

Policy Handbook: A Guide for Volunteer-run Organisations



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About this document

This document has been developed by Volunteering WA to provide an example of the kind of policies that **may be adapted by volunteer-run organisations (without any paid employees)**. They are intended for use by incorporated associations.

Care must be taken to adapt the contents to reflect your organisation's vision, mission, values, and operational context. Any industry specific legislative or regulatory requirements should be considered and reflected in your documentation.

It is recommended that volunteers of your organisation are consulted on the intention and operation of policies and procedures that are applicable to them, as part of the development process. This assists in raising awareness and ensures all issues and viewpoints are considered. Your Board / Management Committee will need to consider the strategic, financial, and operational risks of the organisation, with appropriate risk mitigations and treatment.

The development of your organisation's policies and procedures would generally be led by, and subject to the review and approval of, the Board / Management Committee of your organisation.

Policies and procedures should be supported by awareness and training programs, with supportive processes and systems. They should be subject to a regular, scheduled review and continuous improvement.

All information provided is of a general nature only. Organisations should seek legal advice on specific issues.

Guidance notes: are provided in the document where there are specific issues that an organisation may need to understand. These are not exhaustive.

Other considerations: are prompts to consider other related matters, which may be applicable to an organisation. These are not exhaustive.

Other resources:

See **Volunteering WA's** website and become a member to receive access to further information, training, support, and networking opportunities www.volunteeringwa.org.au.

Not-for-profit Law provides a range of resources related to the legal obligations of volunteer involving organisations including the National Volunteer Guide <https://www.nfplaw.org.au/volunteers>

The **Institute of Community Directors** has a Policy Bank which is freely available and contains sample policies for not-for-profit organisations <https://communitydirectors.com.au/tools-resources/policy-bank>.

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1. Governance

This organisation is governed in accordance with the *<insert name of Constitution>*.

The *Board / Management Committee* works collaboratively to achieve the organisation's objectives, determine the strategic direction, vision, and mission, and operate in accordance with our values.

The *Board / Management Committee* is responsible for the strategy and risk management of the organisation, including achievement of performance and financial targets. It works with other volunteers to carry out any day-to-day operation of the organisation.

The *Board / Management Committee* should:

- Establish an effective Board including evaluation of its performance, training and development and implementation of continuous improvement actions
- Approve policies and strategic plans of the organisation
- Establish an effective risk management system
- Determine delegations of authority and establish effective internal controls
- Approve and monitor financial budgets
- Consider and approve financial and statutory reporting
- Monitor performance
- Monitor compliance with external legislation and regulation as well as internal policies
- Manage grievances that may arise between Board members, volunteers, members of the public or service users.

Whistle blower

GUIDANCE NOTE | Some VIOs may be required to comply with the Whistleblower protection laws under the Corporations Act 2001 (Cth) (Corporations Act). This legislation applies to corporations which meet the definition of a 'trading or financial corporation' under the Australian Constitution. More information on this definition is available [here](#).

The legal requirements are very stringent, and the penalties can be significant. It is recommended that organisations determine if these provisions apply to them and seek legal advice if required. More information is available from:

- Australian Securities and Investments Commission (ASIC): <https://asic.gov.au/regulatory-resources/find-a-document/regulatory-guides/rg-270-whistleblower-policies/>
- Not for Profit Law: <https://www.nfplaw.org.au/whistleblower-protection-laws>

A draft policy template is also available:

- Institute of Community Directors Australia: <https://communitydirectors.com.au/policies/whistleblower-policy>

2. Ethics and Conduct

Code of Conduct

This organisation is a professional organisation with high standards and expects that all volunteers adhere to behaviours that exemplify these standards. This section describes the behaviours and standards which all volunteers are expected to apply to uphold the mission and values of the organisation.

Conduct and Behaviour

The organisation expects that volunteers will uphold the standards and values of the organisation.

Volunteers should always treat others with respect and courtesy, reflecting the objectives of both *the organisation's* policy and government legislation about access, inclusion, and equal opportunity.

Volunteers are expected to behave with integrity in their dealings with others, providing support and assistance to fellow volunteers and to individuals and organisations to whom they provide services or information.

Harassment and bullying are not tolerated in *the organisation's* workplace or in any venue where its services are delivered. All volunteers share responsibility for ensuring that *the organisation's* workplace is free from bullying and harassment and that the appropriate processes are used to deal with any incidents that may arise.

Community Care

The organisation has a responsibility to the community to provide services which are sensitive to the needs of the community and the individuals within it. During their work, *the organisation's* volunteers will encounter children and vulnerable members of the community and have a duty to protect the rights, safety, financial security, and the well-being of these individuals.

To support these responsibilities *the organisation* requires that volunteers, including the Board of Directors, have *insert screening requirements appropriate to the role e.g., National Volunteer Police Clearance / Working with Children Clearance / NDIS screening etc.*

A volunteer will advise the Chair of the Board / Management Committee immediately if any Authority commences proceedings that may result in the *National Volunteer Police Clearance / Working with Children Clearance / NDIS screening* being negated.

The organisation will advise volunteers of the procedures required to apply for the identified clearance/s and will meet the normal costs associated with obtaining the required clearance/s. *The organisation* may require volunteers to renew the required clearance/s every three years, *or such lesser period required by law.*

Privacy and Confidentiality

All volunteers are required to maintain the confidentiality of all personal and corporate information which they may have access to during their time at *the organisation*. This information is only for use in the course of your duties at *this organisation* and may not be used for other purposes.

Volunteers must also respect the privacy of individuals who are registered with *the organisation* and should not use or disclose personal details except when expressly authorised by *the organisation*. This includes disclosure to any other volunteer.

Except when expressly authorised by *organisation*, a volunteer will not:

- Directly or indirectly reveal, or cause to be revealed, to any third party any confidential dealings, finances, transactions, or affairs of *the organisation* or any of its clients which may come to their knowledge during their period of their involvement
- Use for their own benefit or gain or that of any other person, firm or company, any confidential information belonging to *the organisation*.

Volunteers should observe these requirements even after they no longer volunteer for an organisation.

Conflict of Interest

Volunteers must disclose any actual, perceived, or potential conflict of interest to the Board / Management Committee at the earliest opportunity. The Board will determine whether the conflict of interest requires the individual to withdraw from participation in an activity or decision

Internet and Email Access

The primary purpose for access to the internet and email is to assist *the organisation's* volunteers carry out their duties of their role. Volunteers may use the internet and email access provided by *the organisation* for any volunteering-related purpose.

Limited personal use is permitted if it:

- Is infrequent and brief
- Does not interfere with volunteering duties of *the organisation*
- Does not compromise the security of *the organisation's* system or impact on *the organisation's* electronic storage capacity or network performance
- Does not incur any additional expense for *the organisation*
- Does not violate any laws
- Does not compromise any confidentiality requirements of *the organisation*

A volunteer may not use the internet or email (including internal email access) provided by *the organisation* to:

- Conduct a business
- Create or exchange messages that are discriminatory, offensive, harassing, bullying, obscene or threatening
- Knowingly visit websites containing illegal, objectionable (including pornographic), or criminal material
- Create, store or exchange information in violation of copyright laws including the uploading or downloading of commercial software, games, music, or movies.
- Use internet-enabling activities such as gambling, gaming, or conducting illegal activities.

- Create or exchange advertisements, solicitations, chain letters and other unsolicited or bulk email

Personal Mobile Phone Use

Volunteers are asked to limit time on personal calls when on duty and minimise any adverse impact on others.

Personal Use of Work Telephones

Limited personal use of work telephones is permitted when it is infrequent, brief and does not interfere with a volunteering role or the operation of *the organisation*.

Without the approval of the Board / Management Committee, personal intrastate, interstate, or international calls may not be made using *the organisation* telephones.

Dress Code

Volunteers are required to demonstrate a neat and presentable standard of dress.

Drugs and Alcohol in the Workplace

The organisation is committed to providing volunteers and visitors with a smoke, drug, and alcohol-free workplace during designated work hours. *Alcohol is permitted to be served at designated social occasions.*

The unlawful distribution, dispensation, possession or use of a controlled substance in *the organisation's* offices or shared spaces is prohibited.

The Board / Management Committee must be notified immediately if a volunteer is:

- Convicted of a drug or alcohol violation arising out of conduct occurring in the workplace
- Fined, or has their license suspended while driving an *organisation* vehicle under the influence of alcohol or other intoxicants.

Gifts

Volunteers may on occasion receive gifts in recognition of services provided by *the organisation*.

The Board / Management Committee must be advised when this occurs, and a decision will be advised about the future of the presentation or gift.

Care of personal property

Volunteers should take reasonable precautions to ensure the security of personal possessions brought into the volunteering organisation to reduce the risk of theft or damage. *The organisation* does not take responsibility for loss or damage to personal property due to negligence or wilful action on the part of a volunteer.

Volunteers are encouraged to bring only items considered essential to their daily needs, whether working in the office or at a temporary work location. Depending on the circumstances, volunteers may be compensated for loss or damage to personal effects which occurs during, or because of, carrying out official duties at the office or at a temporary work location.

3. Work Health and Safety

GUIDANCE NOTE | This policy was written on the basis that the organisation does not fall within the definition of a “person conducting a business or undertaking” (PCBU) under the Work Health and Safety Act 2020 (WA) (which may be the case for VIOs that have no paid staff). Legal advice should be sought on this matter.

Even in situations where this legislation does not apply, all organisations have an obligation to not act in a negligent manner and to exercise due care and diligence to protect the physical and emotional health and safety of volunteers.

This [guide from WorkSafe WA](#) provides an overview of the legislation, definitions and concepts in the legislation. There is also a specific guide available for VIOs available [here](#). The following policy outline has been informed by these documents.

The organisation is committed to seeking to promote healthy and safe workplace for volunteers, visitors, and contractors.

This is undertaken by:

- Eliminating risks to health and safety, so far as is reasonably practicable; and
- Minimising residual risks, so far as is reasonably practicable.

Members of the Board / Management Committee of the *organisation*, are required to exercise due care and diligence, including taking reasonable steps to:

- Acquire and keep up to date knowledge on work health and safety matters;
- Understand the nature and operations of the work and associated hazards and risks;
- Ensure that *organisation* has, and uses, appropriate resources and processes to eliminate or minimise risks to work health and safety;
- Ensure that *organisation* has appropriate processes to receive and consider information about work-related incidents, hazards, and risks, and to respond in a timely manner;
- Ensure that *organisation* has, and implements, processes for complying with their duties and obligations including:
 - Consulting with volunteers and contractors and
 - Providing appropriate training and instruction
- Verify the provision and use of the relevant resources and processes.

Duties of Volunteers

Volunteers must take reasonable care for their own health and safety and that of others who may be affected by their actions or omissions. They must also co-operate with any reasonable policy or procedure relating to health or safety at the workplace.

Duties of Other Persons at the Workplace

Any person at a workplace, including customers and visitors, must take reasonable care of their own health and safety and that of others who may be affected by their actions or omissions.

They must also comply, so far as they are reasonably able, with any reasonable instruction that is given by *organisation* to ensure a safe and healthy workplace.

Consulting with Volunteers

The Board / Management Committee should consult with volunteers when:

- Identifying hazards and assessing risks arising from their role;
- Proposing changes that may affect the health and safety of volunteers or members of the public;
- Making decisions about:
 - Ways to eliminate or minimise risks
 - The adequacy of facilities for volunteers' welfare when involved in the organisation
 - Procedures for resolving health and safety issues
 - Procedures for monitoring the health of volunteers or workplace conditions
 - How to provide health and safety information and training to volunteers.

Consultation should be undertaken collaboratively, although there is no requirement for consensus to be reached.

Incident Notification

All incidents (including near misses) should be reported as soon as possible to the Board / Management Committee. They should be recorded and investigated promptly with corrective actions taken.

Pandemics and vaccinations

GUIDANCE NOTE | In WA there are very specific requirements currently for COVID-19. Organisations are encouraged to access these resources and reflect them in policy settings, follow Government directions, implement mandatory vaccination where applicable, and strongly encourage all volunteers to be vaccinated.

There may also be requirements to follow Government directives that mandate vaccines for some work groups, including volunteers, and work sites. These may require record keeping in a manner consistent with legislative requirements.

More information is available here:

WA State Government: <https://www.wa.gov.au/government/covid-19-coronavirus>

Volunteering WA: <https://www.volunteeringwa.org.au/resources/covid-19>

There have been several pandemics in recent years, including the COVID-19 pandemic, which have caused significant community disruption, illness, and severe illness, including death, in Australia.

Keeping volunteers, clients, and the community safe is of utmost priority.

Organisation follows Government directives to reduce the risk of community transmission. These may include reinforcing personal hygiene by providing training, resources and signage, physical distancing, adapting programs or processes to minimise contact, working from home, testing, and quarantining.

Additional measures may also be put in place, based on consideration of our circumstances, risks and potential mitigants.

Volunteers and contractors will be consulted and kept informed of settings for working in pandemics. They are encouraged to talk with their volunteer coordinator about any issues, concerns or ideas that support their safety, and the safety of the community.

OTHER CONSIDERATIONS

- *Links to specific resources pertaining to working in any current pandemic*
- *Requirements for mandatory vaccinations*
- *Arrangements for time to test, quarantine and recover impacting on volunteer availability*
- *Reporting of COVID-19 which may have been contracted while volunteering*

First Aid

The organisation encourages a minimum of *number* volunteers to hold a current first aid certificate. On request the Board / Management Committee will arrange for volunteers to attend an appropriate first aid course.

Emergency Procedures

Emergency procedures for the *office/location* are clearly outlined in the emergency procedures sign posted *<insert location of emergency procedures>*. It is imperative that all volunteers are familiar with this document and concerns should be raised immediately with the warden.

Volunteering virtually

The organisation supports virtual volunteering for some roles, to promote accessibility and inclusion.

It is to be put in place through mutual agreement. Arrangements must meet the operational needs of the organisation as well as providing a suitable option for the volunteer.

Volunteer role descriptions should specify the nature of the arrangement and confirm that the virtual volunteering environment is safe and secure. The volunteer should complete a Working from Home checklist and taken all corrective action to ensure a safe environment.

Where virtual volunteering is all or most of an individual's work time, the agreement should also include mechanisms for communication and reporting, to ensure that the volunteer member is included in general communication, meetings, and social events.

The agreement should include details of any equipment or expense reimbursement which is to be provided by *the organisation*, where applicable.

Volunteers involved virtually can be granted approval to access email and electronic records using remote access protocols. Volunteers must take proper precautions regarding any *organisation* data which is stored on the home computer. All volunteers are required to maintain the confidentiality of all personal and corporate information which they may have access to during their time at *the organisation* and to ensure that this information is always secure.

OTHER CONSIDERATIONS

- This WorkSafe WA [Guide](#) for volunteering organisations includes information relating to Working from Home

Volunteer Assistance Services

The organisation has arrangements with a private provider to provide counselling services to volunteers as required. Up to *number* counselling sessions will be provided to each volunteer on an annual basis.

4. Volunteer Conditions

Volunteer Recruitment and Induction

Volunteers will be recruited based on suitability for the position, and in line with *the organisation's* recruitment and appointment procedures.

Volunteers will be provided with a job description. Orientation is provided to all new *the organisation's* volunteers and is aimed at introducing them to the organisation and to the policies and procedures governing practices at *the organisation*.

During this session, the emergency procedures will be explained, and volunteers taken on a guided tour showing them the layout of the premises areas including the kitchen, the toilets, the fire extinguisher location, emergency exits and muster points. Volunteers will also be introduced to the fire warden and first aid officers.

Ongoing Support & Development

Volunteers will be provided with ongoing support and supervision. Volunteers are designated a supervisor dependent on their role and tasks undertaken.

Annual Review

An annual interview will be held to review performance and determine further training requirements or opportunities.

Review of Volunteer Role Descriptions

Volunteer role descriptions may be reviewed by the organisation. Volunteers will be consulted during this process and advised of any changes.

Identified Education and Training Requirements

The organisation encourages its volunteers to enhance their knowledge of matters relating to their volunteering position. Should training needs be identified during the Annual Review or a volunteer identify an appropriate course or event, consideration will be given as to what level of support may be provided by *the organisation*.

Termination of service - by Volunteer

Should a volunteer wish to resign from their role they are asked to give *the organisation* reasonable notice. The volunteer will be paid any outstanding reimbursements due. Property of *the organisation* must be returned prior to leaving the organisation.

When a volunteer terminates their engagement with *the organisation* an exit interview will be conducted. A record of the interview will be retained. Our wish is to obtain information that may help to:

- Establish the reasons for leaving
- Analyse any trends in the reason for leaving
- Gain constructive feedback on the volunteer's position and their time at *the organisation*.

Termination of service - by the Organisation

The organisation may terminate volunteer services if the volunteer is no longer required for reasons such as:

- The volunteer is considered not suitable for the position offered
- The workload changes such that the volunteer is no longer required
- The workload changes such that the volunteer does not have suitable skills for the work available.

Termination due to Misconduct

The organisation may terminate a volunteer in the event of misconduct. Misconduct includes breaches of any *the organisation's* policies which warrant instant dismissal and includes serious misconduct. Examples of misconduct include:

- Theft of property or funds from *the organisation*
- Wilful damage to *the organisation* property
- Intoxication through alcohol or other prohibited substance whilst volunteering
- Verbal or physical harassment of any other employee, volunteer, board member or any other person particularly in respect of race, sex, or religion
- Disclosure of confidential information regarding *the organisation* to any other party without prior permission from a *position title*
- Falsification of any of *the organisation's* records for personal gain or on behalf of any other employee/volunteer
- Unwillingness or inability to support and further the mission of the organisation and/or the objectives of the programme.

Immediate dismissal would only take place in the most serious of circumstances, and in these instances:

- The Chair of the Board / Management Committee will advise the volunteer
- The volunteer may wish to include the presence of a support person
- A written report is prepared and approved and stored in a secure location on the premises or IT of the organisation
- All property of *the organisation* must be returned.

5. Communications & Marketing

Promotional Material

All promotional material is to be approved by the *position title* to ensure that the design and content are consistent with *the organisation's* publications.

Media Contact

The Chair of the Board / Management Committee has sole responsibility of determining what media interviews and other promotional opportunities are undertaken on behalf of *the organisation*.

Should a volunteer be approached with a media or promotional opportunity they should immediately advise the *position title* to determine if the request is appropriate and who should speak on behalf of *the organisation*.

Media Releases

All media releases must be submitted to the *position title* for approval prior to release.

Social Media

Social media and external communications will be timely, relevant, and appropriate to the business, image, and reputation of *the organisation*. All postings on social media will be considered as public comment.

Volunteers must ensure that postings are not discriminatory, offensive, inappropriate, or liable to bring the organisation into disrepute.

Volunteers of *the organisation* have responsibility to ensure that social media content is aligned with the values and policy of the organisation and is consistent with the following:

- Consent will be obtained in writing prior to posting images of individuals, either from the individual or from parent/guardian when the person is under the age of 18
- Any information or image/s of a person will be removed on request by the person or their parent/guardian
- Only volunteers authorised by the Board / Management Committee will post to social media platforms
- Breaches of policy may trigger disciplinary action.

Social media accounts must be monitored to ensure they are consistent with this policy.

Any postings and comments on postings that are, or appear to be, in conflict with this policy or with the values of *the organisation* should be brought to the attention of the Board / Management Committee as soon as possible.

Inappropriate material or comments must be deleted as promptly as possible.

Managing Client Feedback

From time to time, clients may feel unhappy with their situation and although this may sometimes be caused by external factors, volunteers are encouraged to always assist and support their clients. When clients have a complaint or other issue, use the four steps shown below to help in managing the situation.

1. **Listen:** to their story without interruption. To show that you understand their problem, it may be helpful to repeat their issue back to them in your own words.
2. **Apologise:** acknowledge their issue and apologise for the inconvenience. Don't be defensive, don't over explain and don't assign any blame to the client or other volunteers. Thank them for their feedback.
3. **Act:** tell the client what you are going to do about it to fix the situation for them, or to ensure it doesn't happen again. Take their details, so that they can be contacted later if appropriate.
4. **Follow Up:** Make sure that the action you have promised the customer is completed.

Intellectual Property

Any changes, innovations and ideas initiated by volunteers belong to *the organisation*.

All records, documents and other papers or electronic images, together with any copies or extracts thereof, made, or acquired by volunteers during their volunteer role with *the organisation* must be returned to *the organisation* on demand or otherwise no later than upon the termination of their role.

6. Internal Grievance Resolution

If any volunteers feel they have cause for complaint regarding their treatment within the organisation, they may seek resolution via the formal grievance process. Every effort should be made to solve problems cooperatively and informally before escalating them to the Board / Management Committee.

All formal avenues for handling of grievances will be fully documented and the volunteer's wishes will be considered in the determination of appropriate steps and actions. All complaints will receive thoughtful consideration in a timely manner and will be discussed with the individual who raised them. Discussions held are confidential.

Volunteers are assured they will not be disadvantaged using these procedures whether decisions are found for or against their grievance.

OTHER CONSIDERATIONS | *Note that the Constitution of an Incorporated Association generally includes specific processes that must be applied to grievance processes. It is recommended that the organisation translate these requirements into a simple table, such as the following, and include it in their policy manual.*

Trigger	Action	Responsibility
Volunteer is unable to resolve an issue or grievance informally, or would like assistance/support in order to resolve it.	Volunteer to raise with a representative of the Board / Management Committee. The content of this discussion is confidential however there will be a record that a discussion has occurred in relation to a grievance.	Volunteer to raise the issue
Initial discussion results in agreement that a representative of the Board / Management Committee will seek to resolve the issue.	Representative of Board / Management Committee seek to resolve issue, considering both the views of the volunteer and the well-being of the organisation. Record a brief description of the action they have or will take.	Representative of Board / Management Committee
Issue is resolved satisfactorily	Representative of Board / Management Committee to note for the record that the grievance has been resolved.	Representative of Board / Management Committee
Issue is not resolved to the satisfaction of the volunteer	Volunteer to make a formal, written complaint to the Board / Management Committee	Volunteer
Formal complaint received	Determination to be made and advised in writing to the individual within 14 days.	Board / Management Committee

7. Financial Management

Organisation will provide sound and transparent financial management throughout its operation.

All expenditure will be in alignment with the goals and aspirations of the organisation and funds will be used to provide and support the organisation's role in the broader community.

Use of corporate resources and facilities will also be managed to ensure alignment with the organisation's goals. Tools, resources, and equipment are provided for use in the course of your duties, and volunteers have a responsibility to ensure that they are used appropriately.

Insurance

GUIDANCE NOTE

Insert information on the requirement for and coverage of insurances. These may include, and may not be limited to:

- *Voluntary workers personal accident*
- *Public liability*
- *Director's liability and indemnity*
- *Property and crime*
- *Motor vehicles*
- *Business interruption and cyber safety*

For more information, contact an insurance broker or find out more by visiting sites such as this: <https://business-insurance.aon.com.au/aon-partners/volunteering-australia>

Vehicles

The organisation operates a fleet of *xx* vehicles, *xx* of which are pool vehicles. Pool vehicles are available when volunteers are required to travel on behalf of the organisation.

Travel

Guidance note: Insert information on travel procedures such as: request to travel, approval requirements, expenses, and reimbursements.

Volunteer reimbursement

Volunteers are reimbursed for the following out-of-pocket expenses:

- Costs of volunteer screening
- Cost of travel:
 - a rate per kilometre in accordance with the ATO guidelines¹ and parking costs or
 - public transport costs
- Cost of any required training or memberships.

¹ <https://www.ato.gov.au/Business/Income-and-deductions-for-business/Deductions/Deductions-for-motor-vehicle-expenses/Cents-per-kilometre-method/>

Volunteers should not be out of pocket for any equipment or office supplies required to undertake their role. These and any other costs that may be subject to reimbursement are required to be approved before spending any personal money.

All volunteers are required to comply with the appropriate procedures for approval and reimbursement of expenditure.



Leading, advancing and celebrating volunteering

Email: info@volunteeringwa.org.au

Phone: 08 9482 4333

Visit: www.volunteeringwa.org.au

