

# Self-Audit Tool

## User Guide



## Introduction

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The Volunteering Tasmania Self-Audit Tool has been developed to support our members in assessing how well they are meeting the National Standards for Volunteer Involvement and how their volunteers rate their volunteer program.

The Self-Audit Tool is quick and easy to use, for you and your volunteers.

First, you will complete a questionnaire with questions based on the National Standards. This will generate a report that you will receive by email, summarising your answers, and providing you with a rating per Standard.

Then, you will invite your volunteers to also complete a volunteers' specific questionnaire. Your volunteers will also receive a customised report, unique to their answers to the questions. Once enough volunteers have completed the questionnaire, you can close the questionnaire and generate a report, showing the combined results of all people completing the self-audit.

Not only do you gain an understanding of how well you are meeting the National Standards for Volunteer Involvement, and how well your volunteer program is rated by your volunteers, you will also receive tips to help you improve your volunteer engagement and management strategy.

In summary, you no longer need to develop your own survey or evaluation process. The Volunteering Tasmania Self-Audit Tool provides you with the resources you need to do an audit of your volunteer program now, and in the future.

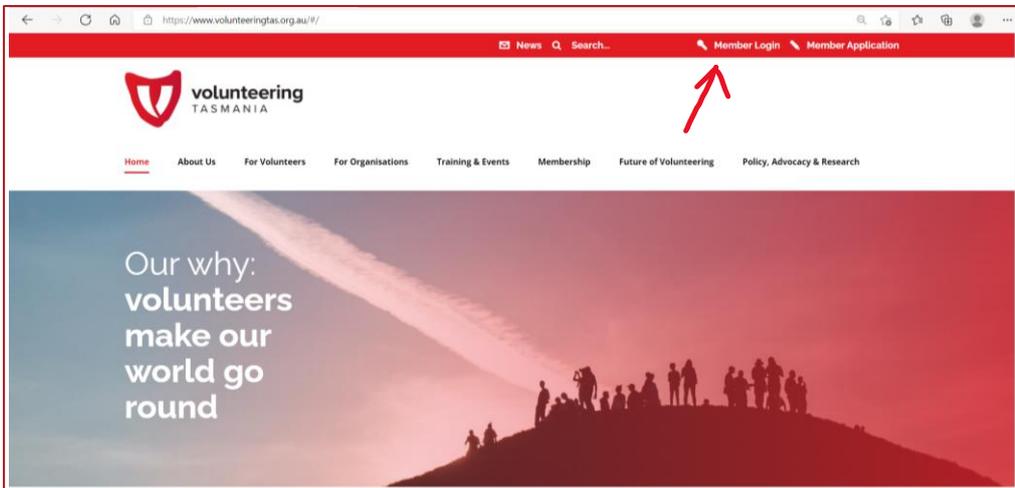
For best results, we recommend you re-do the self-audit after six or 12 months and use the outcomes from the first time you use it, as a benchmark. This means you can track your continuous improvement efforts over time.

This user guide provides an overview of how the Self-Audit Tool works.



## Getting started

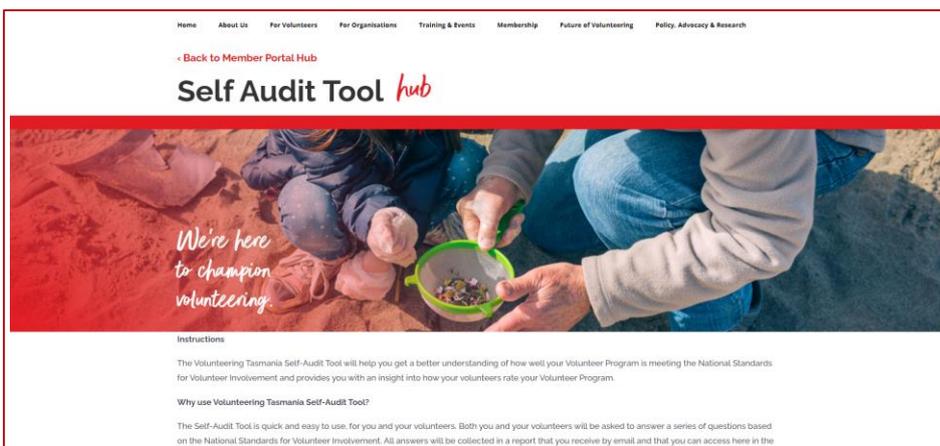
- Login to the Member Portal on our website [www.volunteeringtas.org.au](http://www.volunteeringtas.org.au). You can find the Member Portal in the top right-hand side of the website.



- If you do not have a Member Portal login yet, please request access via this link: <https://www.volunteeringtas.org.au/membership/portal-access-request/>
- Once logged in, click on the '**Self-Audit Tool**' button which takes you to the Self-Audit Hub  
**Self Audit Home – Volunteering Tasmania**



- The Self-Audit Hub home page provides you with information and instructions about the use of the tool. It is worth reading this information first, so you know how it all works, before you get started.



- When you are ready to get started, click on the button '**Manager's Self-Audit Tool**' at the bottom of the page.



<h3>Manager's Self Audit Tool</h3> <p>Start here, by completing your own volunteer managers questionnaire to see how well you think your Volunteer Program is meeting the National Standards for Volunteer Involvement. More than one volunteer manager in your organisation can complete this questionnaire, by logging in to the Member Portal with their own unique login.</p> <p><a href="#">Manager's Self Audit Tool</a></p>	<h3>Generate Volunteer Self Audit Link</h3> <p>After you have completed your own questionnaire, click here to generate a link to share with your volunteers, for them to complete a volunteer's questionnaire. Please note this link is unique to your organisation and to be shared with your volunteers only.</p> <p><a href="#">Generate Volunteer Self Audit Link</a></p>	<h3>Self Audit Submissions</h3> <p>Here you can find an overview of all the volunteers that have completed the questionnaire so far. When you are happy with the number of volunteers that have completed the questionnaire, you can click the 'Close Questionnaire Submissions' button. This will generate a report that summarises all feedback from your volunteers in one place. You will receive this automatically by email.</p> <p><a href="#">Self Audit Submissions</a></p>
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- This will take you to the Volunteer Manager's questionnaire: [Online Self-Audit for Volunteer Managers Instructions – Volunteering Tasmania](#)
- After reading the instructions on this page, click the button **'Let's get started'** and you will find the questionnaire. [Online Self-Audit for Volunteer Managers Form – Volunteering Tasmania](#)



- First, you will be asked to complete your contact information. Please note that your organisation name will be auto populated based on your login information to the Member Portal.
- You need to choose what Round of the Self-Audit you are undertaking. If this is the first time you do the Audit, you choose Round 1, the next time (for example, in six months from now) you choose Round 2, and if you choose to re-do the Audit another time (after 12 months) you choose Round 3.



- There are three statements per National Standard for Volunteer Involvement. You will be asked to indicate how much you agree with each statement on a scale of 1 to 5. Once you have finished this, don't forget to click the **'Submit'** button! This is important as this will generate your customised report that will automatically be sent to you by email.

**Submit**

## Volunteer Manager's Report

- When you have submitted your questionnaire, you will automatically receive an email with your report, showing your answers to the questions and tips to help you improve your volunteer management strategy.
- On the first page, the report shows a spider chart as a snapshot of the way you have rated your volunteer program against the eight National Standards for Volunteer Involvement. The below image is used for illustrative purposes only.



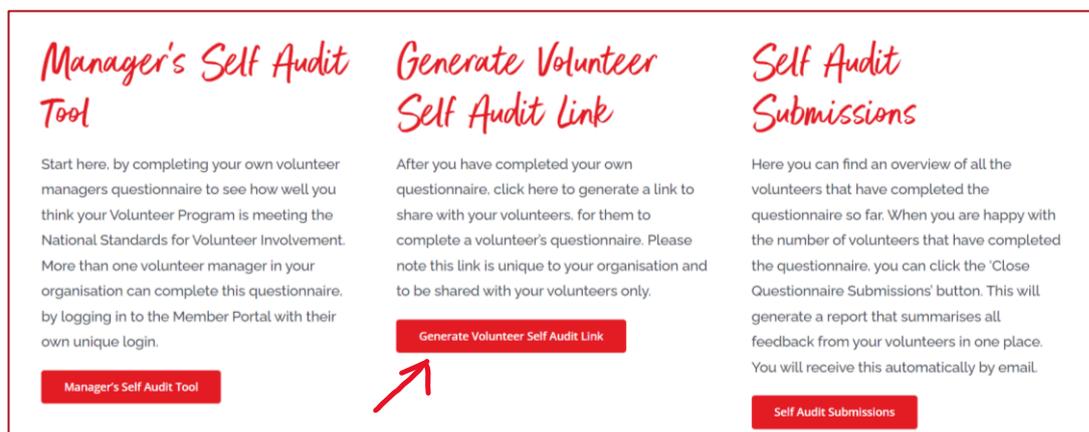
- This is followed by the answers you have given to the questions/statements with tips for you to consider, see example below.

Statements	Score	Tips
We promote our volunteer programs widely to ensure we maintain a volunteer base that is fit for purpose (the right number and type of volunteers)	3	<p>You could:</p> <ul style="list-style-type: none"> <li>• Start with developing a formal statement for your organisation that outlines your philosophy, direction and objectives for volunteer involvement.</li> <li>• Review how you can best communicate this statement and your volunteer program to the right audience, to ensure you attract the right number and type of volunteers for your program.</li> <li>• Ask existing volunteers for their input on how to do this. How did they find out about your volunteer program? Do they have tips on how and where to attract the right volunteers</li> </ul>
We plan and design volunteer involvement to contribute to the organisation's purpose, goals and objectives.	4	<p>You could:</p> <ul style="list-style-type: none"> <li>• Invite volunteers to join a focus group or committee of volunteers to contribute ideas, next time the organisation has a strategic planning day or similar.</li> </ul>

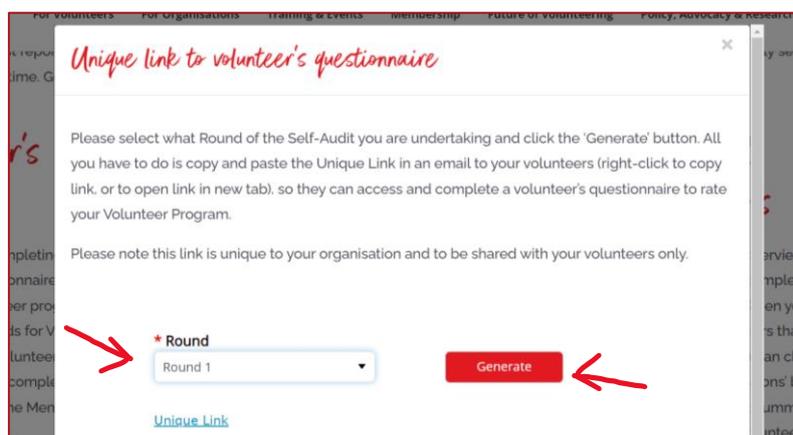


## Inviting volunteers to complete the questionnaire

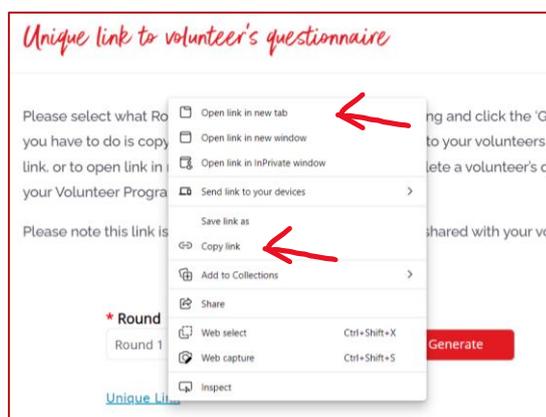
- The next step is to invite your volunteers to complete the volunteers' specific version of the self-audit questionnaire.
- Go back to the Self-Audit Hub home page in the Member Portal (**Self Audit Home – Volunteering Tasmania**) and click on the '**Generate Volunteer Self-Audit Link**' button.



- This will open a pop-up screen with a URL to your volunteers' questionnaire. Again, you first have to choose what round of the Self-Audit you are undertaking and then click the 'generate' button, which will generate a Unique Link, as per screenshot below.



- You can then either **right click on the link** and open this in a new tab or screen, or you can simply copy and paste the link into an email to send to your volunteers.





- ❑ **Please note** that the link that will be generated, is unique to your organisation. Don't share this with volunteers or people outside your organisation. If people other than your organisation's volunteers completed this questionnaire, the data in your final report will not be correct.
- ❑ All you need to do now, is write an email to your volunteers, asking them to complete the questionnaire, using the unique link. We recommend you give your volunteers a deadline for completing the questionnaire, so you can follow-up with them a few days prior to the deadline, if needed. **Note:** It's important to make it clear in your email that you will not be able to view their answers from the questionnaire.
- ❑ Every volunteer completing the questionnaire will receive their own customised report, like the one you received. They will receive tips for volunteers and can learn a thing or two about their rights and responsibilities as volunteers too.

## Tracking submissions and generating a combined report

- ❑ The final step is to track how many invited volunteers have completed the questionnaire and generating a combined report once you are happy with the number of completed questionnaires.
- ❑ Go back to the Self-Audit Hub home page in the Member Portal ([Self Audit Home – Volunteering Tasmania](#)) and click on the '**Self-Audit Submissions**' button ([Self Audit Submissions – Volunteering Tasmania](#)).

**Manager's Self Audit Tool**  
Start here, by completing your own volunteer managers questionnaire to see how well you think your Volunteer Program is meeting the National Standards for Volunteer Involvement. More than one volunteer manager in your organisation can complete this questionnaire, by logging in to the Member Portal with their own unique login.

**Generate Volunteer Self Audit Link**  
After you have completed your own questionnaire, click here to generate a link to share with your volunteers, for them to complete a volunteer's questionnaire. Please note this link is unique to your organisation and to be shared with your volunteers only.

**Self Audit Submissions**  
Here you can find an overview of all the volunteers that have completed the questionnaire so far. When you are happy with the number of volunteers that have completed the questionnaire, you can click the 'Close Questionnaire Submissions' button. This will generate a report that summarises all feedback from your volunteers in one place. You will receive this automatically by email.

- ❑ On this page, you can create an overview of the volunteers and volunteer manager(s) that have completed their relevant questionnaires, per round of the Audit that you are undertaking.
- ❑ All you need to do is select the relevant round of your Self-Audit for each questionnaire via the drop-down menu, and you will see all submissions.

**Manager's Self Audit Submissions**

Name	Round	Submitted Date	Manager Report
Sanne-Test Reijenga	Round 1	2022-02-07	Manager Report

1 rows

Manager's Self Audit Round  
Round 1  
Round 2  
Round 3

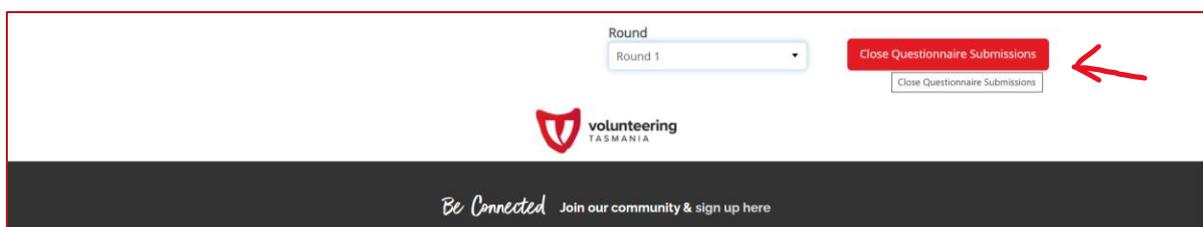
**Volunteer's Self Audit Submissions**

Name	Round	Submitted Date	Manager Report
Sanne Reijenga	Round 1	2022-02-07	Yes

Volunteer's Self Audit Round  
Round 1  
Round 2  
Round 3



- Once you are satisfied with the number of people that have completed the questionnaire for the relevant round, go to the bottom of the webpage, choose the round from the drop-down menu and click on the **'Close Questionnaire Submissions'** button.



- Clicking this button will generate a report showing the combined results of the volunteer managers' and volunteers' questionnaires. An average rating per National Standard for Volunteer Involvement will be calculated, based on the responses to the questionnaires. On this webpage, the column **'Added to combined report'** will change from 'no' to 'yes'.
- The combined results report will automatically be sent to your inbox.
- **Please only hit the 'Close Questionnaire Submissions' button once you are satisfied with the number of questionnaires completed. If you do this earlier, the data in your final report may be incorrect.**
- We recommend you give your volunteers a deadline to complete the questionnaire. A few days before this deadline, check how many volunteers have completed the survey. If you hope to get more results, you can then follow-up with them to encourage them to complete the survey by the deadline, or if needed, extend the deadline.
- You may notice that on this page, you can only see volunteer names and the dates they have completed the questionnaire. For privacy reasons, you will not be able to see the volunteer's individual reports and answers. You will be able to find your volunteer manager's report back on this page, and multiple volunteer managers or coordinators from your organisation can complete the volunteer managers' survey, providing they all log in to the Member Portal with their own unique login.

## What's Next?

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Now that you and your volunteers have completed the questionnaires, and you have generated a combined results report, you will have a good idea of how well you are meeting the National Standards for Volunteer Involvement and how your volunteers rate your volunteer program.

What next steps can you take to do something with all this new knowledge?

We recommend the following:

- Read and review your own volunteer manager's report and the combined results report, showing the average rating against each National Standard.
- Discuss these results with your colleagues, management and/or board or committee members.
- Consider inviting a group of volunteers to discuss the outcome of the Self-Audit, to dive deeper into what you are already doing well, and where there is space for improvement. What ideas do your volunteers have, that you may not have thought of yourself? Tap into their knowledges and ideas!



- Consider developing a simple action plan to outline next steps and tasks that you identify based on your review and further conversations. Be specific on what needs to be done, who needs to do it (it may not have to be you as the volunteer manager/coordinator, maybe a colleague can help, or one or more volunteers?), and when you would like the task to be completed.
- Set yourself some reminders to check your action plan regularly, to ensure it stays front of mind.

There is always so much you can learn from your peers, simply by having a chat with them about your work. Why not share your self-audit results with your peers in the sector, to help you develop ideas and next steps, or take inspiration from strategies others may have developed and implemented.

- If you participate in the CPD Program, we recommend you discuss your results in a CPD session.
- For others, we recommend you discuss your results with your peers in a Network Meeting.

## Re-do self-audit 6-12 months later

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After six and/or 12 months, we recommend you re-do the self-audit, so you can track how much progress you have made since the first time you did the audit. Use the reports from the first time as a benchmark, to track your progress made over time.

You will automatically receive an email to remind you to take this step, six and twelve months after you have completed your first audit.

To re-do the self-audit, you simply go through all the steps as listed above, but this time you choose 'Round 2' (after six months) and 'Round 3' (after 12 months) for the volunteer manager's questionnaire and when generating the unique link for your volunteers' questionnaire.

When tracking the submissions and closing the questionnaire submissions to generate a combined report, you again choose 'Round 2' or 'Round 3' to ensure the relevant data is captured in your combined report.

## Volunteering Tasmania is here to help

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Volunteering Tasmania is here to assist you, if you would like some help in identifying next steps for your organisation, after you have completed the self-audit.

- Please contact the Sector Development team for a free, one-off, 45-minute online consultation.
- We will have a look at the results of your self-audit and discuss ideas for next steps with you, that are suitable to you and your organisation.
- If you feel you need more support after this consultation, we can tell you more about the opportunity to undertake a Volunteer Management Review for a fee.

### Questions?

Contact us today!

- [team@volunteeringtas.org.au](mailto:team@volunteeringtas.org.au)
- (03) 6231 5550