence guide</b>	<b>Organisation's evidence</b>	<b>Gaps identified</b>	<b>Action</b>	<b>Who</b>	<b>When</b>
<ul style="list-style-type: none"> <li>Descriptions of volunteer roles indicate how the role contributes to the organisation's purpose, goals and objectives. Staff with volunteer involvement responsibilities are provided with training, supervision and resources to effectively undertake this role.</li> </ul>					
<p><b>Evidence examples (These are examples only and not applicable to all organisations)</b></p> <ul style="list-style-type: none"> <li>Volunteer position descriptions</li> <li>Documented role of volunteers in organisation plans and strategies</li> <li>Volunteer plans and strategies which align with organisation plans and strategies</li> </ul>					

Criteria 3.2					
Volunteer roles are appropriate for the community, service user or stakeholder groups with which the organisation works.					
Organisation's rating	<input type="checkbox"/> Met	<input type="checkbox"/> Partially Met	<input type="checkbox"/> Not Met		
Evidence guide	Organisation's evidence	Gaps identified	Action	Who	When
<ul style="list-style-type: none"> <li>o Volunteer roles reflect current developments in volunteering, volunteer availability and ways of involving volunteers.</li> <li>o Volunteer roles and activities are designed to attract people with relevant attributes, and a diversity of experience and interest.</li> </ul>					
<p><b>Evidence examples (These are examples only and not applicable to all organisations)</b></p> <ul style="list-style-type: none"> <li>- Volunteer position descriptions</li> <li>- Volunteer policies, procedures and practice address all forms of diversity including cultural background, age, ability, and gender</li> <li>- Variety of volunteer involvement strategies, roles and activities</li> <li>- Assessments of the organisation's community, service users and stakeholders, and their needs</li> <li>- Volunteer involvement practice meets the needs of volunteers</li> </ul>					

<b>Criteria 3.3</b>		<b>Volunteer roles are defined, documented and communicated.</b>			
<b>Organisation's rating</b>	<input type="checkbox"/> Met	<input type="checkbox"/> Partially Met	<input type="checkbox"/> Not Met		
<b>Evidence guide</b>	<b>Organisation's evidence</b>	<b>Gaps identified</b>	<b>Action</b>	<b>Who</b>	<b>When</b>
<ul style="list-style-type: none"> <li>o The relationship between volunteer and employee roles is defined.</li> <li>o Volunteer roles meet the requirements of the <i>Fair Work Act</i>, or subsequent legislation addressing volunteer work.</li> <li>o Volunteer roles have written descriptions that include duties, responsibilities, and accountabilities.</li> <li>o Current volunteer role descriptions are distributed and readily available to all relevant employees and volunteers of the organisation.</li> </ul>					
<p><b>Evidence examples (These are examples only and not applicable to all organisations)</b></p> <ul style="list-style-type: none"> <li>- <i>Volunteer policies and procedures</i></li> <li>- <i>Human resources policies and procedures</i></li> <li>- <i>Documentation and availability of volunteer and staff position descriptions</i></li> </ul>					



Criteria 3.4 Volunteer roles are reviewed with input from volunteers and employees.					
Organisation's rating	<input type="checkbox"/> Met	<input type="checkbox"/> Partially Met	<input type="checkbox"/> Not Met		
Evidence guide	Organisation's evidence	Gaps identified	Action	Who	When
<ul style="list-style-type: none"> <li>o Feedback from current and exiting volunteers is sought and used to review the relevance and appropriateness of volunteer roles and activities.</li> <li>o The governing body, management and staff contribute to the development and review of volunteer roles.</li> </ul>					
<p><b>Evidence examples (These are examples only and not applicable to all organisations)</b></p> <ul style="list-style-type: none"> <li>- Schedule of feedback, consultation and review activities regarding volunteer roles</li> <li>- Reports from feedback received from governing body members, volunteers and staff regarding volunteer roles</li> <li>- Reports from review / evaluation of volunteer roles and involvement</li> <li>- Record of volunteer role change and development over time</li> <li>- Volunteer role development plans</li> </ul>					

## STANDARD 4: RECRUITMENT AND SELECTION

**Volunteer recruitment and selection strategies are planned, consistent and meet the needs of the organisation and volunteers.**

Recruitment and selection ensures that the organisation is effective in attracting appropriate volunteers and in screening to maintain safety and security.

Meeting this standard helps the organisations ensure prospective volunteers are provided with information to make informed decisions about working with the organisation and to implement consistent procedures for assessing, selecting and placing new volunteers.

<b>Criteria 4.1</b>				
<b>If the organisation recruits volunteers, it uses planned approaches to attract volunteers with relevant interests, knowledge, skills or attributes.</b>				
<b>Organisation's rating</b>	<input type="checkbox"/> Met	<input type="checkbox"/> Partially Met	<input type="checkbox"/> Not Met	
<b>Evidence guide</b>	<b>Organisation's evidence</b>	<b>Gaps identified</b>	<b>Action</b>	<b>Who</b>
<ul style="list-style-type: none"> <li>o Recruitment and selection of volunteers is guided by the organisation's broader plan for volunteer involvement.</li> <li>o Targeted methods are used to advertise and communicate volunteer opportunities.</li> </ul>				
<p><b>Evidence examples (These are examples only and not applicable to all organisations)</b></p> <ul style="list-style-type: none"> <li>- Volunteer recruitment plans</li> <li>- Volunteer recruitment policies and procedures</li> <li>- Advertising and communications of volunteering opportunities</li> <li>- Records from volunteer recruitment activities</li> </ul>				

<b>Criteria 4.2</b>		<b>Potential volunteers are provided with relevant information about the organisation, the volunteer role and the recruitment and selection process.</b>		
<b>Organisation's rating</b>	<input type="checkbox"/> Met	<input type="checkbox"/> Partially Met	<input type="checkbox"/> Not Met	
<b>Evidence guide</b>	<b>Organisation's evidence</b>	<b>Gaps identified</b>	<b>Action</b>	<b>Who</b>
<ul style="list-style-type: none"> <li>o Information is readily accessible to potential volunteers about the organisation and volunteer roles.</li> <li>o Details of volunteer roles, organisation expectations of the role, and the recruitment and selection process are provided in print, electronically and/or face-to-face.</li> <li>o An identified person is available as a contact for potential volunteers throughout the recruitment and selection process.</li> <li>o Volunteer applicants are informed of recruitment and selection outcomes and offered feedback, as relevant to the role.</li> </ul>				
<p><b>Evidence examples (These are examples only and not applicable to all organisations)</b></p> <ul style="list-style-type: none"> <li>- Volunteer recruitment policies and procedures</li> <li>- Volunteer position information pack in a range of formats</li> <li>- Publicly available volunteer involvement and organisation information</li> <li>- Records from volunteer recruitment activities</li> <li>- Records from volunteer communication activities</li> </ul>				

<b>Criteria 4.3</b>		<b>Volunteers are selected based on interest, knowledge, skills or attributes relevant to the role, and consistent with anti-discrimination legislation.</b>			
<b>Organisation's rating</b>	<input type="checkbox"/> Met	<input type="checkbox"/> Partially Met	<input type="checkbox"/> Not Met		
<b>Evidence guide</b>	<b>Organisation's evidence</b>	<b>Gaps identified</b>	<b>Action</b>	<b>Who</b>	<b>When</b>
<ul style="list-style-type: none"> <li>o A documented selection process is followed to match volunteer interest, knowledge, skills or attributes with suitable roles.</li> <li>o Volunteer recruitment and selection complies with anti-discrimination legislation.</li> </ul>					
<p><b>Evidence examples (These are examples only and not applicable to all organisations)</b></p> <ul style="list-style-type: none"> <li>- Documentation of volunteer position knowledge and skill requirements</li> <li>- Documentation of volunteers' interest, knowledge, skills and attributes through recruitment processes</li> <li>- Volunteer recruitment policies and procedures</li> <li>- Records from volunteer recruitment activities</li> <li>- Anti-discrimination policies and procedures</li> </ul>					

Criteria 4.4		Screening processes are applied to volunteer roles that help maintain the safety and security of service users, employees, volunteers and the organisation.				
Organisation's rating	<input type="checkbox"/>	Met	<input type="checkbox"/>	Partially Met	<input type="checkbox"/>	Not Met
Evidence guide	Organisation's evidence	Gaps identified	Action	Who	When	
<ul style="list-style-type: none"> <li>o Volunteer screening requirements are documented, applied and meet legislative requirements.</li> <li>o Volunteer reference checks are undertaken as appropriate to the role.</li> <li>o Guidelines are applied to determining the types of convictions or disciplinary actions that preclude people from becoming volunteers, and to informing people about how their personal history may be used for decision making.</li> </ul>						
<p><b>Evidence examples (These are examples only and not applicable to all organisations)</b></p> <ul style="list-style-type: none"> <li>- Volunteer recruitment policies and procedures</li> <li>- Records from volunteer recruitment activities</li> <li>- Volunteer position information pack</li> <li>- Guidelines for screening, responding to and managing volunteers' convictions and/or disciplinary actions</li> </ul>						

## STANDARD 5: SUPPORT AND DEVELOPMENT

**Volunteers understand their roles and gain knowledge, skills and feedback needed to safely and effectively carry out their duties.**

Support and development ensures that the organisation has processes to equip volunteers to perform their roles well and in line with the organisation's needs.

Meeting this standard assists the organisation to identify and provide orientation, skill development and ongoing support needed by volunteers, and to manage situations fairly and consistently where a volunteer may not be meeting the requirements of their role.

<b>Criteria 5.1</b> <b>Volunteers are provided with orientation relevant to their role and responsibility.</b>				
<b>Organisation's rating</b>	<input type="checkbox"/> <b>Met</b>	<input type="checkbox"/> <b>Partially Met</b>	<input type="checkbox"/> <b>Not Met</b>	
<b>Evidence guide</b>	<b>Organisation's evidence</b>	<b>Gaps identified</b>	<b>Action</b>	<b>Who</b>
<ul style="list-style-type: none"> <li>Orientation requirements for all volunteer roles are documented and implemented.</li> <li>Volunteer orientation includes information about the organisation, their role and how it contributes to organisation's goals and objectives.</li> <li>Volunteers are made aware of their rights and responsibilities related to the role and to the organisation.</li> <li>Volunteers understand and agree to a code of conduct and/or rights and responsibilities statement.</li> <li>Relevant policies, such as reimbursement of out of pocket expenses, are explained to volunteers.</li> </ul>				
<p><b>Evidence examples (These are examples only and not applicable to all organisations)</b></p> <ul style="list-style-type: none"> <li>Volunteer recruitment policies and procedures</li> <li>Volunteer orientation plans and schedules</li> <li>Volunteer orientation pack</li> <li>Records from volunteer orientation activities</li> <li>Records of signed volunteer code of conduct and/or rights and responsibilities statements</li> </ul>				

<b>Criteria 5.2</b>		<b>Volunteers' knowledge and skills are reviewed to identify support and development needs.</b>		
<b>Organisation's rating</b>	<input type="checkbox"/> Met	<input type="checkbox"/> Partially Met	<input type="checkbox"/> Not Met	
<b>Evidence guide</b>	<b>Organisation's evidence</b>	<b>Gaps identified</b>	<b>Action</b>	<b>Who</b> <b>When</b>
<ul style="list-style-type: none"> <li>o Processes are in place to regularly review volunteers' knowledge and skills in relation to the roles they undertake.</li> <li>o New roles and development opportunities are offered to existing volunteers where appropriate.</li> <li>o Volunteers' knowledge and skills are reviewed when new roles and duties are implemented.</li> </ul>				
<p><b>Evidence examples (These are examples only and not applicable to all organisations)</b></p> <ul style="list-style-type: none"> <li>- Documentation of volunteers' interest, knowledge, skills and attributes through recruitment processes and throughout their volunteering role</li> <li>- Assessment of volunteer knowledge and skills required for different roles</li> <li>- Records of interviews / consultations with volunteer individuals and/or teams regarding their knowledge and skill needs</li> </ul>				

Criteria 5.3		Volunteers' knowledge and skill needs relevant to their roles are identified, and training and development opportunities are provided to meet these needs.		
Organisation's rating	<input type="checkbox"/> Met	<input type="checkbox"/> Partially Met	<input type="checkbox"/> Not Met	
Evidence guide	Organisation's evidence	Gaps identified	Action	Who
<ul style="list-style-type: none"> <li>o The organisation's workforce development planning incorporates the needs of volunteers.</li> <li>o Where appropriate, volunteers receive practical instruction on how to perform their roles and responsibilities safely and effectively.</li> <li>o Relevant training and development opportunities are offered to volunteers to meet their knowledge and skill needs for the roles they undertake.</li> </ul>				
<b>Evidence examples (These are examples only and not applicable to all organisations)</b> <ul style="list-style-type: none"> <li>- Workforce development plans</li> <li>- Schedule of workforce, and specific volunteer, development activities</li> <li>- Records of volunteer orientation, training, mentoring and other development activities</li> </ul>				



<b>Criteria 5.4</b>		<b>Volunteers are provided with supervision and support that enables them to undertake their roles and responsibilities.</b>		
<b>Organisation's rating</b>	<input type="checkbox"/> Met	<input type="checkbox"/> Partially Met	<input type="checkbox"/> Not Met	
<b>Evidence guide</b>	<b>Organisation's evidence</b>	<b>Gaps identified</b>	<b>Action</b>	<b>Who</b>
<ul style="list-style-type: none"> <li>o Volunteers are assigned organisation supervisors and support contacts appropriate to their role.</li> <li>o Volunteer supervision and review is conducted for individual and/or teams of volunteers, matched to the roles.</li> <li>o Discussions are held with individual and/or teams of volunteers on achievements and areas for development.</li> </ul>				
<p><b>Evidence examples (These are examples only and not applicable to all organisations)</b></p> <ul style="list-style-type: none"> <li>- Delegations chart</li> <li>- Staff position descriptions</li> <li>- Volunteer personnel files</li> <li>- Schedule of volunteer supervision and development activities</li> <li>- Records of volunteer supervision and development meetings and activities</li> </ul>				

Criteria 5.5		Changes to the involvement of a volunteer are undertaken fairly and consistently.			<input type="checkbox"/> Met <input type="checkbox"/> Partially Met <input type="checkbox"/> Not Met	
Organisation's rating						
Evidence guide	Organisation's evidence	Gaps identified	Action	Who	When	
<ul style="list-style-type: none"> <li>o Fair and transparent procedures are in place for changing the role or nature of the involvement of a volunteer.</li> <li>o Fair and transparent procedures are in place for ending the involvement of a volunteer, for whatever reason.</li> <li>o Volunteer performance or misconduct issues are promptly identified, recorded and addressed in line with principles of natural justice.</li> </ul>						
<p><b>Evidence examples (These are examples only and not applicable to all organisations)</b></p> <ul style="list-style-type: none"> <li>- Human resources policies and procedures</li> <li>- Volunteer policies and procedures</li> <li>- Volunteer exit procedures</li> <li>- Records of processes undertaken from changing or ending volunteer roles</li> <li>- Examples of how volunteer roles are promoted internally and externally</li> <li>- Volunteer code of conduct</li> <li>- Records of processes undertaken to address volunteer poor performance or misconduct</li> <li>- Volunteer personnel files</li> </ul>						

## STANDARD 6: WORKPLACE SAFETY AND WELLBEING

### The health, safety and wellbeing of volunteers is protected in the workplace.

Workplace safety and wellbeing ensures that the organisation includes volunteers in its health and safety procedures, and recognises its duty of care to volunteers.

Meeting this standard assists the organisation to meet its obligations for the health and safety of volunteers, manage risk and provide a supportive and responsive workplace for volunteers.

Criteria 6.1 Effective working relationships with employees, and between volunteers, are facilitated by the organisation.					
Organisation's rating	<input type="checkbox"/> Met	<input type="checkbox"/> Partially Met	<input type="checkbox"/> Not Met		
Evidence guide	Organisation's evidence	Gaps identified	Action	Who	When
<ul style="list-style-type: none"> <li>o Structured processes are in place for relevant staff to communicate and/or meet with volunteers.</li> <li>o Where requested, volunteers are provided with opportunities and resources to meet collectively regarding their work with the organisation.</li> </ul>					
<p><b>Evidence examples (These are examples only and not applicable to all organisations)</b></p> <ul style="list-style-type: none"> <li>- Delegation chart</li> <li>- Staff position descriptions</li> <li>- Schedule of volunteer and staff meetings</li> <li>- Records from volunteer team meetings</li> <li>- Records from volunteer and staff meetings</li> </ul>					

<b>Criteria 6.2</b>		<b>Processes are in place to protect the health and safety of volunteers in their capacity as volunteers.</b>		
<b>Organisation's rating</b>	<input type="checkbox"/> Met	<input type="checkbox"/> Partially Met	<input type="checkbox"/> Not Met	
<b>Evidence guide</b>	<b>Organisation's evidence</b>	<b>Gaps identified</b>	<b>Action</b>	<b>Who</b>
<ul style="list-style-type: none"> <li>o Health and safety management policies and procedures include volunteers.</li> <li>o Volunteers are insured for personal injury and liability.</li> <li>o Volunteers have access to the same post-incident debriefing and support provided to employees.</li> <li>o Expectations and limits of volunteer roles, including time commitments and any designated hours are agreed with volunteers, and individual workloads of volunteers are monitored and managed.</li> </ul>				
<p><b>Evidence examples (These are examples only and not applicable to all organisations)</b></p> <ul style="list-style-type: none"> <li>- Workplace health and safety policies and procedures</li> <li>- Records of workplace health and safety orientation, information provision and training for volunteers</li> <li>- Insurance policies covering volunteers and volunteers' work</li> <li>- Employee and volunteer incident debriefing and support procedures</li> <li>- Records of incident debriefing and support activities</li> <li>- Reports of proactive management of stress or other negative health impacts where required</li> </ul>				

<b>Criteria 6.3</b>		<b>Volunteers have access to complaints and grievance procedures.</b>		
<b>Organisation's rating</b>	<input type="checkbox"/> Met	<input type="checkbox"/> Partially Met	<input type="checkbox"/> Not Met	
<b>Evidence guide</b>	<b>Organisation's evidence</b>	<b>Gaps identified</b>	<b>Action</b>	<b>Who</b>
<ul style="list-style-type: none"> <li>o Volunteers are given information about how to make a complaint or raise a concern within the organisation and to relevant external bodies.</li> <li>o Grievances from volunteers are managed consistently, transparently, equitably and in line with principles of natural justice.</li> </ul>				
<p><b>Evidence examples (These are examples only and not applicable to all organisations)</b></p> <ul style="list-style-type: none"> <li>- <i>Volunteer orientation procedures</i></li> <li>- <i>Volunteer rights and responsibilities</i></li> <li>- <i>Documented procedures for managing concerns and complaints from volunteers</i></li> <li>- <i>Records of concerns, complaints and grievances received from volunteers</i></li> <li>- <i>Records of management of volunteer concerns, complaints and grievances</i></li> </ul>				

## STANDARD 7: VOLUNTEER RECOGNITION

**Volunteer contribution, value and impact is understood, appreciated and acknowledged.**

Volunteer recognition ensures that the organisation understands the contribution made by its volunteers and that it lets them know that this contribution is appreciated.

In assessing the impact of volunteer contribution, the organisation should consider the results of the work performed by volunteers, the value to the organisation, and less tangible benefits such as volunteer contributions to change and innovation.

Meeting this standard assists the organisation to develop and maintain a respectful relationship with its volunteers, ensuring that volunteers are encouraged to actively participate in the business of the organisation, provide feedback and appreciate the way their work benefits the organisation.

<b>Criteria 7.1</b>		<b>The governing body and employees understand how volunteers benefit the organisation, service users and the community.</b>		
<b>Organisation's rating</b>	<input type="checkbox"/> Met	<input type="checkbox"/> Partially Met	<input type="checkbox"/> Not Met	
<b>Evidence guide</b>	<b>Organisation's evidence</b>	<b>Gaps identified</b>	<b>Action</b>	<b>Who</b>
<ul style="list-style-type: none"> <li>o People at all levels of the organisation are informed of, and can articulate, the organisation's reasons and benefits for involving volunteers.</li> <li>o The governing body, employees and volunteers are involved in the evaluation of volunteer involvement.</li> </ul>				
<p><b>Evidence examples (These are examples only and not applicable to all organisations)</b></p> <ul style="list-style-type: none"> <li>- Volunteer policies and procedures</li> <li>- Documented volunteer objectives and plans</li> <li>- Documented role of volunteers in organisation values, plans and strategies</li> <li>- Schedule of volunteer involvement feedback and evaluation activities</li> <li>- Reports from volunteer involvement feedback and evaluation</li> </ul>				

<b>Criteria 7.2</b>		<b>Volunteers are informed about how their contributions benefit the organisation, service users and the community.</b>		
<b>Organisation's rating</b>	<input type="checkbox"/> Met	<input type="checkbox"/> Partially Met	<input type="checkbox"/> Not Met	
<b>Evidence guide</b>	<b>Organisation's evidence</b>	<b>Gaps identified</b>	<b>Action</b>	<b>Who</b>
	<ul style="list-style-type: none"> <li>o Volunteers are informed of the organisation's reasons and benefits for involving volunteers.</li> <li>o Volunteers are provided with feedback on the impact and value of their contribution to the organisation and its work.</li> </ul>			
<p><b>Evidence examples (These are examples only and not applicable to all organisations)</b></p> <ul style="list-style-type: none"> <li>- Volunteer policies and procedures</li> <li>- Volunteer orientation procedures</li> <li>- Documented volunteer objectives and plans</li> <li>- Documented role of volunteers in organisation values, plans and strategies</li> <li>- Communication of reports to volunteers from volunteer involvement feedback and evaluation</li> </ul>				

Criteria 7.3		The organisation regularly acknowledges contributions made by volunteers and the positive impact on the organisation, service users and the community.		
Organisation's rating	<input type="checkbox"/> Met	<input type="checkbox"/> Partially Met	<input type="checkbox"/> Not Met	
Evidence guide	Organisation's evidence	Gaps identified	Action	Who
<ul style="list-style-type: none"> <li>o The organisation plans and schedules activities to acknowledge the contribution, value and impact of volunteers at individual and group level.</li> <li>o References and statements of service are provided to volunteers as appropriate.</li> <li>o The governing body and management take an active role in volunteer acknowledgement</li> </ul>				
<p><b>Evidence examples (These are examples only and not applicable to all organisations)</b></p> <ul style="list-style-type: none"> <li>- Schedule of planned and completed activities acknowledging individual and team volunteer contribution, value and impact</li> <li>- Public documents acknowledging volunteer contribution, value and impact</li> <li>- Human resources policies and procedures</li> <li>- Volunteer policies and procedures</li> <li>- Volunteer reference and service statement templates</li> <li>- Volunteer personnel files</li> <li>- Public recognition of volunteer award recipients</li> </ul>				



Criteria 7.4		Volunteer acknowledgement is appropriate to the volunteer role and respectful of cultural values and perspectives.			
Organisation's rating	<input type="checkbox"/> Met	<input type="checkbox"/> Partially Met	<input type="checkbox"/> Not Met		
Evidence guide	Organisation's evidence	Gaps identified	Action	Who	When
<ul style="list-style-type: none"> <li>o Volunteers are consulted on appropriate acknowledgement.</li> <li>o Volunteer acknowledgement is provided in a variety of formats appropriate to the volunteer role and volunteer.</li> <li>o Activities that acknowledge volunteers align with the volunteer's culture and perspectives.</li> </ul>					
<p><b>Evidence examples (These are examples only and not applicable to all organisations)</b></p> <ul style="list-style-type: none"> <li>- Records of consultation with individual and group volunteers regarding preferred acknowledgement of their contribution</li> <li>- Range of volunteer acknowledgement – events, media, organisation documents, letter</li> </ul>					

## STANDARD 8: QUALITY MANAGEMENT AND CONTINUOUS IMPROVEMENT

### Effective volunteer involvement results from a system of good practice, review and continuous improvement.

Quality management and continuous improvement ensures that the organisation has a way of monitoring how well its involvement of volunteers is working, and of identifying and implementing ways of improving the outcomes for both volunteers and the organisation. This includes monitoring and reviewing:

- o how well volunteer recruitment and management systems are working for volunteers and the organisation;
- o the extent to which volunteer involvement is providing a positive impact on the organisation outcomes;
- o how effectively volunteer time is being used.

Meeting this standard assists the organisation to follow good practice in its policies and procedures, implement processes for review and evaluation, and systematically make ongoing positive change.

Criteria 8.1		Policies and procedures are implemented to effectively guide all aspects of volunteer involvement.		
Organisation's rating	<input type="checkbox"/> Met	<input type="checkbox"/> Partially Met	<input type="checkbox"/> Not Met	
Evidence guide	Organisation's evidence	Gaps identified	Action	Who
<ul style="list-style-type: none"> <li>o Volunteer involvement strategies, policies and procedures are informed by current best practice and meet legislative requirements.</li> <li>o The organisation's policies and procedures effectively guide volunteer involvement practice.</li> <li>o All employees and volunteers are made aware of and understand policies and procedures relating to volunteer involvement.</li> <li>o Volunteer involvement policies and procedures are reviewed and improved on a regular schedule.</li> <li>o Processes are in place for identifying, implementing and communicating required changes to volunteer involvement policies and procedures.</li> </ul>				
<p><b>Evidence examples (These are examples only and not applicable to all organisations)</b></p> <ul style="list-style-type: none"> <li>- Acknowledgement / identification of volunteer involvement best practice</li> <li>- Acknowledgement / identification of legislative requirements relating to volunteer involvement</li> <li>- Current and previous volunteer involvement policies and procedures demonstrating development over time</li> <li>- Record of volunteer involvement policy and procedure changes and developments</li> <li>- Schedule of planned volunteer involvement policy and procedure review and development activities</li> <li>- Employee and volunteer orientation and ongoing communication procedures regarding volunteer involvement policies and procedures</li> </ul>				

<b>Criteria 8.2</b>		<b>Volunteer involvement is regularly reviewed in line with the organisation's evaluation and quality management frameworks.</b>			
<b>Organisation's rating</b>	<input type="checkbox"/> Met	<input type="checkbox"/> Partially Met	<input type="checkbox"/> Not Met		
<b>Evidence guide</b>	<b>Organisation's evidence</b>	<b>Gaps identified</b>	<b>Action</b>	<b>Who</b>	<b>When</b>
<ul style="list-style-type: none"> <li>o Quantitative and qualitative performance data is used to monitor, review and improve the organisation's volunteer management systems, effectiveness of volunteer contribution and impact on outcomes.</li> <li>o Feedback from volunteers, employees and other stakeholders is used to inform improvements to volunteer involvement.</li> </ul>					
<p><b>Evidence examples (These are examples only and not applicable to all organisations)</b></p> <ul style="list-style-type: none"> <li>- Organisation quality improvement plans</li> <li>- Volunteer involvement data collection plan</li> <li>- Quantitative and qualitative volunteer involvement data collations</li> <li>- Schedule of feedback gathering from volunteers, employees and other stakeholders regarding volunteer involvement development</li> <li>- Reports from analysis of volunteer involvement data collations</li> <li>- Volunteer involvement development activities</li> </ul>					

Criteria 8.3		The organisation's performance with volunteer involvement is monitored and reported to the governing body, employees, volunteers and stakeholders.			
Organisation's rating	<input type="checkbox"/> Met	<input type="checkbox"/> Partially Met	<input type="checkbox"/> Not Met		
Evidence guide	Organisation's evidence	Gaps identified	Action	Who	When
<ul style="list-style-type: none"> <li>o Quantitative and qualitative performance data relating to the organisation's volunteer involvement objectives are identified, collected and analysed.</li> <li>o Performance data is used to regularly evaluate the organisation's volunteer involvement.</li> <li>o Targeted reports on the organisation's volunteer involvement performance are communicated to the governing body, employees, volunteers and stakeholders on a regular schedule.</li> </ul>					
<p><b>Evidence examples (These are examples only and not applicable to all organisations)</b></p> <ul style="list-style-type: none"> <li>- Documented volunteer objectives and plans</li> <li>- Volunteer involvement data collection plan</li> <li>- Volunteer involvement performance monitoring schedule and procedures</li> <li>- Volunteer involvement performance reports distributed to governing body, employees, volunteers and stakeholders</li> <li>- Systems for reporting on volunteer involvement</li> </ul>					

Criteria 8.4		Opportunities are available for volunteers to provide feedback on the organisation's volunteer involvement and relevant areas of the organisation's work.			
Organisation's rating	<input type="checkbox"/> Met	<input type="checkbox"/> Partially Met	<input type="checkbox"/> Not Met		
Evidence guide	Organisation's evidence	Gaps identified	Action	Who	When
<ul style="list-style-type: none"> <li>o Feedback and input from volunteers about their experience as volunteers is regularly sought.</li> <li>o A range of methods is used to gain volunteer feedback, appropriate to volunteers and their roles.</li> <li>o Volunteers are provided opportunities to contribute to the review and development of the organisation.</li> <li>o Data is collected, analysed and used to evaluate volunteer role satisfaction</li> </ul>					
<p><b>Evidence examples (These are examples only and not applicable to all organisations)</b></p> <ul style="list-style-type: none"> <li>- Range of volunteer feedback processes</li> <li>- Schedule of planned and completed volunteer participation and feedback activities for reviewing volunteer involvement</li> <li>- Schedule of planned and completed volunteer consultation activities on organisation review and development</li> <li>- Volunteer role satisfaction reports</li> </ul>					

## NOTES

## NOTES

**THE NATIONAL  
STANDARDS FOR  
VOLUNTEER  
INVOLVEMENT**