1. Concept Stage		Practice	Info source	Notes
a. Has clearly defined vision, mission and goals for volunteers	i	Key people (such as Board, management, volunteer coordinator) can articulate the organisation's reasons for engaging and retaining volunteers.	☐ A Vision and/or Value Statement on Volunteers ☐ Annual reports ☐ Newsletter ☐ Minutes of meetings	Sample steps in writing vision statement for volunteer management in NVPC's Volunteer Management System Guide or VMS Guide: pg 1-2 of http://knowledge.nvpc.org.sg/?wpdmdl=2476
b. Assessed volunteer needs	i	Organisation establishes where volunteers are needed and how they will be involved.	☐ Survey on volunteer needs ☐ Volunteer request forms	Sample survey on volunteer needs and sample interview questions for staff in NVPC's VMS Guide: pg 1-4 of http://knowledge.nvpc.org.sg/?wpdmdl=2476 For organisations that engage ad hoc volunteers, refer to Annex 3 from "Engaging Ad hoc volunteers: a guide for non-profit organisations" http://knowledge.nvpc.org.sg/?wpdmdl=2740
c. Designed a budget for volunteer involvement	i	There are adequate financial resources to cover the volunteer programme and volunteers have the necessary resources to do their work.	☐ Budget	Eg volunteer support costs: transport, refreshments, training and development, insurance, recognition Sample budget template in NVPC's VMS Guide: pg 1-8 of http://knowledge.nvpc.org.sg/?wpdmdl=2476
	ii	Organisation provides support facilities where applicable eg working space, office equipment	☐ Working space (eg desk and chair) ☐ Equipment (eg office or other tools for the job)	Sample checklist for facilities support in NVPC's VMS Guide: pg 1-9 of http://knowledge.nvpc.org.sg/?wpdmdl=2476
	iii	Informs all volunteers what expenses can be claimed, and the procedure for reimbursement or payment of allowances	☐ Volunteer policy ☐ Expenses claim forms/ petty cash forms	

References:

Investing in Volunteers. (n.d.). *Investing in Volunteers Standard.* Retrieved April 13, 2015, from http://www.investinginvolunteers.org.uk

National Volunteer & Philanthropy Centre (NVPC) (2001). *The Essential Guide to a Volunteer Management System.* Singapore: NVPC

National Volunteer & Philanthropy Centre (NVPC) (2007). Risk Management Primer. Retrieved on 13 April 2015 from http://knowledge.nvpc.org.sg/risk-management-primer-2007/

National Volunteer & Philanthropy Centre (NVPC) (2008). Engaging Ad-hoc Volunteers: A guide for non-profit organisations. Retrieved on 13 April 2015 from http://knowledge.nvpc.org.sg/engaging-ad-hoc-volunteers-a-guide-for-non-profit-organisation-2008/

2. Planning Stage		Practice	Info source	Notes
a. Has written job description and policies for volunteers and staff who work with volunteers	i	Organisation has written policies and procedures for volunteers especially in basic areas such as recruitment, terms of appointment, orientation and operations.	☐ Volunteer policies ☐ Procedures	Writing policies and procedures for volunteers and Sample guide to volunteer policies and procedures manual/handbook in NVPC's VMS Guide: pg 2-1 to 2-2 of http://knowledge.nvpc.org.sg/?wpdmdl=2477
	ii	Organisation has procedures for regularly reviewing the volunteering policy and its implementation.	See also "4. Review" below	
	iii	Organisation has job descriptions (JD) for paid staff, which include any responsibilities they have for volunteers.	☐ Job description for staff who work with volunteers	Identify all staff in the organisation with responsibility for volunteers. Critical if programme staff work with volunteers and this should be reflected in their JDs.
	iv	There is clarity between the volunteer and the organisation about the boundaries of the volunteers' roles. It has volunteer job descriptions and updates it regularly according to the strategies and plans adopted by organisation to achieve mission, vision and goals. The JD sets out the necessary skills, attitude, experience and availability needed to do the work.	☐ Job descriptions for each volunteer role	Sample job descriptions elements and sample volunteer job description template in NVPC's VMS Guide: pg 2-4 of http://knowledge.nvpc.org.sg/?wpdmdl=2477 Sample job descriptions for ad hoc volunteers (Annex 4 & 5) available from "Engaging Ad hoc volunteers: a guide for non-profit organisations" http://knowledge.nvpc.org.sg/engaging-ad-hoc-volunteers-a-guide-for-non-profit-organisation-2008/
b. Has a recruitment plan and procedure for volunteers	i	Organisation has recruitment strategies and techniques to attract the right volunteers. It designates responsibility for recruiting, selecting, and supporting volunteers, and protecting their interests to a key person or group of people within the organisation, and these responsibilities are regularly reviewed.	☐ Recruitment strategy including staff responsible, methods, timeline and budget	To show that the JD was actually used.
	ii	People interested in volunteering are provided with clear information about • the type of volunteer work available • the application and selection process • whether there is any training • a summary of the organisation's expectations of volunteers • what volunteers can expect from the organisation	☐ Examples of recruitment materials ☐ Information pack for volunteers	May include a list of standard interview questions
c. Designed database and recordkeeping system for managing volunteers' information, activities, hours etc	i	Organisation has designed a database and record keeping system for managing volunteers' information.	☐ Database with data fields such as volunteer particulars, work assignments, records of training, appraisal, awards and recognition etc	Sample database categories and attendance / time log sheet template in NVPC's VMS Guide: pg 2-9 to 2-10 of http://knowledge.nvpc.org.sg/?wpdmdl=2477
	ii	Information of volunteers' personal details is restricted to those who need it, and passed on only with volunteers' consent, and care is taken regarding storage of confidential information.	☐ Confidentiality policy statement	See Model Data Protection Code, which outlines the minimum requirements for the protection of personal information in the form of electronic data ("personal data") from http://www.pdpc.gov.sg/docs/default-source/default-document-library/model_data_protect
d. Identified potential risks faced by volunteers and ensuring that these risks are minimised	i	Organisation has assessed potential risk to volunteers when designing volunteer roles and has good risk management practices eg careful screening, placement, clear job descriptions and authorisation levels, orientation, training, supervision, and dismissal.	☐ Risk assessment form	Completed risk assessments should be included to match the role descriptions in job description. Sample of risk assessment form available from http://knowledge.nvpc.org.sg/?wpdmdl=2425
	ii	There are clear health, safety and emergency procedures to avoid, reduce risks.	☐ Information sheets eg health, safety, emergency procedures ☐ Drills are carried out	To show how the organisation communicates these procedures to staff who work with volunteers and volunteers.

3. Implementation Stage		Practice	Info source	Notes
a. Has a screening procedure to identify suitable volunteers	i	Organisation has clear criteria regarding skills and abilities needed against which it assesses volunteers' suitability for particular roles.	□ Potential volunteers are recruited with reference to job descriptions □ Application form	Sample screening and interviewing procedures in NVPC's VMS Guide: pg 3-4 of http://knowledge.nvpc.org.sg/?wpdmdl=2478 .
	ii	During recruitment, time is given to explore the individual's reasons for volunteering.	□ Volunteer is asked in application form or during interview	
	iii	Procedures for reference checks is based on the nature of the organisation's work and the roles volunteers will be undertaking.	□ Guidelines/ criteria for references checks	
	iv	Organisation has considered which types of convictions/disciplinary actions may or may not be relevant to the volunteer work being undertaken.	□ Policy Statement □ Guidelines on the Rehabilitation of Offenders Act	See SPF's FAQ on Registration of Criminals (Amendment) Bill 2005 http://tinyurl.com/registrationofcriminals0001
	v	Where possible, tasks are adapted to suit the needs and interests of individual volunteers.	□ Arrangements made for volunteer orally or in writing	
	vi	Where appropriate, potential volunteers are given further opportunities to find out more about the volunteer work before committing themselves.	□ Trial, probation period	
	vii	Inform potential volunteers whose applications are turned down.	□ Notification (preferably in writing) to potential volunteers	How do organisations manage potential volunteers without current suitable matches eg KIV, reject?
b. Conducted orientation and training for volunteers	i	Provides volunteers with the necessary information and training to do the voluntary work, including any policies as appropriate.	□ Code of conduct □ Job descriptions □ Orientation, training for volunteers □ Volunteer Policy/ Manual/ Handbook	Sample orientation programme and training procedure and forms in NVPC's VMS Guide: pg 3-7 of http://knowledge.nvpc.org.sg/?wpdmdl=2478 Information items for Sample Orientation Kit in NVPC's VMS Guide: pg 3-8 of http://knowledge.nvpc.org.sg/?wpdmdl=2478 Sample checklist for training needs analysis in NVPC's VMS Guide: pg 3-8 of http://knowledge.nvpc.org.sg/?wpdmdl=2478
	ii	Introduces all new volunteers to the relevant paid staff and other volunteers they will work with.	□ Volunteer Policy/ Manual/ Handbook or at least induction checklist for staff	
	iii	All volunteers know what form of support the organisation offers them, and who to contact in case of any problems.		
	iv	Volunteers are aware that they can refuse demands they consider are beyond their role or which they do not have the skills to carry out.		The materials should make it clear to the volunteers that they may decline to carry out tasks they feel are inappropriate
	v	Volunteers are advised of and understand, the procedure to use if they wish to give feedback about their experience with paid staff, users, committee members or other volunteers.	□ Code of conduct □ Complaints policy/ procedure	All staff who work with volunteers should be aware of the policy/ procedure
c. Supervised volunteers	i	Staff who supervise volunteers are appropriately trained in volunteer management and the organisation's policies.	□ Training programme/ materials/ resources □ Record of staff training	Examples of leadership styles to manage volunteers in NVPC's VMS Guide: pg 3-9 of http://knowledge.nvpc.org.sg/?wpdmdl=2478
	ii	Informs volunteers of all relevant changes in the organisation which affect their work.	□ Memos □ Newsletters □ Email/ oral briefings	
	iii	Volunteers have opportunities to give feedback (eg on policies and procedures) through one-to-one and/or group sessions.	□ Volunteer Policy □ Code of conduct □ Minutes of meetings (eg support meetings) □ Supervisors' notes/ review notes	The material should show how the organisation involves volunteers in consultation and in giving feedback on how the organisation operates and in decision making. This could be formal or informal.
d. Has recognition activities for volunteers	i	Management and staff recognise the value of volunteers' contributions and communicate effectively their appreciation to volunteers, both formally and informally.	□ Recognition, appreciation schemes □ Volunteers' contributions mentioned in annual report, local paper, other publications	The material should show how management and staff appreciate, recognise volunteers in words and action. Sample recognition and motivation methods in NVPC's VMS Guide: pg 3-10 of http://knowledge.nvpc.org.sg/?wpdmdl=2478

4. Review Stage			Practice	Info source	Notes
a. Reviewed performance/ reasons for exit of volunteers	i		Organisation plans and conducts performancereviews and appraisals with volunteers.	☐ Appraisal forms ☐ Notes of review meetings	Sample review and appraisal procedure and sample volunteer performance appraisal form inNVPC's VMS Guide: pg 4-1 to 4-2 of http://knowledge.nvpc.org.sg/?wpdmdl=2479 Where 1-to-1 appraisals are not carried out eg with group volunteers, consider getting feedback from other sources on volunteers' performance egfrom beneficiaries which the volunteers are serving. Highlight issues, if any, with the coordinator of the volunteer group.
	ii		Organisation provides volunteers with opportunitiesto developing their skills and interests within the roles available	☐ Supervision/ review notes ☐ Range of volunteer work available and development opportunities	
	iii		Organisation endeavours to obtain feedback fromvolunteers leaving the organisation.	☐ Exit interview/ questionnaire	Sample exit survey for exiting volunteers in NVPC's VMS Guide: pg 4-3 of http://knowledge.nvpc.org.sg/?wpdmdl=24 79
b. Assessed impact of volunteer programme	i		Organisation's annual workplan includes review ofvolunteer programme	☐ Results of review and follow up action / recommendations	Sample pointers for evaluation and sample volunteer programme evaluation in NVPC's VMSGuide: pg 4-4 to 4-5 of http://knowledge.nvpc.org.sg/?wpdmdl=2479
	ii		Time is given during board/ staff meetings to discuss volunteer issues.	☐ Agenda / minutes of meetings	Notes of meetings that show volunteers arepresent and participating is a useful indicator.