



## Toolkit

### DO YOUR VOLUNTEERS NEED TRAINING?

Tips to help managers of volunteers and not-for-profit organisations identify their volunteers' training needs



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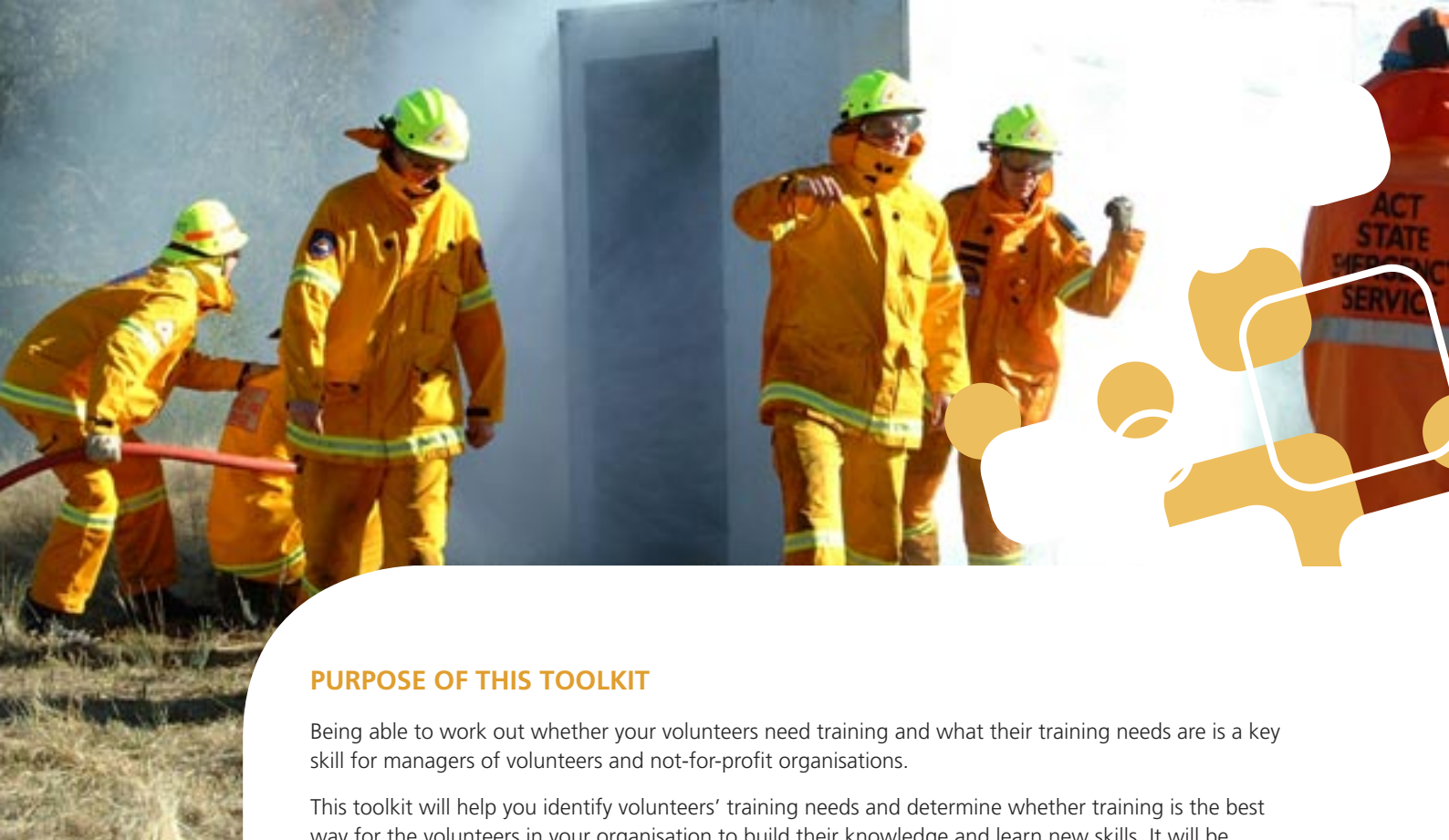
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Cover image: *Volunteer Glenys provides service with a smile. Image courtesy of Melton Visitor Information Centre – 2006 NAB National Volunteer Awards State Winner (Vic.) for Tourism, Sport and Recreation.*



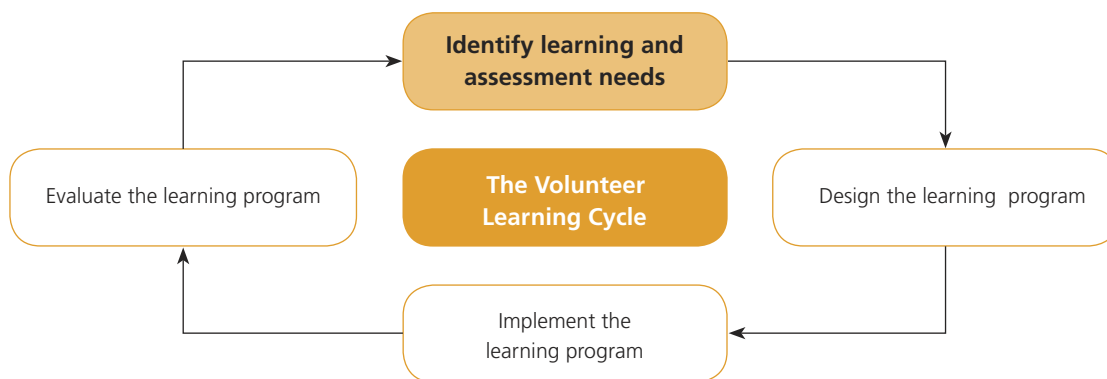
## PURPOSE OF THIS TOOLKIT

Being able to work out whether your volunteers need training and what their training needs are is a key skill for managers of volunteers and not-for-profit organisations.

This toolkit will help you identify volunteers' training needs and determine whether training is the best way for the volunteers in your organisation to build their knowledge and learn new skills. It will be particularly useful for managers of volunteers and organisations with little or no experience of determining training needs. The two final sections are a guide to finding and choosing the right training.

The kit uses four templates. Modifiable versions of all the templates can be separately downloaded free of charge from the Volunteering Australia website. Look for the document *Do your volunteers need training? – Modifiable templates for managers of volunteers*.

While this toolkit focuses on how to identify volunteers' learning and development needs, it is important to remember that this is only one part of the learning cycle.



More detailed information on the design, delivery and evaluation of training can be found in the *Guide and Toolkit for Training Volunteers (Part A and Part B)* which can be accessed and downloaded from the Volunteering Australia website.

Organisations also need to remember that training is only one way in which people gain knowledge, develop new skills and enhance existing ones. Attending conferences, networking and mentoring relationships are some of the other pathways to learning.

Members of the ACT Rural Fire Service and SES participate in a structural fire protection scenario. Image courtesy of Fire and Emergency Services Training Activity (FESTA) – 2006 NAB National Volunteer Awards State Winner (ACT) for Emergency and Safety.



### WHY DEVELOPING VOLUNTEERS' SKILLS IS IMPORTANT

Supporting volunteers to learn and develop their skills is a core part of the *National Standards for Involving Volunteers in Not for Profit Organisations*, with Standard 5 stating that 'an organisation that involves volunteers shall ensure that all volunteers obtain the knowledge, skills, feedback on work, and the recognition needed to effectively carry out their responsibilities'.<sup>1</sup>

Many not-for-profit organisations depend on volunteers to help them meet their mission, deliver services to their target group and build organisational capacity. By giving volunteers opportunities to gain new knowledge and add to existing skills, organisations can build a pool of skilled volunteers and support them to perform their roles effectively.

Findings from Volunteering Australia's 2006 *National Survey of Volunteering Issues* show that volunteers themselves value and recognise the benefits of engaging in activities to develop their skills, with 81% of volunteers surveyed stating that they would personally appreciate having their work recognised by being given opportunities to develop their skills. Creating an environment that nurtures development and the growth of skills shows volunteers that their contribution is recognised and highly valued.

**Offering learning and development opportunities to volunteers is an investment which pays off for everyone!**

<sup>1</sup> Volunteering Australia, 2001, 2nd ed., *National Standards for Involving Volunteers in Not for Profit Organisations*.

Image courtesy of the  
Caloundra City Libraries  
Adult Literacy Program  
– 2005 NAB National  
Volunteer Awards National  
and State Winner (Qld)  
for Education and  
Youth Development.





Image courtesy of  
Save Our Waterways  
Now (SOWN) Inc. – 2006  
NAB National Volunteer  
Awards National and  
State Winner (Qld) for  
Environment and Wildlife.

## WHAT IS A TRAINING NEEDS ANALYSIS (TNA)?

**Undertaking a Training Needs Analysis will help you explore and recognise the potential of your volunteers and volunteer program.**

A training needs analysis (TNA) is a process that helps organisations to find out not only what learning needs exist but whether training is the best way to meet them.

A TNA will also help organisations to make sure that their resources are used well and that they invest in learning methods and techniques that are most likely to meet organisational needs while developing individuals' capability.

TNAs can vary in complexity, depending on whether the TNA is being conducted for a whole organisation, teams of people or an individual. Undertaking a TNA can be as simple as comparing a checklist of an individual's capabilities against the skills required for a specific job, or can involve a comprehensive analysis of the whole organisation. Whether you undertake a complex or simple TNA, it should assist your organisation to:

- find out what your volunteers know and can do;
- work out what knowledge and skills you need your volunteers to have;
- discover any gaps or shortfalls in their knowledge and performance; and
- find and deliver effective learning solutions.

Involving volunteers at each stage of the process of the training needs analysis allows both the organisation and the volunteer to gain a greater understanding of the opportunities and benefits of engaging in learning and development.

One of the most practical ways for organisations to facilitate this involvement can be by seeking direct feedback from the volunteer about:

- what they believe their current skills are;
- what areas they have strengths in; and
- what areas they identify as needing more support or further learning in.

For many volunteer-involving organisations, often the most immediate need is to determine whether individual volunteers have the essential skills and knowledge to carry out their volunteer roles effectively and, where gaps in knowledge do exist, to find solutions that are both time- and cost-effective.

While this toolkit primarily focuses on the steps to take when carrying out a needs analysis for an individual volunteer or specific volunteer role, the guidelines presented here can be used as a framework for undertaking a TNA at any level.

### Four simple steps to a training needs analysis

#### Step 1

Set your goal

#### Step 2

Work out what skills and knowledge are needed

#### Step 3

Measure the gap in skills and knowledge

#### Step 4

Find and deliver the most effective solution

## Step 1 Set your goal

At the start of a training needs analysis (TNA), you need to be clear about its purpose and what the organisation hopes to achieve from it.

Does the volunteer need to...

### a) meet current job requirements?

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When a volunteer first joins an organisation, working out what they need to know or what new skills they need can form part of the selection and orientation process. An example might be:

*'My new volunteers do not know enough about mental health services in the area to provide advice to people who use our help line. If we can make sure they're familiar with all of the relevant local resources and support services, our clients will receive the right kind of support at the right time.'*

### b) meet changing job requirements?

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Key responsibilities of volunteer positions can change over time for a number of reasons, including the way a position is resourced, the purpose of the position etc. An example might be:

*'Our organisation has recently purchased a new database to store client details. Previously client notes were paper files and this information will need to be transferred into the new database. Our volunteers have limited experience in data input, and we need to find the best way to help them learn these new skills so that they can continue to perform effectively in their volunteer role.'*

### c) meet future job requirements?

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For some individuals one of the key motivations for volunteering is to gain new skills that will assist them in their personal and professional development. For example:

*'I have been approached by a volunteer who works in our reception and wants to gain experience in marketing campaigns. They're interested in finding paid employment in this field, and have done study in the area. Their current volunteer position doesn't require this knowledge, but there are volunteer positions within the marketing and communications team that might suit them. I'll see if we can find a role and support that will help the volunteer to learn and develop their skills, and will help us run better marketing campaigns.'*

Remember that individuals volunteer for a range of reasons and that 'these motivations are not usually the same as the motivations to take up and remain in a conventional job – a volunteer is much more in control of what they do and what they are motivated to learn. Accordingly, organisations also need to take volunteer motivations into account when acting on problems and opportunities'.<sup>2</sup>

<sup>2</sup> Volunteering Australia, 2006, *A Toolkit for Training Volunteers (Part B)*.

## Step 2 Work out the skills and knowledge needed

For a TNA to be effective, organisations need to be able to specify the type and level of knowledge and skills needed in each role.

A good starting point is to look at the key responsibilities of each position. Once these have been defined, you can start to work out what skills, knowledge and attributes are needed. It is important to recognise all the resources a person needs to draw on to be competent in a particular activity, or to carry out a responsibility.

For example:

Key responsibility: Ensure that the client database is kept up to date	
Tasks	Required skills, experience and attributes
Input data into Microsoft Access.	Intermediate working knowledge of Microsoft Access. Attention to detail.
Contact clients on a quarterly basis to check their details are current.	Ability to communicate effectively with a wide range of people using a variety of methods – verbal and written communication skills required. Ability to work autonomously and within timeframes – record-keeping and time-management skills required.

### Working out what skills are needed: some tips

- In the case of an existing position, ask the people currently performing the role what skills and knowledge they think are needed to do the job effectively.
- Talk to someone in a similar position in a different organisation to gain another perspective about what is needed.
- Consider what impact the role has on your customers (internal and external), and identify what skills and knowledge the position needs to provide the service effectively.
- Talk to a trainer – you may know someone in your organisation who is a trainer or who has a Certificate IV in Training and Assessment. People with training experience will be skilled in specifying what it is that a person actually needs to be able to do to carry out a role effectively.

Make sure that any new position descriptions reflect the key responsibilities, skills and knowledge you've identified, and/or that current position descriptions are updated. If you decide you need to make changes to existing position descriptions as a result of this process, make sure that you discuss these with your volunteers.

### Need help with writing position descriptions?

If your organisation does not have written volunteer position descriptions, now is the time to start. For further information and ideas, download the toolkit: *Designing volunteer roles and position descriptions* from the Volunteering Australia website.



### Step 3 Measure the gap in skills and knowledge

*Knowing your starting point is as important as knowing where you want to arrive.*

Once you know what skills and knowledge are required for a particular role, look at whether there is a gap between the volunteer's current abilities and knowledge and the essential or desired level.

There are different methods that you can use to gather accurate and reliable information about the skills and knowledge your volunteers already have. These can be categorised into three key types: direct, indirect and supplementary.

#### Information-gathering techniques <sup>3</sup>

<b>Direct</b>	<p>This is the most reliable form of information. It is frequently obtained by observing performance in the workplace or in simulations. This may involve a detailed 'walk through' of workplace operations and exploration of work-related information that shows the skills and knowledge of your volunteer. While observation of workplace performance is the most reliable way of knowing the actual skills that your volunteers have, it isn't the only way to assess their competency.</p> <p><i>Ask your volunteer to give a practical demonstration of a particular task that they are responsible for. Are they doing this effectively? Can they repeat the performance successfully? If yes, this is a sign that they probably already have the required skills and knowledge.</i></p> <p>Another way of obtaining direct information is to ask volunteers to complete a self-assessment of their skills in relation to their volunteer position. (You can use the Self-assessment Checklist template.)</p> <p><i>Ask your volunteer to rate (on a sliding scale) their own competence in a skill that you have specified or that is specified in the position description, and also to rate how important they think having that skill is to the role.</i></p>
<b>Indirect</b>	<p>Where actual workplace performance cannot be directly observed, other forms of information can indicate the sorts of skills and knowledge your volunteer has. Examples include work samples and workplace documents that the volunteer has produced.</p> <p><i>A volunteer may provide you with a work sample of a letter they have written. This sample might identify that they have highly developed writing skills, but lack knowledge in the layout/formatting of the letter.</i></p>
<b>Supplementary</b>	<p>Information can be gathered by talking to a third party, often one or more people who have worked alongside the volunteer. This is of value when direct observation and/or indirect work examples are insufficient to indicate what skills and knowledge your volunteers possess.</p> <p><i>A volunteer may take excellent minutes of meetings, but has trouble producing these minutes within the required timeframe. Discussion with a third party will clarify if there are any skills such as time-management that can be improved.</i></p>

<sup>3</sup> Modelled on *A Guide to Writing Competency Based Training Materials*, National Volunteer Skills Centre, Commonwealth of Australia, 2003

## Template 1

### Sample self-assessment checklist

<b>Name:</b>						
<b>Key responsibilities (refer to volunteer position description):</b> Ensure that the client database is kept up-to-date						
Skills required (Refer to volunteer position description)	Skill / Rating			Importance		
	1	2	3	1	2	3
Intermediate working knowledge of Microsoft Access						
<b>Skill Rating</b> 1 = I have beginner's knowledge/level of skill. 2 = I have intermediate knowledge/level of skill. 3 = I have advanced knowledge/level of skill.	<b>Importance</b> 1 = I need to use this knowledge/ skill occasionally. 2 = I need to use this knowledge/skill frequently. 3 = I need to use this knowledge/skill all the time.					

#### Is there a performance problem rather than a need for training?

The information you gather in Step 3 may show that the volunteer already has the skills and knowledge needed to carry out the role, and does not need any training. In *Analyzing Performance Problems*, Mager and Pipe (1970) point out that sometimes:

- A person might choose to perform below their capability because they are trying to avoid having to do the task – e.g. a person in share accommodation might deliberately do a poor job of washing the dishes so as to avoid the task in future.

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- A person might perform below their capability because there is reward for doing so – e.g. a person might get attention from behaving badly.

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- A person might not get rewarded for capable performance – e.g. if those who do their job very well are not valued more highly than those who just turn up, they wonder why they should put in the effort.

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- A person might be performing below their capability because there is an obstacle in their way – e.g. not having sufficient authority, not having appropriate resources, others working against them, or just not knowing what is expected of them.

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These problems are not related to the knowledge and skill possessed, so enhancing knowledge and skills won't fix the problem. A combination of appropriate motivation and attention to obstacles is a more likely remedy than training (Mager and Pipe, 1970).

A modifiable version of this template can be found at [www.volunteeringaustralia.org](http://www.volunteeringaustralia.org)>Publications.

## Step 4 Find and deliver the most effective solution

Once any gaps in knowledge or skills have been identified, you can start considering what type of learning will best fill these gaps. These learning needs should also be examined to determine how important they are to the overall objectives of the position. One way of doing this is to consider what will happen if you do not meet the needs you've identified.

Working through the key questions set out in Template 2 can be one way of determining whether training is the best solution to learning needs.

### Template 2

#### Is training what is needed?

Issues to consider	Comments and action by you
<p>Does the volunteer have a performance issue?</p> <p><i>Giving a volunteer feedback may be the key to maintaining the desired level of performance. Or a volunteer may think that they are doing a good job, but this is not the case and nobody has sensitively told them so.</i></p>	
<p>Why is action needed?</p> <p><i>Some situations may not be important enough to justify a huge training effort. There might be a very simple quick fix such as talking about the goal or the reason for concern.</i></p>	
<p>Does the volunteer recognise what knowledge and skills they have?</p> <p><i>Volunteers may not understand the full importance of drawing on their knowledge and skills, and may even undervalue what they know. This might be the reason for a current gap in performance.</i></p>	
<p>Can the volunteer's performance issue be addressed by training? Why is training the right approach?</p> <p><i>The person may have adequate skills and knowledge but lacks the motivation to apply them, or may face obstacles such as not having the correct equipment or resources, not having enough time, or just not feeling valued.</i></p>	
<p>Is refresher training all that is needed?</p> <p><i>Maintaining skills and knowledge can be a major issue where the volunteer does not have much chance to use set skills.</i></p>	
<p>Where a formal training program is appropriate, what are the learning objectives? What is the intended learning pathway and how are you going to assess that the required skills and knowledge have been acquired?</p> <p><i>Even where you are not the principal designer or facilitator of the learning, you should discuss what contribution you can make with the people facilitating the learning.</i></p>	

Adapted from *A Toolkit for Training Volunteers (Part B)*, Volunteering Australia, 2006

A modifiable version of this template can be found at [www.volunteeringaustralia.org](http://www.volunteeringaustralia.org)>Publications.

Remember, too, that gaps in knowledge can exist for a number of reasons. Understanding the reason for a gap in knowledge can often determine whether training is the best solution. Non-training solutions can include providing support for volunteers to:

- establish networking opportunities so they can share information;
- attend conferences/seminars;
- participate in mentoring/buddy relationships;
- engage in work duties that build experience and knowledge; and
- undertake self-directed study (reading books, accessing online information etc).

These learning methods all contribute to the overall development of volunteers, of which training is only one component.

Once the most useful learning method has been identified, you can move on to planning how to implement it, and what resources you will need to do this successfully. Tips for finding the right type of training and training provider are given in the next section.



*Volunteering Australia librarian Antje Dun introduces volunteer Sharon Stapleton to the online catalogue.*

## MANAGING AND TRACKING VOLUNTEER LEARNING

In some cases the need you have identified may not require an immediate fix, or there may be resource constraints that prevent you from meeting it in the short term. To ensure that no information is lost or forgotten, accurate documentation of the process and outcomes of any analysis should be recorded. This will help your organisation to be clear about what it is trying to achieve and the information can be incorporated into individual learning plans for volunteers.

### Template 3

#### Sample individual learning plan

<b>Volunteer's name:</b>			
<b>Position:</b>			
<b>Position objective and key responsibilities:</b>			
Learning Plan			
<b>Time-frame</b> 1 = immediate need 2 = within 3 months 3 = within 6 months 4 = within 1 year	<b>Skill, knowledge or ability to be acquired/enhanced</b>	<b>Learning method</b>	<b>Resources required</b>
<b>Example:</b> 2	Intermediate knowledge of Microsoft Access	Combination of formal training course and on-the-job experience	Funding for training course  Allocate sufficient time to practice on-the-job
<b>Volunteer's signature:</b>		<b>Manager's signature:</b>	

A modifiable version of this template can be found at [www.volunteeringaustralia.org](http://www.volunteeringaustralia.org)>Publications.



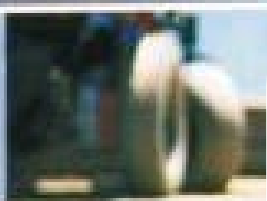
As the number of volunteers involved in an organisation can range in size from one to over a hundred, it is vital that individual volunteer learning plans do not get overlooked. One simple way for managers of volunteers to keep track of individual volunteers' plans is to incorporate each plan into one central document. Template 4 shows a way of doing this.

#### **Template 4**

##### **Combined learning plans for volunteers**

<b>Volunteer name</b>	<b>Skill to be acquired</b>	<b>Start date</b>	<b>End date</b>	<b>Skill acquired (tick when completed)</b>
Susan	Intermediate knowledge of Microsoft Access	January	April	<input type="checkbox"/>
Michael	Experience in delivering formal presentations	June	July	<input type="checkbox"/>

A modifiable version of this template can be found at [www.volunteeringaustralia.org](http://www.volunteeringaustralia.org)>Publications.



Volunteers host a workshop to help people with disabilities enjoy recreational fishing. Image courtesy of Fishers with Disabilities Inc. – 2006 NAB National Volunteer Awards National and State Winner (WA) for Community Service and Development.

## NEXT STEPS – FINDING THE RIGHT TRAINING

If you decided that training for your volunteers is the right path to take, you will need to determine what type of training will be best, and how it should be delivered.

### Informal training

- can take place in a group or one-on-one;
- usually has an immediate, practical focus, such as helping a volunteer perform a task;
- usually draws on and is delivered using the skills and knowledge of people in the organisation or through other networks;
- doesn't take place through a school, TAFE or university; and
- doesn't involve a formal assessment and doesn't result in a formal qualification.

An example might be showing a volunteer how to access the computer filing system.

Informal training requires you to tap into the knowledge and expertise that your organisation already has. You will often find that there is someone in your organisation who has the skills and knowledge to provide on-the-job training.

### Non-accredited fee-for-service training

- is useful when a number of people require the same type of training;
- is usually delivered by an external provider and not someone who works in the organisation;
- is usually sought when there is no-one in the organisation able to deliver the training, or with enough knowledge about the topic;
- is useful when you want training customised to your organisation's and volunteers' needs;
- doesn't involve a formal assessment and doesn't result in a formal qualification; and
- has a cost attached.

An example might be engaging a trainer to deliver training in public speaking to volunteers who are responsible for promoting your organisation to the wider community.

Volunteering Australia maintains a database of trainers experienced in delivering training to the not-for-profit sector. The database can be accessed from our website at [www.volunteeringaustralia.org](http://www.volunteeringaustralia.org) and searched online.

There is a network of adult community education providers across Australia. See the website of Education Network Australia (edna) at [www.edna.edu.au](http://www.edna.edu.au) for further information.

You might also like to talk to other organisations within your networks. They may be able to recommend a trainer to you.

### **Accredited training**

- enables participants to gain a nationally recognised formal qualification;

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- provides participants with a Statement of Attainment for partial completion of a course;

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- is delivered by a trainer with a Certificate IV in Training and Assessment who works for or through a registered training organisation (RTO);

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- requires a formal assessment; and

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- is recognised nationally.

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A number of courses that fall within the Vocational Education and Training (VET) sector have been developed specifically for the not-for-profit sector and focus on areas such as disability, community work, aged care etc.

To find the qualification or course that you need and a RTO, visit the National Training and Information Service website at [www.ntis.gov.au](http://www.ntis.gov.au). This website contains a database of all the accredited courses within the VET sector as well as links to the registered training organisations that deliver the courses.



## FINDING THE RIGHT TRAINER

If you decide on fee-for-service or accredited training, the questions below may help you choose the training provider best able to meet your needs. Not all questions will be relevant to your particular circumstances, and this isn't a comprehensive list. It's more of a starting point for you.

- If you want accredited training, ask the trainer if they work for or through a registered training organisation, and if they are authorised to deliver the particular course or subject area (also called a unit, or unit of competency) that you're interested in.

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- What are the learning outcomes or objectives of the training? Check that these match the outcomes you and your volunteer(s) want from the training.

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- How is the training assessed (course work, practical exams etc.)? Check whether there are any pieces of assessment that need to be undertaken by participants after the course – this may affect your decision.

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- How long will the training take?

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- How is the training conducted? Is it delivered in a class-room setting, or is it activity-based? Will this suit your participants?

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- What is the maximum number of people who can participate in the training at any one time?

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- How much does the training cost? Is this cost fully inclusive? It is worth comparing prices between similar training services, as there is a lot of competition and price variation.

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- Is catering provided? Are training facilities provided, or do you need to organise this?

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- Some training organisations will have many trainers on their books. Ask who will actually be conducting the training, and what qualifications and experience that person has.

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- Ask if the trainer can provide you with a referee. You may want to check that other organisations have had good experiences with the trainer. If you can find a referee organisation which delivers services similar to yours, or is in the same sector, even better.

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- Does the trainer have any experience in the volunteer sector?

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*Image courtesy of the  
Asylum Seeker Resource  
Centre – 2005 NAB  
National Volunteer Awards  
National and State Winner  
(Vic.) for Community  
Service and Development.*

## GLOSSARY OF TRAINING TERMS

The Australian Government Department of Education, Science and Training has a National Training System Glossary of Terms which you can access from their website at [www.dest.gov.au](http://www.dest.gov.au). Some of the common training-related terms that you might come across are:

### **accreditation**

The formal recognition of a course by the state or territory course accrediting body in accordance with the *Standards for state and territory Registering / Course Accrediting Bodies* (ANTA 2001)

### **accredited course**

A structured sequence of vocational education and training that leads to an Australian Qualifications Framework qualification or Statement of Attainment

### **recognition of prior learning (or RPL)**

The acknowledgement of a person's skills and knowledge acquired through previous training, work or life experience, which may be used to grant status or credit in a subject or module

### **registered training organisation (or RTO)**

An organisation registered by a state or territory recognition authority to deliver training and/or conduct assessment and issue nationally recognised qualifications in accordance with the Australian Quality Training Framework. RTOs include TAFE colleges and institutes, adult and community education providers, private providers, community organisations, schools, higher education institutions, commercial and enterprise training providers, industry bodies and other organisations meeting the registration requirements.

### **vocational education and training (VET)**

Post-compulsory education and training, excluding degree and higher level programs delivered by higher education institutions, which provides people with occupational or work-related knowledge and skills. VET also includes programs which provide the basis for subsequent vocational programs. Alternative terms used internationally include technical and vocational education and training (TVET), vocational and technical education and training (VTET), technical and vocational education (TVE), vocational and technical education (VTE), and further education and training (FET).

## Further reading

If you want to read more about creating volunteer roles and supporting volunteer learning, there are several related resources available free in PDF format from the Volunteering Australia website at [www.volunteeringaustralia.org](http://www.volunteeringaustralia.org)

- [\*Designing Volunteer Roles and Position Descriptions\*](#)

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- [\*A Toolkit and Guide for Training Volunteers \(Part A and Part B\)\*](#)

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- [\*Do your volunteers need professional development plans? \(in production\)\*](#)

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- [\*Recognition of Prior Learning Toolkit\*](#)

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## Your feedback is welcome

We hope you found this resource useful in working out whether and what type of training your volunteers require.

Volunteering Australia is always keen to improve the resources we develop and we encourage you to send us feedback. If you have any suggestions or comments which will help us improve this toolkit, please email us at [volaus@volunteeringaustralia.org](mailto:volaus@volunteeringaustralia.org)

## List of templates

- 1 Sample self-assessment checklist.
- 2 Is training what is needed? Checklist of questions.
- 3 Sample individual learning plan.
- 4 Combined learning plans for volunteers. Tracking sheet.