

GUIDE TO PARTICIPATION POLICY TEMPLATE

ABOUT THIS POLICY AREA

This policy guides how the organisation enables clients to participate in the delivery and management of the service they receive.

A written participation policy is required as part of meeting Standard 3 (Participation and choice).

Standard 3 — participation and choice

The organisation develops, implements and reviews policies and procedures that provide opportunities for clients and representatives to participate in the development, evaluation and improvement of services.

Policy checklist

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

The policy should:

- describe the ways that clients can be involved in the development, evaluation and improvement of services they receive
- describe other opportunities given to clients individually or as a group to provide input into the way services are delivered, and to comment on key organisational policies, practices and strategies
- provide for a support person where required to assist clients to participate in service development
- contain clear procedures and actions
- indicate the timing of any actions
- show when it was approved
- show when it was last reviewed.

COMPLETING YOUR PARTICIPATION POLICY

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 policy template, delete the shaded instruction sections such as: [Refer to the participation policy 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 questions:

- Does this policy apply to all your organisation's services and to all clients and agencies?
- Are different participation opportunities available to some groups of clients?
- Would it be helpful to define the use of the term 'participation' in the context of your services and activities?

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.

In identifying the actions your organisation will take to implement this policy, you should include the following:

- how you inform clients about the opportunities for participation
- how you explain to clients the ways in which they can take advantage of these opportunities
- how you assist and support clients to participate
- how you enable clients to be involved in decisions that affect them and the service they receive.

4. Procedures

The procedures describe how your organisation achieves the aims and goals you have outlined in your purpose, scope and policy statement.

4.1 Information strategies to ensure understanding of our services

Describe the information strategies you will use to inform your clients (or community) about the opportunities for participation at each stage of the service they receive (or community development process) and for broader participation in service development, evaluation, planning and in organisational management.

List the written information about these opportunities (including the client service charter), and how you bring each to the attention of clients.

4.2 Support to participate

Describe how you actively support your clients (or community) to make the best use of the opportunities provided for active participation. This may include follow-up on written information and specific assistance to clients who may experience cultural or language

barriers, or who may need specialised advocacy or support to take full advantage of the opportunities.

4.3 Strategies to involve clients in the planning and delivery of services they receive

Describe the strategies you use to encourage active participation by clients in service decisions that affect them directly, at each stage of their involvement with the service.

These opportunities might include:

- being listened to and asked about their wishes and preferences
- having input into service-planning processes
- being involved in decisions about service planning
- self-management of aspects of the service
- taking part in social and educational activities
- mutual support and mentoring other clients.

4.4 Strategies to encourage participation in service development and organisational management

Describe ways that clients may be involved in service development and organisational management. This may include contributing feedback, having complaints heard (refer to your policies for feedback and complaints), consultation processes, and involvement in committees and governance bodies (refer to your policies for governance and accountability).

These opportunities might include:

- taking part in client surveys and feedback forums
- input when new services or activities are being developed
- representation on client committees or groups
- attending sector training or conferences
- active membership of the organisation
- standing for the board or management committee.

5. Other related policies and documents

The participation policy should be linked to governance and accountability policies, all client service policies, and in particular:

- client service charter
- choice and self-reliance policy
- feedback policy
- complaints policy

6. Review processes

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

- **frequency of review:** Most policies benefit from an annual review. The experience of implementing the policy is used to decide what changes are necessary. Consider reviewing your participation policy as part of an annual review of your organisations's policies or, if your organisation is small, perhaps over a three-year period. Critical incidents may prompt you to review the policy ahead of schedule.
- **responsibility for the review:** In most organisations, the person accountable for client service would be responsible for reviewing this policy. In small organisations, this may

be the coordinator or manager. 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 how clients will be involved.
- **decision-making process:** Who will review draft changes to the policy 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 policy be communicated to staff implementing the policy? 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 policy being implemented? Are procedures being followed? Is the policy clear? What has changed that may prompt a change to the policy? Have particular stakeholders had difficulty with any aspect of the policy? Can their concerns be resolved? How does the policy compare with that of similar organisations?