

Volunteer Management Procedure

1. Purpose and Objective

This procedure outlines The Heart Foundation's approach to each stage and practical steps related to volunteer engagement and involvement. It should be read and used in conjunction with the **Volunteer Management Policy** and the **Volunteer Classification and Compliance Matrix (VCCM)**.

2. Scope / Coverage

This Procedure applies to all Heart Foundation Board Members, Advisory Committee Member, employees, volunteers, contractors and honoraries (together 'HF People').

3. Related and Supporting Documents

Volunteer Management Policy

Volunteer Classification and Compliance Matrix

Volunteering Australia National Standards for Volunteer Involvement

Volunteering Australia – Rights and Responsibilities of Volunteers

4. Procedures

4.1 *Leadership, Governance and Culture*

Heart Foundation leaders actively champion and promote volunteering in the organisation and ensure there are sufficient resources available to support meaningful and safe volunteer participation.

4.2 *Who can become Heart Foundation Volunteers?*

Volunteers must be aged 18 or over and legally permitted to volunteer in Australia.

Former employees interested in volunteering will be considered on a case-by-case basis and in consultation with People and Culture.

4.3 *Volunteer Roles*

A volunteer role can be created for work in any business area of the Heart Foundation; however, it **must not** replace an existing paid role. The Heart Foundation is committed to developing volunteer opportunities that are meaningful, mutually beneficial, and directly supportive of our goals. Volunteering Australia advocates that volunteers undertake **no more than 16 hours** of volunteer work per week for one organisation. Employees should refer to the Volunteer Classification and Compliance Matrix (VCCM) to establish if the proposed volunteer role is already established in our processes.

Prior to beginning the process of recruiting a volunteer, employees must have agreement from their People Leader. The recruiting person should contact People and Culture.

The volunteer supervisor must confirm with People and Culture whether they intend to create a new volunteer role, change a current volunteer role, or move an existing volunteer into a different or existing role. A draft position description (PD) must be prepared for this conversation. The role classification will then be confirmed according to the VCCM.

Volunteers may fulfill more than one volunteer role at the Heart Foundation. Volunteers must be provided with a PD for each volunteer role.

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Note: some volunteer roles do not require approval from People and Culture; this includes Walk Organisers, Advisory Board Members, Board Members and Peer Reviewers, however this does not exclude them from other volunteer management obligations.

4.4 *Volunteer Position Descriptions*

A PD is essential for effective volunteer engagement. It should include accountabilities, expectations, skills and experience required to do the role, information about the team the volunteer will support, the supervisor, timeframes and commitment required, location and how the role will support the goals and vision of the Heart Foundation.

A volunteer PD helps ensure Fair Work compliance, clarifies the role for all parties and guides role classification, screening and background check requirements.

4.5 *Volunteer Recruitment and Screening*

Volunteers are recruited in line with the Heart Foundation Recruitment Policy, aligned to our Equity, Diversity and Inclusion Strategy and in compliance with anti-discrimination law.

People and Culture will provide guidance on screening (including background checks), induction and training necessary for volunteer positions depending on their classification and with the recruiting employee will refer to the VCCM and volunteer PD to support this process. This should be transparent to those involved.

4.6 *Volunteer Onboarding and Training*

The volunteer supervisor(s) will provide an appropriate program and team induction which includes clarity about Heart Foundation values and ways of working.

Volunteers will have access and agree to the Heart Foundation Code of Conduct and Volunteer Agreement (includes confidentiality and Intellectual Property clause) and will be informed about their rights and responsibilities and where to access relevant policies and procedures.

The supervisor will support the volunteer to complete allocated compliance training and ensure policy sign offs required for the role (according to the VCCM).

4.7 *Heart Foundation Information Communication and Technology (ICT)*

Volunteers that require access to Heart Foundation ICT Systems will be given the relevant information, training, equipment, and access. It is the responsibility of the supervisor to submit a request for a Heart Foundation account via the usual ticket system in time for the agreed start date. Volunteers who have access to Heart Foundation ICT systems must complete the ICT compliance training.

The supervisor is responsible for collection of any Heart Foundation assets at the end of the volunteer placement and submitting a ticket to offboard the user.

4.8 *Volunteer Supervision, Support & Development*

All volunteers will be assigned a supervisor. The assigned supervisor and their position title will be outlined in the volunteer's PD. 'Day to day' support and supervision of the volunteer is the responsibility of the supervisor. They will ensure the volunteer(s) have adequate information, support and guidance to carry out their role and will have regular discussions with the volunteer to allow for two-way feedback.

The supervisor will ensure a welcoming team environment and include the volunteer in organisational activities and opportunities for learning.

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The organisation will build opportunities into the volunteer experience for review and feedback which will be appropriate according to the role being undertaken.

Any changes required to a volunteer role, or performance and misconduct issues that arise, will be promptly identified and addressed in line with Heart Foundation Policies and Procedures, and supported by People and Culture. The Code of Conduct, Volunteer Agreement and PD, along with other relevant Heart Foundation Policies, will guide both the volunteer and supervisor.

4.9 Volunteer Workplace, Wellbeing, Health and Safety (WWHS)

The Heart Foundation is committed to the health, safety, and wellbeing of all volunteers. We have outlined key policies, processes and measures to be included in volunteer recruitment and supervision, to ensure positive engagement for our volunteers.

Supervisors must ensure volunteers have access to safe workplaces and practices and work in accordance with the Heart Foundation Workplace, Wellbeing, Health, Safety policy. Volunteers will be made aware of information that enables them to raise any concerns or make a complaint about matters that arise in the workplace and will be supported should they need to do so.

The Heart Foundation Employee Assistance Program (EAP) is available for volunteers to access, and they will be made aware of this during onboarding or, if required, for post-incident debriefing. Volunteer supervisors and other paid people must support volunteers to report and record all incidents and near misses via the Heart Foundation Safeguard tool as soon as is practicably possible to do so.

Volunteers are insured for personal injury and liability when at their designated place of volunteer work. Compliance with all Heart Foundation Policies and risk management practices is required to ensure our insurance coverage is valid. Heart Foundation insurance policies do not cover volunteers engaged in activities outside of agreed roles and duties that are outlined in their PD. WWHS related policies and responsibilities will be clearly documented and shared with volunteers and understood by any paid employee who is engaging with volunteer(s).

4.10 Volunteer Recognition and Engagement

Volunteer contribution, value and impact are understood, appreciated and acknowledged at all levels of the Heart Foundation. The organisation communicates internally and externally about the way volunteers contribute to organisational goals. Leaders in our organisation champion volunteer acknowledgment, but all Heart Foundation people play a part in recognising volunteers in a consistent, equitable and culturally appropriate way.

Guidance and training on appropriate and best practice volunteer recognition approaches is available from People and Culture for all employees who work with, or would like to work with, volunteers.

4.11 Evaluation & Continuous Improvement

The Heart Foundation follows volunteer sector guidance on best practice relating to volunteer involvement, which includes regular review and monitoring of volunteering in the organisation along with the policies and procedures governing and guiding this.

Heart Foundation people who are accountable for volunteers will be given training and guidance on the volunteer policy and procedures at the Heart Foundation. They will be supported to work with volunteers in a way that is in line with best practice standards, as set out by The National Standards and Heart Foundation policies and procedures.

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Data is gathered to evaluate and inform how we engage with volunteers, and we will use information captured to monitor and adapt our volunteer involvement regularly.

Feedback from volunteers is regularly gathered and reviewed through both formal and informal mechanisms, including via the annual Volunteer Experience Survey(s). Formal complaints or issues will be managed in line with the Heart Foundation Complaints Policy (Internal).

4.12 Data and Record Keeping

Volunteer records are maintained according to the Heart Foundation Privacy policy and Data Protection Legislation. Responsibility to keep the records up to date lies with the volunteer, the volunteer supervisor and the People and Culture team. Any changes to records (such as a volunteer resigning or moving location) must be communicated at the earliest opportunity to People and Culture so the volunteer database can be updated. Exceptions to this include Walk Organisers and Board Members who are managed in other databases.

Volunteers who are onboarded through the volunteer database are asked to maintain a record of the hours they work each time they volunteer. Volunteer supervisors are asked to remind them to do so.

4.13 Reimbursements, Out of Pocket Costs or Expenses

Volunteers should not be out of pocket due to approved volunteer activities (as outlined in the PD). All volunteers must obtain authorisation from their volunteer supervisor prior incurring any out-of-pocket costs. Any request for reimbursement is managed by the volunteer supervisor. Full guidance on managing and processing volunteer expense reimbursements can be accessed by contacting the finance team.

In some areas of our organisation, there are budgets and processes in place which support some activities performed by volunteers as 'paid participation', which attracts an **honorarium** payment. Employees should discuss the setup of this type of volunteer activity with their people leader, People and Culture and the Finance team before putting this in place or offering this to volunteers.

4.14 End of Volunteering

Volunteers have the right to end their volunteer arrangement with us at any time and should do so in writing. The volunteer supervisor can consider ending the volunteer agreement and should discuss this with People and Culture and act in accordance with Heart Foundation policies and procedures.

5. Review and Document Control

This procedure shall be subject to periodic review to ensure its relevance, accuracy, and effectiveness in achieving its stated objectives. At minimum this procedure will be reviewed every three years and approved by the COO.

To address any questions or concerns you have related to this procedure please contact People & Culture who can provide guidance with the administration of this procedure and associated documents.

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