5.10 Volunteer Appraisal Procedure

**Procedure**

The <Insert Position> or supervising staff should negotiate a time with the volunteer and provide them with the relevant paperwork prior to the meeting, including the Annual Appraisal form and a copy of their position description. The appraisal should follow an open-ended discussion format whilst using pre-determined questions to guide discussion regarding volunteer performance. Both parties may take notes if they wish.

**Preparation**

Prior to an appraisal the volunteer should read through the position description to identify any areas of work performance they wish to discuss during the appraisal. These may be areas where the volunteer identifies the need for further training or support, or areas where they feel a change may be needed in organisational practice and/or in work performance. Volunteers should also consider other matters they wish to raise in this forum.

**Appraisal Meeting**

The appraisal should be an open discussion with clear outcomes, including the following:

* Identify future training needs,
* Attempt to find solutions to any problems that may exist in relation to work performance,
* Result in the setting of specific goals in relation to training, future work performance, workplace relationships and culture, with timelines for achievement where appropriate,
* Identify particular volunteer strengths and how these might be harnessed for the mutual benefit of the volunteer and <Insert Organisation Name>, and
* Identify any need to review the job description.

**Documentation**

During the meeting each parties’ responses will be noted on the appraisal form, ready for documentation and review; both the volunteer and supervising staff will review the final appraisal form to ensure agreement. When both parties are satisfied with its accuracy, both parties will sign and date the form which will then be filed in the volunteer’s personnel record. The appraisal form may be consulted as necessary during the year and at the next appraisal to evaluate progress in meeting any plans or goals set.

**Review of Position Description**

If during the course of the appraisal a need to review the position description is identified, then the <Insert Position> will inform the CEO who will ensure the position description is reviewed and communicated in line with the Position Description Development and Review Policy and Procedure. The volunteer will be encouraged to provide feedback and suggestions to supervising staff regarding the nature of the volunteer role.

**Application**

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

**Standards**

1.1, 1.4, 2.2, 2.3, 3.3, 3.4, 5.2-5.5, 6.1, 7.1, 7.2, 8.1-8.4

**Related Policies and Procedures**

* Volunteer Appraisal Procedure
* Volunteer Training and Development Policy and Procedure
* Volunteer Supervision Policy and Procedure
* Position Description Development and Review Policy and Procedure
* Volunteer Recognition Policy and Procedure
* Documentation and Records Policy and Procedures
* Communication with Volunteers Policy and Procedure
* Continuous Improvement Policy and Procedures

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