

Volunteering in the 21st Century



Developing and implementing policies

Policies establish in clear language what the organisation wants to achieve and provide boundaries for how it wants to get there, helping to ensure consistency and accountability.

While developing policies can seem like a daunting task, they save enormous time and energy in the long run, reduce the possibility of things going wrong, and help keep everyone in your organisation safe, involved and included.

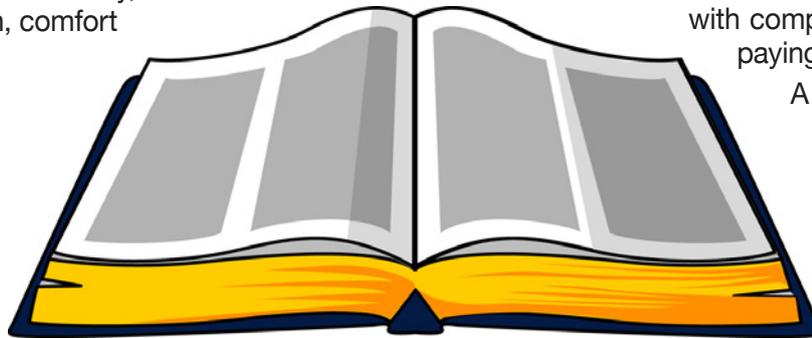
Your peak body, representative organisation or head office may have an existing framework setting out policies relevant for your group or sector. In order for policies to be supported and adhered, people need to have ownership of them. Consult widely on each policy you are considering, taking into account all of those people in your group who will be affected by the new or revised document. Do not assume a one-size-fits-all approach: policies are living documents which need to be customized to fit your organisation.

Why have policies?

Policies help clarify things like:

- The guiding principles for the way your organisation works, and who and what it values.
- What volunteers / members can and cannot do to ensure things like their safety, inclusion, satisfaction, comfort and enjoyment (and, in turn, what your organisation will do to support them).
- How everyone in your organisation will be treated fairly, equally and respectfully.
- Determines actions and sets boundaries. Policies are often developed as a direct result of the need to have a clear definition about a course of action to follow in response to a set of circumstances.
- Determines the lines of communication and accountability.
- Connects programs and the work of volunteers / members / staff to the larger organisation and its mission.

Clearly documented and articulated volunteer policies also help to make your organisation more attractive to volunteers. Providing a fair, professional and organised environment helps ensure your current volunteers feel valued, satisfied and certain about their roles. It also helps attract prospective volunteers who recognise your organisation as a place that knows what it is doing and respects and appreciates its volunteers.



What's the difference between policies and procedures?

Policies and procedures go hand-in-hand. A policy is a clear and concise statement of an organisation's position on a particular issue e.g. including people from different cultures or backgrounds, dealing with complaints, keeping people safe, paying for out-of-pocket expenses.

A procedure describes how to put a policy into action e.g. who will do what, what steps they need to take, what forms or documents are used. Procedures are usually written as lists, instructions or flowcharts.

How are policies structured?

It's up to you how formal or informal your policies are.

Most policies will typically contain:

- an introductory statement about why the policy exists
- a purpose statement about what the policy wants to achieve within the organisation
- a section that outlines the details of the policy (often includes who's responsible for actioning or implementing the policy, and other related documents or policies)
- a procedures section that explains how people go about actioning the policy
- administrative information (policy name, version, creation and review dates, who authorised it) to help keep them organised and up to date

It's good to have a standard template so that all your policies look the same and are easily identified. Policy review can be standardized and incorporated as a regular agenda item, with one policy at a time being considered and reviewed at Committee meetings.

Alternatively a comprehensive policy review can be done annually, possibly by a Sub-Committee. Policies and procedures need to be revisited and re-examined to ensure they are understood, are being followed and remain relevant to the group. The key is to ensure your policies are respected and upheld – it is better to have no policy than to have an ineffective or ignored policy.

What policies and procedures should you have?

Organisations have different policies and procedures depending on things like their size, volunteers, programs, services and other funding or regulatory requirements. While there are some core policies and procedures that may be similar between organisations there is no one-size-fits-all policy manual that will apply to everybody, everywhere.

Key policies to consider include

- Board / Committee and Staff / Member relationship
- Conflict of Interest
- Confidentiality & Privacy
- Grievance Procedures & Conflict Resolution
- Conditions of Engagement including termination procedures
- Ethics & Code of Conduct
- Financial management procedures
- Insurance & Liability
- Induction & Training Requirements
- Disciplinary Policy
- OH&S and Risk Management
- Pre-employment and Police Checks
- Reimbursement for Out of Pocket Expenses
- Volunteer engagement including Volunteer Rights and Responsibilities

Policy development process

A new policy can be developed using this six-step process:

1. Make sure all who are concerned with the particular issue are consulted. This means those either involved with, affected by, or informed about the particular policy issue.
2. Develop one or more draft policy statements following consultation to reflect the consultation.

3. Present the draft (or drafts) to a formal committee meeting for discussion and endorsement. This stage may include any amendments, or even a recommendation for further consultation if the committee cannot agree.
4. Committee endorsement through a formal motion recorded in the committee minutes.
5. Include the endorsed policy in the organisation's official policy manual.
6. Make sure all involved or affected by the new policy are given written advice of its adoption and implementation.

Policies should be reviewed on a regular basis as a part of the organisation's standard practice. Policies can become out of date, unclear, or even at odds to the way in which the organisation is working. When any of this happens the policy needs to be reviewed. The policy review process is the same as the policy development process.

Template for policy documents

Organisation name

Policy title

Adopted by – (your organisation) – date
Scheduled review – date (usually in one or two years time)

Introduction

A sentence or two introducing the background on why the policy exists

Purpose

An outline of what the policy seeks to achieve

Policy

The section contains the content of the policy and details the position held by the organisation on the topic

Procedure

An outline of how this policy is implemented on a day-to-day basis

Responsibility

Who is responsible for monitoring and implementing the day-to-day aspects of the policy and procedures

Related documents

Any other documents of the organisation that relate to the policy