

# Volunteer Management Health Check Guide



volunteer ireland  
obair dheonach éireann

The best practice volunteer management guide has been developed to offer general guidance to volunteer-involving organisations in identifying and putting the necessary items in place to manage your volunteer programme more effectively, improve volunteer retention, and ultimately enhance your reputation as an organisation where volunteers want to be involved. The action plan has been developed to help your organisation identify the gaps in best practice within your volunteer programme and to develop a plan for gradually putting them in place.

The Health Check checklist is suitable for use by organisations that are putting a new volunteer programme in place or those who wish to audit or improve their current programme. It is suitable for use by organisations of all sizes and regardless of whether you have 1 or 10,000 volunteers within your organisation.

The checklist is divided into 3 stages identifying the various, policies, forms and documents that need to be put in place. It is recommended that items listed in 'Stage 1' be put in place first, then items in 'Stage 2' and finally the items in 'Stage 3'. All items in Stage 1 and 2 are relevant to subsequent stages. You may find that some items are more or less important within your organisation and ultimately you must decide when and how you put these items in place and what works best for your volunteer programme and your organisation.

For general guidance and support in putting best practice in place in your organisation please contact Volunteer Ireland or your local Volunteer Centre or Volunteering Information Service. Additionally, you will find sample templates for many of the items below on [www.volunteer.ie](http://www.volunteer.ie) or on our affiliate Volunteer Centre or Volunteering Information Service websites.

[www.volunteer.ie](http://www.volunteer.ie)

01	Best Practice Item	Explanation	In place: Yes / No / In Progress	Action Plan
<b>Stage 1 : this stage contains 10 core elements that are fundamental for new or developing volunteer programmes</b>				
1.01	Role descriptions	There is a written role description in place for each volunteer role which includes at minimum: tasks, time commitment, length of commitment, skills, qualities and experience needed		
1.02	Recruitment, selection & screening process	There is a recruitment, selection and screening process in place and communicated to volunteers and staff. Application form, interviews, reference checks, training requirements, and Garda Vetting may all be part of the process.		
1.03	Response to enquiries	There is a designated individual (staff member or volunteer) to respond in a timely manner to enquiries from potential volunteers.		
1.04	Application Form	There is a volunteer application form utilised that gathers contact and next of kin details and other details relevant to the application. The application provides an opportunity for the volunteer to state their suitability for the role.		
1.05	Induction	An induction checklist is in place. Volunteers provided with induction within couple of days of starting volunteer role.		
1.06	Volunteer agreement	A volunteer agreement is in place, signed by both volunteer and supervisor and held in a dedicated volunteer file.		
1.07	Training	Volunteers receive general training and role-specific training. Volunteers are provided with on-going training where necessary and appropriate.		
1.08	Support & supervision	Dedicated staff / lead volunteers assigned to managing volunteer programme. Support & supervision (S&S) guidelines are in place. S&S is provided on regular basis and as relevant to role e.g. one-to-one or in a group.		
1.09	Volunteer policy	There is a volunteer policy in place that is added to as the need arises and is updated and reviewed regularly. Volunteers are given a copy of the policy. The volunteer policy is separate to staff policies.		
1.10	Recognition	The contribution of volunteers is valued and recognised by all staff, Committee & Board members. Volunteers are recognised regularly and in a variety of ways.		

02	Best Practice Item	Explanation	In place: Yes / No / In progress	Action Plan
<b>Stage 2 : this stage contains 20 elements to be implemented by intermediate level volunteer programmes</b>				
2.01	Health and safety	There is a Health & Safety policy in place for volunteers and health and safety training is provided as relevant to the volunteer role.		
2.02	Budget	A budget is considered and set aside for the volunteer programme to cover for e.g. expenses, training, uniforms, office materials, recognition etc.		
2.03	Interview guidelines	Interview guidelines are in place. Areas covered might include: selection process; who conducts interviews; number of interviewers; suggested questions and format; transparent process in place to accept / reject volunteers.		
2.04	Volunteer webpage	There is a dedicated page on the organisation website, promoting the volunteer programme, listing volunteer opportunities and inviting visitors to volunteer.		
2.05	Volunteer information pack	A volunteer information pack is in place and includes: organisation mission, overview of services, programmes and clients, description of volunteer programme, overview of volunteer roles, appropriate forms and next steps to volunteer. Pack available online or sent to volunteers via hard / soft copy.		
2.06	Staff job descriptions	Staff job descriptions state who and how staff members will supervise and manage volunteers.		
2.07	Insurance	Volunteers and all volunteer activities are covered under the organisation's insurance policy. A statement to this effect is included in the volunteer policy.		
2.08	Garda Vetting Policy	Garda Vetting (GV) is conducted for all relevant roles (dealing with children or vulnerable adults). A GV policy is in place along with a process for dealing with disclosures. GV should only be considered as one part of the screening process.		
2.09	Diversity of volunteer roles	There is flexibility regarding the development of volunteer roles. Where reasonable the roles meet the needs, interests and availability of volunteers. The organisation is open to developing new roles based on the unique skills of individual volunteers.		

<b>2.10</b>	<b>Complaints</b>	There is a complaints procedure in place and this is communicated to volunteers via the volunteer policy and in a variety of ways.		
<b>2.11</b>	<b>Data protection</b>	Volunteer data is treated in line with and adheres to data protection legislation. Volunteer policy includes data protection statement. Volunteers are clear on how they can access their own information if they require.		
<b>2.12</b>	<b>Staff meetings/ management reports</b>	The work impact, issues and successes of the volunteer programme are brought to and dealt with at staff and management meetings regularly.		
<b>2.13</b>	<b>Expenses</b>	The organisation's policy on reimbursement of expenses is clearly stated and communicated to volunteers during the recruitment phase and via the volunteer policy. Where budgets permit volunteers are reimbursed for out-of-pocket expenses (perhaps to an agreed maximum) for travel to and from the volunteer site and lunch where the volunteer works more than 4 hours.		
<b>2.14</b>	<b>Exit interviews</b>	Exit interviews are conducted when volunteers are leaving organisation to gather feedback on their experience and how the volunteer programme could be improved.		
<b>2.15</b>	<b>Problem solving procedures</b>	Problem solving procedures are in place and communicated to volunteers via policy.		
<b>2.16</b>	<b>Trial period</b>	All volunteers are provided with a trial period to ensure both parties are satisfied with the volunteering arrangement and this is communicated to volunteers when starting in their role.		
<b>2.17</b>	<b>Boundaries</b>	The boundaries between staff and volunteers are clarified in volunteer policy, volunteer agreement etc.		
<b>2.18</b>	<b>Communications</b>	Volunteers are kept up-to-date with information relevant to their role via formal / informal communications such as newsletter, email lists, Facebook page etc.		
<b>2.19</b>	<b>References</b>	The organisation's policy on providing references is clearly stated and communicated to volunteers via the volunteer policy.		
<b>2.20</b>	<b>Unsuccessful Applicants</b>	There is a system in place to inform unsuccessful applicants they have not been offered a role with the organisation.		

03	Best practice Item	Explanation	In place: Yes / No / In progress	Action Plan
<b>Stage 3 : this stage contains 10 final elements to be implemented in the advanced volunteer programme</b>				
3.01	<b>Diversity and Equality</b>	There is a diversity / equality policy in place with which all staff and volunteers are familiar. Diversity / equal opportunities training provided to all. Recruitment, communications, publicity and recognition materials openly embrace and encourage diversity.		
3.02	<b>Diversity monitoring</b>	There is a review system in place to assess and increase diversity within the volunteer pool. Volunteer age, gender, race etc. are gathered anonymously and for statistical purposes only.		
3.03	<b>Staff / key volunteers trained in volunteer management</b>	Staff or key / lead volunteers with responsibility for supervising volunteers on a day-to-day basis have received volunteer management training.		
3.04	<b>Volunteer handbook</b>	There is a volunteer handbook in place. The handbook is a user friendly booklet providing volunteers with information about the organisation and being a volunteer. It generally includes policies relevant to volunteers while volunteering.		
3.05	<b>Satisfaction / feedback surveys</b>	Volunteers are surveyed regularly (e.g. annually) to gather feedback and ensure their satisfaction with the volunteer programme.		
3.06	<b>Risk assessments</b>	All volunteer roles are assessed for risk. Where possible volunteers are included in assessment. Measures put in place to prevent risk.		
3.07	<b>Annual Report</b>	Volunteers and the impact of their work are included in the organisation's annual report.		
3.08	<b>Board reports</b>	The work and successes of the volunteer programme are communicated to the Board regularly.		
3.09	<b>Review schedule</b>	There is a review schedule in place for the volunteer programme and all volunteer related policies, documents e.g. policy, handbook, application forms, risk assessment		
3.10	<b>Refusal of demands</b>	Volunteers are aware they can refuse to carry out work outside of their role, that they do not have the skills to carry out, that seems unreasonable or for any reason e.g. they simply don't want to.		