Advance Care Planning Australia
Volunteer Program Resource Manual
Acknowledgements

Advance Care Planning Australia is funded by the Australian Government Department of Health and administered via Austin Health.

Advance Care Planning Australia provides expertise in advance care planning practice, health professional education, translational research, information resources and advisory services. Our purpose is to build the foundation for a national collaborative approach to advance care planning.

We acknowledge the valuable advance care planning work being undertaken by others throughout Australia and internationally. This initiative was undertaken with the support and advice of our volunteer community.

Further information about this resource can be obtained by contacting the Advance Care Planning Program Director on phone +61 3 9496 5660 or email acpa@austin.org.au.

Disclaimer:

This resource has been prepared by Advance Care Planning Australia for the purposes of training and supporting advance care planning volunteers. It should not be relied upon by any other party or for any other purpose. We are happy for organisations to copy, distribute and adapt the ACPA Volunteer Program Setup Package for use in their communities and health services. We ask that you use our work for non-commercial purposes and acknowledge the development of the core material by Advance Care Planning Australia. While the Australian Government Department of Health has contributed to the funding of this project, the information contained in it does not necessarily reflect the views of the Australian Government and is not advice that is provided, or information that is endorsed, by the Australian Government. Advance Care Planning Australia are not responsible in negligence or otherwise for any injury, loss or damage however arising from the use of or reliance on the information provided in this manual and will not be liable to any person who relies upon the resource.

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Resource overview

This resource package has been developed by Advance Care Planning Australia for the purpose of training and supporting volunteers who are providing information and support in relation to advance care planning. This package will be most useful to staff who are managing volunteers, advance care planning or community education programs. The resource package provides information and resources to recruit, train, support and retain advance care planning volunteers in your organisation. The resource package can be used as part of a complete training and on boarding process or as standalone items, including a community education presentation.

The package has been designed to support the initial set up and ongoing management of an Advance Care Planning Volunteer program in your organisation, with the aim of increasing community awareness of advance care planning.

We need your help.

On the last page of the manual there is an evaluation form. To help us evaluate and improve the ACPA Volunteer Program resource package, we would appreciate feedback on your experience and thoughts using the resource.

How to use this resource

There are a number of ways that your organisation can provide information and support in relation to advance care planning. Before involving your organisation and volunteers in advance care planning education, it may be helpful to consider the following:

1. Is helping people plan for their future health and personal care (advance care planning) relevant to your organisation and/or volunteer program?
2. Do you believe the consumers of your organisation would be interested in learning more about planning for their future health and personal care?
3. Do you believe your volunteers would be interested in learning more about planning for their future health and personal care?
4. Are there requirements regarding advance care planning in the National Safety and Quality Health Service Standards, Aged Care Quality Standards and/or other standards relevant to your organisation?

If you answered yes to the questions above, we have developed three levels of involvement to guide your organisation in thinking about how it would like to become involved in strengthening
community understandings of advance care planning. Advance Care Planning Australia is able to provide resources and support at each of these levels.

**Level 1 – Novice (general awareness raising)**

Recommended activities:

- ACPA volunteer [online modules](#) (see online courses) via ACPA Learning website
- ACPA [online modules 1-4](#) (core modules) via ACPA Learning website
- ACPA [resources / tips on starting the conversation](#) via ACPA website

Resources available:

- ACPA national phone advisory service 1300 208 582 (Monday – Friday, 9am – 5pm AEST)
- ACPA [resource order form](#)
- ACPA [YouTube](#)
- ACPA enews subscription (scroll to bottom of home page to subscribe to newsletter)

**Level 2 – Intermediate (in-house presentations on advance care planning)**

Your volunteer team would be supported and trained to deliver a **10-minute presentation** (within your organisation) to small groups of staff/community members. This 10-minute presentation may be added to an existing training session. This presentation would be designed to cover the principles of advance care planning nationally, and direct attendees to resources for further advice (e.g. ACPA website and national advisory service). It could include a 2 minute animation.

**Level 3 – Advanced ACP Volunteer (external presentations on advance care planning)**

You will be provided with resources to train and support your volunteer team to deliver a **40-minute presentation**. This is designed as a stand-alone presentation. It contains information about the importance, benefits and process of advance care planning as well as the principles of advance care planning nationally and the specific forms and resources people need to complete in your state. It includes a 2 minute animation.

**Training and support**

- Observe ACPA volunteers conducting community presentations (video recording available)
- ACPA consumer introduction to ACP presentation slides (available upon request)
- ACPA volunteer training slides - modified to focus on ACP content and skills required for community presentations (available upon request)
<table>
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<tr>
<th>ACP 1-day workshop (registration cost involved) – register via ACPA website</th>
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Utilise this ACPA volunteer resource package, including all templates and additional resources

If located in metropolitan Melbourne, volunteers can apply (during our annual recruitment campaign every May) to become an ACPA Volunteer Community Ambassador to complement their existing volunteer role. Upon successful recruitment, volunteers complete a mandatory 6-day training program and receive ongoing mentoring and support.

It is important for those supervising advance care planning volunteers to have knowledge and capability. A range of educational resources are available at advancecareplanning.org.au or learning.advancecareplanning.org.au, see Figure 1. Further advice can be obtained via the national advance care planning advisory service 1300 208 582.
Figure 1. ACPA education resources
Advance Care Planning Australia

Advance Care Planning Australia (ACPA) is a national health program funded by the Australian Government. The program is committed to empowering Australians to achieve greater choice and control over their future medical treatment decisions and end-of-life care. Quality advance care planning (ACP) enables people to have conversations about what is important to them, document their preferences for future treatment in an Advance Care Directive (ACD) and/or appoint a Substitute Decision Maker (SDM) they trust. Advance care planning provides benefits to the individual, families, carers and/or treating teams. ACPA has comprehensive experience implementing an ACP Community Volunteer program and provides this resource to assist your organisation in developing its own program.

Background

Australia’s population is ageing. People are living longer, but more people live with chronic conditions which affect their quality of life. This has implications for the person, families, carers and the health system. In 2018, approximately 376,000 Australians were living with dementia which is the second leading cause of death in the nation. In addition, approximately 4.3 million Australians live with a disability. However, ACP should not be seen exclusively as a disability or older person issue, as sudden, life-changing events can happen to anyone. The need to improve quality of life, individual choice and control, and end-of-life care is becoming an increasing societal concern.

An important part of healthy ageing is making informed choices about one’s care and planning ahead for future events. Advance care planning can provide clarity and certainty during difficult circumstances. In the absence of advance care planning, medical treatment decision-making can result in family conflict and disagreements, at a time when families should be supporting each other. Research has shown that advance care planning benefits individuals, families, carers and health services. ACP can reduce the anxiety, depression and stress experienced by families, by ensuring that they feel comfortable that their loved ones are receiving care that aligns with their wishes.

Evidence suggests that almost 50% of people will be unable to make their own end-of-life decisions, yet less than 15% of Australians have an advance care plan. Even among older Australians aged over 65, the prevalence of Advance Care Directives is only 25%, leaving most older people potentially vulnerable and without a voice in their medical care as their health declines. For older people living in rural and regional areas, advance care planning prevalence is even lower, standing at 19%.

Since 2012, Advance Care Planning Australia has utilised a small team of experienced volunteers to provide community presentations on the topic of advance care planning, both to consumer groups
and health professionals located in Melbourne. This package is designed to support organisations throughout Australia to establish their own volunteer program to support advance care planning within their communities.

**Volunteering**

Advance care planning volunteers are community ambassadors that work to increase awareness and uptake of advance care planning among Australians and help to ensure that the person’s values, preferences and wishes in regards to their future medical treatment are upheld. Volunteers may come from a diverse range of professional backgrounds, including nursing, education and/or spiritual care workers. Advance Care Planning Volunteers can bring important peer support to your organisation and they should be considered a highly valued member of your team.

**Benefits of volunteering**

Volunteering can bring many benefits to communities, organisations and volunteers. As a first step, it is important that your organisation can articulate the value that volunteers will bring to your organisation, whilst also supporting volunteers to think about the benefits they will gain from volunteering with your organisation. To further support this process, you may wish to refer to *The Principles of Volunteering Guide* developed by Volunteering Victoria.

In addition to establishing the benefits of volunteering for your organisation and the role that volunteers will play, it is also important that your volunteer program has received executive approval, and that you have the financial and human resources required to both establish and maintain the program.
Volunteer rights and expectations

It is important that volunteer expectations are clearly articulated at the beginning of the program. To ensure a positive experience for both volunteers and the organisation, it might be useful to consider articulating the scope of practice of the volunteer(s), including any responsibilities and/or expectations. This might include:

- Clearly defining the role(s) that volunteers do and do not play within the organisation, including defining the tasks that fall within the volunteer scope of practice.
- Clearly articulating the responsibilities of any volunteer representing your organisation, including any key organisational messages.
- Establishing clear lines of accountability to ensure volunteers are provided with support and supervision and that reporting and escalation procedures are understood.

It is also important to consider the rights of volunteers, as outlined in the National Standards for Volunteering. The standards below are accepted as best practice in Australia.

<table>
<thead>
<tr>
<th>National Standards for Volunteering</th>
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<tbody>
<tr>
<td>Information about the organisation they are volunteering with</td>
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<tr>
<td>A clearly written job description</td>
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<td>Know to whom they are accountable and to whom they should report</td>
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<tr>
<td>Be recognised for their contribution and as a valuable member of the team they are part of</td>
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<tr>
<td>Be supported and supervised in their role</td>
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<tr>
<td>A safe and healthy workplace and be covered by insurance</td>
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<tr>
<td>Say ‘no’ if they are being exploited</td>
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<tr>
<td>Be reimbursed for any out of pocket expenses they incur</td>
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<tr>
<td>Be advised of all relevant organisational policies that affect them in their role as a volunteer</td>
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<tr>
<td>Be informed and consulted on all matters affecting their work</td>
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<tr>
<td>Be made aware of the organisation’s grievance procedure</td>
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<tr>
<td>Access to orientation and training in a safe and healthy workplace and be covered by insurance.</td>
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Volunteering Victoria, 2019
Recruitment

It is assumed that your organisation has an existing volunteer program or access to a volunteer program, with appropriate volunteer management positions in place to support your volunteers. However, advance care planning is a very complex and potentially sensitive topic. Therefore, volunteers involved in presenting on this topic require a specific skill set, including excellent communication and IT skills, to be effective in this role. If you do not have suitable volunteers in your existing volunteer team for this role, you may wish to recruit to attract those with the required skill set and background knowledge base.

Depending on the size of your volunteer team, consider an annual recruitment campaign to attract new volunteers who are passionate and keen to learn more about advance care planning.

Recruitment resources:

Justice Connect provide free resources to support volunteer recruitment. Visit their website here for more information.

Volunteering Victoria and your local Volunteer Resource Centre (VRC) can also assist with volunteer recruitment. Volunteering Victoria have developed a Recruiting Volunteers Guide that provides important information about the planning and administration of volunteer recruitment.

It is important that you select the right volunteers for your organisation. Below are suggested selection criteria that you may wish to consider for your Advance Care Planning Volunteer Community Ambassador program.
Selection criteria (essential):

- An interest in promoting advance care planning
- Effective communication skills, including listening skills and a capacity to communicate ideas effectively to other people
- An ability to respond empathically to the experiences of local community members whilst keeping a focus on core messages (e.g. ‘Introduction to ACP’ material)
- An ability to recognise when additional supervision and debriefing is necessary
- Experience working in a team and ability to work within host agency requirements
- Availability to participate in ongoing support gatherings and evaluation processes
- Availability to complete the volunteer training program
- Ability to understand when to refer a question to ACP health professionals or similar
- Availability and capability to present ‘Introduction to ACP’ information package to local community groups (10-100+ people) with an ACP volunteer buddy
- Agreement not to reveal to any person or entity confidential information relating to patients and employees, policies, processes and dealings and not to make public statements relating to the affairs of [HOST AGENCY] without prior authority of the [VOLUNTEER COORDINATOR]
- Active participation in the ongoing identification, assessment, treatment and prevention of risks.
- Basic computer literacy
- Over 18 years of age and in good general health
- Hold a current driver’s license and have use of a registered and fully insured private vehicle
- Satisfactory police check

Selection criteria (desirable):

- Previous training in basic volunteering (e.g. role of volunteers, confidentiality, volunteer insurance, ethics, communication, loss and grief)

Organisation/location specific selection criteria:

This could include the specific skills or attributes (required and desired) for presentation to the groups/audiences with which your organisation works. For example:

- Background in (but not limited to) health, nursing, law, ethics, education
- Very good IT skills to manage AV equipment
- Available to attend training / meeting dates as required
• Any skills or attributes that will assist in the delivery of information sessions to particular groups (e.g. languages other than English, cross-cultural communication and understanding)

Advertising

The ACPA Volunteer Community Ambassador Position Description is attached (Appendix 1) as an example to guide the development of your organisation’s Volunteer PD.

You may wish to consider the following advertising platforms (online and other):

• Go Volunteer / Seek Volunteer website
• Ethical Jobs website (NB: cost involved)
• Palliative Care Victoria website (and Newsflash newsletter)
• Good Company website – only possible if your host organisation is registered
• Your organisation’s website (e.g. ACPA website volunteer page)
• Your organisation’s existing volunteer program (e.g. internal newsletter)

Interviewing

Group Information Session

It is recommended that information sessions be held during your recruitment campaign to provide an opportunity for interested applicants to find out more about the volunteer role and to ask questions. Ideally each information session should be scheduled at different times of the day to accommodate for varying availability. An example information session flyer is attached (Appendix 2). A brief presentation could be provided by your organisation’s Volunteer Manager to discuss the volunteer role and the support that would be provided. Once your volunteer program is established, you could consider having current volunteers involved in the delivery of this presentation.

Group Interview

If you receive a large number of applicants, a group interview can be an efficient recruitment strategy. The interview panel should include a current volunteer, in addition to an appropriate number of staff members. A behavioural interview style is recommended, in order to observe the applicants’ communication skills and ability to interact with others in a group setting.
The group interview can also be used as an opportunity to collect the relevant on-boarding documentation required, such as identification required for a police check.

Alternatively, individual interviews could also be conducted to establish the applicant’s suitability for the volunteer role. The following example interview tools are attached:

- Example interview format (Appendix 3) and ACP questions (Appendix 4)
- Example interview rating scale (Appendix 5)

**Policies and Procedures**

As per Volunteering Australia’s National Standard 1.2 pertaining to Leadership and Management it is important that:

*Policies and procedures applying to volunteers are communicated, understood, and implemented by all relevant staff across the organisation.*

Your organisation’s Volunteer Manager will be able to advise on which policies and procedures are relevant for your volunteers. Given that some volunteers may be employed (or self-employed) in other paid roles outside of their volunteer role, it is strongly recommended that you request that all new volunteers complete a conflict of interest declaration. This provides an opportunity for the volunteer to identify any potential conflicts, and to outline appropriate mitigation strategies.

Examples of relevant policies and procedures include:

- Conflict of interest declaration (Appendix 6)
- Code of conduct (Appendix 7)
- Confidentiality agreement (Appendix 8)
- Policy for off-site presentations conducted by volunteers (Appendix 9)
- (including failure to return procedure) (Appendix 9)

A number of the policies and resources are listed below to guide your organisation in identifying the policies or issues specific to your program and volunteer workforce. Please refer to your local volunteering organisation for state specific forms and resources.
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<thead>
<tr>
<th>Policies and Procedures</th>
<th>Resources</th>
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<td>Volunteer policy</td>
<td>National Volunteer Guide</td>
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<td>Recruitment</td>
<td>Recruiting Volunteers Guide</td>
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<td>Volunteer checks</td>
<td>Police Checks for Volunteers in Australia</td>
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<td>Orientation and induction</td>
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<td>Volunteering Australia Fact Sheet – Complaint</td>
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<td>Handling by Charities and Not-For-Profits</td>
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<td>Exit procedures</td>
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<td>Sexual harassment</td>
<td>Sexual Harassment Guide</td>
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<td>Privacy</td>
<td>Protecting Privacy for Volunteers Guide</td>
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<td>Confidentiality and Intellectual Property</td>
<td>Confidentiality and Intellectual Property Guide</td>
</tr>
<tr>
<td>Reimbursement for out-of-pocket expenses</td>
<td>Reimbursements, allowances, honoraria and tax Guide</td>
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<td>Volunteer insurance</td>
<td>Insurance and Liability Guide</td>
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<td>After hours policy</td>
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<td>Offsite policy</td>
<td>Off-site Volunteering: Managing volunteers</td>
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<td>outside of the workplace</td>
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<tr>
<td>Rights and Responsibilities of Volunteers</td>
<td>Rights and Responsibilities of Volunteers Guide</td>
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Justice Connect have also developed a National Volunteer Guide: Covering key legal obligations organisations owe its volunteers. This guide has been developed for use by volunteer involving organisations across Australia. The guide provides information relating to: key terms; legal differences and obligations when working with volunteers; protecting volunteers and those your volunteers engage with; and recruitment, induction and volunteer management.

Consider using a Risk Register to identify potential risks for your volunteer team. This should include clear mitigation strategies for any risks that are recorded, including an escalation process where required.

**Diversity and Inclusion**

A diverse and inclusive volunteer program will ensure you attract volunteers with a wide range of skills, experiences and perspectives and who reflect the diversity within the community. There are a number of resources that can assist your organisation to support inclusive volunteering.
• **JobAccess** provide useful workplace and employment information regarding *disability and workplace adjustments* for employers and service providers.

• **Volunteering Australia** have developed a *Practical Guide: Involving volunteers from diverse cultural and language backgrounds in your organisation*. An *Information Sheet* has also been developed as a quick reference tool.

• **Diversity Australia** provide training and support to organisations to promote diverse, inclusive, and high performing workplace cultures.

• **ACON’s Pride Inclusion Programs** offer a range of services to assist employers, sporting organisations and service providers with all aspects of LGBTQ inclusion.

There are also a number of state-based organisations that support diversity and inclusion in volunteering. Some of these resources are listed below. Please contact your state or territory based volunteering organisation regarding additional resources.

• Volunteering Victoria provide a number of *guides* to support diversity and inclusion in volunteering including:
  
  o **Guidelines for Managing Individuals from a CALD Background**
  
  o **LGBTIQ Volunteers Inclusive Practice Guide**

• The **Victoria Alive Project** aims to improve disability inclusion in the volunteering community sector. Victoria Alive project activities include the development of *tools and resources*.

• **Enhancing Access** is based in Western Australia and provide information about how to include people with a disability or mental health issue in your volunteer program.

• Volunteering ACT have created a *Let’s talk about Inclusion* resource to promote inclusion in volunteer involving organisations.
Insurance

Once a Volunteer has completed the mandatory training they are usually covered by the host agency insurance policy whilst carrying out activities as outlined in the job description. Please check your organisation’s insurance policy to ensure there is adequate cover for your volunteers. Volunteering Victoria provide an Insurance and Liability Guide that provides essential information about insurance and your responsibilities.

Volunteer Resources

Volunteers will require access to a range of easily accessible resources. These resources may include:

- Presentation slides
- Handouts
- Presentation schedule
- Professional development resources
- Policy documents

Storing these documents / resources in a central location such as Dropbox is recommended. Ensure the account is password protected and that the password is updated annually.

The creation of a volunteer guide or handbook can be another useful way to provide volunteers with the essential information they require to carry out their roles, and may include details such as:

- Policies and processes
- Health and safety
- Emergency procedures
- Key contacts
- Software log-in details
- Volunteer rights and responsibilities
- Support and supervision
- Training
### Information Technology

Information technology required for the volunteer role may include:

- Mobile phones
- Printing facilities or access to printing
- Computers
- Internet access

IT software programs that can assist with this work include:

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<thead>
<tr>
<th>IT software</th>
<th>Description</th>
<th>Access</th>
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<tbody>
<tr>
<td>Doodle Poll</td>
<td>Create online polls to determine volunteer availability for presentation dates or team meetings.</td>
<td><a href="https://doodle.com">https://doodle.com</a></td>
</tr>
<tr>
<td>Dropbox</td>
<td>Central online storage system</td>
<td><a href="www.dropbox.com">www.dropbox.com</a></td>
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<tr>
<td>Canva</td>
<td>Design program used to create newsletters, flyers etc.</td>
<td><a href="www.canva.com">www.canva.com</a></td>
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### Better Impact

Better Impact is volunteer management software designed for businesses and non-profit organisations. The software supports many aspects of volunteer management, including recruitment, on-boarding, training, communications, scheduling and reporting.

Better Impact allows an unlimited number of administrators, unlimited volunteer profiles and custom fields, in addition to the following features:

- The system is password protected and allows for tracking of volunteer activities and hours, and data management of key volunteer documents.
- Volunteers record their hours under specific activity fields (which can be customised).
• Key documents can be attached to volunteer profiles (e.g. CV, qualifications, car insurance details etc.)
• Mobile App available for user friendly interface.
• Customise activity fields to enable accurate recording of volunteer time:
  o Administration
  o Travel time
  o Professional development
  o Mentoring
  o Conference / seminar presentation
  o Community presentation – health professional or consumer audience
  o Team meeting attendance
  o Training of new volunteers
  o Reviewing / updating resources upon request

Organisations will incur a subscription fee for the use of the Better Impact software. Costs vary depending on: the software edition selected (standard or enterprise); and the number of volunteers registered on the program. The Better Impact package offerings, including all inclusions, exclusions and costs are outlined on the Better Impact website: https://www.betterimpact.com.au/volunteer-software-pricing/

**Administration**

It is important to consider and plan for the administrative tasks associated with running volunteer community presentations. These tasks may include, but are not limited to:

• Printing (e.g. summary sheet of resources)
• Asset register (to record all assets allocated to volunteers, e.g. mobile phones)
• Parking vouchers
• Room bookings (consider rooms required for team meetings, interviews, group information sessions during recruitment, training sessions, etc.)
• Stationery orders

**On-boarding Requirements**

There are a number of documents that will need to be completed as part of the on-boarding process, including but not limited to:
• Confidentiality agreement
• Immunisation requirements (e.g. immunisation pathology slip)
• Police check (e.g. Fit2Work)
• Commonwealth of Australia statutory declaration
• Media consent form
• Volunteer Code of Conduct

An example on-boarding checklist is attached (Appendix 10).

## Training Program

In addition to your organisation’s standard volunteer induction training, a comprehensive 2-day volunteer training program is the ideal way to prepare your volunteer team for their duties. This training is best suited to intermediate and advanced level ACP volunteers. An overview of the key components that could be included in a training program are outlined below.

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<td>• Overview of advance care planning</td>
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<td>• Overview of healthcare in Australia</td>
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<td>• Mentor-mentee relationship</td>
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<td>• Rights and responsibilities of a volunteer</td>
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<td>• Debriefing and self-care</td>
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<td>• Doodle polls and Dropbox</td>
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<td>• Decision-making capacity</td>
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<td>• Jurisdictional differences</td>
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<td>• Scope of the volunteer</td>
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<th>Day 2</th>
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<td>• Communication and presentation skills</td>
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<td>• My Impact volunteer software</td>
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<td>• State/territory based advance care planning legislation</td>
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<td>• Advance care planning resources</td>
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<td>• Links for further information</td>
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An example package of presentation slides that you may wish to use as part of your tailored training program are available from ACPA, upon request.

ACPA online education program

The ACPA online education program, including learning modules 1-4, provide important education for volunteers about advance care planning. It is recommended that volunteers complete these 30-minute modules as part of the volunteer training and on-boarding process. Volunteers can register online to find more information about these modules and to complete the online training at a convenient time.

Module (1) One: Advance Care Planning Introduction

In the first module of the online learning series, find out about advance care planning, key components and benefits.

Module (2) Two: Advance Care Planning Conversations

In the second online module, learn how to initiate advance care planning conversations and explore key communication strategies.
In addition to the training outlined above, it is also important that your volunteers complete the mandatory training requirements for your organisation. Liaise with your organisation’s Volunteer Coordinator to determine the training that volunteers at your organisation are required to complete. Training may also include specific training in any computer software programs used as part of the role, such as Better Impact.
ACPA have developed an Advance care planning for Australian volunteers YouTube video available online that will provide basic information about advance care planning and resources and support available. The information that relates specifically to advance care planning runs from the 6.20 – 6.25 minute mark.

Volunteer Records

It is important that personal volunteer information and documents are stored in a secure and central location. Programs such as Better Impact volunteer management software allows for the storing of important volunteer information in a central, password protected location. The Human Resources department in your organisation may also be able to assist with storing and retrieving such information which could include, but is not limited to:

- Identity documents
- Insurance documents
- Completed forms
- Completed training

Data collected by Better Impact can then be used to help demonstrate the impact of volunteers at an organisational level, including the total number of volunteer hours and various types of activities completed.

Volunteer Retention Strategies

Implementing strategies to ensure your volunteers feel supported and valued in their roles is an integral component of volunteer management and will support volunteer retention.
Initiatives you may wish to consider as part of your volunteer support and management could include:

- Team / social events (e.g. welcome dinner, National Volunteer week function)
- Recognition of effort / achievements
- Regular communication (e.g. newsletters, email, team meetings)
- Ensure the work space is professional and inviting
- Celebrate birthdays and other special events (e.g. via volunteer newsletter (Appendix 11)
- Acknowledge that volunteers have other roles and responsibilities that may impact their availability, and that availability may change depending on other life events
- Promote self-care strategies for volunteers
- Provide professional development opportunities (e.g. communication skills training)
- Involve volunteers in reviewing and updating resources and seek their input on decisions
- Nominate individual volunteers and/or volunteer teams for relevant awards (see section on nominations)

Volunteering Victoria has developed a [Managing Volunteers for Retention Guide](#) which outlines the National Standards for Volunteer Involvement and Retention, as shown below.

<table>
<thead>
<tr>
<th>National Standards for Volunteer Involvement and Retention</th>
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<tbody>
<tr>
<td><strong>Standard 5.1:</strong> Volunteers are provided with orientation relevant to their role and responsibility.</td>
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<td><strong>Standard 5.2:</strong> Volunteers knowledge and skills are reviewed to identify support and development needs.</td>
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<tr>
<td><strong>Standard 5.3:</strong> Volunteers knowledge and skills needs relevant to their roles are identified, and training and development opportunities are provided to meet these needs.</td>
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<tr>
<td><strong>Standard 5.4:</strong> Volunteers are provided with supervision and support that enables them to undertake their roles and responsibilities.</td>
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<tr>
<td><strong>Standard 5.5:</strong> Changes to the involvement of a volunteer are undertaken fairly and consistently.</td>
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Volunteering Victoria, 2019
Mentoring Program

It is recommended that new volunteers are assigned to a more experienced volunteer (if available) or staff member for a minimum period of 6 months for 1:1 mentoring and support. Mentoring sessions can be completed face-to-face or via phone.

Developing a mentor/mentee agreement form can help to formalise the mentor arrangement (Appendix 12) and provides an opportunity to clearly articulate learning goals.

Resources you may wish to develop to support the mentoring program include:

- A mentoring log to record mentoring sessions, including any results and concerns (Appendix 13).
- Frequently Asked Questions (FAQ) sheets to provide answers to commonly asked questions. For example, see the Frequently Asked Questions (FAQs) on the ACPA website.
- Skills based checklist to monitor and record skills obtained and mentee progress (Appendix 14)

There are also a number of mentoring resources and tools available online:

1. Questioning Techniques – Maine.gov

2. 5 Foolproof Tips To Make Your Mentorship Count – By Jon Simmons
   https://www.fastcompany.com/3063181/five-foolproof-tips-to-make-your-mentorship-count

3. How Mentors Can Help Set SMART Goals – By Lois J. Zachary and Lory A. Fischler

4. Common Mistakes Made By New Mentors – Mentoring Complete

5. Reflective Questioning – Assist Beginning Teachers
   http://assist.educ.msu.edu/ASSIST/school/mentor/workwith/reflectivequestioning.htm
Out of pocket costs

It is important that your organisation establishes clear policies in regards to volunteer reimbursements and allowances. Volunteers should not be required to purchase any item for the delivery of a presentation or event. Volunteering Victoria has developed a Reimbursements, allowances, honoraria and tax guide.

Examples of out-of-pocket expenses or allowances your organisation might need to consider may include, but are not limited to:

- Public transport to/from approved activities
- Parking permits/exit passes for onsite parking for team meetings/training
- Reimbursement for the use of private vehicles ($X per kilometre)
- Reimbursement for out-of-pocket expenses where prior approval has been given and receipts obtained

Volunteer Recognition and Award Nominations

It is important to recognise the important work of volunteers. There are many opportunities to formally recognise the work of a volunteer team. Consider submitting a nomination(s) to the following awards on behalf of your volunteers, either individually or as a team:

- Minister for Health Awards
- Australia Day Awards
- Volunteering state awards – program of excellence
- Local council grants
- Hesta aged care awards
- Palliative Care Australia

Other ways to recognise volunteer contributions include:

- Providing positive feedback to volunteers (formally or informally)
• Celebrating success (e.g. celebratory morning tea etc.)
• Writing thank you notes/cards
• Including information about volunteers on your organisation’s website, newsletter etc.
• Reporting on the impact of volunteer services in annual reports
• Providing volunteers with references or act as a referee, if requested
• Issuing certificates for length of service, achievements, completion of training etc.

**Volunteer Team Meetings**

Team meetings provide a valuable opportunity to maintain regular contact with volunteers and to discuss changes or updates, receive feedback, plan for future activities etc. Bi-monthly meetings held at the host organisation can ensure meetings are regular without placing onerous expectations on the organisation or volunteers. However, each organisation and volunteer team will need to determine a meeting schedule that is most appropriate for their needs.

Prior to holding a volunteer team meeting you might consider:

• Creating a Doodle Poll to determine availability and confirm attendance
• Consultative development of a meeting agenda and circulation of this prior to the meeting
• Logistics such as room bookings, catering, parking permits

As part of the meeting you might consider:

• Recording meeting minutes (to be circulated to all volunteer team members following the meeting). You might even delegate minute taking to a volunteer who has the relevant skills.
• Meeting attendance by Program/Medical Director, CEO etc. to provide any organisational updates and answer any questions from volunteers

**Community Presentations**

ACP volunteers play an important role in promoting and raising awareness around the importance of ACP. Community presentations aim to increase community understanding of advance care planning, the benefits of ACP, and how to undertake the process. These presentations are delivered to a variety of community based clubs, groups, events and organisations. Examples of these audiences
are outlined in more detail below. A minimum of two volunteers are required to present at each session for safety reasons.

**Presentation content**

ACPA provides two presentations for your local use, one for consumers and one for health professionals. Presentation materials, including a PowerPoint presentation, have been developed for both presentations. If using the ACPA presentation, it is important that volunteers only present information provided in the approved presentation slides and do not add additional information. Please contact Advance Care Planning Australia (+61 3 9496 5660 or email acpa@austin.org.au) to request an updated version of this presentation.

**Content exclusions**

It is important that presenters are aware of the differences between ACP and Voluntary Assisted Dying (VAD), including the legal restrictions around raising and discussing VAD. If any questions relating to VAD are asked during or after presentations, volunteers should explain that their role is to discuss advance care planning. Any VAD enquiries should be redirected to the person’s treating doctor, DHHS website or the state-based VAD navigators for further information.

**Audience**

Presentations have been developed for two audience types: consumers and health professionals.

- Consumer audiences may include but are not limited to: Lions Clubs, Probus Groups, Rotary Groups, libraries, Men’s Sheds, Country Women’s Association, retirement villages, and chronic health condition support groups
- Health professional audiences may include, but are not limited to: GP clinics, aged care facilities, community health centres.

Audience numbers can vary from 10 – 100+ people. For this reason, your volunteers need to be confident presenting to large groups and have the ability to effectively respond to questions from the audience.

**Presentation training**

A comprehensive training package has been developed for Advance Care Planning Volunteers, including specific training for community presenters. To become presenters, Community Ambassadors must:

- Complete online learning modules 1-4 (via ACPA website).
- Attend any local advance care planning workshops.
- Watch the ACPA for Australian Volunteers video
• Begin by presenting a small section of a presentation (e.g. a few slides only) to build up their confidence presenting to an audience. Following this, volunteers can progressively present more content for each subsequent presentation.

• As part of training and induction, volunteers could also present to your organisation to ensure you have an opportunity to check that you are satisfied with their presentation skills and/or provide feedback, before sending them out into the community.

**Presentation administration**

• Volunteers provide free 40-minute presentations upon request, however a minimum audience of 10 people is recommended, to ensure optimal use of volunteer time.

• Consider promoting this service to local community groups, as required. Promotion could be via mail out letters to local groups and organisations, via your organisation’s website or social media pages, or by word-of-mouth. For an example of promotional material, refer to the ACPA promotional postcard (Appendix 15).

• If the initial request for a presentation has been made by a facility’s head office, it is important to ensure you have communicated and liaised with the local organisation to arrange presentation dates, times and logistics.

**Managing community requests**

It is important to develop a process for receiving and responding to community requests for presentations. An example community presentation process is outlined in detail below.
• Requesting organisation submits **Volunteer Community Ambassador Speaker Request Form** indicating 3 preferred dates.
  o The ACPA **Volunteer Community Speaker Request Form** is available online, and can be used as an example for developing a speaker request form for your organisation.
• Volunteer Manager to **confirm receipt of request**.
  o Presentations should not be confirmed more than 3 months in advance, as volunteer availability cannot be guaranteed.
• **Doodle poll** to be sent out to volunteers to check availability. This can be done at the beginning of each month (e.g. Doodle poll for March presentations created and sent to volunteers in the first week of January). It is recommended that Doodle polls remain open for at least 5 working days, to ensure adequate time for all volunteers to vote.
• **Volunteer Ambassadors assigned** to presentations (based on availability) as either Presenter 1 or Presenter 2. Email volunteers to confirm their presentation allocation.
  o Presenter 1 is required to contact the organisation two weeks prior to confirm the presentation will proceed; to verify IT set up required on the day (e.g. projector, laptop); and to identify and confirm details for an organisation/community group contact person on the day.
  o Presenter 2 is responsible for logging the number of attendees at the session.
• **Volunteer manager to email requesting organisation** to confirm presentation booking.
• **Volunteer manager to assign volunteers on Better Impact calendar** (if applicable).
• **Volunteer manager to update Excel spreadsheet** to reflect confirmed presentation details, including: dates, times, location, audience type and anticipated number, presenters, organisation/group contact details.

**NB:** if for any reason the presentation is cancelled or the request is changed, repeat the above process for new dates/times.

A community presentation flowchart, detailing the entire process from three months prior to the presentation up to and including the day of the presentation, is shown in the flowchart on the next page.
Travel Reimbursement

Volunteers should be reimbursed for their travel to and from presentation venues. Discuss with your department manager regarding the required steps for managing the travel reimbursement process.

Community presentation safety procedures

When conducting off-site presentations in the community, volunteers should never work on their own. It is always preferable that volunteers work in pairs (or together with a staff member) to undertake their work in the community.

Volunteers should text the Volunteer Manager upon arrival and departure to ensure their whereabouts is known. Better Impact can also be used by volunteers to ‘clock on’ and ‘clock off’ at the start and finish of their allocated shift.

A basic risk assessment of any community location should be undertaken by the volunteer upon confirming the presentation. This process should be undertaken in conversation with a representative/host from the community organisation or commercial venue. This assessment should take into account the following (please note, this list is not exhaustive):

- Access and entry to location;
- Parking arrangements and lighting (for evening events);
- Venue representative or host who will meet the volunteers at the designated location;
- Any lifting/moving of equipment (strongly discouraged wherever possible);
- Number of people expected to be in attendance;
- Neighbourhood security risks. You should also consider measures to avoid exposure to these risks. Your local hospital’s HITH service may have further advice on any exclusion zones.

Refer to your organisation’s local policy / procedure for volunteer off site tracking.

After hours presentations

If a presentation has been arranged for after hours, the following procedures are advised:

- Ensure volunteers have the contact details for the Volunteer Manager to text/call on arrival/departure.
- Your organisation’s After Hours Site Manager must be notified prior to the presentation that volunteers will be working out of business hours.
• It is strongly recommended that your organisation/department develops an internal escalation process in the event that a volunteer cannot be contacted.

**Community presentation resources**

Presentation materials, including separate PowerPoint presentations for consumer and health professional audiences are available upon request.

Additional resources and materials required for presentations may include, but are not limited to:

• USB (with copy of PowerPoint presentation)
• Laser pointer (optional)
• IPad or laptop
• Data projector
• Trolley (to ensure safe transport of materials)
• Internet connection
• Any hard copy materials or handouts/brochures etc.

Please note, that some of the above resources may be provided by the organisation requesting the presentation. Presenter 1 is required to contact the organisation/venue two-weeks prior to the presentation date to confirm details, including car parking arrangements, a key contact person on the day, and IT set up and equipment arrangements.

Volunteer presenters are advised to direct audience members who wish to obtain further advice to the ACPA national phone advisory service (1300 208 582). Any requests for additional resources can also be redirected to the advisory service or ACPA website. The national phone advisory service is able to provide advice of a general nature only. Therefore some callers may be redirected to contact their state’s Office of the Public Advocate/Guardian if they require advice that is specific to their individual circumstances. A summary sheet outlining some of the resources available from ACPA is attached (Appendix 16).

**Evaluation of community presentations**

An example evaluation form was developed to collect feedback from presentation audience members (Appendix 17).
Video recording of consumer presentation

ACPA has video recorded the Volunteer Community Ambassadors consumer presentation. This video is available for download online, via the ACPA website. The presentation from volunteers runs from the 6.20 - 25 minute mark in the video. You may wish to offer this as an alternative option for any requests for community presentations that you are unable to accommodate due to distance or volunteer availability.

National Standards for Volunteer Involvement

In May 2015, Volunteering Australia launched National Standards for Volunteer Involvement. The National Standards have been developed to reflect best practice in volunteer management and provide a useful tool for guiding the development and ongoing management of your volunteer program.

The standards support organisations by:

- providing good practice guidance and benchmarks to help attract, manage and retain volunteers; and
- helping to manage risk and safety associated with working with volunteers

Volunteering Australia have developed an implementation resource that provides guidance for applying the National Standards.

In addition to using the National Standards as a guide for good practice, organisations can also use these standards for self-evaluation and assessment to support program enhancements.
Annual Performance Reviews

Annual performance reviews should be conducted with every volunteer to ensure they are getting the most out of their role, and to enable them to set goals for the following year.

Performance reviews are also an opportunity to assess volunteer performance and to ensure the role is meeting the expectations of both the organisation and each volunteer.

ACPA have developed an annual performance record template (Appendix 18) that organisations can use as a guide for developing their own performance review documents. Completed performance reviews can be uploaded to the Better Impact system for safe storage and retrieval. The Better Impact system also allows the user to set alerts to notify volunteer management staff when performance reviews are due for review and renewal.

Exit Process

While it is preferable that volunteers submit a written notice to their coordinator prior to resigning, to enable debriefing and discussion, volunteers are able to withdraw from their position at any time.

Volunteers who do not adhere to the policies and procedures of the host agency or fail to perform in their role in a satisfactory manner can have their position concluded at any time. Prior to termination, volunteers should be given an opportunity to discuss and address any issues or concerns with their coordinator or volunteer manager.

A clear exit process is required for any volunteer who withdraws from their volunteer role, or who may be deemed unsuitable to continue, irrespective of the reason behind this decision.

The exit process should ensure:

- Certificate of service (laminated) provided to the volunteer, this should acknowledge the hours of volunteer service provided
- Return of any assets / resources belonging to the host organisation (e.g. mobile phone)
- Removal from any email DLs
- Communication with volunteer team of any volunteers departing
- Better Impact status updated, including reason for withdrawal. Consider archiving, rather than removing, to allow access to volunteer information should the volunteer apply again in the future.
- Exit interview form sent to volunteer to complete (Appendix 19)
- Thank you card and small thank you gift provided to the volunteer
Evaluation and Reporting

It is important to consider the evaluation and reporting requirements of your organisation as part of the planning and design stage of a volunteer program. Consider the information or data that your organisation requires for program reporting and accountability, program improvements and redesign, or for any planned advocacy or influencing work.

An example evaluation form was developed to collect feedback from presentation audience members (Appendix 17). This form can be used as a guide for developing an evaluation tool for your organisation. The form can be provided to all attendees to complete at the end of every presentation or presented at select presentations to collect a snapshot of data. The example form provided is given in hard copy to audience members and collected by presenters before they leave. Depending on your audience, you may wish to consider other survey tools, including online survey platforms or electronic/email surveys.

Completed ACPA surveys are entered into Zoho survey by ACPA staff so that data can be collated, analysed and reported on. When developing your survey tool, it is important to consider the information that your organisation requires, how this will be used, and how data will be collated, analysed and reported on.

Additional data you may wish to collect and record may include:

- Number of community presentations per month and type (health professional versus consumer)
- Number of attendees at presentations per month
- Case studies to highlight the impact of the volunteer role

Other Resources

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<th>Online Resources</th>
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<tr>
<td><strong>National Standards for Volunteer Involvement</strong></td>
<td>Volunteering Australia’s National Standards for Volunteer Involvement are designed to reflect best practice in volunteer management, providing guidance and benchmarks to help organisations attract, manage and retain volunteers.</td>
</tr>
<tr>
<td><strong>Advance Care Planning Australia</strong></td>
<td>Advance Care Planning Australia is a national program that provides information and resources to individuals, care workers and healthcare</td>
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professionals to support the process of advance care planning. A number of resources, support materials and guides are available online for individuals and organisations. These resources are available free for download or printed copies can be requested by completing a resources online order form.

**Support and advice**

ACPA advisory services (including phone, email and online) ensure information and resources are provided to address direct enquiries. The ACPA advisory service is available 9am – 5pm (AEST) Monday to Friday by calling 1300 208 582 or submitting an online enquiry.

<p>| <strong>Volunteering Victoria</strong> | Volunteering Victoria is the state peak body for volunteering in Victoria, focusing on advocacy, sector development and the promotion of volunteering. Volunteering Victoria provide online resources and guides for both volunteers and volunteer managers, in addition to professional development and training, and research and advocacy materials. |
| <strong>Volunteer Resource Centre</strong> | Identify the Volunteer Resource Centre in your local area, each area will have their own local chapter. Volunteer Resource Centres can support volunteers, volunteer managers and assist organisations wishing to design their own volunteering program. |
| <strong>Volunteer.vic</strong> | Volunteer.vic provide policy and resources for Victoria’s volunteer community. The website also provides links to other agencies and organisations that represent different areas in the volunteering community. |
| <strong>Justice Connect</strong> | Justice Connect provide free legal advice on volunteer recruitment processes, including the rights and responsibilities of volunteers. They have developed a National Volunteer Guide. Other resources include a Recruiting Volunteers: Justice Connect E-Learning Module, and a National Volunteer App. |
| <strong>Palliative Care Victoria (PCV) Volunteer Managers Network</strong> | Loomio – online group on PCV Volunteer Managers Network Contact: PCV Volunteer Engagement &amp; Capacity Building Manager Phone: 03 9662 9644 |</p>
<table>
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<tr>
<th><strong>Volunteer Gifts</strong></th>
<th>Specialise in customised gifts for volunteer rewards and recognition.</th>
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<tr>
<td><strong>Better Impact</strong></td>
<td>Volunteer management software, including customer record management (CRM) functionality.</td>
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<tr>
<td><strong>Leaders of Health Volunteer Engagement (LOHVE) Network</strong></td>
<td>The purpose of LOHVE is to guide and support health leaders in volunteer management in the provision of well structured, integrated programs that are inclusive and benefit clients, volunteers, health services and community alike. The objectives of the network are to promote leadership within health volunteer programs, to provide a reference point for benchmarking of services and to provide information back to health services and peak bodies to ensure that volunteer programs are understood and supported into the future.</td>
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Appendix

Appendices will be made available upon request. This is to account for any ongoing updates and to ensure users are receiving the most up to date versions.