

Meeting Notes from Tautoko Network Meeting

February 2020

Volunteer Agreements: What Do We Include In The “Substance” Section?

Thank you to those who took the opportunity of joining us at our first Tautoko Network meeting of the decade! Susan from Community Law was our guest speaker at this session, and we followed on from a session at the end of last year around the subject of 'Volunteer Agreements'.

Here's a summary of what was covered:

We recommend that, in most situations involving an ongoing volunteer role, volunteers are asked to sign a Volunteer Agreement. This document reminds both your organisation and your new volunteers that the volunteer role carries both rights and responsibilities.

Not all volunteer agreements will be alike as the content will differ based on the work of your organisation and the role of the volunteer. Despite this there are some sections that would ideally be included in most agreements. Those include the volunteer's name, contact details and any other information you need from your volunteer in order to manage that relationship. A note of caution here: be mindful of privacy law when collecting personal information from volunteers and don't ask questions unless the answers are necessary for the role. Don't forget to include a privacy statement which clarifies why you are collecting the information and how it will be used, stored and disposed of.

The second part of the volunteer agreement is content that is tailored for your organisation. As a rough guide, we would generally recommend that the following sections be included:

Role description

Some groups choose to include a role description in the Agreement which lists the tasks the volunteer will do. Alternatively the tasks could be listed in another document with the two documents being linked by including a reference to the role description in the Agreement.

Conduct standards

If there are standards to be met – perhaps a code of conduct or similar – include a reference to these in the Agreement. If the standards are short, they could be included in full; if more detailed, link to the separate document by including a reference to the standards in the Agreement.

Reviews

Role/Performance reviews can be a useful tool for providing and receiving feedback. We recommend these for ongoing positions and suggest you include a statement about these in the Agreement.

Absences and Illnesses

It can be helpful to include a statement which makes clear what is expected of the volunteer in the event of absence or illness.

Induction and training

Keeping volunteers safe is a key responsibility, as is ensuring your organisation meets any health and safety obligations it may have. Training – both induction training and ongoing training – is an important tool for this. Including a statement in the Agreement that clarifies that training has/will be provided is recommended.

Confidentiality

Many volunteer roles involving working with vulnerable clients or dealing with sensitive matters. Including a rule which makes clear that confidentiality is expected serves as an important alert for new volunteers.

Compliance with policies

Most organisations have a series of policies relevant to volunteers, including health and safety, expense reimbursement, complaints and the like. A reference to these policies – and the need to comply with them – is a useful addition to your Volunteer Agreement.

Voluntary position

It can be helpful to include a statement in the Volunteer Agreement which makes clear that the volunteer role is an unpaid position. This can be particularly helpful in situations where a volunteer may also hold both paid and volunteer roles with your organisation.

Dispute resolution and complaints

Complaints and disputes are an unfortunate but often unavoidable fact of volunteer management. Including a rule in your Agreement which links to your complaints and disputes policies – or instead outlining how the volunteer can raise their disputes and complaints – can help to ensure these are managed consistently and fairly.

Hours and location of work

Where a range of venues and/or hours are available, it can be helpful to include mention of those relevant to the volunteer in the Agreement. However give some thought to this if flexibility is desirable or required – if these could change then it may instead be more appropriate to hours, dates and/or locations being set 'by agreement'.

Preferred work environment

There may be occasions where – either because of the nature of the work or because of the health of the volunteer – it is helpful to check what types of work environment the volunteer would prefer. Someone who performs best in a low stimulus environment may not thrive if included in a busy team and vice versa. Depending on your organisation, this may be something you include as part of your Agreement.

Specialist skills

Some roles required specialist skills or qualifications. Including a statement about these in the Agreement can help to alert the volunteer to the fact that these skills or qualifications are essential to the role. It is also recommended that you include a statement requiring the volunteer to keep you notified if s/he is no longer able to meet those requirements.

Personal property

Depending on your organisations and your security and storage options, it may be appropriate to include a statement discouraging the bringing of valuables together with an acknowledgement that any personal items are bought at the volunteer's own risk.

Intellectual property

There are some grey areas around who owns copyright in the work done by volunteers. If the volunteer role includes the development of resources, it may be appropriate to include a statement in the Agreement about the ownership of the work done by that volunteer.

Conflicts of interest

Volunteers often serve multiple organisations or hold multiple roles within an organisation. Depending on your organisation and the nature of the volunteer's role, it can be helpful to include a statement about reporting conflicts of interest.

Privacy

Many groups promote the work of their organisation by posting material on social media or in other forums. If your organisation wishes to do this, we recommend you include a provision in your Agreement that clarifies whether the volunteer has consented to this.