

GUIDE TO CLIENT SERVICE CHARTER TEMPLATE

ABOUT THIS POLICY AREA

This policy is a guide for the organisation's client service charter.

A written client service charter is required as part of meeting Standard 3 (Participation and choice).

Standard 3 — client service charter

The organisation develops, implements, distributes and reviews a client service charter in a manner whereby clients:

- *receive information about the services provided to them*
- *participate in making decisions that are relevant to them*
- *are provided with opportunities to participate in service planning, development, delivery and evaluation.*

Policy checklist

The following checklist will help you check that an existing policy covers this area adequately.

The charter should be:

- clear about what your organisation does, with information about how to contact you, the standard of service clients can expect, basic client rights and responsibilities, and options for providing feedback and making a complaint
- easily understood and accessible to the general community, including people from diverse cultural and linguistic backgrounds
- dated for when it was approved
- dated for when it was last reviewed.

COMPLETING YOUR CLIENT SERVICE CHARTER

Using the policy template

The template provides some example statements. You can adapt these statements and include them in your policy or write your own statements to better suit the operations and services of your organisation.

To customise the policy template, click on the shaded sections `<<Insert text>>` and insert the information that is specific to your organisation.

When you have completed the charter template, delete the shaded instruction sections such as: [Refer to the client service charter template guide for questions and/or examples to consider when customising this section.](#)

For further information on using the policy guides, refer to the information in *Using the policy templates and guides*.

Guidelines for each section of your policy

1. Purpose

When identifying the purpose of the policy, consider how it might apply to your client group/s and other agencies you work with. Do you need to make specific statements to ensure you are inclusive of particular groups, such as Aboriginal and Torres Strait Islander peoples, Australian South Sea Islanders, people from culturally and linguistically diverse backgrounds and people with a disability?

2. Scope

To determine the scope of the policy, consider the following question:

- Does this policy apply to all your organisation's services and to all clients and stakeholders?

3. Policy statement

If you are adopting the policy statement in the template, consider whether there are any additional commitments your organisation wants to make.

4. Charter

4.1 Client service charter

All clients should be made aware of your client service charter and their opportunities for choice and participation. This is to be done at the earliest appropriate moment of their contact with your service. Your client charter is written for your clients in a language and format that can be easily understood by the client group. Clients will ideally be involved in its development and review.

The charter outlines:

- what your organisation does
- the services available to your clients, including the opening hours and locations of these services
- how clients can contact your organisation
- what standards of service your clients can expect from your organisation
- what rights and responsibilities your clients have within your service
- opportunities for feedback and for complaints (and appeals, if appropriate)
- opportunities to exercise choice and to participate in service decisions
- the support you provide clients to enable them to make choices and participate, including the use of interpreters, advocates, written materials in a variety of community languages, and culturally appropriate service strategies
- how and when the charter will be brought to the attention of clients.

5. Other related policies and documents

The client service charter should be linked to all client service-related policies in the policy groupings 1—5.

6. Review processes

Consider how often the charter should be reviewed and the process for doing this:

- **frequency of review:** Most policies benefit from an annual review. The experience of implementing the client service charter is used to decide which changes are necessary. Consider reviewing your charter as part of an annual review of your organisation's policies or, if your organisation is small, perhaps over a three-year period. Critical incidents may prompt you to review the charter ahead of schedule.
- **responsibility for the review:** In most organisations, the person accountable for client service would be responsible for reviewing the charter whenever a related policy change is proposed. In small organisations, this may be the manager or coordinator. In larger organisations, this may be a client service manager.
- **process for the review:** Decide which particular staff, volunteers, external people and organisations will provide input to the policy review, and whether clients will be involved.
- **decision-making process:** Who will review draft changes to the charter and approve changes? What will be the timeframe for the review process?
- **documentation and communication:** What records of the policy review process are needed? How will changes to the charter be communicated to staff with direct client service contact? In a small organisation, this may be as simple as noting the changes at a staff meeting. In a larger organisation, an email memo may be needed.
- **key questions for the review:** Is the charter being implemented? Are procedures being followed? Is the charter clear? What has changed that may prompt a change to the charter? Have particular stakeholders had difficulty with any aspect of the charter? Can their concerns be resolved? How does the charter compare with that of similar organisations?