

# GUIDE TO MANAGING HISTORICAL SOCIETIES

## Involving People

### Volunteers

In 2008 the RHSV prepared material for a series of Heritage Victoria workshops and for the workshop publication *Heritage Keepers – Volunteer Training Program Resource Kit: a guide to managing your heritage organisation*. Most of the following information was originally published in *Heritage Keepers*.

Historical societies in Victoria are generally volunteer managed organisations. In some cases there may be one or two paid staff but the operation of the organisation still depends heavily on its volunteer workforce.

There are a range of responsibilities and costs associated with involving volunteers, including time, resources, management and planning. To run an effective volunteer program requires careful planning and a well-coordinated approach from the whole organisation.

### Motivations to volunteer

Research has shown that when individuals are engaged with their communities, community wellbeing is enhanced. Participation by volunteers in a range of activities is considered to be an indicator of a well-functioning community.

Much research has been undertaken in identifying the broader benefits that volunteer participation achieves within the organisation. A Department of Victorian Communities survey in 2005 showed that 41% of Victorians volunteer.<sup>1</sup> The figures show that older women living in rural and regional areas volunteered more often than other groups.

Volunteering does involve the desire to contribute for the benefit of others, however there are many other valid motivations and it is important not to consider volunteering as something that is done for people or organisations but as an exchange.

The Department of Victorian Communities research in 2005 identified that people's most important reasons for volunteering were to:

- give something back
- help others
- socialise
- teach skills
- maintain and develop new skills and work habits.

This research also included information from the Australian census figures identifying other motivations including:

- personal satisfaction
- helping others/the community
- doing something worthwhile
- gaining work experience
- learning new skills.

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<sup>1</sup> Volunteering in Victoria factsheet - <http://tinyurl.com/2cf3f85>

Research also indicates there are a number of indirect benefits for volunteers including improved health and wellbeing and better employment prospects.

### **Principles of volunteering**

Volunteering Australia has produced *Principles for Volunteering*<sup>2</sup> in order to provide a clear understanding of volunteer activities. The principles state that:

1. Volunteer work is unpaid  
and that volunteering
2. benefits both the community and the volunteer
3. is always a matter of choice and is not compulsorily undertaken to receive pensions or government allowances
4. is a legitimate way in which citizens can participate in the activities of their community
5. is a vehicle for individuals or groups to address human, environmental and social needs
6. is an activity performed in the not-for-profit sector only
7. is not a substitute for paid work
8. respects the rights, dignity and culture of others
9. promotes human rights and equality

### **Why involve volunteers?**

There are many reasons to involve volunteers in an organisation, but they need to be clear. They may include:

- keeping the organisation alive
- getting the work done
- helping spread the work among members
- a source for new ideas

### **Planning for Volunteers**

Taking the time to plan for volunteers saves time.

Volunteers are the backbone of the community heritage sector. They are the leaders and the doers. They provide the inspiration, wisdom and dynamic. They are the main resource that sustains local history.

Volunteers bring enthusiasm, a range of skills and the potential to widen networks within the community. However, it is well known that volunteer program will not succeed if the volunteers feel:

- they are not being well used and well managed
- their task is unclear and unsatisfying
- they feel their time is being wasted
- they feel unappreciated.

This section looks at strategies to support the management of the community heritage sector's greatest asset, volunteers.

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<sup>2</sup> Volunteering Australia - Definitions and principles of volunteering - [http://www.volunteeringaustralia.org/files/0WQ1A2EUTZ/Def\\_and Princ\\_English.pdf](http://www.volunteeringaustralia.org/files/0WQ1A2EUTZ/Def_and Princ_English.pdf)

Creating a balance between the organisation and the expectations of the volunteer requires good planning and ongoing management. Volunteering is a two-way street whereby skills, experience and time are contributed in return for nurturing, support and development.

By encouraging the development of volunteers you encourage the growth capacity of your volunteer community and your organisation.

### Looking at what your organisation has to offer

Before any successful volunteer strategy can get underway it is worthwhile taking stock of what the organisation has to offer, what sets it apart from other groups in your community and why people would consider becoming a volunteer. Working with heritage has a lot to attract volunteers, but community heritage groups within communities can find themselves competing for volunteers' time.

Here are some suggestions for encouraging volunteer participation:

- Developing new skills including working with computers, vegetation management, minor works and repairs to a heritage place, indexing, archiving, cataloguing, exhibition skills, working with collections.
- Career development. Volunteering with a heritage organisation is an attractive addition to a resume.
- Working with the public by assisting visitors with research, customer service, taking guided walks and talks.
- Opportunities to volunteer in areas of interest such as local history, research, behind the scenes in a collecting organisation.
- Opportunities to do practical work such as making conservation boxes, exhibition displays, stands, framing and outdoor work.
- Volunteer roles that offer a variety of alternatives to suit a volunteer's time commitments.
- Community heritage organisations provide a great opportunity to volunteer with wonderful people. Make sure that any new volunteer is made welcome and that there are opportunities for team work and social interaction.
- Working with heritage is an important way to preserve and understand a community's history. Increasingly, community heritage holds the story of a community's identity.

### **Being Prepared**

Volunteers in community heritage are essential for the ongoing viability of the organisation, but in planning to develop a volunteer program and to plan for its ongoing sustainability, a number of factors need to be considered.

The number of volunteers your organisation can manage may depend on:

1. Physical resources
2. Human resources
3. Financial resources
4. A 'welcoming culture'

To help determine whether the organisation can take on volunteer assistance, a checklist of requirements can be found in the *Procedures* section of this Guide under *Forms*.

### **Volunteer recruitment**

Make sure you know what you want volunteers to do before you recruit them.

Within the organisation somebody must take responsibility for the volunteers – usually this person is known as the volunteer coordinator.

The volunteer coordinator:

- works with the committee of management to ensure that tasks are relevant to the organisation's goals and projects for the year
- works with the committee person responsible for occupational health and safety and risk management regarding any new tasks or updates on roles of volunteers
- interviews and places volunteers in appropriate roles
- organises induction
- develops specific position descriptions with the volunteer
- matches the volunteer with the appropriate person for training
- ensures volunteer registration forms are completed and securely stored
- ensures maintenance of volunteer register
- informs treasurer of increased/decreased insurance
- follows up enquiries to volunteer
- prepares recruitment material
- fulfils the role of a contact point for volunteers
- provides feedback and encouragement
- organises rewards such as the Christmas party, thank you letters and certificates of merit from the organisation<sup>3</sup>

### **Identifying Roles for Volunteers**

Volunteers in community organisations bring a variety of backgrounds, commitment and skills. Planning a volunteer role requires creativity and flexibility and must achieve a balance between matching the volunteers' interests and their expectations of the role.

In developing new roles and tasks for volunteers, complete a job safety analysis sheet to identify any risks associated with the task. It is part of your OH&S responsibility to inform volunteers of any hazards and/or risks. Volunteers are entitled to training.

Volunteer positions should be part of the annual/forward plan.

The committee of management should develop a forward plan. See *Planning – Strategic plan / Forward plan – Business plan* in *Managing the organisation*. Museums Australia (Victoria) has produced a forward plan template. You can download a copy from their web site at <http://www.mavic.asn.au/services/resources>.

To effectively plan for volunteers, it is important to identify the roles before developing the position descriptions. Roles relate to your forward or annual plan, and position descriptions relate to the individual volunteer. Roles should describe broad activities, while position descriptions describe how a task will be performed.

By identifying a broad range of roles for volunteers according to interests and motivations, volunteers can be quickly matched with the activities of the organisation and the precise position description can be developed later.

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<sup>3</sup> Adapted from Bowbridge, Nina and Creyton, Mark. *Willing and Able: recruiting, managing and retaining volunteers in museums and galleries*. 2002. - [http://www.magsq.com.au/01\\_cms/details.asp?ID=21](http://www.magsq.com.au/01_cms/details.asp?ID=21)

See *Developing volunteer roles* in *Procedures* section of this Guide under *Forms*.

### Creating position descriptions

It is important to write position descriptions for every volunteer because:

- position descriptions are important risk management tools in the event of a volunteer accident – it is good practice to be able to record what the tasks are should there be an insurance claim
- position descriptions support volunteer recruitment and break down roles into smaller components allowing for flexibility and developing tasks to suit volunteers
- position descriptions help the management of volunteers and are an effective tool for forward planning and for reviewing activities of the organisation
- position descriptions are an essential tool for succession planning as they identify the roles and activities of the organisation

It is a helpful management tool to rank position descriptions by levels of supervision: high, medium and low. This helps manage the workload of the volunteer coordinator while matching the level of responsibility to the volunteer and the position.

### **Preparing position descriptions**

<b>Position title</b>	Titles help to shape the volunteer’s expectation of the role. The title should connect the volunteer as closely as possible to the role. For example: Indexer for Daily News Project
<b>Key responsibilities</b>	Describe the elements of the position in terms of responsibilities: <ul style="list-style-type: none"> <li>• The details of the position could be described as outcomes to be achieved</li> <li>• Level of responsibility – will they train others?</li> </ul>
<b>Skills, experience and attributes</b>	What skills, knowledge and attributes will be needed to undertake the responsibilities? How will the volunteer be trained?
<b>Supervision and support</b>	Who will be responsible for supervising the volunteer? How closely will they be supervised? Will they be expected to supervise other volunteers?
<b>Benefits for the volunteer</b>	Show how the volunteer’s work is contributing to the overall objectives of the organisation
<b>Date of position description review</b>	When and how and with whom will the position be reviewed?

(Adapted with permission from Volunteers Australia)

For more details and templates of position descriptions see the Volunteers Australia website – <http://www.volunteersaustralia.org>

### **Recruiting Volunteers**

In order to encourage diversity, sustainability and community outreach, recruiting volunteers requires many different approaches.

### Word of mouth

Word of mouth is the most effective form of recruitment. Current volunteers are great advocates for your organisation; however, relying solely on word of mouth can create a club-like atmosphere. It is important to create new links with your community to build volunteer sustainability.

### Publicity

Let it be known the organisation is looking for volunteers. Describe the sorts of tasks available and how those tasks will benefit the sustainability of the organisation. List volunteer benefits including new skills, the opportunity to meet new people and to contribute to the community.

- Make sure the organisation's newsletter regularly publishes information for prospective volunteers including jobs and time commitment.
- Publicity through your local media can be very useful.
- Target publicity to attract new and diverse volunteers.
- Use accessible communication tools to reach a wider range of volunteers.
- Develop a relationship with your local journalist/editor and let them know about events, special volunteers and significant projects.
- Organise an interview with a volunteer or send a press release about the benefits of volunteering to the local paper and radio station during Volunteer Week (usually in May; check Volunteering Victoria website - <http://www.volunteeringvictoria.org.au/> - for dates).
- Make sure your website has information for prospective volunteers
- If the organisation has a brochure, include volunteer information or make a flier specifically with information to attract volunteers.

### Looking beyond your pool

Extending your networks into the community is important for the profile of the organisation but it can also be a way of increasing your recruitment options for volunteers.

Community mapping is a way of seeing where your organisation fits into the community and is a helpful exercise for developing potential sources for volunteers: A community mapping approach might proceed as follows:

1. Collect information on any groups that you have visited or have visited your organisation
2. Collect information on people you have helped during the year – for example, researchers, local newspaper, local government and local business
3. Identify groups or individuals within the community who would be interested in your activities – for example, descendants of families known to have settled early in the district and family history groups
4. Identify people with skills you need – for example, graphic designers, carpenters, crafts people and photographers

Collected information could be grouped into interests, age group and active groups. Be sure you do not breach privacy laws. See *Sample Privacy Policy* in *Procedures* section of this Guide under *Policies*.

Use the data collected to develop approaches to these groups – for example, dissemination of newsletters and invitations to events.<sup>4</sup>

### Encouraging diversity

In recruiting volunteers, ensure that you consider the community widely, rather than just looking for people like yourself. When recruiting through the broader community, consider diversity across a range of ages, gender, cultural backgrounds and abilities.

Other methods of recruiting volunteers might include:

- information tables at community events including festivals
- advertising through a broad range of other community groups, from schools and sports clubs to local migrant communities and newsletters of the various cultural or religious organisations in your area
- specifically targeting new people; for example, invite the local drama group to perform in your building, or develop a performance based on your collections and research areas
- developing a local history course for your local u3a (university of the third age) group
- registering your organisation with Volunteering Victoria - <http://www.volunteeringvictoria.org.au/>

### **Volunteers with Skills**

Sometimes an organisation requires volunteers with particular or specialist skills. There are a number of sources for finding these potential skilled volunteers. For example, university students are often looking for student placement opportunities. Engaging a student can be a great way to get information technology projects, management plans, databases and websites done at little or no cost to the organisation. Skilled volunteers also need to be managed well in order for both parties to benefit fully from the experience.

### **Customer Service**

Poor initial contact with your organisation will deter any but the most committed volunteer.

- Make sure the people who answer the phone at your organisation know how to answer enquiries regarding volunteering in a friendly and welcoming manner
- Always make sure volunteers who answer the phone know who to refer the call to and what is the process for including new volunteers
- Always make sure that messages left regarding volunteering are followed up.
- Keep a logbook of names, phone numbers and addresses of volunteer enquiries and maintain contact
- Welcome volunteer enquiries in person and collect contact details

### **Recruitment Process**

Developing a system for the recruitment of volunteers will help manage those wanting to start immediately. It will also help you manage volunteers that come with skills you may want to call upon later.

- An offer to volunteer should be followed up quickly with a phone call.

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<sup>4</sup> Adapted from Bowbridge, Nina and Creyton, Mark. *Willing and Able: recruiting, managing and retaining volunteers in museums and galleries*. 2002. - [http://www.magsq.com.au/01\\_cms/details.asp?ID=21](http://www.magsq.com.au/01_cms/details.asp?ID=21)

- Prepare a volunteer pack that can be sent immediately or given to a prospective volunteer. Include a brochure, a membership form, newsletter, information about upcoming events and a volunteer registration form.

It is important to quickly create a connection between the volunteer and the organisation.

### Setting up an interview

As well as encouraging a volunteer to become involved, it's important to have an interview. The interview should be informal and is an efficient method of identifying:

- the volunteer's interests, skills and expectations
- their time commitment
- any support which may be required to carry out tasks

The interview is a good opportunity to:

- provide information about the organisation
- talk about policy, expectations and the types of volunteer roles
- discuss the level of training and supervision that might be required
- discuss any issues or concerns
- discuss starting date
- give formal details of who will guide the volunteer when starting

### Medical Information

When interviewing somebody for paid employment you are unable under human rights and equal opportunity legislation to ask the person to disclose any medical information. Volunteers are not mentioned in the legislation, and although you cannot require someone to disclose their medical information, you can give them the option to provide this information. It must be made very clear that medical information will not influence in any way the volunteer selection process or access to volunteer opportunities.

Should the volunteer give you medical information, this information should be kept separate from other volunteer information. It is good practice to collect this information only after they have started as a volunteer.

It should be made clear that collecting medical information is only for specific purposes such as supporting them in an emergency, or designing particular jobs.

### Saying 'no' to a volunteer

Volunteers are a necessary resource of a heritage group. They can bring skills to the group and extend the organisation's networks within the community, and whereas every effort should be made to include people, sometimes it is better just to say 'no'.

If it is clear that the volunteer would not be able to perform tasks to an agreed standard, or that the level of supervision required is more than can be provided, or that it is clear that the tasks and the prospective volunteer are a poor fit, then it is better to encourage the volunteer to offer their services to another, more appropriate organisation.

### **Volunteer Induction**

It is part of your OH&S responsibilities to provide a volunteer with an induction. The timing for inductions should be flexible, but they should be conducted soon after the volunteer



begins. If an induction can be delivered as each volunteer starts, it is essential that it is consistent and thorough.

Develop an induction checklist (see *Procedures* section of this Guide under *Forms*) that includes every detail a volunteer will need to know, including where the first aid cupboard and coffee is. Provide the volunteer with a checklist that includes information about occupational health and safety and who to report to with any concerns.

### **Communications**

To ensure that an organisation operates as successfully as possible, communication must be established through all levels. Each organisation will develop communications to suit its particular needs but these would include:

- regular meetings
- newsletters
- notice boards with information
- clearly defined tasks

Good communications will not only ensure that the organisation runs smoothly, but also that the volunteers feel engaged and committed to the project.

### **Recognition**

Volunteers contribute to an organisation through good will. It is important to remember that good will needs to be a two-way process. Therefore, the organisation needs to find ways of thanking and recognising the participation of volunteers.

Examples of recognition include:

- hosting an annual event where volunteers can be awarded certificates or Volunteer of the Year awards. National Volunteer Week (May each year) is an excellent opportunity to organise something special
- ensuring voluntary activity is reported on in the annual report and other reports – this should clearly articulate the time, commitment and skills of volunteers who have contributed to the organisation
- provide a forum such as a staff meeting where volunteers can contribute their ideas to the organisation and its development
- where appropriate, skill enhancement or other learning opportunities can be provided, recognising the skilled contribution volunteers provide

The Department of Planning and Community Development has 'Certificates of Recognition' that can be used by volunteer organisations. These can be downloaded from the Department's website and used by volunteer organisations: <http://www.dpcd.vic.gov.au/volunteering>.

### **Documentation**

#### Volunteer Registration Forms

Volunteer registration forms are important management records for contact details, age and next of kin details. It is important to register the age of the volunteer because of insurance implications. See a volunteer registration form template in *Procedures* section of this Guide under *Forms*.

It is good practice to update your volunteer registration forms every year. For privacy, keep the volunteer information in a secure but handy location. Always be aware of privacy issues. See a sample privacy policy in *Procedures* section of this Guide under *Policies*.

### Volunteer sign-in book

It is important to keep a volunteer sign in/out book as a risk management tool. The volunteer sign in book should be kept in a prominent place with mandatory requirements that volunteers sign in and out. The volunteer sign in book is an essential emergency planning tool to account for volunteers on the premises.

A volunteer sign in book is also important for counting the number of volunteer hours contributed to your organisation and can be used in grant applications.

### Membership register

Historical societies must keep a membership register. A membership register includes names of all members of the organisation whether or not they are volunteers. Keeping a membership register is important as voluntary workers personal accident insurance must cover all members irrespective of any voluntary contribution.

### **Training**

Although the aim of any volunteer program is to identify volunteers with the skill base you require, it may be necessary to provide training opportunities for volunteers.

This may be necessary if they are to undertake specialist activities for which they have an aptitude or for the long-term sustainability of the organisation when there are gaps in the skill base that cannot be filled elsewhere. In general, training will be for the purpose of:

- increasing the sustainability of the organisation and its skills
- adding to the skills of existing volunteers as the organisation develops
- keeping up to date with new developments—these could be management issues such as OH&S as well as collection management issues or conservation procedures
- increasing the interest and commitment of the volunteer
- essential volunteer safety if the intended work practice is in any way hazardous

Much training has associated costs and a budget should be developed to cover this, although there is some specialist training available in the heritage field, especially designed for community groups, which is either low cost or free.

For most volunteer-run heritage organisations, it is good practice to use the “buddy system” for training – that is, putting a new volunteer with an experienced volunteer to learn their task. The benefits of this style of training are that it is practical, provides a network for the new volunteer, and provides the new volunteer with a contact person and supervisor. Simple as it might seem, this style of training needs planning; the experienced volunteer needs to be available, with sufficient time to train and supervise the new volunteer while ensuring the procedures are up to date.

Providing some organised training for volunteers is motivating, shows that they are valued within the organisation and increases their capacity to assist the organisation.

For some volunteers, improving their skills has been a motivating factor. Simple training might include inviting speakers to your organisation, circulating interesting articles, and organising “behind the scenes” visits to other museum collections and conservation labs.

There are many online training modules for which you could organise volunteers into pairs to work on.

As part of Heritage Victoria’s Community Capacity Building Strategy, a web-based calendar has been developed to highlight available training across Victoria. You can access this calendar at <http://heritage.vic.gov.au/Volunteer-community/Calendar.aspx>.

Other “professional training” is available free of charge to registered volunteers through the Heritage Victoria Community Collections Training Program organised through Museums Australia (Victoria). Further information is available at <http://www.mavic.asn.au>.

The Royal Historical Society of Victoria will deliver training free of charge to any RHSV affiliated society on request. Particular strengths are cataloguing, collections management, web design, IT and advocacy. The Royal Historical Society of Victoria also runs Seminar days, usually at a cost of \$15.00, featuring topics developed on request from societies. These are practical days delivered by local history experts.

Some regions have local history officers employed by councils who organise training on a regional basis.

### **Policies & Procedures**

All organisations require clear policies that outline the expectations of all staff, whether paid or volunteer. Policies and procedures are essential for defining frameworks around the activities of the organisation.

#### Developing a volunteer policy

A volunteer policy should be developed with the volunteers and the committee of management, and agreed and “signed off” by the committee of management. The policy should be made available to prospective and current volunteers.

An example of a volunteer policy can be found in the *Procedures* section of this Guide under *Policies*. A policy needs to be a document that is relevant for your organisation. You might consider some of the following guidelines to help frame your policy.

- Why involve volunteers in the organisation?
- Are there role descriptions for volunteers?
- Who is defined as a volunteer? Is the Committee of Management considered volunteers?
- Can anybody volunteer? Are you able to meet access issues? Does the volunteer insurance policy have an age range?
- How will volunteers apply? Will there be application forms? Interviews? Will references be taken up? Police checks?
- Who will “appoint” the volunteer?
- Is there a dress code? Safety issues with any clothing?
- How will volunteer information be managed? Who will have access to this information?
- What resources will you provide for volunteers? Tea/coffee? Training? Certificates of appreciation? Christmas Party? Invitations to openings?

- Will you reimburse expenses? Which expenses? How is this agreed and is there an expense limit?
- What support and supervision will be provided?
- Is volunteer insurance and public liability insurance in place?
- What are the volunteer's responsibilities? Time keeping? Attendance? Absence?
- How will disagreements be handled?
- How will volunteers be kept informed? How will volunteers' views be fed back to the board of management?
- Are there issues about volunteers speaking on behalf of the organisation?
- What are the arrangements for termination and resignation?
- Do volunteers have to be members?
- Who does the volunteer report to?
- Are other policies in place?

### Developing a grievance or complaints policy

A grievance is a formal expression of dissatisfaction about a work situation, usually made by an individual employee, but sometimes initiated by a group of employees or a union acting on their behalf.

It is important to have a transparent process for resolving problems. For those organisations incorporated using the Model Rules (1981), a grievance procedure is part of the organisation's constitution. A sample grievance policy can be found in the *Procedures* section of this Guide under *Policies*.

Some guidelines to help frame your policy might include the following.

- What sort of complaints might arise?
- The inability of one volunteer to work with another?
- The volunteer task not meeting expectations?
- The inability of the volunteer to be able to perform the task.
- Can policy procedures be put in place to prevent/reduce conflict?
- An informal and formal process?
- What is the management policy for complaints?
- What happens if complaints remain unresolved?

### Privacy laws

Generally, the Federal Privacy Act 1988<sup>5</sup> covers the collection, use and disclosure, quality and security of personal information. The Privacy Act 1988 also gives individuals rights to access and correct personal information about themselves. Under the legislation, individuals have the right to make a complaint if they think their personal information has been mishandled.

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<sup>5</sup> Privacy Act – Office of Privacy Commissioner - <http://www.privacy.gov.au/law/act>

The 11 Information Privacy Principles in the Privacy Act 1988 protect your personal information and give you rights in the way Australian and Victorian government agencies handle your information.

The principles under the Privacy Act 1988 are:

- Principle 1- Manner and purpose of collection of personal information
- Principle 2 - Solicitation of personal information from individual concerned
- Principle 3- Solicitation of personal information generally
- Principle 4- Storage and security of personal information
- Principle 5- Information relating to records kept by record-keeper
- Principle 6 - Access to records containing personal information
- Principle 7- Alteration of records containing personal information
- Principle 8 - Record-keeper to check accuracy etc. of personal information before use
- Principle 9 - Personal information to be used only for relevant purposes
- Principle 10 - Limits on use of personal information
- Principle 11 - Limits on disclosure of personal information

Information regarding privacy issues can be obtained from <http://www.privacy.gov.au/>

#### Developing a privacy policy

In developing a privacy policy the following issues may help to frame the policy.

- What information is to be collected?
- To what activities would a privacy policy apply?
- How will information be administered?

Under what circumstances will access be given to private information?

#### Equal opportunities policy

It's unlawful to treat someone unfairly in public life<sup>6</sup> on the basis of one or more of the following attributes:

- age
- disability
- industrial activity
- marital, parental or carer status
- physical features
- political beliefs or activity
- pregnancy
- race
- religious beliefs or activity
- gender
- sexual orientation

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<sup>6</sup> Equal Opportunities Act – Victoria - [http://www.austlii.edu.au/au/legis/vic/consol\\_act/ea1995250/](http://www.austlii.edu.au/au/legis/vic/consol_act/ea1995250/)

- gender identity

It's also unlawful to discriminate against a person because that person is associated with someone who has, or is assumed to have, one of the above characteristics.

### **Conflict of interest**

Occasionally a conflict of interest may arise between the volunteer and the organisation. A volunteer must declare a conflict of interest.

Where there is a financial interest, defined as an issue where there is the possibility of a financial gain, volunteers should declare their interest prior to joining the organisation.

Other conflict of interest problems may occur through friendship, family relationships, and membership of other organisations or societies.

### Performance issues

Volunteers' performance issues are often difficult for organisations to handle due to the voluntary nature of the contract. In order to avoid performance issues, make sure that the volunteer has a clear understanding of the tasks they have been asked to undertake, and make certain that there is a constant two-way communication about these.

Ensure that the contribution that the volunteer makes is recognised and, similarly, that any negative issues are dealt with swiftly and fairly.

Issues can arise when a volunteer is being asked to undertake a task for which they do not have adequate skills. Similarly, many people do not cope with change well, so make sure that new activities are clearly explained and provide time for individuals to understand any changes within the organisation or the tasks.

### **Review**

It is good practice to establish a review process for volunteers: reviews could be on request, six monthly or annually.

Reviews should be an effective way of monitoring:

- that the “relationship” between the organization and the volunteer is progressing well
- that volunteer feels their expectations are being met
- that the expectations of the organization are being met
- whether changes need to be made to the volunteer’s job description
- whether the volunteer wants a change

Reviews should be undertaken by the volunteer coordinator

Periodic reviews are not for resolving conflict – these should be dealt with immediately.

See *Volunteer Review Checklist* in *Procedures* section of this Guide under *Forms*.

### **Confidentiality**

All organisations have sensitive information. All staff, voluntary or otherwise, must understand they cannot disclose sensitive information about the organisation, within the organisation or to its stakeholders.

### **Exit interviews**

Undertaking an Exit Interview when a volunteer decides to leave is a good way of identifying areas where the organization's volunteer program could be improved.

It is also a good way of demonstrating how the contribution of the volunteer has been valued

Reasons for leaving might include:

- completion of the task
- moving away from the area
- other time commitments
- need a change
- didn't feel they were being well used or well managed
- felt their time was being wasted
- felt they were unappreciated
- their task was unsatisfying

### **Volunteer projects**

Volunteers don't have to commit to your organisation for life. In designing projects, consider a range of options and volunteer sources to fill these.

#### **Project-based volunteers**

Design your projects to attract a wide range of volunteer groups and plan a range of volunteer activities around different timeframes. Many volunteers may be willing to say yes to a short-term commitment.

#### **Teams**

Some projects can be delivered by a group, so recruiting teams, rather than individuals, can be more effective with younger volunteers. A group provides both a social framework for the volunteers and a range of skills for the organisation.

#### **Corporate volunteers**

Large commercial firms may encourage and support staff participation with community organisations. They see this as part of their community responsibility and as a way of generating goodwill and building a positive reputation. These volunteers will often want to deliver a particular project that can then be identified as the corporation's contribution.

#### **Partnering with business**

Partnering is another effective way to recruit volunteers, particularly when specific technical skills are required. These can be for a range of specific activities including:

- projects that require professional skills – for example, marketing your organisation
- specialist skills that a board might require, such as accounting or legal skills
- one-off activities such as an annual report or a special event

There are a number of organisations you can find on the web that partner volunteer skills with organisational needs.

The Australian Business Arts Foundation (AbaF) - <http://www.abaf.org.au/> - provides two services, Advice Bank and Board Bank, that manage programs to identify skilled volunteers

for cultural organisations. These services provide specialist advice for boards and individuals willing to undertake specific strategic projects for organisations.

See the *Procedures* section of this Guide for relevant Policies, Forms and Guidelines relating to managing volunteers.