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# Governance Handbook – Section 11 Volunteers

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# Legal Stuff

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While the authors have used their best efforts in preparing this handbook and the resources contained within it, they make no representations or warranties with respect to the accuracy or completeness of this document.

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Due to the dynamic nature of the internet, certain links and website information contained in this publication may have changed. The authors make no representations to the current accuracy of the web information shared.

In Queensland, as an incorporated association, most organisations will be subject to the Associations Incorporations Act and its Regulations. The relevant Government regulator is known as the Office of Fair Trading. There is substantial information available on their website about the legal aspects of both the Act and its Regulations and during the service of this guide, it is possible that some information may change to reflect changes in the legislation. We have added some important links here for you to easily remain up to date.

## HELPFUL LINKS

[Incorporated Associations Smart Business Guide](#)

(A must for your association, on the laws and how they apply to you in simple to understand terms)

[Associations Incorporations Act 1981](#) (For rules about running an association)

[Office of Fair Trading Queensland](#) (For information about your responsibilities)

[Australian Charities & Not-for-profits Commission](#) (For those who are registered charities)

[Australian Taxation Office](#) (To keep up to date with changes in tax law)

[Department of Justice OFT Fundraising](#) (For information on raffles & donations)

[Australian Consumer Law](#) (What claims you make in advertising and to “sell” membership & activities)

[Workplace Health & Safety Queensland](#) (For your obligations to members, staff & volunteers)

[Fair Work Ombudsman](#) (When volunteers are bullied)



# Introduction

**Good Governance** - two little words full of meaning that should be at the heart of all the work undertaken by your board/committee and your subcommittees.

**The Good Governance Health Check guides users through the essential concepts, principles and activities needed to ensure a healthy and productive organisation.**

Most incorporated Associations are small, volunteer-driven organisations, with limited resources and in need of practical guidance to meet the many challenges of the modern not-for-profit environment.

The Health Check contained within this Handbook will give you a snapshot of your Association's governance health status and will identify areas where improvement is needed. Levels of understanding and familiarity will vary amongst your board members according to the purpose, structure, scale and sophistication of your organisation, but the Health Check can be applied to any incorporated entity.

And - to help you work smarter not harder - we've included a Toolbox full of simple tips, techniques, templates and examples to help your organisation on its governance journey.

## **How does it work?**

It's simple. The Handbook is divided into 11 sections, starting with the big picture and moving through the detail of specific areas of operation. Each section contains Questions and Toolbox tips, techniques and examples.

Carefully read each question and the explanation. If you can confidently answer "yes", then tick the box. If the answer is "no" or you don't know, then leave it blank for now. You'll get most value from the Good Governance Health Check if you're completely honest. Most questions are objective - they ask for evidence of something factual or tangible.

When the question asks if you have a particular plan or policy or procedure, only say yes if you can actually put your hands on an example or on the finished item. Some questions are subjective - they ask for an opinion or perception. Glossing over problem areas puts your organisation at further risk and means you miss out on important opportunities to diagnose issues and work out solutions. And - hey - it means you're wasting your time and your money - and that's never smart. Honesty is the best policy!

After you've answered all the questions for that section, review your answers. If you find blank check boxes then you have the start of your Good Governance To Do list. It's simple! Good Governance is complex, but the step-by-step Health Check breaks it down into bite size chunks and makes it do-able.

At the end of each section you'll find the Toolbox. It contains tips, techniques and examples relevant to that particular topic. You can work through the Checklist and Toolbox one section at a time or you can come back to the Toolbox after you've answered all the questions in all sections.

Work through all of the sections. You can do this at your own pace - take all the days, weeks or months that you need. The speed isn't important - but achieving continued forward progress is. It's all about having a strategy and the right tools to achieve genuine continuous improvement.

## **Good luck and good governing!**

# SECTION 11

## Volunteers

Many Associations rely on Volunteers for their activities and services. The Committee themselves are usually volunteers, donating their time and expertise to lead and govern the organisation. Recognising the importance of Volunteers and managing and rewarding them for their efforts is essential if you want to maintain a strong and committed Volunteer base.



### Volunteers Checklist

<p><b>Do you have written job descriptions for volunteers?</b></p>	<p><i>Volunteers should be managed in much the same way as you would paid staff. Job descriptions are a fundamental tool in developing an effective volunteer workforce.</i></p>	<input type="checkbox"/>
<p><b>Do you provide training and supervision for volunteers?</b></p>	<p><i>Like staff, volunteers will need training and supervision to be able to do their jobs effectively. How much training and supervision is required will depend on the task at hand and the skill level of the volunteers involved.</i></p>	<input type="checkbox"/>
<p><b>Have you made adequate provision for volunteer programs and management in your budget?</b></p>	<p><i>Volunteers donate their time and skills, but that doesn't mean that there are no costs associated with your volunteer programs! Ensuring that these programs are adequately resourced will give them the best chance of success.</i></p>	<input type="checkbox"/>
<p><b>Do you have appropriate policies for your volunteer workforce?</b></p>	<p><i>In many ways, volunteers must be treated in the same way as paid staff, so an appropriate set of policies are required. In particular, make sure that Work Health &amp; Safety issues are addressed.</i></p>	<input type="checkbox"/>



# SECTION N 11

## Tips & Techniques

Volunteer Policy  
Volunteer Job Description





# TIPS & TECHNIQUES

## Volunteer's Policy

If your organisation has (or is planning to have) volunteers, then you should have a Volunteers Policy (and supporting Procedures) so that everyone who is part of your organisation (or has any dealings with it, or is considering becoming a volunteer or referring potential volunteers) understands your views on managing volunteers.

The Principles in your Volunteer Policy should set out why you have volunteers and what value they add to your organisation. The Definition should include a statement along the lines of:

### **A volunteer is someone who:**

- benefits the community and themselves by participating in our volunteer program
- provides their services of their own free will
- does not receive any monetary reward (out of pocket expenses are not regarded as monetary reward)
- complements, but does not replace or threaten the livelihood of paid workers or contractors.

The Policy should make reference to the National Standards for Volunteers developed by Volunteering Australia. It should outline the rights and responsibilities of people volunteering with your organisation. For example:

### **Our volunteers have the right to:**

- be made aware of our Code of Conduct and our policies and procedures
- a healthy and safe working environment
- be covered by personal accident and public liability insurance
- be recognised and included as a valued team member
- have a clearly written job description
- receive proper training, initially and on an ongoing basis
- know whom to turn to with difficulties and problems
- know to whom they are accountable
- be supported and supervised in their role
- say no if feeling exploited or if the task is inappropriate to the volunteer
- be reimbursed for out of pocket expenses
- be informed and consulted on matters which directly or indirectly affect their work
- have confidential and personal information dealt with in accordance with privacy legislation and the organisation's Privacy Policy.

### **Our volunteers have the responsibility to:**

- abide by our Code of Conduct and our policies and procedures (which include working in a safe manner in regard to themselves and others, and to maintaining the privacy, dignity and confidentiality of the people and organisations that we work with)
- work within the framework established by our values/goals
- be reliable and notify an appropriate person if unavailable or running late
- value, support and respect the rights of other volunteers and paid staff
- respect confidentiality
- give feedback which will assist the development of our activities, programs and services
- work to the job description
- accept feedback and direction from their supervisor in relation to their performance
- respect, acknowledge and act on decisions made by colleagues and the Board of Management
- address areas of concern with the appropriate person
- undertake training when requested
- exercise a Duty of Care in areas of Health and Safety, including informing others of potential or actual hazards
- ask for support when needed
- care for our equipment and property & carry out their agreed role responsibly and ethically.



# TIPS & TECHNIQUES

## Volunteer's Policy

### ORGANISATIONAL RESPONSIBILITIES

You should also outline your organisation's responsibilities. For example:

Our organisation has the responsibility to:

- maintain appropriate Public Liability and Personal Accident Insurance cover for our volunteers
- have a budget allocation for volunteer management (including training)
- ensure that paid or unpaid staff who manage volunteers will be allowed sufficient time and resources and given relevant training and recognition to enable them to appropriately carry out their responsibilities
- ensure that each volunteer has:
  - an up-to-date job description which clearly describes their role
  - an appropriate induction, including being given a copy of our Code of Conduct and ready access to our policies and procedures
  - a safe workplace with the necessary space, tools and equipment to safely fulfill their role
  - appropriate training and development to meet the needs of the role
  - the opportunity to participate in meetings, planning and in consultation and decision making appropriate to their role and responsibilities
  - on-going support and supervision.

### ELIGIBILITY

Clear delineation needs to be made between volunteering, work experience, work or rehabilitation placements and Job Services Australia requirements. There are subtle differences between each one so your policy should make it clear about who is eligible to be a volunteer.

### AGE LIMITATIONS

The social benefits of volunteering are important for healthy ageing, and many volunteers will be able to continue volunteering with modifications to their role and duties as they age.

Personal accident insurance for volunteers is available up to 90 years of age, however a volunteer does not need to stop volunteering provided they are able to properly and safely fulfil their role. You may need to include a statement about older volunteers, and equally, younger volunteers, especially those under 18 years of age.



# TIPS & TECHNIQUES

## Volunteer's Policy

### **COORDINATION**

Your policy should make statements about how who will have responsibility for the overall management of your volunteer program including:

- developing procedures
- designing job descriptions
- promoting volunteering opportunities
- recruiting, selection and placement of volunteers
- monitoring the work performed by volunteers
- organising training opportunities for volunteers
- recognising the effort and contribution of volunteers
- maintaining up to date, accurate records of all volunteers
- identifying and responding to issues that are raised by or impact on volunteers.

### **HEALTH AND SAFETY**

Under your local Work Health and Safety legislation, your organisation is responsible for providing a safe working environment for volunteers. Any breaches of your duty of care towards volunteers are treated as seriously as if the person were a paid employee. Your policy needs to make this clear.

### **BUDGET**

Even though volunteers are not paid for their labour there are costs involved in successfully managing a volunteer program (for example recruitment costs, name tags, training, uniforms and protective equipment, reimbursement etc.). Your policy should make it clear that you recognise this and will make funds available.

### **JOB DESCRIPTION**

The Job Description tells an important story about your organisation – it shows that you are organised, systematic and professional in your approach to managing people. It tells anyone looking at your organisation that you have carefully considered where how best to involve volunteers and that you value and respect their contributions. Your policy should make it clear that every volunteer will have a job description. Refer to the Job Descriptions Tool.

### **RECRUITMENT, SCREENING, INDUCTION, REVIEW AND RECOGNITION**

Your policy should summarise the process your organisation will use to find, screen and select new volunteers. How complex this process is will depend on what you want the volunteers to do, and what risks need to be managed. You will need to spell out, in broad terms (because the detail of 'how' will be in the Volunteer Procedures) how you will screen and select (or reject) potential volunteers. You will also need to include some broad statements about your organisation's commitment to inducting, training, reviewing and recognising your volunteers – the key components of a good volunteer management system.

### **REIMBURSEMENT**

Although volunteers offer their skills and time for no remuneration, volunteers are entitled to reimbursement of pre-approved out of pocket expenses. It is important to identify situations in advance where the volunteer will be considerably out of pocket to minimise confusion and embarrassment for both parties and to describe what (if any) reimbursements are available.

### **TRAINING**

There are two purposes for volunteer training. The first is to manage risk and health and safety responsibilities, ensuring that you have equipped volunteers with the skills and knowledge they need to perform their role. The second is to provide volunteers with personal development. Your policy should include training.



# TIPS & TECHNIQUES

## Volunteer's Policy

### **MANAGING POOR PERFORMANCE AND UNACCEPTABLE BEHAVIOUR**

Your organisation has a responsibility to ensure that its volunteers maintain high standards of conduct and performance. Unsatisfactory performance or unacceptable behaviour must be managed in a fair, reasonable and timely manner. Your policy should outline what behaviour is unacceptable and what will be done to address the situation.

### **INSURANCE**

You should seek advice from your peak body or insurance broker about what insurance policies your organisation should hold to ensure that volunteers are provided with the right mix of protections. Your policy should include a statement about this.

### **IMPROVING AND DEVELOPING**

Your policy should include a statement about how your organisation appreciates volunteers making suggestions for improvement and innovation and welcomes formal and informal involvement by volunteers in decision making that affects their volunteer roles.

### **REVIEW**

Like all policies, your Volunteer Policy should be reviewed regularly.

Volunteering Australia has a range of resources and tools to assist organisations find direction and develop structures and systems to manage volunteers.

<http://www.volunteeringaustralia.org>

Each state or territory has its own state or local volunteer resource centres who can help you and local councils are often able to provide assistance. You can search for them from Volunteering Australia website's front page.

Your peak body will have expertise in managing volunteers in your particular area of activity.



# TIPS & TECHNIQUES

## Volunteer's Job Description

**Every (smart) organisation wants to make the most of what their volunteers bring to the organisation's strategic goals and day-to-day work. This is even more so for those organisations who have no paid staff.**

The Job Description tells an important story about your organisation – it shows that you are organised, systematic and professional in your approach to managing people. It tells anyone looking at your organisation that you have carefully considered where and how best to involve volunteers and that you value and respect their contributions. For some roles you will design Volunteer Job Descriptions and then recruit to fill the positions. For other roles you might customise an existing Job Description to suit the particular skills or circumstances of an individual volunteer.

A good Volunteer Job Description sets out the responsibilities and supervision or support arrangements for a volunteer. It helps everyone to be clear about what is expected of the volunteer and it helps the volunteer to feel confident in their role.

Volunteering Australia's Job Description Tool Kit and Victoria's Volunteering Portal will help you work through some of the more complex questions about designing Job Descriptions.

<http://www.volunteer.vic.gov.au/manage-your-volunteers/planning-volunteer-programs/writing-position-descriptions>

[http://www.volunteeringaustralia.org/wp-content/uploads/Volunteering\\_Australia\\_Volunteer\\_Roles\\_Toolkit+1-1.pdf](http://www.volunteeringaustralia.org/wp-content/uploads/Volunteering_Australia_Volunteer_Roles_Toolkit+1-1.pdf)

A good Job Description is more than a list of tasks viewed in isolation from the other roles. For most positions it's more productive to set out the responsibilities of the position – the meaningful contribution the volunteer makes to the organisation by highlighting what the work actually achieves.

For example, instead of saying 'prepare financial reports' you might say 'Is responsible for ensuring that financial records are kept and that members have the information they need to make informed decisions about the organisation's financial affairs.'

If you do decide to list Key Tasks make sure that each task (the how) links to the Key Responsibilities (the what).





# Congratulations

You've worked the whole way through the Good Governance Health Check. Take a bow!

It doesn't matter how long it took you to get here - the important point is that you've taken the time and put in the effort to carefully consider how well your Association is performing.

By now you'll have a plan for continuous improvement (Organisation Development Plan - call it whatever you like, we're plain and simple so we like 'To Do List' - but whatever works for your Committee is fine by us).

You'll also have developed a much greater understanding of what good governance really means - in practice, not just in theory and we're confident you'll have a much greater appreciation of its value to any organisation.



If you ever need assistance you can contact us:

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# About Us

The original concept and development The Good Governance Handbook and the online Good Governance Health Check are the result of an original collaboration between Kate Hartwig and Kate Reynolds. Leisa Donlan & Adrian Hart from [www.goodgovernanceconsultants.com.au](http://www.goodgovernanceconsultants.com.au) have tailored this guide & updated the content specifically for your organisation and the regulatory framework you work in and added a few templates and other information.

We've all been working in the not-for-profit sector for most of our working lives (hooley dooley, that's about 120 years between us!) and we know what works and what doesn't. Our approach - as you can see with this Handbook - is plain and simple - we provide no-nonsense, proven, practical assistance with governance and organisational development.

We've pooled our good, bad and ugly experiences and some of the many publications, tools, tips and techniques we've developed over the years into one, easy to access Handbook. We hope you've found it useful.