



# Volunteer Management Toolkit

A resource for arts organisations

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 **Workbase**

Front cover: Gap Filler, Volunteer Day (2014)



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## Introduction



**Arts Access Aotearoa**  
Radhika Goyat (2014)

*“Every volunteer programme has someone who makes sure the right people are in the right roles doing the right thing at the right time.”*

*Vanisa Dhiru, Chief Executive, Volunteering New Zealand*

# Introduction

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## Purpose

This Volunteer Management Toolkit (Toolkit) is to help arts organisations to develop a volunteer management system.

Creative New Zealand has commissioned this Toolkit for Boards, managers, and co-ordinators to use as they attract, manage and retain volunteers.

## What is a volunteer?

The term volunteer is generally used to mean:

*“...a person who chooses to work for the good of the community or some public benefit, and who isn't paid or otherwise rewarded for this work and doesn't expect to be.”<sup>1</sup>*

There are some key differences between employees and volunteers:

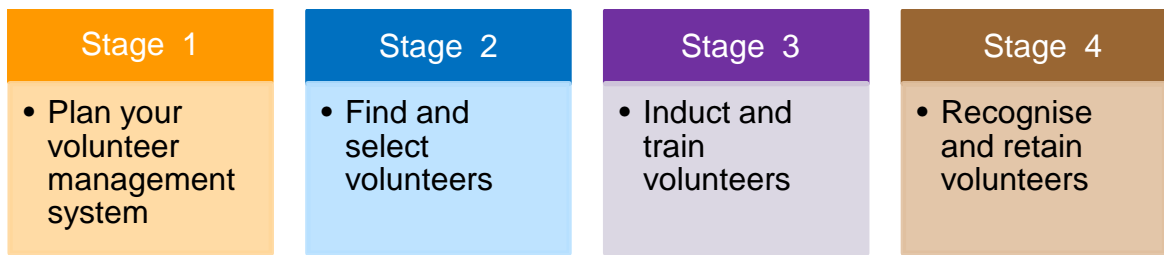
Employees	Volunteers
<ul style="list-style-type: none"><li>• Expect to be paid for their time and services.</li></ul>	<ul style="list-style-type: none"><li>• Do not expect to be paid for their time and services.</li></ul>
<ul style="list-style-type: none"><li>• Have a 'contract of service' as defined in the Employment Relations Act (2000).</li></ul>	<ul style="list-style-type: none"><li>• Are not bound by a 'contract of service' as defined in the Employment Relations Act (2000).</li></ul>
<ul style="list-style-type: none"><li>• Work days and hours can be set by the organisation.</li></ul>	<ul style="list-style-type: none"><li>• Work days and hours are by agreement between the volunteer and the organisation.</li></ul>
<ul style="list-style-type: none"><li>• Are entitled to receive and be paid for sick leave, annual leave and public holidays.</li></ul>	<ul style="list-style-type: none"><li>• Are not entitled to payment for sick leave, annual leave or public holidays.</li></ul>
<ul style="list-style-type: none"><li>• Require a signed employment agreement.</li></ul>	<ul style="list-style-type: none"><li>• Do not require an employment agreement.</li></ul>

## The Four Stages

This Toolkit has four Stages to help you develop or review your volunteer management system.

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<sup>1</sup> Community Law New Zealand (<http://www.communitylaw.org.nz/community-law-manual/chapter-14-employment-the-employment-relationship/other-types-of-workers-contractors-and-volunteers/>)



## Using the Toolkit

As you read each stage, use the questions, examples and templates in the Toolkit to develop the policies and processes your organisation needs to effectively manage volunteers.

Use your organisation's existing policies and processes for employees as a starting point. Align your employee and volunteer policies and processes for consistency, equity and to save time.

Use and adapt the templates and examples provided in the Appendices of the Toolkit to create a system that is consistent with your organisation's purposes and values.

## The benefits of a Volunteer Management System

A documented volunteer management system will help your organisation:

- More effectively attract, manage and retain volunteers.
- Retain more satisfied volunteers who feel valued.
- Manage risks for the organisation and volunteers.

## Treaty of Waitangi and recognising all New Zealanders

All arts organisations need to work with the culturally diverse communities they serve. Māori hold a unique position as tangata whenua in New Zealand. Creative New Zealand is committed to the Treaty of Waitangi, and the impact and relevance of a bi-cultural environment. Creative New Zealand also recognises the role of Pacific Island peoples and the cultural diversity of the people of New Zealand.

Questions to help your Board and managers to consider the application of the Treaty of Waitangi:

- How are we working with local iwi and hapu?
- How do we involve Māori in governance?
- How are culture and tikanga (customs and practice) reflected appropriately in the work we do?
- How do we make sure that our services and systems do not inadvertently disadvantage Māori?
- How do we make sure that Māori staff, board members and others we work with are given equality of opportunity, and work in environments that feel safe and nurturing for them?

Questions to help you practically apply the Treaty of Waitangi in managing volunteers:

- How do you ensure that you respect the culture of Māori volunteers, employees, members and visitors?
- Do you have approved greetings in te reo Māori?
- How do you provide an environment which is welcoming and appropriate for Māori?
- How do you train and support volunteers and employees to know, recognise and use tikanga (customs and practices), and to correctly spell and pronounce people and place names in te reo Māori?
- How are you supporting Māori to participate as volunteers or to train volunteers?

For more information about working with the Treaty of Waitangi see

<http://workplacewellbeing.org.nz/mana-mahi-resource/workplace-wellbeing-guide-6-working-with-te-tiriti-o-waitangi/>



# Planning your Volunteer Management System



**Gap Filler**

Pallet Pavilion build (2012)

*“A planned volunteer program has a direction and purpose to achieve the right outcomes for the organisation.”*

*Sue Jane, Chamber Music New Zealand*

## Stage 1: Planning your Volunteer Management System

---

### Purpose

In this stage you review and plan your organisation's opportunity to work with volunteers and your reasons for having volunteers. Planning helps you clarify what is involved in developing a system for volunteer management, and how to achieve your goals.

Your system for volunteer management will have policies, processes and documents to successfully attract and manage volunteers and meet regulatory requirements.

In this stage you are planning and confirming your intentions to work with volunteers, and preparing to develop documents in your volunteer management system.

### Planning how volunteers contribute

Developing a volunteer management system starts with being clear about your organisation's purpose and goals in working with volunteers. You then analyse what is involved so you can realistically plan how you will achieve your goals.

As you review the opportunity to work with volunteers you need to involve managers and Board members. Consider who else needs to be involved in planning and making decisions about your use of volunteers.

Analyse your organisation's needs and reasons to work with volunteers. Start with your organisation's goals, activities, resources, structure, workforce and ways of operating. Look at documents that will help such as your strategic or annual plans, constitution, annual reports, event or funding proposals and organisation structure.

Questions to help you consider whether to use volunteers:

- What are your organisation's mission, vision, purpose and goals?
- How does the use of volunteers fit with your organisation's purpose and goals?
- What events or projects are you planning over the next one to five years?
- What roles do you need people to perform?
- What roles are performed by employees?
- What roles could be performed by volunteers?
- How many volunteers would you need?
- Do you need to consult with funders, Board, employees or members to decide to use volunteers?

## Decide if having volunteers is right for your organisation

The successful use of volunteers relies on having an effective system to support and manage them.

Make notes of your answers to these questions to help you decide whether you can successfully use volunteers:

- Is volunteering for our organisation likely to be attractive to potential volunteers?
- Why would people want to volunteer in our organisation?
- What roles are the volunteers likely to perform?
- Are the roles likely to be satisfying?
- Can the roles be performed safely and successfully?
- Can we compete with other organisations to attract volunteers?
- Do we have the capacity and capability to recruit, induct, train and manage volunteers?
- What are our obligations to volunteers?
- What legislation do we need to understand?
- Who would plan and lead the development of a volunteer management system?
- Who would develop the policies, processes and documents?

Analyse your internal strengths and weaknesses, and your external threats and opportunities (SWOT analysis) in relation to your ability to successfully attract, manage and retain volunteers.

Your senior managers and Board members should then make a decision whether to work with volunteers and to develop a volunteer management system.

A record of the decision could briefly note your organisation's goals for volunteers and who will lead, and contribute to, the establishment of your volunteer management system. You may also allocate responsibility for agreed actions such as consulting or communicating with employees or members.

## What do you need to develop for a volunteer management system?

Plan what you need in your volunteer management system including the policies, processes and documents.

As you work through the questions below, identify what needs to be done, who will be responsible for doing it, and by when.

Questions to help you plan your volunteer management system:

- What activities or events will volunteers support?
- What roles and tasks will volunteers perform?
- What supervision will volunteers need to undertake the roles?
- How will we induct and train volunteers?
- Who will they report to?
- Do we need a dedicated volunteer co-ordinator?
- Do we want a buddy system?
- Where will we locate and accommodate volunteers?
- Are we able to include volunteers who have disabilities?
- What do we need to do to attract and work with volunteers from diverse cultures?
- What do we know about the motivations of volunteers to be involved in our organisation?
- How will we consult with employees in our organisation about volunteers?
- How will we build the relationship between employees and volunteers?
- How will we keep records of volunteers?

## **Preparing your volunteer management system**

Developing a volunteer management system can be treated as a project, with a project leader and team members. A project should have a written plan which lists, however briefly, the project goals, the key tasks and steps that need to be completed, who will be involved, their responsibilities, milestones and deadlines.

Keep your volunteers' motivation and needs in mind, as well as your organisation's goals, needs and values, as you develop your volunteer management system.

Volunteers want to be involved in, and stay with, organisations where they will have a satisfying role that is aligned with their motivations for volunteering. Volunteers want to see how they contribute to the success of the organisation and to feel valued and recognised for their contribution.

## Volunteer co-ordinator

You need to decide who will manage your volunteers. In this Toolkit we have called this a volunteer co-ordinator position. In larger organisations the co-ordinator could be a full time, paid position. In smaller organisations this may be a part-time role, managed by an experienced volunteer.

The person who is most closely involved with managing and supervising volunteers is likely to have the greatest impact on their experience and enjoyment of the role. The management and organisational skills and abilities of the co-ordinator position are critical, as is the organisation's support for that position.

A volunteer co-ordinator needs experience and skills to manage people and programmes, and may be responsible for:

- Developing policies and processes.
- Writing and reviewing documents such as the:
  - Volunteer Task Description
  - Volunteer Agreement
  - Application Form
  - Advertisement
  - Induction information
  - Code of Conduct.
- Managing and contributing to the recruitment of volunteers.
- Developing and delivering induction and training.
- Supporting and managing volunteers.
- Managing scheduling and rosters.
- Reviewing performance and satisfaction.
- Managing rewards and recognition.
- Managing complaints.
- Managing records.
- Liaising between senior managers, employees and volunteers.



## Volunteer policy

Some organisations have a written policy or statement on volunteers. A policy can range from broad philosophies to specific rules. A volunteer policy could include information about:

- The rights and responsibilities of volunteers in your organisation.
- Bi-cultural or human rights or equal opportunities.
- Keeping volunteers safe.
- How you train and support volunteers.
- How your organisation recognises and rewards volunteers.
- Whether you reimburse volunteers' expenses.
- How you manage grievance processes.
- How you schedule work, organise rosters and agree working times.

A volunteer policy is particular to your organisation.

**For more ideas about what might be included in a policy, see the Universal Declaration on Volunteering in Appendix A**

## Volunteer records

You need to keep records about your volunteers in a secure place, such as a locked filing cabinet, as for personnel files for employees. A volunteer's personal details, including his/her home telephone number, address or other personal information cannot be given to other staff (other than managers, co-ordinators or administrators who need to contact volunteers for work purposes) or anyone outside your organisation, without the consent of the person concerned.

If you store volunteer's information in an online database or Excel spreadsheet for easier reference, make sure the electronic files can only be accessed by authorised people.

Follow the Privacy Act (1993) in storing and using volunteer information.

**For more information about the Privacy Act and other legislation, see Appendix B - Legislation**

During induction discuss confidentiality and privacy and request relevant consents from volunteers.

Explain to volunteers that:

- *“Personal information about you on your Application Form and in our files is confidential. It will only be used for the purpose of your role as a volunteer in this organisation. Your information will not be shared without your consent. We will ask you if you consent to sharing this information with other employees and volunteers.”*
- *“When you become a volunteer in our organisation, your personal information will become a part of your volunteer personal file. If you ask your manager/co-ordinator you may look at your file.”*
- *“Applications and other information about volunteers is kept on a database in our organisation, so we can contact you for future events. If you ask us in writing, when you leave our organisation, we will remove your details from our database.”*
- If you have decided you need to complete police checks, seek consent and the information needed for those (refer to information about police checks on Page 18).

Volunteer personnel files can include:

- The completed Application Form.
- Information from selection interviews or reference checking.
- The Volunteer Task Description.
- The signed copy of the Volunteer Agreement.
- The signed copy of the Code of Conduct.
- Emergency contact numbers.
- Updated contact information for the volunteer.
- Updated information about availability to volunteer (days and hours).
- Tasks or projects the volunteer has worked on.
- Skills and abilities, training records or attendance records.
- Information about interests or performance from observations or review meetings.
- Notes about any conduct concerns or complaint discussions.

## Volunteer Agreement

A *Volunteer Agreement* is a written document, signed by both the volunteer and the organisation, that states the basic tasks and undertakings that are involved in volunteering. It aims to provide clarity and certainty about what is expected of volunteers in your organisation. A *Volunteer Agreement* may be signed when a volunteer accepts your offer of a role or during induction, when you can explain more about the commitments involved.

Review and adapt the *Volunteer Agreement* template to meet your organisation's needs.

See the *Volunteer Agreement* template in Appendix C

## Code of Conduct

A *Code of Conduct* describes the behaviours that are expected, and the behaviours that are not acceptable in your organisation. Your *Code of Conduct* for volunteers and employees should be clear and consistent about behaviours, compliance and consequences. Any minor differences would be due to the different nature of the roles. If you have a *Code of Conduct* for employees, you could review and amend that to include volunteers. Your *Code of Conduct* is particular to your organisation.

Use these additional questions to decide if you also need to cover:

- Expected standard of dress.
- Customer service or patron expectations.
- Communication on behalf of the organisation (media, public relations, interviews, etc).
- Confidentiality and proprietary information.
- Privacy.
- Copyright.
- Diversity and inclusion.

Write your *Code of Conduct* in language that is easily understood by employees and volunteers. Clearly state your organisation's expected behaviours, and the possible consequences for breaches.

See the example *Code of Conduct* in Appendix D

## Reimbursing expenses

Decide if you will offer to reimburse volunteers for their out-of-pocket expenses such as travel and parking costs. Reimbursement of expenses needs to be actual and reasonable. To reimburse actual expenses ask volunteers to give you receipts rather than giving an allowance. Reimbursements made to volunteers for actual and reasonable expenses are non-taxable.

You can also make a calculation of the estimated, reasonable expenses of travel, and make payments to refund volunteers for the costs of using their own vehicle. Use a reputable source such as the Inland Revenue Department for your mileage rate estimates.

Volunteers may be given a modest amount of money to reimburse them for the estimated cost of buying lunch each day they work. Payments that are not considered reasonable, or are considered a gain or reward, have implications for Inland Revenue, Immigration Service (MBIE) and possibly WINZ (Work and Income).

Honorariums, which are payments for professional services that are provided supposedly without charge, are not tax exempt. For more information see Appendix A.

## Volunteering and diversity

Your volunteers, employees and members, will come from diverse backgrounds with a wide-range of skills and cultural expectations. Valuing the diversity of volunteers, employees and members reflects the diversity of your community. For more information see Appendix A.

## Volunteering and disability

Being disabled is not a barrier to volunteering. Positively identify what people with disabilities can contribute to your organisation. If you cannot safely accommodate a person with disabilities (e.g. you have stairs and no elevator), state this in your advertisement and be prepared to explain what opportunities you can and can't offer to people with disabilities who enquire about volunteering. For more information on encouraging volunteer diversity and working with people who have a disability see Appendix A.

## Legislation and legal compliance

Volunteers are covered by many of the Acts that protect employees. You need to understand your legal responsibilities for volunteers.

### Duty of Care

Organisations have a duty of care for their volunteers. You need to make sure that you have ways to keep volunteers safe while they are performing tasks for your organisation and to protect volunteers' rights under the relevant Acts:

- Human Rights Act (1993).
- Health and Safety in Employment Act (2002 Amendments).
- Criminal Records (Clean Slate) Act (2004).
- Privacy Act (1993).

**For more information on legislation you need to know about and comply with, see Appendix B – Legislation**

### Liability

Organisations are responsible for the actions of their volunteers while they are performing their role. This means that a volunteer (in the same way as an employee), when acting on behalf of the organisation, creates a legally binding obligation for the organisation. For example, if a volunteer orders supplies and agrees to payment terms and amounts, your organisation is bound by the agreement. If a volunteer makes a defamatory statement, suffers an injury, or causes harm to others while performing their duties as a volunteer, your organisation is liable.

You should check your insurance policies to clarify whether you are covered for your volunteers and in what circumstances.

### Police checks

Decide if you need to carry out police checks. If you decide to proceed with police checks, you need to do this consistently across all volunteers and employees doing similar work. Decide which convictions could affect the suitability of volunteers.



You might decide to carry out a police check if the volunteer is going to be undertaking duties:

- with vulnerable groups such as children<sup>2</sup> [sexual offences and offences against children]
- handling money or finances [dishonesty, theft or fraud offences]
- driving a motor vehicle [drink driving or dangerous driving offences].

If you decide you need to proceed with police checks you will need to explain why screening is part of your process and use a consent form. Alternatively you could add information about consenting to police checks to your *Volunteer Agreement* form which volunteers sign.

For example: *I understand that xx organisation works with children and wishes to carry out police checks on their volunteers, and I consent to this.*

You may also add a section to the application form asking volunteers to declare their applicable criminal convictions. Making a false declaration would be a reason to immediately discontinue using the person as a volunteer.

Volunteers do not need to reveal previous convictions if they meet the criteria of the Clean Slate Act.

For information about how to check for criminal records and to understand the Clean Slate Act see Appendix B.

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<sup>2</sup> *Vulnerable groups include children under the age of 18 years, people who require care for an intellectual or physical disability or under the Mental Health Act.*

## Finding and Selecting Volunteers



**Auckland Writers Festival**

The University of Auckland Festival Debate: Privacy is an Outdated Concept (2014)

*“Volunteers help our organisation to achieve our goals. The success and promotion of our festival attracts volunteers.”*

*Shona Roberts, Auckland Arts Festival*

## Stage 2: Finding and Selecting Volunteers

---

### Purpose

In this stage you decide where and how you find volunteers with the skills you need, and who will enjoy working in your organisation.

The aim is to find suitable volunteers where there is a good fit between your organisation, the roles available, and the volunteers' motivations and interests.

As you develop your volunteer advertising and selection processes, think about how you can help volunteers to make a realistic assessment of their interests and abilities in relation to your requirements and tasks. Be clear and realistic about what is involved so volunteers get an accurate idea about whether they will find the role satisfying and will want to continue to work in your organisation.

The advertising and selection process is the start of your relationship with volunteers so it pays to make a good impression. You need to positively represent your organisation and its values, in order to create the basis for an ongoing relationship.

### Defining the volunteer role

Review the decisions made in Stage 1 by your Board and managers about your organisation's reasons for using volunteers.

Use these questions to help you define your volunteer roles:

- Do we have short term projects, regular events or ongoing tasks?
- What tasks do we need volunteers to do?
- How many volunteers will we need?
- What hours and times are involved?
- What skills, knowledge, attitudes or experience are needed for the tasks?
- Who will the volunteers report to?
- What relationships exist between these tasks and other roles?
- What are the key relationships?
- Where are we likely to find volunteers who will enjoy our organisation and our roles?

Write a *Volunteer Task Description* to describe what the volunteer will do and the key relationships. A task description is like a job description and may also be called a job, role or assignment description.

Review and adapt the *Volunteer Task Description* template to reflect your organisation's needs.

**See the *Volunteer Task Description* template in Appendix E**

Use the *Example Volunteer Roles, Tasks and Skills* as a source of information about ways to describe tasks and the skills, knowledge or experience that volunteers need for your roles.

**See the *Example Volunteer Roles, Tasks and Skills* in Appendix F**

## Finding volunteers

Volunteers can be found through:

- word-of-mouth
- notices on supermarket or community notice boards
- a stall at a local market
- social media
- e-mailing your data base of members, supporters and existing volunteers
- employees or members asking people in their networks
- advertising in your newsletter or on your website
- advertising through electronic or local print media
- Volunteering New Zealand or other volunteering groups. Not-for-profit organisations can source volunteers from volunteer centres affiliated with Volunteering New Zealand. For a small fee you can register online with your closest volunteer centre. For your fee you may advertise as often as you want for a year. The volunteer centre will pre-interview volunteer applicants for you at no extra charge. For more information see Appendix A.

## What motivates volunteers?

Volunteers come from a diverse range of backgrounds and cultures, and have their own reasons for volunteering. Some of these include:

- a desire to help others
- wanting to use their expertise and skills
- wanting to learn and develop
- wanting to gain experience that may help with future employment
- an interest in the activity, e.g. dance
- a desire for social contact and new friends
- having a friend who is a volunteer
- a sense of achievement and feeling useful
- having a lot of free time
- wanting to give back to the community
- whanaungatanga (connection and kinship with others)
- an expectation that volunteering will be enjoyable, rewarding or fulfilling.

## Preparing to advertise

Before you write your advertisement for volunteers, think about who your organisation wants to attract, and why volunteers might want to work for your organisation.

The more you know about the motivations and interests of potential volunteers, the better you can target your advertising and recruitment. To find out more about what attracts and motivates volunteers you can use past volunteer feedback, ask current volunteers, or review applications from people who have expressed interest in being a volunteer.

Questions to help you write your advertisement:

- What attracts people to volunteer in our organisation?
- What motivates potential volunteers?
- What can we offer volunteers who work for our organisation?
- Where can we find volunteers representative of our members and our community?
- How can we make this advertisement personal and relevant to the reader?
- Has the advertisement answered the basic questions: who, what, why, where, when and how?



## Writing your advertisement

Write your advertisement to gain interest and attract volunteers. Here is a simple outline that you can improve by appealing to your volunteers' motivations:

- Have a clear heading: *Local art group needs volunteers.*
- Have a sub-heading that attracts the reader's attention: *Interested in helping others enjoy art?*
- Have a brief statement about your organisation and its purpose or activity. Think about how you can describe the need or the difference your organisation and your volunteers make.
- Clearly and briefly describe the role and tasks: *We need volunteers to greet visitors and assist at local painting and sculpture exhibitions. If you enjoy art and social interaction, this role will suit you.*
- Help people imagine themselves in the role and dispel any fears that may prevent them from applying: *No previous experience needed - just interest and enthusiasm. One afternoon a week. Full training and support is given.*
- Describe the benefits of volunteering in your organisation: *You will enjoy working in a great team who take pride in learning and developing themselves and the creative talent in our community.*
- Make essential requirements clear so that you receive applications from people who can meet the requirements:
  - *You will be available to work on these days and hours.*
  - *If you help install new exhibitions you will need to be able to lift heavy objects.*
  - *You will also use your Microsoft Word and computer skills to create mail outs.*
- Be clear what the applicant needs to do to apply: *Phone Sue on xxxxxx for an application form or download an application form on our website: www.xxxx.*
- Use your logo and bold design to make your advertisement stand out.

You must advertise for, and select, volunteers on the basis of their skills, experience and qualifications for the role, and you must not discriminate against an applicant. Check your advertisement and recruitment complies with the Human Rights Act (1993). For more information about the Human Rights Act see Appendix B.

## Preparing information

Be prepared to respond promptly to enquiries about becoming a volunteer.

The people who receive calls in your organisation need to know what they should say and do when they get calls about volunteering. Have clear instructions for the people who receive calls about what to do.

For example:

- Thank callers for their interest.
- Tell callers about the volunteer roles and tasks.
- Offer to send out a *Volunteer Task Description* and/or a *Volunteer Application Form* ( by email or post).
- Invite callers to make an Application to be a volunteer.
- Explain the process you use to select volunteers.
- Ask if you can add the caller's name and contact details to your database so you can send out more information about exhibitions and volunteer recruitment.

## Selection panels

Use a small group of people, rather than just one person, to recruit and select volunteers (or employees) if possible. Ideally involve at least three people in selecting volunteers, no matter what selection process you use.

Think about including people on your selection panel who:

- understand the role and tasks volunteers perform
- will manage, co-ordinate or support volunteers
- are artists or performers within the organisation
- are experienced volunteers
- represent iwi or hapu, your Board, members or supporters.

The people on your selection panel need to understand the volunteer roles and tasks and be able to define and agree questions and selection criteria. They also need to have time to be involved in reviewing applications, short listing, interviewing and/or reference checking, depending on your process.

Panel members must keep all the information they see and hear confidential.

## Approaches to selecting volunteers

Large organisations that attract a lot of potential volunteers and have the resources and desire to use a formal selection process may include interviews and reference checks. Smaller organisations which are able or want to work with all people who volunteer, may use informal processes, for example, accepting everyone who expresses interest.

The Toolkit provides information and templates for several approaches to selecting volunteers using:

- an application form
- an information process
- an interview process
- reference checking.

During recruitment, selection and reference checking, you must make decisions based on the ability of the volunteer to perform the tasks (and their availability and interest). You cannot ask an applicant's age or discriminate on the basis of age, gender, or ethnicity.

Volunteers need to be a good fit for, and able to perform, the volunteer tasks. Asking for information about physical disabilities or limitations is allowed in relation to health and safety risks (such as being able to safely use equipment), or if your building has accessibility limitations and you cannot provide safe access.

You can collect information about age and gender once you have recruited a volunteer for the purposes of managing people well and for statistical purposes. For more information see Appendix B.

## Application forms

The purpose of an application form is for potential volunteers to express their interest in volunteering. Application forms can be used to assess the suitability of applicants against the requirements of the role, based on the information provided on the form. Application forms can also be used to shortlist applicants to decide which applicants will be interviewed.

Do not put off potential volunteers by making the *Application Form* too hard to answer. Think about the essential information you need to collect. You can collect more information later from people who do become volunteers, for example during the induction.

Review and adapt the *Application Form* template to meet your needs.

**See the *Application Form* template in Appendix G**

## Selecting volunteers using an application form process

If you choose volunteers using only the *Application Form* make sure you ask for all the information you need to make your selection. You need volunteers who are a good fit with the tasks and time requirements of your role and organisation. Decide on your minimum requirements or criteria before you start.

To select volunteers using the *Application Form*, review the sections that cover:

- the volunteer's interest in your role(s)
- their skills and experience in relation to the tasks that are involved, and
- the times and days they are available to work.

## Acknowledging applications to be a volunteer

Respond to everyone who applies to be a volunteer in your organisation, no matter what selection process you use. Use a letter or an e-mail, depending on how you received the information and your usual processes. Thank everyone for their interest and their application. Give information about the next steps, or if their application is not successful tell them the outcome.

Prompt, courteous and respectful responses help maintain a positive view of your organisation in your community.

Use and adapt the letter templates to reflect your organisation's needs and values.

See the *Application Acknowledgement Letter* template in Appendix H

See the *Appointment Letter* template in Appendix I

See the *Decline Letter* template in Appendix J

See the *Interview Invitation Letter* template in Appendix K

## Selecting volunteers using an information process

Hold an event, hui or fono to provide an opportunity for people to find out more about your organisation and volunteer roles. For example, an open/whānau day, a two hour workshop, a wine and cheese event, or a coffee meeting. Advertise the event and invite people through your database, and/or invite the people who have applied to be volunteers.

You can use an event to engage with potential volunteers as part of the selection process.

During the event you could:

- Invite all participants to introduce themselves and their interests.
- Give a preview of upcoming exhibitions, performances or projects.
- Have an activity that gives an experience of your art form.
- Have a tour of your site or work environment.
- Get a volunteer to talk about their role, what they enjoy, what a typical day volunteering is like.
- Get managers to talk about the tasks volunteers do and the rewards of being a volunteer.
- Give realistic information about the less exciting tasks.
- Invite participants to ask questions.
- Make asking questions fun. For example, have some sample questions in a hat and ask people to pull out a question to ask on behalf of the group.
- Give out Volunteer Application Forms and pens, and ask people to fill them in.
- Ask people who have already filled out a *Volunteer Application Form* if they are ready to commit to times, a project or an event.

To use an event as a selection process, members of your 'selection panel' would attend the event and make sure that a panel member speaks with each person. You might collect more information from participants or just ask people who are interested in continuing with their application to tell you.

After the event, get the members of the selection panel to review the *Application Forms* of people interested in becoming volunteers and add information from their observations and conversations. The selection panellists should reach agreement on which applicants are suitable for the role available.

Advise all applicants, and people who expressed interest, of the outcome using the *Appointment Letter* template in Appendix I or the *Decline Letter* template in Appendix J.

## Selecting volunteers using an interview process

Interviews are a chance for the applicant and you to find out more about each other, and to explore the fit between the volunteer's motivation and interests, and your role and organisation.

Interview selection processes take time and organisation. You will need to arrange interview times with panel members and applicants, arrange venues for interviews, prepare information for panel members and letters for applicants.

Use the panel members and/or the co-ordinator responsible for volunteers to decide what will be covered in the interview. Give each selection panel member a copy of the *Volunteers Task Description* you developed in Stage 2. Refer to that as you review and adapt the *Interview Plan and Questions* template when deciding the questions you will ask in the interview.

**See the *Interview Plan and Questions* template in Appendix L**

If you have more applicants than you can interview, get panel members to choose a shortlist of applicants to interview. Use the *Application Form* to choose the applicants who are the closest fit with your role and tasks. Plan to interview more applicants than there are roles, to allow for applicants who withdraw or are unsuitable. If you are likely to accept all the applicants you may not need to hold interviews.

Estimate how long you will need for each interview allowing at least five minutes for each question. When you set up interview schedules allow at least 30 minutes between interviews to debrief, or in case they run over time.

Decide on a date to hold the interviews that all the panel members can attend. Invite the short listed applicants to come for an interview, giving them notice and time to prepare. Use the *Interview Invitation letter template* in Appendix K.

The *Interview Plan and Questions* template in Appendix L includes instructions about the interview process, which panel members should read to make decisions about how they will manage the process.

The *Interview Plan and Questions* template has a rating scale that allows the panel members to score each applicant after the interview. Panel members should discuss and reach agreement about which applicants are suitable for the role.

When you have completed interviews let the applicants know the outcome as soon as possible. Use the *Appointment Letter template* in Appendix I and *Decline Letter template* in Appendix J. Treat both the successful and unsuccessful applicants with respect. Let the successful applicants know what will happen next including the time and place for induction or training.

If you can only use a limited number of volunteers at the time, but will need more volunteers later, ask applicants for consent to keep their details on file so you can contact them in the future.

## Reference checking

Decide if you will carry out reference checking. Reference checking is usually by phone and involves talking to people who personally know the applicant and can vouch for them or their skills and experience. You can reference check about people's character, and/or their previous work, experience and skills.

Character references are usually given by a family friend who has known the person a long time, and who can talk about their reliability, honesty and personal characteristics.

A reference for experience and skills is usually given by a person who has been the employer or manager, or the volunteer co-ordinator of the person in another organisation. The referee can confirm the person's skills, experience and ability to complete tasks based on their knowledge of their work.

You must get the applicant's consent to do reference checks. The applicant must agree which people you can call and give you their names and contact details. You cannot call other people who may know the applicant and ask about them without their permission.

Review and adapt the *Reference Checking* template to meet your needs.

**See the *Reference Checking* template in Appendix M**

You should link the questions you ask closely to the tasks the volunteer will be performing and the skills they need. All the legal requirements that apply to recruitment also apply to reference checking.

## Trial periods

A trial period allows both you and the volunteer to decide if there is a good fit and to make a decision whether to continue, after an event or a specified period of time, such as three months.

You might offer potential volunteers a trial period working in your organisation. A trial period works best when there are events, projects or tasks that can be completed without too much prior training or preparation. You still need to make sure volunteers on a trial period have a health and safety induction and can work safely. For a trial period to be successful in attracting volunteers, the tasks that volunteers complete and the experience they have, need to be satisfying.

Volunteers are not covered by the 90 day trial period established under the Employment Relations Act (2000). The length of a trial period should be agreed with the volunteer and written into the *Volunteer Agreement*.



## Inducting and Training Volunteers



### Arts Access Aotearoa

Susie McShane helps at the Awesome Arts Access Auction (2013)

Photographer, Vanessa Rushton

*“Volunteers need structure and purpose for their skills to flourish.”*

*Chloe Geoghegan, Director, Blue Oyster Art Project Space*

## Stage 3: Inducting and Training Volunteers

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### Purpose

Induction and training welcomes volunteers and prepares them to contribute to the organisation. Induction and training establishes an understanding of the organisation's purpose and activities and clear expectations about the role and tasks. Setting clear expectations is crucial for effective volunteer management and retention.

Volunteers want to be involved with organisations where they will have a satisfying role that is aligned to their motivations and interests.

Have an induction plan prepared before you start recruiting so you are ready to begin the induction and training soon after you select and appoint volunteers. Be prepared to deliver your induction on the first day that volunteers start.

Plan your induction and training to make it easy for volunteers to learn the things they need to know. As you recruit and induct volunteers find out what they already know, so you can give information and training at the right level. Induction is also an opportunity to find out more about the volunteers and their interests.

### Planning induction and training

Induction is the initial training that orients and prepares the volunteer for working in the organisation and the role. It establishes relationships and expectations and often covers critical information about health and safety and emergency procedures that must be provided early.

Induction then flows into training. Training is the ongoing support for the volunteers to acquire the knowledge and skills needed to perform their roles.

Plan your induction and training together so you can decide the best time to provide information. Involve the people who will be managing, supervising and supporting volunteers in your planning, and delivery of induction and training.

Think about all the policies, ways of working, approval processes, equipment, as well as knowledge and skills a new person needs to be familiar with, to perform the tasks in your organisation.

If you have an induction process for employees, use that to plan for your volunteers' induction. Use and adapt the *Volunteer Induction Plan* template to prepare your induction if you do not have an established way to induct volunteers.

**See the *Volunteer Induction Plan* template in Appendix N**

Things to consider when preparing for induction and training:

- Plan to provide a lot of information, guidance, supervision and support when new volunteers start. This will reduce as volunteers gain experience.
- Explain to new volunteers that this is your approach.
- Ask volunteers about what they already know as you cover each topic.
- Ask volunteers how they like to learn a new task.
- Think about how you can involve volunteers in decision making and planning for their duties.
- Expect to give demonstrations or instructions for most equipment e.g. using a different type of dishwasher or photocopier can be easier if you are shown.
- Decide which managers, supervisors, experienced employees or volunteers will deliver the induction and training.
- When will you and the volunteer sign the *Volunteer Agreement* (developed in Stage 1)?
- When will you ask the volunteer to sign the *Code of Conduct* (developed in Stage 1)?
- What and when will you collect statistical or emergency contact information?

Use and adapt the *Additional Information* template to collect more information to manage volunteers.

**See the *Additional Information* template in Appendix O**

As well as welcoming people, induction provides volunteers with information about:

- Your organisation's purpose, goals, activities and staff.
- How training and support are provided.
- Volunteer roles, expectations, and responsibilities.
- Volunteer role satisfaction and rewards.
- Health and safety information and responsibilities.
- Policies and processes.
- How to perform tasks and use equipment.
- Performance expectations and review.

There is more information about what to cover in an induction in the *Volunteer Induction Plan* template in Appendix N.

**Use and adapt the example *Health and Safety Information* in Appendix P**

For more information about health and safety and event safety see Appendix A.

## Induction packs or handbooks

Give volunteers hard copies of information they need to refer back to and copies of forms that they sign, as a minimum. Decide if you will develop a written handbook or induction pack. An induction handbook or pack includes written information about many of the things you cover in induction.

Decide whether you will send out information or an induction pack to the volunteer to read before they come to the induction. Alternatively you can give the information out when the volunteer starts their induction.

What you can include in an induction pack:

- Board Chair's or Chief Executive's letter of welcome.
- *Volunteer Agreement*.
- *Volunteer Task Description*.
- *Code of Conduct*.
- Reimbursement claim forms.
- *Health and Safety Information*.
- Information about a trial period if you have decided to have one.
- Background and history of your organisation.
- What your organisation does and what you offer your members.
- Mission and values.
- Organisational structure.
- Information about your management team.
- Information about the governance of your organisation.
- Contact details of the co-ordinator.
- Information about IT systems and processes.
- Information about the induction and training that will be provided.

## Delivering induction and training

The number of volunteers and the space you have may influence whether you have large group inductions, small group inductions or one-to-one inductions. Group inductions take less time than individual inductions and give volunteers the opportunity to meet each other.

To define your volunteers' training needs:

- Look at your volunteer roles and tasks using your *Volunteer Task Description*.
- Review the example *Volunteer Role and Task Training Options* in Appendix Q.

- Identify the knowledge and skills needed to meet health and safety, emergency, privacy and confidentiality requirements.
- Be clear about the health and safety needs specific to the tasks performed in each role.
- Identify the training needed to perform the tasks in the roles.
- Identify who and how you will deliver information, and assess volunteers' understanding of that information.
- Identify how you will support volunteers as they learn.
- Be clear about who makes decisions and who is accountable.
- Make sure volunteers can represent you appropriately if they work directly with the public. You may need to provide them with examples or scripts of what they should say.
- Look at how you will make your volunteer roles interesting and challenging.
- Think about duties that allow for job satisfaction and autonomy, as well as a chance to develop skills and enjoy social interaction.

Use and adapt the example *Volunteer Role and Task Training Options* in Appendix Q and your *Volunteer Task Description* to plan your role and task specific training.

**See the example *Role and Task Training Options* in Appendix Q**

## Buddy support

A buddy is an experienced volunteer, not a supervisor, who is willing and able to provide support to assist new volunteers. A buddy system can add to your support for new volunteers, build volunteer relationships and recognise experienced volunteers. For example, a buddy can give information, guidance, demonstrate tasks or be a companion during the first few weeks.

Make sure the purpose of the buddy relationship and the timeframe for the relationship is clear so both parties know what is expected. For example, “For the first month, xxx, who is also a volunteer, will be with you on the membership desk and will show you how to use the ticketing system”.

## Refresher training

Some training, such as first aid, needs refresher training so that the certificate remains current.

Key health and safety information and evacuation procedures should be regularly revisited to keep staff and volunteers up-to-date with how to manage your hazards and risks. Refresher training is important if volunteers work infrequently in your organisation.

## Recognising and Retaining Volunteers



**The Court Theatre**

Gala re-opening performance (2011)  
Angela Brooke, Chief Usher (on right)

*“I enjoy the challenge of and fulfilment I get from volunteering.”*

*Angela Brooke, Volunteer, The Court Theatre*

## Stage 4: Recognising and Retaining Volunteers

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### Purpose

Volunteers need to feel that working for your organisation is worthwhile. Supporting, reviewing and recognising the contributions of volunteers helps your volunteers remain satisfied with their roles.

When volunteers are supported to perform in a role that they enjoy they are more likely to do a good job, feel engaged and productive, and stay working for your organisation for longer.

Keep volunteers informed about your organisation's purpose, plans, new events and successes to maintain their connection with the organisation.

Aim for a close fit between the volunteer roles, rewards and volunteers' motivation. Plan roles that are challenging but well supported. Give regular feedback, recognition and rewards.

### Managing volunteers

To make sure being a volunteer in your organisation is attractive and fulfilling you need to:

- provide satisfying roles and tasks
- match volunteers' interests, needs and skills with the tasks
- communicate the purpose and value of the organisation's work
- show volunteers their impact on the success of the organisation's work
- provide supportive leadership and supervision
- build and maintain positive relationships
- provide training to enable successful performance of tasks
- provide regular feedback and review
- recognise, reward and value volunteers.

### Providing supportive management of volunteers

The way in which you give direction and support in your organisation will carry over to your approach to managing volunteers.

The person who is responsible for leading tasks or projects will give directions and instructions, and provide guidance and feedback during the performance of the work.



The amount of support and guidance will be adjusted to reflect experience and task complexity. An experienced volunteer who performs a role regularly will need a lower level of support than a volunteer who infrequently performs a one-off-task.

For roles that are infrequently performed, you may choose to buddy the volunteer with a more experienced volunteer. For more complex roles you may meet to review progress at agreed intervals.

Use and adapt these suggestions for managing and giving feedback to volunteers:

- Hold regular short meetings with your volunteers (and employees working on the same tasks) to discuss the tasks, progress, updates, resolve queries, offer support and recognise skills and contributions.
- Before the start of an event or before work starts, have a short briefing meeting to clarify tasks and expectations. Ask for suggestions.
- Give clear instructions and check whether they have been understood.
- Make sure volunteers know who to ask if they have any queries or need assistance.
- Give encouragement and look for ways to recognise progress and work that has been done well.
- Support co-ordinators to provide clear, frequent and positive feedback to volunteers.
- If you see a volunteer performing well, give the feedback immediately or at the end of the work period.
- If you see a volunteer not performing as expected, talk to the person as soon as possible to clarify expectations and suggest ways to improve how the work is done. You may need to meet in a private room.
- Where possible, explain the reasons why tasks or processes are done in a particular way.
- Have meetings with volunteers as a group to review the success of an event, what made the event go well, and to thank them for their contributions. Can you use these identified success factors to improve or measure the success of future events?
- Keep notes of your observations and discussions about the skill development and contribution of volunteers on their personnel file.

## **Review meetings with volunteers**

A volunteer is not an employee and review and feedback meetings are not performance appraisal sessions. Review meetings should be at pre-agreed, regular intervals (such as every six months) and explained during induction.

The co-ordinator, who is in a position to know how the volunteer is doing, should conduct the review meeting. Review meetings are an opportunity for both the volunteer and their co-ordinator to give and receive feedback. The co-ordinator should acknowledge and thank the volunteer for what they have contributed since the last review.

Be as specific as possible about the contributions and the strengths of volunteers. The more you can affirm positive and expected performance, the greater the likelihood that volunteers will continue to perform to your expectations and gain satisfaction from their role.

Use and adapt these questions for review meetings:

- What is going well for you?
- What is not going well for you?
- What have you learnt over the last six months?
- What support have you received in the last six months and has that been helpful?
- What do you feel you have achieved over the last six months?
- What aspects of your experience as a volunteer give you the most satisfaction?
- What aspects have been difficult?
- How can we support you better?
- Is there any support or training you believe you need?
- Are there areas we need to clarify?
- What do you understand is the expectation of you in this situation?
- Are there changes we can both agree on?
- Are there any other tasks which you would like to do or learn about?
- Do you feel valued as a volunteer? What has contributed to this?

Review meetings are not opportunities to raise concerns about the volunteer's performance that have not previously been discussed. If you are concerned about the way a volunteer is performing, you should raise this with them as soon as possible so that they have the opportunity to improve.

## **Managing complaints and disruptive behaviour**

Ask to meet the volunteer in a private room. Be open-minded and empathetic.

- Explain why you have asked them to meet you.
- Be specific about what you saw and the actions, attitude or behaviour that is causing concern.
- If there has been a complaint, get clear and specific information about what happened.
- You must investigate and resolve complaints fairly. This requires collecting details so that the person who is the subject of the complaint has a chance to fully respond and give their version. Seek consent to identify the person who has made the complaint, to the person who is the subject of the complaint. Clarify with the person making the complaint, what you can tell the person who is the subject of the complaint, especially if there are issues about identifying who complained. If the complaint or concern is serious, you may ask if the volunteer wants to bring a support person.
- Ask the volunteer for his/her explanation and views about the concern or complaint.

- If the explanation is acceptable, thank the volunteer and confirm the conduct you expect.
- Confirm understanding and agree to future appropriate conduct.
- Confirm any training or support needed, if applicable.
- If the explanation is not reasonable or acceptable, or concerns remain, decide on the appropriate response. For example, ask the volunteer to change his/her behaviour and arrange support, training or a review.
- If the behaviour is a breach of the *Code of Conduct*, consider whether you need to advise the volunteer that he/she can no longer continue, or whether a second chance is appropriate. Use your organisation's previous decisions to guide consistency and fairness.
- In some situations you may ask the volunteer not to work while the complaint is investigated.
- Seek a commitment to change and agree how concerns will be addressed.
- Explain the consequences of similar conduct or complaints reoccurring if necessary.
- Advise if you need to do further investigation.
- Advise the person who made the complaint of the outcome.

Write brief notes in the volunteer's personnel file about the situation, the discussion, agreements, actions, or follow up.

### **If a volunteer refuses an assignment or task**

A volunteer is within his or her rights to refuse an assignment or task. Ask to meet in a quiet place and seek to understand the volunteer's situation. Ask the volunteer about why he or she does not want to carry out the assignment or task:

- Clarify the issue.
- Have their circumstances or availability changed?
- Are there issues of safety?
- Do they need training or other assistance?
- Is there anything that would make a difference?
- Is the task part of their regular volunteer duties?
- Do they still want to volunteer?
- Are there other roles or tasks that they want to continue to do?
- What would they like to do now?

Decide if the volunteer's preferences can be accommodated and whether you can agree to the new arrangement. If so, decide if a new *Volunteer Agreement* is needed to reflect the changes.

If you are unable to accommodate the volunteer's preferences, you need to discontinue the volunteer relationship. See 'Ending a volunteer's involvement' on page 42.

## Recognising volunteers

Recognition shows your appreciation of the contribution of volunteers. Saying thank you is important. Use ways to recognise volunteers that reflect the values, culture and usual practices in your organisation. For example:

- Welcome and introduce volunteers with a social event.
- Have a morning tea or lunch for all team members, including volunteers.
- Hold team meetings including volunteers.
- Send organisational updates and other information to volunteers.
- Include volunteers in discussions and decision making and ask for their ideas.
- Learn and use volunteers' names.
- Present volunteers with a certificate when they complete their training or for a particular contribution.
- Get all team members to sign thank you cards for volunteers on the completion of a project.
- Give awards for Volunteer of the Month or Year.
- Ask experienced volunteers to coach or buddy less experienced volunteers.
- Identify development opportunities for each volunteer.
- Recognise volunteers who have contributed two, five or ten years of service.

## Rewarding volunteers

Volunteers are not employees and may not be rewarded with money or regular gifts. Also see Page 17 about reimbursing expenses. You may:

- Give your volunteers a one-off gift such as tickets or flowers.
- Let a volunteer choose tickets to an event of his/her choice in recognition of a special occasion, or in recognition of the time spent volunteering with you.
- Allow volunteers to watch rehearsals with no payment.
- Allow volunteers and their family and friends to view exhibits ahead of opening day.
- Include volunteers in events and activities, such as a social club or Christmas functions.

For more information see the Community Law Library in Appendix A.

## Retention

Volunteers are a valuable resource and the result of your investment in recruitment, selection, training and support. Strategies to retain volunteers start with having an effective volunteer management system. Every organisation is unique, so you need to align your management of volunteers with your culture and values.

Understanding why volunteers want to work in your organisation and how they feel about working with you will help to refine and tailor your management and retention of volunteers.

Collect information to support the retention of volunteers:

- During selection and/or induction ask about, and keep records of, how the organisation can satisfy volunteers' reasons for volunteering.
- Survey volunteers every one to two years to find out what they enjoy about volunteering in your organisation.
- During review meetings ask volunteers about what your organisation could improve.
- Have a process to match and adapt volunteers' work assignments and review their satisfaction.
- Arrange a senior manager or Board member to meet with volunteers and ask for their feedback and recommendations about how you could better attract, train, support, manage and retain volunteers.
- Use exit interviews to gain insight into why volunteers stay and why they leave your organisation.

## Ending a volunteer's involvement

Volunteers do not need to give notice to end their service with you, or tell you their reasons for leaving. Volunteers leave for many reasons and when they choose to leave, thank them and acknowledge their contribution to the organisation. Ask if the volunteer is willing to complete an exit interview. See the 'Exit interviews' section below.

Use a simple but consistent way to advise other employees and volunteers about when volunteers leave. For example: "*Person's name* involvement/role as a volunteer will finish/is coming to an end on xxx date. We thank *person's name* for his/her contribution and hard work and wish him/her all the best".

There may also be times when you need to review and end a volunteer's involvement. This might include situations where a volunteer is unwilling or unable to complete work to an acceptable standard or when he/she has breached your *Code of Conduct*.

When you need to review and end a volunteer's involvement consider how you can:

- Apply consistent standards and processes (treat people in similar situations in the same way).
- Engage in good faith with honesty and fairness.
- Explain your reasons for your concerns clearly and as soon as possible.
- Ask for and consider explanations and feedback.
- Offer alternative tasks or training if possible.
- Treat the volunteer with courtesy and respect.

The basis for discontinuing a volunteer's involvement is in the statement in the *Volunteer Agreement*: "Either you or we can end this agreement at any time by giving X days notice to the other party that it will not continue."

Here are three situations and approaches that you can adapt.

If you are unable to accommodate the volunteer's preferences adapt the following approach:

- Thank you for your contribution to our organisation and your willingness to give your time.
- We acknowledge your reasons for being unable/unwilling to complete this task/assignment.
- However, we must make sure we provide effective supervision and management of all volunteer roles/tasks/assignments.
- We are only able to provide supervision/management for volunteers in the roles/tasks/assignments as they are defined.
- In this situation we are unable to provide effective supervision/management so we cannot continue to support your work as a volunteer.
- If we have different roles in the future, which do not involve this task/assignment would you like to become involved again?
- How would you like to manage the completion of your role and decide on your last day?

In situations where a volunteer has breached your *Code of Conduct* you need to end the agreement by adapting the following approach:

- We have fully investigated the incident and considered your explanations for xxx breach of the *Code of Conduct*.
- In this situation we must consistently apply our policies and given the nature of this breach, we are sorry to tell you that we have no option but to end your work as a volunteer.
- We are sorry that we are unable to continue with the volunteer agreement.
- We appreciate what you have contributed.
- Depending on the breach of the *Code of Conduct* (e.g. serious safety breaches), you may wish to end the agreement immediately.

In situations where there is concern about a poor fit or inability to perform tasks as required and you need to end the agreement, adapt the following approach:

- As we have previously discussed we need volunteers to complete/performance xx tasks in the following ways.
- We are concerned that despite our training/coaching/instructions there has not been sufficient improvement in the way that you are performing this task.
- The reason we are concerned that the task is done in this way is xxxx.
- In this situation, unless we can all agree on suitable alternative tasks, we are sorry but we are unable to continue your involvement as a volunteer.
- We appreciate your willingness to work with our organisation and what you have contributed.
- How would you like to manage the completion of your role and decide on your last day?

## Exit checklist

When volunteers leave, use an exit checklist covering:

- the return of keys and swipes
- the return of property belonging to the organisation
- if they will complete an exit interview.

## Exit interviews

Your relationship with the volunteer and his/her circumstances will influence whether he/she gives a notice period or agree to an exit interview.

Exit interviews give you information to understand volunteers' reasons for leaving and get ideas about how you can improve your volunteer management. Done well, exit interview discussions can acknowledge a volunteer's point of view and show appreciation for their contribution, even if everything has not been ideal.

You can:

- Ask a volunteer to write answers onto an exit interview questionnaire before they leave your organisation.
- Arrange for a neutral person not involved in supervising or managing the volunteer (eg such as a human resources manager, or a manager in another team) to meet with the volunteer and ask the questions. The interviewer would make notes of what is said on the questionnaire.
- Arrange for a neutral person to telephone the volunteer to ask the questions.
- Ask the volunteer to complete the questionnaire and send it back to you in a pre-addressed envelope or to complete it online. Once people have left your organisation, the return rate may not be high.



Questions to ask in an exit interview:

- What are your reasons for leaving?
- How did you find your time as a volunteer in our organisation?
- What were the most positive parts?
- What areas could we improve?
- Did you get enough support? Training? Recognition? Communication? Feedback?
- Are there changes that would enable you to remain as a volunteer?
- What would you tell someone who is thinking about becoming a volunteer with us?
- Are there any other comments you would like to make?

### **Letter or certificate of service**

Be prepared to provide a certificate or letter on your letterhead confirming the time period the volunteer worked with your organisation and the roles and tasks they performed. Depending on your policy and the situation, you may choose to add other positive comments about the person's contribution, performance and relationships with colleagues.

## Appendices

## Appendix A – Resources

Category	Organisation	Website
Universal Declaration for Volunteering	International Association for Volunteer Effort	<a href="http://www.iave.org/content/universal-declaration-volunteering">www.iave.org/content/universal-declaration-volunteering</a>
Legislation and legal compliance	NZ Legislation, Acts and Regulations	<a href="http://www.legislation.govt.nz">www.legislation.govt.nz</a>
	Community Law Library	<a href="http://www.communitylaw.org.nz/community-law-manual/chapter-14-employment-the-employment-relationship/other-types-of-workers-contractors-and-volunteers/">www.communitylaw.org.nz/community-law-manual/chapter-14-employment-the-employment-relationship/other-types-of-workers-contractors-and-volunteers/</a>
	Inland Revenue Department	<a href="http://www.ird.govt.nz/business-income-tax/expenses/mileage-rates/#02">www.ird.govt.nz/business-income-tax/expenses/mileage-rates/#02</a>
Volunteer management	Volunteering New Zealand	<a href="http://www.volunteeringnz.org.nz">www.volunteeringnz.org.nz</a> <a href="http://www.volunteeringnz.org.nz/volunteerorganisations/bestpractice/">www.volunteeringnz.org.nz/volunteerorganisations/bestpractice/</a>
	MBIE (Ministry of Business, Innovation and Employment)	<a href="http://www.mbie.govt.nz">www.mbie.govt.nz</a>
	Encouraging volunteer diversity - Victorian Government, Australia	<a href="http://www.volunteer.vic.gov.au/toolkit-for-volunteer-organisations/manage-your-volunteers/encouraging-diversity/working-with-people-who-have-a-disability">www.volunteer.vic.gov.au/toolkit-for-volunteer-organisations/manage-your-volunteers/encouraging-diversity/working-with-people-who-have-a-disability</a>
	Arts Access Aotearoa	<a href="http://www.artsaccess.org.nz/arts-access-aotearoa">www.artsaccess.org.nz/arts-access-aotearoa</a>
Health and safety and injury management	WorkSafe NZ	<a href="http://www.business.govt.nz/worksafe/">http://www.business.govt.nz/worksafe/</a>
	ACC (Accident Compensation Corporation)	<a href="http://www.acc.co.nz">www.acc.co.nz</a>
	New Zealand Institute of Safety Management	<a href="http://www.nzism.co.nz">www.nzism.co.nz</a>
	Ministry of Civil Defence and Emergency for safety planning guidelines	<a href="http://www.mcdem.govt.nz">www.mcdem.govt.nz</a>
	MBIE (Ministry of Business, Innovation and Employment) for major event safety and planning	<a href="http://www.med.govt.nz/majorevents">www.med.govt.nz/majorevents</a>

## Appendix B - Legislation

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This appendix gives a summary of important legislation that applies to volunteers, and where to find out more.

### The Human Rights Act (1993)

The Human Rights Act (1993) protects employees and volunteers from discrimination.

It is prohibited to discriminate on the basis of:

- sex – including pregnancy
- marital status – including civil union
- religious belief (or lack thereof)
- colour, race or ethnic origin
- physical or mental disability
- age – if 16 or over
- political opinion
- employment status
- family status
- sexual orientation.

There are some exceptions to the prohibited grounds which are:

- Age – where age is a barrier to achieving the tasks e.g. age may be a genuine occupational qualification, for safety or another reason.
- Disability – where the volunteer requires special services or facilities and it is not reasonable to provide them.
- Gender – when a role needs to be held by one sex to preserve reasonable standards of privacy.
- Support roles e.g. counselling services may be restricted to a particular sex, race, ethnic or national origin, or sexual orientation if highly personal matters are involved.

If you are unsure you can contact the Human Right Commission or go to:

<http://www.legislation.govt.nz/act/public/1992/0096/latest/DLM278829.html>

## Health and Safety in Employment Act (1992)

The Health and Safety in Employment Act (HSE Act) recognises that people doing volunteer work should have their health and safety protected in the same way as employees. A person is defined as a “volunteer” under the HSE Act if that person neither expects nor receives any reward for the work.

The HSE Act sets out steps that can be taken to help keep people safe. In particular, these focus on:

- providing and maintaining a safe working environment, particularly by identifying hazards and managing them
- providing and maintaining facilities for the health and safety of volunteers
- ensuring that plant, machinery and equipment is designed, made, set up, and maintained to be safe to use
- providing volunteers with any necessary protective equipment/clothing for plant, machinery or equipment they use
- ensuring that systems of work do not lead to volunteers being exposed to hazards
- providing volunteers with information about the hazards that they may come across in their work
- providing volunteers with orientation, training and supervision for tasks they do
- developing procedures for dealing with emergencies that might arise while volunteers are at work (fire exits, first aid kit location, location of accident and hazard registers, etc).

<http://www.legislation.govt.nz/act/public/1992/0096/latest/DLM278829.html>

## How to Check for Criminal Records

If you need to check for a criminal record and/or to obtain details of any convictions you can:

- Go to the Ministry of Justice website and download the ‘Request by Third Party for a Copy of an Individual’s Criminal Convictions’ and print the form.

See <http://www.justice.govt.nz/services/criminal-records/request-authorisation-to-view-someone2019s-criminal-record?searchterm=Request+by+third+party>

- The form needs to be completed and signed by both the person whose criminal record is being requested and the employer they are authorising to view their record.
- You need to attach a copy of a valid drivers’ licence or a passport belonging to the person you are checking. Do not send original identification. If they do not have a driver’s licence or passport, Section 4 of the form has a place for a person to confirm their identity.
- Post the completed form and copy of identification to:

Criminal Records Unit  
Ministry of Justice  
SX10161 Wellington

- The Ministry of Justice will post a copy of the applicant’s criminal record to the employer within 20 working days of the date they receive the completed form and identification.

## Criminal Records (Clean Slate) Act (2004)

Volunteers do not need to reveal previous convictions if they meet the general criteria for 'clean slate':

- No convictions in the last 7 years.
- Paid in full any fine, reparation, or costs ordered by the Court in a criminal case.
- Have never been sentenced to a custodial sentence (e.g. imprisonment, corrective training, borstal).
- Have never been ordered by a Court during a criminal case to be detained in a hospital due to his/her mental condition, instead of being sentenced.
- Have never been indefinitely disqualified from driving under section 65 Land Transport Act [1998] or earlier equivalent provision.
- Have not been convicted of a 'specified offence' (e.g. sexual offending children and young people or the mentally impaired).

<http://www.justice.govt.nz/services/criminal-records/about-the-criminal-records-clean-slate-act-2004>

For more information about exceptions to the clean slate scheme see:

<http://www.legislation.govt.nz/act/public/2004/0036/latest/DLM293515.html>

## Privacy Act (1993)

Volunteers are covered by the Privacy Act 1993.

Individual's information can only be used for the purpose for which it was intended. You need a person's prior written consent to:

- use any confidential information
- disclose any confidential information to a person or organisation
- copy any material containing confidential information for personal use or for use by an unauthorised person or organisation.

Once confidential material is no longer needed, it must be either archived or disposed of in way that maintains confidentiality (for example, shredded).

In brief the Privacy Act includes:

- all information collected on a volunteer must be collected for the purpose of volunteering
- all information must be collected directly from the volunteer
- you can collect information from other sources with the specific agreement of the volunteer
- the volunteer must be aware of the reasons and purpose the information is being collected
- the volunteer must be aware of the intended recipient of the information collected
- the volunteer has a right to access, and to correct, personal information
- personal information must not be collected by a means that is unfair, or intrudes on the person's personal affairs
- personal information must be kept secure
- information held on the volunteer must be correct, up-to-date and not misleading
- information held on volunteers must not be held for longer than is necessary
- there are limits on disclosure of personal information
- you must not assign a unique identifier to your volunteers.

For more information see:

<http://www.legislation.govt.nz/act/public/1993/0028/latest/DLM296639.html>



## Appendix C – Volunteer Agreement template

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*Insert your organisation name / logo*

### Volunteer Agreement

---

This Agreement is between: \_\_\_\_\_ Volunteer [you]  
and \_\_\_\_\_ Organisation [us/we]

The Agreement starts on *(date)*: \_\_\_\_\_

The days and time you agree to work are: Days: \_\_\_\_\_ Hours: \_\_\_\_\_

The location of the work will be: \_\_\_\_\_

Volunteer role:

The purpose of this role is to provide: \_\_\_\_\_ *(e.g. Backstage support)*

The main tasks:

You will work on the tasks described in the *Volunteer Task Description* as agreed with you (attached).

Commitments:

- You agree you will work as a volunteer and will not be paid for your work.
- You can be reimbursed for your actual and reasonable expenses by us (with receipts).
- You will tell us (the manager or co-ordinator) if you are unable to work on the agreed day and time. You will give us as much notice as you can.
- We will provide you with induction, training, support and feedback.
- Feedback session will take place at least once every six months / year or after a project or event is completed.
- You will resolve problems by raising concerns with your manager or the Volunteer Co-ordinator. If the matter is not resolved that way, you can contact the Chief Executive.
- You will maintain confidentiality and will not tell any other person about information you find out through your work with us.
- You will follow our policies, procedures and rules and Code of Conduct.
- You will keep yourself and others safe and will follow our health and safety information and directions.

Either you or we can end this agreement at any time by giving **x** days notice to the other party that it will not continue.

Declaration:

I have read and understood the commitments and requirements in this Agreement, and I accept them fully.

Signed: \_\_\_\_\_  
*Volunteer [you]*

Date: \_\_\_\_\_

Signed: \_\_\_\_\_  
*Organisation's Chief Executive [us]*

Date: \_\_\_\_\_

## Appendix D – Code of Conduct template

---

*Insert your organisation name / logo*

### **Volunteer Code of Conduct**

---

The purpose of this Code of Conduct is to inform volunteers on the standards of conduct required. Volunteers are expected to act honestly, conscientiously, reasonably and in good faith at all times when carrying out their duties and in their relationships or interactions with other people.

#### Expected Behaviours

At all times, we expect volunteers to:

- be present at the agreed times and tell us if you are not able to volunteer
- carry out duties and responsibilities in a safe, efficient and competent way
- maintain a good standard of dress
- comply with lawful and/or reasonable direction, instructions and policies
- respect the privacy of individuals and only use confidential information for the purposes for which it was intended
- neither use, nor allow the use of, our organisation's property, resources, information, intellectual property or funds other than for authorised purposes
- maintain the confidentiality of any information obtained while volunteering
- observe safety procedures including:
  - keeping yourself and others safe at all times
  - notifying the organisation about hazards or potential hazards in the working environment
  - notifying the organisation about any accident, incident or property damage
  - complying with New Zealand laws.

Volunteers will not:

- create any liability for our organisation without authorisation
- act in a way that may bring our organisation into disrepute (including use of email, social media and other internet sites, engaging with media etc)
- seek or accept any offers, gifts, rewards or benefits
- engage in any activity that may or causes physical or mental harm of another person (such as verbal abuse, physical abuse, assault, sexual or racial harassment, bullying, safety of yourself and others)
- be affected by alcohol, medication or non-prescription drugs while volunteering
- provide a false or misleading statement, declaration or claim
- falsify or change any documents or records.

- engage in any activity that may damage our property
- have unauthorised possession of property belonging to anyone else
- engage in a criminal activity in our workplace.

### Conflicts of Interest

Volunteers should avoid situations that may lead to conflicts of interest by:

- consulting with your manager/supervisor before undertaking other roles in organisations whose goals, purposes or activities conflict with our organisation
- making sure your other commitments do not conflict with the performance of your duties at our organisation
- advising your manager/supervisor immediately if a conflict of interest exists, occurs or could possibly occur.

### Breaches of the Code of Conduct

Breaches of the Code of Conduct may lead to a notification of unacceptable behaviour and a warning or the immediate end to your services as a volunteer. Repeated breaches of the Code of Conduct will lead to the immediate end of your services as a volunteer.

### Declaration

I have read and understand the information in this document, and I agree to follow the Code of Conduct during my time volunteering.

-----

Volunteer's name

-----

Volunteer's signature

-----

Date

## Appendix E – Task Description template

---

*Insert your organisation name / logo*

### Volunteer Task Description

---

*Could also be called a Volunteer Job / Assignment or Role Description*

Role Title: *e.g. Volunteer – Exhibition support*

Responsible to: *Name of person managing the volunteer*

Key relationships: *e.g. The Volunteer Co-ordinator*

*The Event Marketing Co-ordinator*

*Other staff volunteers*

Purpose and tasks:

Our organisation provides/ is planning an event **xxxx**.....

This means we want to provide our visitors / members / artists:

- friendly, welcoming, interesting unique and experiences
- show the works .....
- attract .....

Your tasks will be to:

- welcome visitors
- support the artists
- assist with mail outs and fund raising.

Or

You assist with **xxxx** event / exhibitions / project... knowledge experience, for the roles.

Key skills:

It is acknowledged that not all candidates will have all of the skills, knowledge or experience:

- interpersonal communication
- warm, friendly, polite pleasant well organised
- able to use computer software
- able to give information about ...
- able to operate .....
- experience of **xxxx** cultures...
- some knowledge of the content / Act, forms...

Time commitment involved: \_\_\_\_\_

*Volunteer Task Description prepared: June 2014*

58 **Appendix F – Example Volunteer Roles, Tasks and Skills**

*Select the roles, tasks and the associated skills, knowledge and attributes from this list that are applicable for your volunteers and adapt them to reflect your organisations tasks and needs. Start with the general skills that all volunteers may need.*

General skills needed for all volunteer roles:

- Interpersonal communication skills – listening and speaking, asking questions and checking understanding (at a level relevant to the role).
- Knowledge (or able to learn/transfer similar skills) about the content for the role and tasks (for example, knowledge of the collection, art form, venue, systems, safety procedures, exits etc.).
- Able to follow the processes, guidelines and rules of the organisation.
- Know when to ask for support.
- Operate honestly and ethically.
- Work in a team.

Role	Tasks	Skills, knowledge and attributes specific to tasks
Front of house  Related roles: guide, host, greeter, usher, customer service, crowd control	Welcoming and greeting visitors Providing information and directions Supervising gallery spaces Showing people to seats Providing safety information and direction Selling tickets Handling money	Warm, friendly, polite, pleasant Clearly spoken Well organised Calm manner (in emergencies or crowds) Physical ability relevant to the task, (e.g. standing for x hours) Knowledge and experience with different cultures Knowledge about emergency procedures Able to operate ticket or computer booking systems Able to calculate change

Role	Tasks	Skills, knowledge and attributes specific to tasks
<p>Supporting and hosting artists</p>	<p>Providing or arranging transport                      Providing or arranging accommodation                      Organising timetables and schedules                      Organising refreshments                      Organising equipment                      Accompanying artist to venues                      Hosting and being tour guide for artist                      Catering to artist's requests                      Participating in artist's film, media, documentary</p>	<p>Friendly, polite, pleasant                      Organised                      Time keeping                      Driving</p>
<p>Planning and administration</p> <p>Related roles: Event planning</p>	<p>Assisting with mail outs (of information, invitations etc)                      Preparing copy for labels                      Filing and administration                      Entering information into data bases and record management                      Making bookings                      Composing letters                      Event planning and co-ordination                      Arranging and booking venues                      Arranging and hiring equipment                      Organising supplies                      Arranging for transport or transporting goods</p>	<p>Organisational skills                      Able to use computer software, e.g. Word, Excel                      Able to use printers, photocopiers, etc.                      Able to use social media                      Knowledge of relevant processes or equipment (e.g. booking systems, filing systems, etc)                      Experience of writing letters</p>

Role	Tasks	Skills, knowledge and attributes specific to tasks
Marketing and sales  Related roles: Promotion Fund raising	Participating in meetings Giving information presentations Making phone calls seeking contributions Making applications for grants Staffing promotional booths or stalls Managing social media Selling tickets	Warm, friendly, polite, pleasant Clearly spoken Experience of public speaking Pleasant phone manner Well organised Experience of writing proposals and reports Knowledge and experience using social media Able to operate ticket or computer booking systems Able to calculate change
Back stage  Related roles: Technical support	Installing and dismantling exhibitions Unpacking and repacking work Painting Building sets Assisting with props, lighting, sound Sweeping and setting up venues	Physical ability relevant to the tasks (e.g. using ladders, lifting) Technical knowledge about the relevant tasks (e.g. using sound equipment)
Food and drink preparation and service	Serving and assisting at public events Serving drinks Preparing and serving food Clearing tables and cleaning dishes Taking food orders Handling money	Physical ability relevant to the tasks (e.g. standing for x hours; carrying boxes of wine) Polite and pleasant Clearly spoken Knowledge of drinks Well organised Knowledge of alcohol laws and hygiene requirements Ability to calculate change

## Appendix G – Volunteer Application Form template

*Insert your organisation name / logo*

### Volunteer Application Form

If you would like to become a volunteer please fill in this form and post or email it to:

Name .....

Address: .....

.....

Email: .....

For more information or help to fill in the form phone **xxxx** on **xxxx** or email **xxxx**

Your name			
Your address			
Post code			
Your email			
Your phone	Daytime:	Evening:	Mobile:
Your occupation	<i>(If applicable)</i>		
Which tasks would you like to help with? <i>(tick all that apply) Event...</i>			
• Front of house	<input type="checkbox"/>	• Marketing and sales	<input type="checkbox"/>
• Supporting and hosting artists	<input type="checkbox"/>	• Back stage	<input type="checkbox"/>
• Planning and administration	<input type="checkbox"/>	• Food and drink preparation	<input type="checkbox"/>
What is your past work experience and qualifications that are relevant to volunteering with us?			
Tell us about the skills you have and may use as a volunteer:			



Do you have an NZ driver's licence? Yes / No Type of licence: .....	Do you have your own transport? Yes / No Are you willing to use your own transport as part of your role? Yes / No
--	--

What time are you able to give to our organisation? *(Please circle)*

Weekly / Monthly

One-off-event exhibitions / projects / productions

Which times are you able to give our organisation? *(Please circle)*

Monday	Tuesday	Wednesday	Thursday	Friday	Saturday	Sunday
Morning / Afternoon	Morning / Afternoon	Morning / Afternoon	Morning / Afternoon	Morning / Afternoon	Morning / Afternoon	Morning / Afternoon

Do you have any medical conditions that could affect your work or safety as a volunteer?  
Yes / No

If yes, please give details:

How did you find out about volunteering with us?

I consent to you contacting these people to do a reference check:

Referee One:  
Name: ..... Relationship: .....  
Phone: ..... Email: .....

Referee Two:  
Name: ..... Relationship: .....  
Phone: ..... Email: .....

The information I have given on this form is true and correct. I agree that [Organisation name] can keep electronic and hard copy records of my information.

Signed: ..... Date: .....  
*Volunteer*

## Appendix H – Application Acknowledgement Letter template

---

*Insert your organisation logo*

*Organisation Name*

*Organisation Address 1*

*Organisation Address 2*

*Organisation Suburb*

*City, Postcode*

*<date>*

*Recipient Name*

*Recipient Address 1*

*Recipient Address 2*

*Recipient Suburb*

*City, Postcode*

Dear *Applicant name*

Application to become a volunteer

Thank you for your interest in our organisation and your application to become a volunteer.

The next stage for us is to consider all volunteer applications. We will contact you again soon, when we have completed this process.

Yours sincerely,

*<Name>*

*<Title>*

## Appendix I – Appointment Letter template

---

*Insert your organisation logo*

*Organisation Name*

*Organisation Address 1*

*Organisation Address 2*

*Organisation Suburb*

*City, Postcode*

*<date>*

*Recipient Name*

*Recipient Address 1*

*Recipient Address 2*

*Recipient Suburb*

*City, Postcode*

Dear *Applicant name*

Thank you for your willingness to volunteer for us and for *<making an application / attending our interview / attending our open day>*.

We are pleased to accept and welcome you as a volunteer.

*[I enclose some background information about our organisation.]*

As we discussed you will start on *<date and time>*. You will start your induction on your first day.

We look forward to you joining us at *<organisation>*. We are confident that you will make a valuable contribution to our organisation and that we can offer you an interesting / rewarding opportunity to support our work. Please let me know if you have any questions in the meantime.

Yours sincerely,

*<Name>*

*<Title>*

## Appendix J – Decline Letter template

---

*Insert your organisation logo*

*Organisation Name*

*Organisation Address 1*

*Organisation Address 2*

*Organisation Suburb*

*City, Postcode*

*<date>*

*Recipient Name*

*Recipient Address 1*

*Recipient Address 2*

*Recipient Suburb*

*City, Postcode*

Dear *Applicant name*

Application for Volunteer Role

Thank you again for applying to volunteer in our organisation.

We have now had the opportunity to consider your application. We have been fortunate in receiving a high number of quality applicants for this role. I am sorry that, on this occasion, we are unable to use or accommodate all the applications.

OR

We have finished interviewing and assessing all applicants' time availability, experience and skills for the position. I am sorry that, on this occasion, we will not be continuing with your application.

Thank you for your interest in our organisation and for the time you put into your application.

*[We would like your permission to keep your application on file so that we may consider you again when there are vacancies. Please let us know if you do not agree to this.]*

We wish you all the best.

Yours sincerely,

*<Name>*

*<Title>*

## Appendix K – Interview Invitation Letter template

---

*Insert your organisation logo*

*Organisation Name*

*Organisation Address 1*

*Organisation Address 2*

*Organisation Suburb*

*City, Postcode*

*<date>*

*Recipient Name*

*Recipient Address 1*

*Recipient Address 2*

*Recipient Suburb*

*City, Postcode*

Dear *Applicant name*

Interview for volunteer role *<title of role>*

Thank you again for your application for the role above. I am confirming our interview arrangements as follows.

Date:

Time:

Location: *<Address>*

Parking:

Interviewers: *<Name, Title>*

*<Name, Title>*

Please find enclosed a Volunteer Role Description and some information about our work.

Please let me know if you have any questions before the interview. We look forward to meeting you.

Yours sincerely,

*<Name>*

*<Title>*

## Appendix L – Interview Plan and Questions template

---

### Interview Plan and Questions

---

Volunteer role: .....

Applicant name: .....

Date of interview: .....

#### Instructions for the interview panel

- Use the *Volunteer Task Description* as a prompt to decide the role and tasks that are applicable to this volunteer position.
- Select the interview questions that most match your role and tasks and adapt them to fit your organisation.
- Decide who will welcome the applicant, introduce the interview panel, provide information and ask each question before the interview starts.
- Have copies of the *Volunteer Task Description* to give to the applicant.

#### How to rate the applicant's answers after the interview

When the interview is finished and the applicant has left, interview panel members rate each answer using this rating scale. Each panel member should write down their ratings before discussing the applicant with other panel members. The panel should then attempt to reach consensus about whether to accept or decline the applicant and/or decide the roles and tasks the applicant may be best suited to. You do not tell the applicant about the ratings.

#### The rating scale

---

1	2	3	4	5
Poor		Satisfactory		Strong
<i>Strong relevant skills, knowledge, attributes and/or experience</i>		<i>Some of the skills, knowledge, attributes and/or experience required</i>		<i>No match with relevant skills, ability, no interest or unsuitable</i>

---

**Start the interview**

Explain the interview purpose and format to the applicant.

*Thank you for coming today and for your interest in volunteering for us.*

*Let me introduce the interview panel. This interview is to get an understanding of your interests, strengths and skills that are relevant for the volunteer role. It is also to give you a chance to ask questions and tell us about what you'd like to be involved in doing. I expect it will last xx minutes.*

*Have you got a copy of the Volunteer Task Description? If not, here it is. Before we start the interview, do you have any questions about our organisation's activities or the role?*

*During the interview we will ask you questions about your past experience and situations you have been in as a way to highlight your skills and understand how your skills match the tasks in the volunteer role. Take your time to think about your past experiences and situations and to explain what you did.*

*We would like to take notes as you talk. Is that okay with you?*

*Do you have any questions on the process?*

We would like to start by asking you about your interest in being a volunteer.

**1. Interest in the organisation and role**

- What do you know about our organisation and volunteers' role and tasks?
- Do you have any questions about the role and tasks?
- Which of the roles/tasks interest you most?
- What motivates, interests, attracts you to become a volunteer?
- Do you have any goals for your volunteering?

---



---



---



---

1	2	3	4	5
Poor		Satisfactory		Strong

## 2. Volunteering and other experience

- Have you had experience in volunteer roles before?
- Can you tell us about your previous work, volunteering or other experiences doing these or similar tasks?
- Would you prefer to work behind the scenes, or to be greeting people and answering questions?

---

---

---

---

1                      2                      3                      4                      5  
Poor                                      Satisfactory                                      Strong

## 3. General questions

- Can you tell me about a situation when you worked as part of a team to complete a task? What is your best experience working as part of a team? What made it a good experience?
- What knowledge and experience do you have of the content for the role and tasks (for example, knowledge of the collection, art form, venue, systems, safety procedures, exits etc.)
- Can you tell me about a situation when you needed to understand and follow processes and guidelines and rules?
- Volunteers need to know when to seek support. Can you tell us about a time when you asked for advice and support?

---

---

---

---

---

1                      2                      3                      4                      5  
Poor                                      Satisfactory                                      Strong













## **10. Reference checking**

*We would like to do character/skills and experience reference checks. Do we have your consent to check the referees you listed on your Application Form?*

## **11. Wrap up**

*Thank you again for meeting with us. It has been a pleasure to meet you and to hear about your experience and interests.*

*The next steps in the process will be...*

*We will get back to you by...*

Interview ends



## Appendix M – Reference Checking template

---

### Reference Check

---

*Decide which ten questions are most applicable to the role*

Applicant: \_\_\_\_\_

Volunteer Role: \_\_\_\_\_

Name of Referee: \_\_\_\_\_

Title: \_\_\_\_\_

Organisation: \_\_\_\_\_

Date: \_\_\_\_\_

Instructions for the person doing the reference check

- Introduce yourself to the referee and state the purpose of the call.
- Name the applicant and explain that the applicant has given the referee's name to allow us to make a confidential verbal reference check. The information will not be passed onto the applicant.
- Check the referee has time to talk to you (it may take up to 15 minutes).
- Briefly describe the volunteer role.
- Ask questions chosen from the list below that are most relevant for the role.
- Close interview, thanking referee for his/her time.

Tips for following up on responses

If the referee makes any negative statements follow up by asking the referee to explain: "What makes you say that?" "Can you give me an example where this ..... had an impact?"

If the referee offers any opinions that will seriously prejudice the applicant's opportunity to be a volunteer, ask whether the referee can recall any particular incidents that gave rise to the opinion, anything the applicant did or did not do.

Follow up on incomplete or hesitant responses, by prompting the referee: "Could you elaborate?", "Can you explain?", "What gave you that impression?", or "You sound as if you have some reservations".

If you have questions about the applicant coming from the application form or the interview ask about those.



## Reference checking questions

1. Can I please confirm your association/relationship with **applicant**?

OR: As I understand it, you are/were his/her (manager/colleague/client etc) from month/year to month/year?

---

Checks       Doesn't check

2. What were/are **applicant's** main responsibilities in the position?

---

---

Checks       Doesn't check

3. Overall, how would you rate the quality of his/her work?

- 
- 
4. Were there any areas **applicant** performed especially well in?

- 
- 
5. What were some of his/her achievements in the time he/she was with your organisation?

- 
- 
6. What would you consider are **applicant's** strengths?

7. In which areas do you think he/she could improve?

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8. How would you rate *applicant's* interpersonal communication skills? (clear written and spoken communication, asks questions to clarify, good listener)

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9. Have you seen *applicant* interact with people of other cultures? Could you please comment on his/her approach and ability?

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10. What are/were his/her relationships like with managers, colleagues, team members and clients?

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11. How do you think he/she would manage in an emergency situation?

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12. How does *applicant* like to be managed and to work? For example, does she/he like to work closely with a manager or others, or autonomously?

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13. How does he/she handle conflicting priorities or work pressures?

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14. How does he/she respond to feedback?

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15. What comment you would make about his/her general work attitude?

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16. Clear written and spoken communication skills are required for this role. How would you rate *applicant* in this area?

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17. This role also involves *<skill/knowledge needed>*. How would you rate his/her skills in this area?

---

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18. This role also involves *<skill/knowledge needed>*. How would you rate his/her skills in this area?

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19. Has *applicant* got any injuries, health issues or conditions that would limit or interfere with their ability to safely perform the tasks in this role?

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20. Were there any issues or concerns during his/her time with you?

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21. How would you describe *applicant* as a person?

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22. Could you comment on his/her integrity?

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23. Given the opportunity, would you re-employ/re-engage him/her?

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24. Is there any other information you could offer to help me develop a complete picture of *applicant*?

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Name of Interviewer: .....

## Appendix N – Volunteer Induction Plan template

### Volunteer Induction Plan

*Use and adapt this induction plan template to prepare for your induction delivery. Times and activities are indicative only.*

#### Day One

Time	Activity	Responsibility	√
8:30am	Welcome and orientation <ul style="list-style-type: none"> <li>• Welcome to organisation</li> <li>• Overview of induction programme</li> <li>• Meet the team: introductions, team roles</li> <li>• Introduce yourself, your background and interests</li> <li>• Building tour and introductions to staff in other teams</li> <li>• Practical details:                             <ul style="list-style-type: none"> <li>- where you will sit</li> <li>- toilets, tea rooms, smoking</li> <li>- breaks and lunch times</li> <li>- fire and evacuation exits and assembly points</li> <li>- first aid</li> </ul> </li> </ul>	Greeting by Chief Executive. Manager and Volunteer Co-ordinator.	<input type="checkbox"/>
10:00am	Welcome morning tea		
10.30am	Our organisation <ul style="list-style-type: none"> <li>• Background and history, art form, schedule of events, audiences</li> <li>• Vision, mission and values, brand, objectives, purpose, goals, organisational structures, Board of Trustees, managers, staff, communication lines</li> </ul> <i>Give additional information to read</i>	Presentation from a volunteer or Volunteer Co-ordinator	<input type="checkbox"/>

11:00am	<p>The volunteer role and tasks</p> <ul style="list-style-type: none"> <li>● Review of your role, tasks, purpose <ul style="list-style-type: none"> <li>- <i>Volunteer Task Description</i></li> </ul> </li> <li>● Who is responsible for what? <ul style="list-style-type: none"> <li>- who will supervise, co-ordinate, train, assist</li> <li>- point of contact for queries</li> </ul> </li> <li>● Expectations overview: <ul style="list-style-type: none"> <li>- dress code / uniforms</li> <li>- behaviour, Code of Conduct</li> <li>- how training will be delivered</li> <li>- working as a team</li> <li>- if you have concerns</li> </ul> </li> <li>● Privacy; confidentiality <ul style="list-style-type: none"> <li>- limits on media contact</li> </ul> </li> <li>● Rosters and schedules <ul style="list-style-type: none"> <li>- what to do if you are ill or cannot attend</li> </ul> </li> <li>● Expense reimbursement: <ul style="list-style-type: none"> <li>- expense claims; receipts; prior approval; limits; payment schedule</li> </ul> </li> <li>● Complete documentation: <ul style="list-style-type: none"> <li>- sign Volunteer Agreement</li> <li>- sign Code of Conduct</li> </ul> </li> <li>● Collect additional information <ul style="list-style-type: none"> <li>- emergency contact details</li> <li>- statistics</li> <li>- health issues</li> <li>- consent to share contact information</li> <li>- consent for police checks</li> </ul> </li> </ul>		<input type="checkbox"/>
12:00pm	Lunch break (30 minutes)		
12:30pm	<p>What to expect and role satisfaction</p> <ul style="list-style-type: none"> <li>● Feedback and reviews</li> <li>● Rewards and recognition <ul style="list-style-type: none"> <li>- what benefits we can offer you</li> <li>- view rehearsals, exhibitions, opening nights; friend and family events</li> </ul> </li> <li>● Hear from other volunteers</li> <li>● Discuss what you want to get from your involvement</li> <li>● Questions and discussion</li> </ul>		<input type="checkbox"/>
1.30pm	<p>General health, safety and security</p> <ul style="list-style-type: none"> <li>● Your responsibilities</li> <li>● Health and safety policies</li> <li>● Reporting hazards, accidents, near-misses</li> <li>● Emergency procedures and drills</li> <li>● Health and safety information</li> <li>● Risk management</li> <li>● Hazards and risks specific to your role/tasks will be covered on Day 2</li> <li>● Security and keys</li> </ul>		<input type="checkbox"/>

## Day Two

Time	Activity	Responsibility	√
8:30am	Review of day one <ul style="list-style-type: none"> <li>• Questions, discussion, more information</li> <li>• Other policies or systems</li> </ul>		<input type="checkbox"/>
9:00am	Introducing the role/ tasks <ul style="list-style-type: none"> <li>• General expectations and tasks</li> <li>• How we do this</li> <li>• Who will show you</li> <li>• What you already know</li> <li>• Introducing instructions, scripts or processes</li> <li>• Communication</li> </ul>	You and your co-ordinator, manager or supervisor for the tasks	<input type="checkbox"/>
11:00am	Morning tea		
11.15 am	Role/task specific health and safety <ul style="list-style-type: none"> <li>• Hazards and risks; keeping safe and managing risks</li> <li>• Key health and safety information               <ul style="list-style-type: none"> <li>- protective clothing</li> <li>- safety equipment</li> <li>- your responsibilities</li> <li>- emergency procedures</li> <li>- evacuation</li> </ul> </li> <li>• How we manage the risks and keep safe</li> </ul>		<input type="checkbox"/>
12:00pm	Lunch break		
12:30pm	Getting started in the role <ul style="list-style-type: none"> <li>• Equipment (e.g. computers: username and password; internet; email; calendar; MS Word)</li> <li>• Filing systems, security</li> <li>• Forms and templates</li> <li>• Printers</li> <li>• Telephone answering and greetings</li> <li>• Ticket or computer booking systems</li> <li>• Greetings for visitors</li> </ul>		<input type="checkbox"/>
Ongoing	Learning the role/tasks <ul style="list-style-type: none"> <li>• How will you be supervised and supported</li> <li>• How you will be trained to do the tasks</li> <li>• May be a demonstration or example; may be working alongside a more experienced volunteer, a paid employee or the supervisor</li> </ul>		<input type="checkbox"/>
End of the day	Review <ul style="list-style-type: none"> <li>• Discuss: things you've found out during induction that are interesting, and things you want to know more about</li> <li>• Discuss next steps</li> </ul>		<input type="checkbox"/>





## Appendix O – Additional Information

### Volunteer's Additional Information

*For internal use only*

Volunteer name:			
Current address:			
Emergency contacts:	Name: Relationship: Home phone Work phone: Email:	Name: Relationship: Home phone: Work phone Email:	
Medical or health conditions:			
Date application form received:		Birthday:	
Interview date:			
Induction date:			
Why do they want to be a volunteer?			
Roles / Tasks allocated:			

Information for statistical purposes

Age group	Employment situation	Ethnic identity	Gender
<input type="checkbox"/> Under 20 years <input type="checkbox"/> 20-24 years <input type="checkbox"/> 25-29 years <input type="checkbox"/> 30-39 years <input type="checkbox"/> 40-49 years <input type="checkbox"/> 50-59 years <input type="checkbox"/> 60 years and over	<input type="checkbox"/> Part-time paid employment <input type="checkbox"/> Full-time paid employment <input type="checkbox"/> Retired <input type="checkbox"/> Seeking paid work <input type="checkbox"/> Unpaid labour force <input type="checkbox"/> Registered with WINZ <input type="checkbox"/> Student	<input type="checkbox"/> European <input type="checkbox"/> Māori <input type="checkbox"/> Pacific Peoples (which) _____ <input type="checkbox"/> Asian ( which) _____ <input type="checkbox"/> Middle Eastern/Latin American/ African ( which) _____ <input type="checkbox"/> Other (please state) _____ <input type="checkbox"/> English is not their first language	Male / Female  First-time volunteer? Yes / No

## Appendix P – Example Health and Safety Information

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# Health and Safety Information

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*Adapt this information to meet your organisation's needs*

### **Introduction**

This is an introduction to our important health and safety information, your responsibilities and where to find other health and safety information.

We are committed to ensuring your safety and health while you are a volunteer. Good health and safety relies on everyone having a clear understanding of the risks involved with their work and our expectations, policies and procedures to keep people safe and healthy.

This information is to help you maintain a high level of health and safety awareness.

### **Your responsibilities**

You must comply with our directions and instructions about health and safety and all health and safety legislation.

### **Know about health and safety responsibilities and processes**

Read our health and safety information, policies, processes and guidelines and ask questions in your induction, or ask your manager questions at any time, to make sure you understand.

Look after yourself and do not endanger others.

Protect yourself and others by working in a safe way and following our instructions, policies, processes when you are working.

If you feel you cannot complete a task safely or you are feeling unsafe, tell your manager/co-ordinator immediately.

### **Report all accidents, incidents, near misses and hazards**

Report accidents and near misses to the Co-ordinator/Health and Safety Officer using the Accident and Near-Miss Report Form as soon as you can. An accident is when there is an injury, no matter how minor. A near miss is an incident when you were not injured but might have been injured, or when there is damage to property.

Report any hazards or risks to the Co-ordinator/Health and Safety Officer using the Hazard Report Form. A hazard is anything that has the potential to harm you or create a risk that your health, safety or wellbeing may be harmed.

Tell your Co-ordinator/ the Health and Safety Officer about any early warning symptoms of discomfort or pain caused by work or that might affect your work.

### **If there is a serious harm accident**

Make sure that the injured person gets medical treatment first. Let your Co-ordinator/Health and Safety Officer know as soon as possible.

We will investigate and complete the required serious harm investigation and reporting processes.

A serious harm accident scene should not be disturbed except to:

- provide medical treatment and care to injured people
- prevent serious damage or loss of property.

### **How to report**

The forms for reporting accidents, incidents, near misses and hazards are kept in .....

Please fill in these forms as soon as possible (within five working days) and hand them to the Co-ordinator/Health and Safety Officer.

### **More about hazards and risks**

We have a risk register. Your Co-ordinator or supervisor will talk to you about the risks in the area you work in and for the tasks you will perform.

Read about all our health and safety system in the .....

Please talk with your Co-ordinator/ Health and Safety Officer if you have any questions or concerns.

### **Emergency procedures**

If there is an emergency follow the instructions of..... If you are instructed to leave the building please do so promptly. You are responsible for looking after visitors and ensuring they leave the building. The assembly point is **xxxxx**.

For the safety of yourself and others, when you are in a venue please make sure you know where the emergency exits are. Read our emergency procedures and ask about any aspects that are not clear.

### **First aid**

First aid kits, marked with the green cross sticker, are available from/ kept in .....

Find out who are the first aiders in your team. They can provide immediate advice and assistance in the event of an accident. Their names are in the first aid kits.

If supplies in a first aid kit are running low please let your Co-ordinator know so that the kit can be replenished.

### **The Health and Safety Committee**

We have a Health and Safety Committee of employee representatives. Please talk with your Co-ordinator / Health and Safety Officer to find out more.

## Appendix Q – Example Role and Task Training Options

### Volunteer Role and Task Training

*Review the relevant roles and tasks. Adapt the suggested training options. Start with the general skills that all volunteers may need as relevant.*

#### General skills needed for all volunteer roles:

- Interpersonal communication skills – listening and speaking, asking questions and checking understanding (at a level relevant to the role).
- Knowledge (or able to learn/transfer similar skills) about the content for the role and tasks (for example: knowledge of the collection, art form, venue, systems, safety procedures, exits, etc.).
- Able to follow the processes, guidelines and rules of the organisation.
- Know when to ask for support.
- Operate honestly and ethically.
- Work in a team.

Role	Tasks	Training needs	Training and induction options
Front of house  Related roles: guide, host, greeter, usher, customer service, crowd control	Welcoming and greeting visitors. Providing information and directions. Supervising gallery spaces. Showing people to seats. Providing safety information and direction. Selling tickets. Handling money.	Know and can follow health and safety and evacuation procedures, find and use emergency exits [must complete]. Know customer service procedures and greetings. Layout of gallery/theatre. How ticket system operates. Information about the performance/artist/event.	Ask volunteers about their existing knowledge. Read health and safety policies and procedures – discuss and answer questions [during induction]. Walk around and view emergency exits and discuss evacuation procedures [In induction]. Give plan of venue/theatre – view and locate seats/rooms [in induction]. Demonstrate ticket machine operation; give opportunities to

Role	Tasks	Training needs	Training and induction options
		What procedures apply.	<p>practice using ticket machine/computer booking system/ guiding to seats.</p> <p>Explain procedures.</p> <p>Work alongside an experienced volunteer or employee.</p> <p>Read information about performance/ artist or event.</p> <p>Have a presentation about performance or artist/event.</p> <p>Review if need first aid training (external provider).</p> <p>Ask volunteers what information or support they need.</p> <p>Ask volunteers how they would like to learn about a task.</p>
Supporting and hosting artists	<p>Providing or arranging transport.</p> <p>Providing or arranging accommodation.</p> <p>Organising timetables and schedules.</p> <p>Organising refreshments.</p> <p>Organising equipment.</p> <p>Accompanying artist to venues.</p> <p>Hosting and being tour guide for artist.</p> <p>Catering to artists requests.</p> <p>Participating in artist's film, media, documentary.</p>	<p>Friendly, polite, pleasant</p> <p>Organised.</p> <p>Time keeping</p> <p>Driving.</p>	<p>Consider experience of volunteer assisting on previous events.</p> <p>Get experienced host to describe task requirements.</p>
<p>Planning and administration</p> <p>Related roles: Event planning</p>	<p>Assisting with mailouts (of information, invitations etc).</p> <p>Preparing copy for labels.</p> <p>Filing and administration.</p> <p>Entering information into data bases and record management.</p>	<p>Organisational skills.</p> <p>Able to use computer software, e.g. MS Word and Excel.</p> <p>Able to use printers, photocopiers etc.</p> <p>Able to use social media.</p> <p>Experience of writing letters.</p>	<p>Ask volunteers about their previous experience and knowledge.</p> <p>Link explanations to similar knowledge if applicable.</p> <p>Start with straight forward tasks (one at a time).</p> <p>Ask if the volunteer has a preference about what to do first.</p> <p>Demonstrate use of booking system.</p>

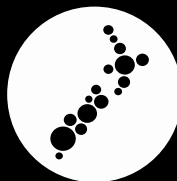
Role	Tasks	Training needs	Training and induction options
	<p>Making bookings.                      Composing letters.                      Event planning and co-ordination.                      Arranging and booking venues.                      Arranging and hiring equipment.                      Organising supplies.                      Arranging for transport or transporting goods.</p>	<p>Knowledge of relevant processes or equipment (e.g. booking systems, filing systems, etc).                      Information about the performance/artist/event.                      What procedures apply.</p>	<p>Have experienced operator sit/stand alongside and instruct volunteer in the use of equipment.                      Provide written instructions.                      Explain filing system; get volunteer to complete sample filing to review understanding.                      Ask volunteers what information or support they need.                      Ask volunteers how they would like to learn about a task.</p>
<p>Marketing and sales                      Related roles:                      Promotion                      Fund raising</p>	<p>Participating in meetings.                      Giving information presentations.                      Making phone calls seeking contributions.                      Making applications for grants.                      Manning promotional booths or stalls.                      Managing social media.                      Selling tickets.</p>	<p>Warm, friendly, polite, pleasant.                      Clearly spoken.                      Experience of public speaking.                      Pleasant phone manner.                      Well organised.                      Experience of writing proposals and reports.                      Knowledge and experience using social media.                      Able to operate ticket or computer booking systems.                      Able to calculate change.</p>	
<p>Backstage                      Related roles:                      Technical support</p>	<p>Installing and dismantling exhibitions.                      Unpacking and repacking work.                      Painting.                      Building sets.                      Assisting with props, lighting, sound.                      Sweeping and setting up venues.</p>	<p>Health and safety knowledge.                      Physical ability relevant to the tasks (e.g. using ladders, lifting).                      Technical knowledge about the relevant tasks (e.g. using sound equipment).                      Information about the performance and what is required.</p>	<p>Ask volunteers about their previous experience and knowledge.                      Discuss health and safety risks of the specific tasks – ask, discuss and answer questions about how the hazards are managed.                      Instruct in use of personal protective equipment.                      Have experienced technician sit/stand alongside and instruct volunteer in the use of technical equipment.</p>

Role	Tasks	Training needs	Training and induction options
			<p>Provide and demonstrate use of equipment.</p> <p>Ask if the volunteer has a preference about what to do first.</p> <p>Start with straightforward tasks (one-at a time).</p> <p>Regularly check in about need for assistance or information.</p>
<p>Food and drink preparation and service</p>	<p>Serving and assisting at public events.</p> <p>Serving drinks.</p> <p>Preparing and serving food.</p> <p>Clearing tables and cleaning dishes.</p> <p>Taking food orders.</p> <p>Handling money.</p>	<p>Physical ability relevant to the tasks (e.g. standing for x hours; carrying boxes of wine).</p> <p>Polite and pleasant.</p> <p>Clearly spoken.</p> <p>Knowledge of drinks.</p> <p>Well organised.</p> <p>Knowledge of alcohol laws.</p> <p>Knowledge of hygiene requirements.</p> <p>Ability to calculate change.</p>	<p>Ask volunteers about their previous experience and knowledge.</p> <p>Give information session on alcohol laws or hygiene.</p> <p>Demonstrate and trial lifting of boxes to assess ability.</p> <p>Discuss health and safety risks of the specific tasks – ask, discuss and answer questions about how the hazards are managed.</p> <p>Show where equipment is stored.</p> <p>Ask volunteers about their preference for what to do first.</p> <p>Demonstrate or explain processes for taking orders, clearing tables, serving food, and using equipment.</p> <p>Work alongside or assist experienced volunteers/staff for first events.</p> <p>Start with limited number of tasks and rotate or build up over time.</p>

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