1.5 Documentation and Records Policy

**Purpose**

To articulate the need for accurate documentation and appropriate storage of documents involved in the delivery of services by volunteers relevant to the strategic and operational context of <Insert Organisation Name>.

**Background**

Access to, generation and storage of accurate records and documents is vital to the efficient operation of <Insert Organisation Name>. It is therefore imperative that all volunteers are aware of the need for accurate documentation as required and are well-informed of appropriate procedures.

**Policy**

All volunteers need to ensure that adequate evidence of business activity is created and captured. All records need to be maintained in good order and condition. Official records must not be damaged, altered or destroyed without the approval of the CEO. Volunteers should seek clarification and approval for everyday records from supervising staff, who may seek direction and / or approval from the <Insert Position>.

As part of the induction process all volunteers will be adequately briefed in documentation and record- keeping requirements and processes. Supervisors will provide appropriate training, time and resources and monitoring of performance to ensure volunteers can satisfy <Insert Organisation Name>’s documentation and record-keeping requirements.

Examples of records and documents may include:

* Volunteer personnel records
* Volunteer involvement system policies and procedures
* Project or work-related documents and materials
* Position descriptions
* Minutes from meetings and reviews
* Reference materials, resources and presentations
* Participation in training, conferences and events
* Volunteer attendance records
* Monthly statistics and reports
* Client notes in CRM software or files
* Volunteer references / statement of attendance

All records and documents generated by volunteers will be treated and stored according to the Volunteer and Staff Confidentiality and Privacy Policies and Procedures, and <Insert Organisation Name>’s Records Management, Documentation Change Control and Data Security Policies and Procedures.

**Responsibility**

This policy applies to all volunteers; its application lies with the <Insert Position> and supervising staff.

**Standards**

1.2, 1.4, 2.3, 3.3, 5.1, 5.2, 5.4, 6.1, 8.1

**Related Policies and Procedures**

* Documentation and Records Procedure
* Access to Personnel Records Procedure
* Volunteer Induction and Orientation Policy and Procedure
* Volunteer Confidentiality and Privacy Policy and Procedure
* Volunteer Supervision Policy and Procedure
* <Insert Organisation Name> Data Security Policy and Procedure
* <Insert Organisation Name> Documentation Change Control Policy and Procedure
* <Insert Organisation Name> Records Management Policy and Procedure
* <Insert Organisation Name> Confidentiality and Privacy Policy and Procedure

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| Approved | CEO | Signature |  |
| Review | Annual | Next Review Date |  |