



Volunteer Management Checklist: Action Plan

Volunteer Management Checklist

This tool is designed to identify actions in the development of the detailed action plan for an organisation.

Participating Organisation:

- Working well / no issues / strategies or processes in place and adequately documented
- Generally working well / no major issues / may need some refinement or minor actions
- Significant issues causing a risk to business effectiveness

Key Business Area	Sub-Category/Description	Status	Comments
Volunteer Policies & Practices	<ul style="list-style-type: none"> Do you have a general policy regarding volunteer involvement? Have you defined volunteer's rights & are they known? 		
Volunteer Opportunities	<ul style="list-style-type: none"> Do you have gaps in your management / administration of the following key business areas: <ul style="list-style-type: none"> Volunteer management Finance IT Administration Sales HR Training & Development Marketing & Networks Governance & funding Risk management Could volunteers potentially fulfil some of these gaps? 		
Volunteer Management - Recruitment, Selection & Orientation	<ul style="list-style-type: none"> Do you have documented policies for volunteer recruitment, selection & orientation? Do you plan volunteer programs before you recruit, including: <ul style="list-style-type: none"> Positions, optimal numbers, alternative options for applicants, selection criteria 		



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	<ul style="list-style-type: none"> ○ Looking within - examining options to align program needs with current volunteer's skills & interests? • Do your selection procedures include: <ul style="list-style-type: none"> ○ Acknowledgement of inquiries ○ Screening of applicants ○ Reviewing of applicants • Police or other checks • Does volunteer orientation happen shortly after a volunteer starts? • Does the responsibility for planning & delivering orientation sit clearly with someone? • Does orientation cover & include: <ul style="list-style-type: none"> ○ Information or references to policies & procedures, including WH&S ○ Mission, vision & values ○ Principles, expectations & entitlements of volunteers ○ Lines of accountability ○ Guided tour? 		
<p>Volunteer Management - Work & Workplace</p>	<p>Volunteer's roles:</p> <ul style="list-style-type: none"> • Are volunteers given clear responsibilities rather than a set of tasks? • Are volunteers given work that needs to be done, rather than just to keep them busy? • Are roles defined, documented & updated regularly? • Do job descriptions include area/s of responsibility, supervisory arrangements & lines of accountability? • Do volunteers understand where their work fits in with the organisation's mission, vision & goals? • Are expectations clearly communicated and appropriate support provided to allow them to meet expectations? • Is it clear to volunteers who they go to for 'on the job' support? • Is a record of attendance kept? 		



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	<p>Volunteer involvement:</p> <ul style="list-style-type: none"> • Are there methods to communicate & inform volunteers? • Are volunteers involved in decision making and given opportunities to contribute ideas? • Are there opportunities for volunteers to meet to discuss work issues? • Is information collected & analysed regarding volunteers satisfaction, challenges, etc? 		
	<p>Risk management:</p> <ul style="list-style-type: none"> • Have you identified and assessed risks for your organisation? • Are strategies in place to address risks (eg adequate insurances, security, etc)? • Are workspace facilities & resources adequate & safe for staff? • Does the workplace comply with WH&S requirements? • Are there grievance procedures in place for volunteers? • Do you have procedures for <ul style="list-style-type: none"> ○ Identifying hazards ○ Recording injuries ○ Operating equipment ○ General workplace health practices (breaks, etc) 		
Volunteer Management - Service Delivery & Performance Management	<ul style="list-style-type: none"> • Are activities generally being completed in a simple & effective manner? • Are quality management & service delivery processes in place? E.g. <ul style="list-style-type: none"> ○ Handling complaints ○ Maintenance of equipment & facilities ○ Gaining feedback • Are service standards for volunteers derived from: <ul style="list-style-type: none"> ○ Customers requirements ○ Industry standards 		



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	<ul style="list-style-type: none"> ○ Volunteer input? • Does the organisation monitor outcomes of services provided? • Is there a process to review performance & provide feedback on a regular basis? Is this documented? • Is performance recognised formally or informally, and perceived as such? How? 		
Volunteer Management - Training & Development	<ul style="list-style-type: none"> • Are volunteers' strengths, needs and aspirations discussed as part of role development? • Are volunteers given adequate opportunity to develop skills in line with role, career aspirations & organisational needs? • Is training budgeted and how is it coordinated? • Is training aligned to organisational needs, roles & development opportunities? • Is learning encouraged through team work, meetings, buddying or other 'on the job' methods? 		
Volunteer Management - Documentation	<ul style="list-style-type: none"> • Are volunteers records collected and maintained, including emergency contacts, police checks, & incidents? • Are the records kept in a secure and confidential place, with procedures and authorities regarding access? • Does the organisation keep documentation to demonstrate an effective volunteer management system? • Does the organisation collect data on volunteer programs, including duration, numbers of volunteers, training & development? 		

