

# Best Practices in Volunteer Management :

*An Action Planning Guide  
For Small and Rural Nonprofit Organizations*

# Acknowledgments

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**Canada**

*For further information on this subject or others relating to volunteering and volunteer management, please visit [www.volunteer.ca/resource](http://www.volunteer.ca/resource).*

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# Introduction

## *The Canadian Code for Volunteer Involvement*

The "Code" was released in 2001, the International Year of the Volunteer. It is written for boards of nonprofit groups to prompt discussion about the role volunteers play in their organizations, how they are engaged, and how they are supported.

The ten best practices outlined in this guide are based on the Organization Standards found in the Code.

The full text of the Code can be found at [www.volunteer.ca](http://www.volunteer.ca)

Nonprofit organizations everywhere rely on volunteers to keep their organizations going. People contribute huge amounts of time, energy, and skills to a wide range of groups. They bring new ideas, skills, and approaches to the groups they work with. They get involved in a variety of volunteer activities for a wide variety of reasons.

So how does a group find the right volunteers for the work it needs to get done? How does a group manage to get volunteers to stay on and keep contributing their time and skills? How does a group deal with potential risks to its volunteers and clients?

If you are involved with a nonprofit organization, the first thing to do is design the jobs you want volunteers to do. Then take the steps to recruit, select, supervise, reward, and evaluate how well the volunteers perform in their positions. These different activities are some of the core volunteer management practices covered in this guide.

Large nonprofit organizations usually have someone paid to be a manager of volunteers. In small and rural groups, those responsible for managing volunteers are usually doing it off the side of their desks or part-time (paid or unpaid!). In groups with limited resources and people, paying attention to volunteer needs can often get buried in the tumble of other priorities.

If this sounds like your group, then this guide is for you! This action planning guide has been developed to help people in small and rural nonprofit organizations take practical steps to strengthen their group's volunteer management

*The Code includes three parts related to volunteer involvement:*

- *Values*
- *Guiding Principles*
- *Organization Standards*

practices. It focuses on helping groups put the necessary structures in place for an effective and consistent volunteer program.

This guide was developed as part of a project for the Community Support Centre of the Canada Volunteerism Initiative. The purpose of the project was to determine how the *Canadian Code for Volunteer Involvement* could be adopted for use in the north and in other rural regions.

# Ten Best Practices in Volunteer Management

## *Development of the ten best practices*

The ten best practices discussed in this guide were adapted from the ten organizational standards set out in the Canadian Code for Volunteer Involvement, with some modifications. The modifications were made so that the best practices would be user-friendly, accessible, and relevant to small rural nonprofit organizations with few, or no, staff. Modifications to the organizational standards in the Canadian Code for Volunteer Involvement were based on the experience of the Yukon Volunteer Bureau and the six Yukon volunteer groups involved in the project. Modifications were also based on expertise in writing plain and accessible public information materials.

## *The ten best practices*

There are ten volunteer management practices described in this guide. These ten best practices focus on essential volunteer management elements relevant to groups of all sizes.

These ten best practices follow a natural progression. The first three focus on laying the foundation for an effective program. The next three deal with developing safe and appropriate volunteer jobs and getting the right people for the positions. The final four centre on creating an environment that provides successfully recruited volunteers with the skills, support, and desire to stay involved.

## *Best Practices*

### Laying the Foundation

1. Valuing the role of volunteers
2. Defining rules and expectations
3. Developing volunteer management skills

### Developing the jobs and getting the right people

4. Reducing client and group risk
5. Creating clear assignments
6. Reaching beyond the circle

### Creating an environment where volunteers feel they belong and want to stay

7. Orienting and training volunteers
8. Providing supervision
9. Making volunteers feel they belong
10. Recognizing volunteer contributions

## Purpose of the Guide

The purpose of this guide is to help you set up a framework for your ongoing work with volunteers.

It is not intended to help you deal with immediate issues such as finding a new board member, training a new recruit or thanking a long-term volunteer who is leaving the group. Instead, it is designed to help you set up a framework that will help you be more proactive and avoid crisis volunteer management.

The guide is based on the following assumptions:

- The suggested steps and actions should be simple, clear, and doable. Small and busy groups often have few resources to improve their volunteer program. This guide divides the work into manageable chunks.
- Most groups have some volunteer management practices in place. This guide is designed to help groups assess how well they are doing and identify which practices they might want to work on most.
- The best people to determine which steps should be taken to change volunteer practices are the people within the group. Each group is different. This guide provides draft action plans to get people started on changing their volunteer management practices, but each group should modify these to suit its own needs and realities.
- Establishing a basic framework will provide a base to build on over time. The guide is designed to help groups put basic volunteer management structures into place. It is intended primarily as a starting point for groups that have few volunteer management practices in place or those that would like to improve in specific areas.

### TIP

*As you go through the action plan steps in this guide, some of them may start feeling like work and more work.*

*When you find yourself feeling that way, stop and think about how you might lighten the load. Should you extend the deadline? Find more help? Move to a more rewarding task in your action plan? Celebrate what you've done so far?*

*Be sure to keep up both your momentum and your spirits.*



# How to Use this Guide

Each of the ten best practices is included in a stand-alone section in this guide. Each section includes:

1. a **"snapshot" of the best practice**. This provides a quick summary of what will be covered in each section;
2. a **set of questions** (on the second page of each section) to help you assess whether you should spend time working on that particular best practice;
3. a **"longer story" about the best practice**. This provides more detail to help you get a better picture of the best practice;
4. **some specific objectives** that you should work towards to achieve the best practice;<sup>1</sup>
5. **draft action plans** that will give you ideas on the steps you should take to implement the best practice. Each action plan is linked to one of the objectives described in the text;<sup>2</sup>
6. **many helpful tips and other ideas** for achieving the best practice;
7. a **short list of resources** to help you implement this best practice;
8. a **checklist from the relevant organizational standard in the *Canadian Code for Volunteer Involvement***. This will help your group determine how it measures up to this national standard.

You can go through this guide one section at a time or you can skip about, focusing on the section of most interest to your group. To help you determine your priorities, consider first going through the assessment questions from each section. This will provide you with an overview of the status of your group's volunteer management practices. Take whatever approach works best for your group!

## TIP

### *Raise awareness*

*You might want to copy and circulate the first page of each section (with the "snapshot" of the Best Practice) to raise awareness in your group of effective volunteer management.*

### *Get input*

*Get the key people in your group (board, staff, and volunteers) to answer the questions from the second page of each Best Practices section.*

*Maybe host a potluck, pizza night, or afternoon tea to give people time to talk about their answers and ideas in a relaxed environment.*

<sup>1</sup> The objectives in this guide are based on the checklist of items found in the *Canadian Code for Volunteer Involvement* under each standard. The objectives combine portions of these items and leave others out altogether. To make it easier for groups to put volunteer management practices in place, priority was given to objectives that were considered most actionable and most relevant to small and rural groups. Objectives were amended based on feedback from the six groups.

<sup>2</sup> The action plans were developed by the author based on experience in running nonprofit organizations and in helping the six groups involved in the project improve their practices. Action plans were amended based on feedback from the six groups.

## Before You Start

### Food for Thought

*"When I started, the only volunteers were our board members and advisory council. Everyone knew we needed volunteers in other parts of our organization, but it was hard for people to commit the time to designing jobs and the program. It really helped when our leadership emphasized that the development of a volunteer program was a priority."*

*Lisa Mainer, Canadian Parks and Wilderness Society - Yukon chapter*

This section provides some ideas to help you get ready to improve your volunteer management practices. It also outlines some tips for approaching your work.<sup>3</sup>

#### *1. Be sure your group is behind you*

For some people, it is hard to see the value of investing time and energy in developing a volunteer program. They might not understand that working with volunteers requires paying attention to their needs and motivations in exchange for their contributions to your mission. Some groups may be lucky and have oodles of volunteers walking in the door and staying for months on end. More often than not, smaller groups are faced with high volunteer burnout and turnover. They struggle to find the right people for the tasks at hand. They likely don't have standard practices in place to reduce their risks and liabilities.

Be sure that your board, staff, and volunteers support your efforts in taking the time to work on a program that will help address these concerns. At different times, you will have to get the support of your board, staff, and volunteers or their ideas for key actions. In the end, you want to ensure the results of your work will be used and carried forward, whether you are there or not.

Get buy-in at the beginning. Have a meeting to discuss your goals. Bring concrete examples that help illustrate the need for a structured program. Was there a highly skilled person who wanted to volunteer but you had nothing for him to do? Is there a staff person putting in tons of overtime on work that volunteers could easily help with? Are there groups in your community that you represent but that aren't part of your volunteer force? Are there volunteers that you don't know much about working with vulnerable clients? Share stories like these to highlight the need for improving your volunteer management practices.

#### *2. Create a vision!*

Create some energy for this work in your group by brainstorming a vision for volunteer involvement in your organization. What would it look like if you had a full force of volunteers working together to achieve your mission? How many people would you love to see getting involved? What different faces would you like to see? What are some of the key jobs it would be great to see volunteers doing? What is the spirit that everyone would like to see when they walk in the door? What new programs could you offer if you had more volunteers?

Developing this vision will help provide direction to your work!

<sup>3</sup> These ideas and tips were based on feedback from the six groups involved in the project and on the author's experience working with a variety of nonprofit organizations.

### *3. Small steps, long timelines*

There are few volunteer organizations that have the luxury of having lots of time on their hands. Developing a volunteer program takes time, and you must acknowledge that. Most people who take this on will be juggling other demands as well. That's reality. So give yourself some leeway!

Some actions in this guide might be done by one person in a couple of hours or less; others might take weeks or months to fully complete. It depends on the current state of your program and how many people will be working on improving it. Be realistic. Take on tasks that you can complete. Start with some easy ones that can give everyone a feeling of progress. Set deadlines (to provide direction and accountability) but be generous with how much time you allow yourself. Remember that things usually take longer than expected! Set your group up for success, not disappointment or guilt!

### *4. Don't try this alone!*

Developing a volunteer program is a great place to start practising what you are preaching! Get some help - involve other volunteers in the process. Develop short job descriptions for committee members who can help your group create an effective and rewarding volunteer program.

This is a good opportunity to pull in new people with skills you might not be using in other areas. If you're working on volunteer policies, is there anyone in your community that might have a background in this area? If you are working on orientation and training, is there a trainer in your area that might be willing to help you design some effective approaches?

You could establish a steering committee to tackle all of the actions, or maybe it's more realistic for you to set up one working group at a time as you take on a new topic. (You can always re-enlist interested participants in the next topic). Remember, the people that know the most about your volunteer program are likely the volunteers. Be sure to ask them for feedback and involve them in the process whenever possible.

## **Food for Thought**

*"We tried to bite off too much at the start and started feeling guilty for not meeting our deadlines. I would suggest other groups start small, celebrate the simple achievements, and get others involved."*

*Barb Evans-Ehricht,  
Hospice Yukon*

*"When we approached an organization that had hosted games for seniors in another province, we got some great information. It moved our volunteer program forward leaps and bounds at a very critical time."*

*Sue Edelman,  
Canada Senior Games 2004*

### *5. You're not the first to do this!*

There are many organizations that have complete or partial volunteer programs. Some are right in your community. Others might be groups you network with in other regions. Approach these groups to find out what volunteer program materials they might share with you. Do they have volunteer policies that you could adopt instead of writing your own from scratch? Do they have examples of job descriptions or recruitment messages that you could revise for your own needs?

There are also many written and Internet resources that have samples and templates. Don't reinvent the wheel - use the resources that are available to you!

### *6. Celebrate accomplishments*

When you complete a significant action, be sure to celebrate! Recognize the contributions of everyone who was involved. Circulate an e-mail to describe what you have completed. Perhaps it's even worth highlighting in a future newsletter. Letting people know you have improved a part of your program highlights that you are taking care of your volunteers.

### *7. Develop a volunteer program binder*

When working on different best practices, think about how you can ensure the practice will be repeated again and again. The goal should be to develop approaches that can be used by you and others in your group for a long time.

Consider developing a volunteer program binder with ten sections, one for each best practice. Each section could include a short "how-to" description relevant to your program. So if you are developing job descriptions for volunteers, first agree upon a template and develop a short "how-to" sheet that will help others in your group develop jobs for volunteers. If you want to gather information on your program from volunteers, include a standard survey form in your binder with instructions on how often it should be circulated, who should get it, and what to do with the results.

A volunteer program binder will help ensure the key information is located in one place and can be easily followed by new people who become involved in your group. Too often groups spend lots of time developing something and then a key person or two leaves the organization - with all the information in their heads. Developing a binder right at the start will help you develop a long-lasting volunteer program.

## 8. Develop resource files or binders

Once you begin working on a best practice, you will likely start collecting many resource materials - on that best practice and on others. You will likely get copies of articles, concrete examples and templates from other groups, lists of books and Web sites, and much more. So, in addition to developing a "how-to" binder for your volunteer program, set up some resource files or a separate binder so you can easily sort and organize the resource materials you gather along the way.

## 9. Build in some support

We all know that attention to the long-term things we try to do in life often gets bumped by shorter-term needs. Some of us require encouragement or looming deadlines to make progress and stay on course. We will focus on making progress if we know someone will be checking in to see how things are going.

So consider getting someone to act as a coach or mentor for your work. This person can help you outline the key steps you want to take and then check in with you regularly to see how things are going, providing encouragement and ideas for dealing with any challenges. The coach does not have to have expertise in volunteer management, but, if possible, should have some project and program management skills to share with you.

Another alternative is to find other organizations that also want to improve their volunteer management practices and to work through the steps together. This would allow you to share resources, to learn from their ideas, to have a sounding board for your ideas, and to get support. You could set up monthly meetings to talk about a specific practice or just to check in and discuss what is working well, and what challenges you need help with. Don't underestimate the value of the knowledge that you and others already have on this topic!

## 10. You don't have to be perfect!

Setting up a new program or improving the one you have will be a learning experience. Sometimes it might be hard to know when you have enough information to make a decision.

But don't worry about getting it perfect right from the start. All programs change over time, and you can always improve things as you go. Get a framework of best practices in place, and it will be easier to fill in more of the details as you go.

## Food for Thought

*"Even though our volunteer program is fairly developed, it was important to work on some key areas. Meeting regularly with other groups provided new ideas and stimulation for improving on what we had."*

*Jennifer Moorlag,  
Girl Guides of Canada -  
Yukon Council*

*"It was great having a coach to help us work on our priorities for the volunteer program. Knowing she was going to check in helped keep us moving forward."*

*Moira Lassen, Sport Yukon*

## Best Practice 1: Valuing the Role of Volunteers

### *How important are volunteers to your group?*

Many groups know that volunteers are the backbone of their organization. But has your group actually stated this anywhere? Has it made it clear that volunteers are important to your organization?

Your board can send a strong signal to volunteers, staff, and the public by putting your commitment to volunteers in writing. State that you are committed to having volunteers contributing their ideas and skills at all levels of the organization. Put it in your mission statement. Say it in your volunteer recruitment information.

Demonstrate this commitment to volunteers by getting them involved in your group's planning processes and decisions. If you have it, put some money and staff time aside to work on building a volunteer program that takes care of volunteers. Your investment will be repaid many times over! Be sure you have space and equipment for volunteers. Train staff on how to work with volunteers.

Show commitment and you will get commitment back.

### *Assess your volunteer program performance*

(Circle "YES" or "NO" for each question)

Comments

Do you believe your board appreciates how important volunteers are to achieving the organization's mission?

YES    NO

Has your board put its support of volunteers in writing (e.g., in its mission and values statement, group goals, or strategic plan)?

YES    NO

Does your group frequently ask volunteers for input when making decisions or developing new plans (e.g., program or strategic plans)?

YES    NO

Do you believe that, given your circumstances, your organization provides an appropriate level of resources, space, equipment, and insurance for your volunteers?

YES    NO

Does your group often think about how well it involves volunteers - and how you can do an even better job?

YES    NO

*If you answered **NO** to any of these questions, work through this section of the guide.*

*If you answered **YES** to all of the questions and feel comfortable that your board (and senior staff if you have any) support volunteers and your volunteer program, consider skipping on to the next section!*

*If you're unsure, review the checklist from the Canadian Code for Volunteer Involvement at the end of this section for suggestions on how your group could get better at this best practice.*

## Food for Thought

*More than one in four Canadians (27% or 6.5 million) volunteered through a charitable or nonprofit organization. This is a decline from 31% of Canadians in 1997.*

*Over one-third (34%) of all volunteer hours were contributed by the 5% of volunteers who gave 596 hours or more of their time.*

*Another 39% of all hours were contributed by the 20% of volunteers who gave between 188 and 595 hours during the year. Although these two groups represent only 25% of volunteers and less than 7% of Canadians, they accounted for 73% of all volunteer hours.*

*Hall, M., L. McKeown, et al. (2001). Caring Canadians, Involved Canadians: Highlights from the 2000 National Survey of Giving, Volunteering, and Participating. Ottawa, Minister of Industry: 83.*

### *The longer story*

If asked, people in most nonprofit groups would likely acknowledge that volunteers play a fundamental role in helping their group achieve its mission and goals.

People might note that involving volunteers from the community they serve also helps the group be more in touch with what is going on in its community. They might add that volunteers contribute useful ideas and perspectives on the issues the group deals with. They would recognize that volunteers contribute a wide variety of skills and knowledge that help the group get its work done.

However, if the same groups were asked if they mention the role of volunteers in their mission statement, strategic plan, or other goals, it is likely that few could reply that they have put anything about the importance of volunteers in writing.

A critical starting point for effective volunteer management is to be sure that everyone in your group truly does value the diversity of benefits all volunteers bring to your group.

The first thing your group can do to show that it values the role of volunteers is to simply adopt a statement that you are committed to having volunteers contribute their perspectives, knowledge, and skills at all levels of the organization.

Your group can also demonstrate its commitment to volunteers by involving a range of volunteers in your planning processes and decisions. Whether you are doing a strategic plan or evaluating a major project you have completed, consider asking non-board volunteers in your group for their perspective. They might have a different view from staff and other participants.

You can also set goals each year for your volunteer program. What do you want to improve on in the next year? Do you want to increase the diversity of your volunteer force? Do you want to get volunteers involved in new areas of your organization? Do you want to come up with new ways of recognizing your volunteers?

Set some annual goals and then evaluate how well you are doing at the end of the year. Have you integrated volunteers effectively in your group? What could you do differently? These answers will help you set your goals for the next year.



## *Canadian Code for Volunteer Involvement*

### **Values for volunteer involvement**

#### **Volunteer involvement is vital to a just and democratic society.**

It fosters civic responsibility, participation, and interaction.

#### **Volunteer involvement strengthens communities.**

It promotes change and development by identifying and responding to community needs.

#### **Volunteer involvement mutually benefits both the volunteer and the organization.**

It increases the capacity of organizations to accomplish their goals and provides volunteers with opportunities to develop and contribute.

#### **Volunteer involvement is based on relationships.**

Volunteers are expected to act with integrity and be respectful and responsive to others with whom they interact.

### **Guiding principals for volunteer involvement**

#### **Voluntary organizations recognize that volunteers are a vital human resource and will commit to the appropriate infrastructure to support volunteers.**

The organization's practices ensure effective volunteer involvement.

The organization commits to providing a safe and supportive environment for volunteers.

#### **Volunteers make a commitment and are accountable to the organization.**

Volunteers will act with respect for beneficiaries and the community.

Volunteers will act responsibly and with integrity.

Like any program your organization runs, volunteer programs cost time and usually money. It is important that you try to dedicate a portion of your budget to providing resources for your volunteer program. For groups on a shoestring, this may be impossible. But many groups could set aside something specifically to support their volunteers.

Budget items could cover things such as staff time, recruitment advertising, recognition items, or even office supplies. There may be training fees you want to cover for your volunteers. You should also ensure you have space and equipment for volunteers to work with and the insurance to protect your volunteers and your organization. All of these efforts will strengthen volunteer involvement in your group.

## *Action planning*

### **Objective #1: Adopt a volunteer statement that acknowledges the valuable role of volunteers.**

You can include a volunteer statement as part of your group's mission statement or you might want to write a stand-alone statement that will be the mission statement for your volunteer program. If you make it a stand-alone statement, make sure it is consistent with your mission statement (if your group has one).

Here are some other points and phrases that you might consider including in your volunteer statement:

- Our group encourages the involvement of volunteers at all levels of the group and in appropriate programs and activities.
- We can best achieve our mission and goals through the active participation of volunteers from the community we serve.
- Volunteers contribute their unique talents, skills, and knowledge of our community.
- Volunteers are an integral part of our team.
- Volunteers help us: extend the reach of our programs; be more cost effective; increase our knowledge and skill base; effect change; communicate to the public and clients.
- The participation of volunteers enriches and enhances our programs and activities.

### **Objective #2: Include volunteers in planning processes.**

There are a number of ways to get more volunteer input into your planning activities.

If you are starting a strategic planning process, think about asking volunteers who work in different areas of the organization to participate in your meetings. They will bring a different perspective from that of staff and board members because of the different roles they play (e.g., volunteers may have inside knowledge of things such as client reactions to programs, community views of the organization, or opportunities for future work).

Host meetings once or twice a year to gather volunteer feedback on your group's activities. You could also develop a survey to get feedback both on every volunteer's individual experience and on ideas for the organization as a

*The Canadian Code on Volunteer Involvement includes value statements and guiding principles that you could include word for word or adapt to fit your own volunteer statement.*

## Food for Thought

*Board members are volunteers too!*

*Board members are volunteers who dedicate an enormous number of hours. Obviously, this group of volunteers already has significant influence in the planning and decision-making in your group.*

*Board volunteers must be supported and recognized for their unique contributions. However, they are also different from other volunteers in your group.*

*Board volunteers govern your organization so they have important legal and financial roles and responsibilities to focus on. In this role, they experience the work of the group differently than other volunteers do (of course, many board members in small groups do a lot more than just sit on the board).*

*It is important to value the unique contributions and perspectives of all volunteers, at all levels of your group. By involving both board volunteers and other types of volunteers, your decisions and planning processes will be richer. Your volunteers will also feel a greater sense of ownership of their work.*

whole. Make sure this type of feedback gets to the people who need it! More information on volunteer surveys is provided under Objective #4.

You can also solicit volunteer feedback through articles in your newsletters, regular e-mails, or postings in your office.

If people in your group agree that you want to get more volunteer input into planning and decision-making processes, think about how you can increase the chances it will happen, year to year. For example:

- If you have policies on how you develop plans and make key decisions, revise them to include the role of volunteers.
- Put information in any board orientation materials you might have to let new board members know that volunteer input is important and should be sought by the group.
- Tell volunteers that their input is welcomed and will be sought. Write it into their orientation materials as well.
- If you have staff, consider making it part of their job descriptions to ask for volunteer input on key initiatives.

If you take some of these steps, you will increase the odds that volunteers will become more involved in the important planning and decision-making processes in your group. While the board members have the final responsibility for making decisions in the group, the more input they get, the stronger their decisions will be.

### **Objective #3: Provide adequate resources (money, time, space, equipment, and insurance) for the volunteer program.**

For groups on a shoestring budget, the idea of setting aside money for volunteer management is nice but unlikely. So the "money" aspect of this objective may be difficult to achieve. However, it is still worth looking at what resources you can get (e.g., through donations) to help with things such as volunteer recognition, equipment for volunteers to work with, a place to do the work, etc.

Realistically, doing an effective job of managing volunteers takes at least some money. Your group might want to help volunteers cover childcare or gas costs. You might want to run ads in the paper to recruit new volunteers. You might have costs related to volunteer training or recognition events. And if you have staff, someone is likely being paid to spend time working on these things. A budget for the volunteer program doesn't have to be large. Most small and rural groups operate on a very tight budget with little room to add new things.

The idea of setting aside money for volunteers might be tough to consider. But remember that the more volunteers you have contributing time and energy, the more your group can get done. It is important to dedicate both time and at least a bit of money to help the program along. In the end, if you build a good program, you might be able to convince any funders you might have that they should contribute money to help you work with even more volunteers!

Some of the costs of running a volunteer program may already be covered in your group's core operational budget (e.g., photocopying, computer equipment, staff time). It might be worth breaking these costs out into a volunteer program budget if you are intending to invest new time and resources into building your program. This will help you track and evaluate the full cost of your volunteer program over time.

Here are some possible budget items that might apply to your volunteer program:

- Phone, fax, and e-mail for coordinating volunteers
- Printing and copying (e.g., of recruitment info, orientation materials, a volunteer newsletter)
- Mailing costs
- Reimbursement for volunteer expenses (e.g., transportation, childcare, materials they've bought for programs)
- Volunteer training and development fees (e.g., registration fees, room rental, trainer costs)
- Professional development costs (workshops and other resources for staff to learn to work better with volunteers)
- Travel (to training events or conferences, for staff or volunteers)
- Refreshments (coffee, tea, and other things to make volunteers feel welcome)
- Recognition items for the formal and informal acknowledgement of volunteers (e.g., pins, certificates, gifts, thank-you cards, pizzas!)
- Uniform costs (including group T-shirts, vests, hats)
- E-mail accounts for "virtual" volunteers
- Office supplies
- Insurance

## TIP

*A good mission statement includes three elements:*

- 1. Purpose: A sentence that describes what the group is trying to accomplish and for whom (e.g., protect a watershed; reduce the incidence of teen pregnancy)*
- 2. Business: A description of how it will accomplish its goals (e.g., provide counselling, offer recreational programs, raise public awareness)*
- 3. Values: A list of values, beliefs, or principles that the group shares and practises in its work (e.g., client-driven, striving for excellence, innovative)*

## Food for Thought

*Directors and officers may be held personally liable for claims arising from:*

- activities of volunteers and/or staff in the name of the organization
- employee discrimination
- wrongful dismissal
- breach of duties as described previously

*Claims may be made by:*

- volunteers
- employees
- government bodies
- suppliers
- customers
- general public

*Know the Legal Risks of Being a Volunteer Board Member, a Volunteer Canada pamphlet. [www.volunteer.ca/volunteer/pdf/DObrochure.pdf](http://www.volunteer.ca/volunteer/pdf/DObrochure.pdf)*

The level of insurance you might need will depend on the potential risks to your volunteers and from your volunteers. Again, this is a tough item to consider paying for if you are a very small group. But it is an important one to consider!

Insurance is particularly important if your volunteers are working with vulnerable clients (e.g., children, people with disabilities). If there is a risk that people receiving services from your group may be harmed by a volunteer, it is particularly important that you research your insurance needs. The other thing you should do is carefully screen all your volunteers to minimize your risk up front. Screening is talked about in the section Best Practice 4: Reducing client and group risk).

Research the insurance your group might need by talking to other volunteer groups about their coverage. Call an insurance broker to discuss your group's situation.

### **Objective #4: Set and regularly evaluate goals for volunteer involvement in the group.**

There is a broad range of goals that your group might want to adopt to guide the level and type of volunteer involvement in your group.

You might want to set goals that are geared toward strengthening your volunteer program. For example, one goal might be to get volunteer policies and procedures in place in the next year. Another might be to do an analysis of your group's different initiatives and to use this information to write up new volunteer positions in the next year. You might decide to adopt a goal to design a new training program for a certain group of volunteers (e.g., board members, coaches, event organizers).

Other goals might focus on evaluating your existing program. For example, maybe you have a good screening process in place - your goal might be to evaluate the process to ensure it is working effectively. If you have an annual volunteer awards ceremony, you might develop a goal to get feedback from volunteers who have and haven't received this award in the last five years.

You could also have goals that focus on connecting and sharing with other groups. For example, you might think about setting a goal to share information on trends and tips in volunteer management with other similar groups in your community. You might set a goal to explore ways to share the costs of volunteer training activities with other groups.

By setting even one goal, you are making a commitment to improving your program and setting a path that your group has agreed is important to follow. Make sure your goals and objectives are SMART (see sidebar)!

For example, a goal that says you will improve your volunteer program in the next year is not specific enough and will be hard to measure. A goal that says you will increase the number of volunteers by 25% in the next two years might be Measurable and Time-bound, but is it Realistic and Attainable? For some groups it might be something they can get done; for others it might be a pipedream. (You also don't want to recruit unless you have specific roles for your volunteers to fill. See Best Practice 5: Creating Clear Assignments).

So set out goals that will help you move forward but also remember to set yourself up for success by being realistic and starting small.

It is also important to write SMART goals and objectives so that you can evaluate whether you achieved them. Evaluation isn't intended to determine whether you passed or failed. The main purpose of evaluation is to figure out what worked and what didn't. If you weren't able to design 10 new volunteer jobs in the time you allowed, why not? What were the barriers? Can those barriers be removed by taking other steps? Are there things that did work well that you can build on? If you did achieve your goal, what worked well? Are there things about what worked that you can apply in other areas of your work?

One of the best ways to figure out how well your volunteer program is doing and to identify what areas might need work is to ask your volunteers! While some volunteers might be vocal about their satisfaction with their job or your group, others may be quieter and just come in and do their work. Then there are the volunteers who just stop coming, and no one is quite sure why.

Consider setting up a process that will regularly get input from volunteers on what is working and what they would like to see changed. You could use a combination of techniques. You might identify someone who will meet with every volunteer in the next month to get input on your volunteer program. You might hold an annual volunteer event with all volunteers to get tips on improving the program (and then have a party!). Surveys might be a good thing to use to get information from people who might not want to say things in person. Unless you are a very small group with only a handful of non-board volunteers, consider starting a regular volunteer survey.

## TIP

### *SMART goals & objectives*

*Does your objective pass the SMART test?*

*Specific - Are you clear on what you want to do?*

*Measurable - Will you be able to determine whether or not you have achieved your goal?*

*Attainable - Is this something you can achieve?*

*Realistic - Is this pie in the sky or is it reasonable?*

*Time-bound - Have you set a time frame to make it happen?*

## TIP

*Some questions you might want to ask volunteers about your program (rate some on a scale of 1-5):*

- *Are volunteers made to feel welcome in our group?*
- *Do you feel volunteers are valued for their contributions?*
- *Do you feel volunteers have adequate input into decisions that affect them?*
- *Do you feel volunteers are given opportunities to learn and grow within the organization?*
- *If you could make changes to the volunteer program, what would they be?*
- *Do you see any areas volunteers could be better used by our group?*

*Some questions you might ask during an exit interview or in a survey:*

- *Why are you leaving?*
- *What did you like best about volunteering with us?*
- *What would you suggest we change or improve?*
- *Rate your overall experience with us.*

The people who choose to leave your organization are also a very important source of information. Don't let volunteers simply disappear. Why did they leave? Was it simply for personal reasons or were they dissatisfied with their role or how they were treated? Consider developing a written exit survey for volunteers who have chosen to leave your group. Or give them a call to talk about it. Whether written or verbal, make either approach short and don't force them into it! It might help if you tell the person you want honest feedback so you can improve your program.

Review your goals based on the feedback you receive from current and outgoing volunteers. Are there new goals that might require priority over your current ones? Are you on the right track?

## Conclusion

Congratulations! As you complete these objectives, you will be well on your way to laying a very strong foundation for your volunteer program! Your group's demonstration of its commitment to volunteers will help you create a volunteer program that people will want to be involved in!



## Action plans

### Objective #1: Adopt a volunteer statement that acknowledges the valuable role of volunteers.

Done ✓	Action	Lead person	Deadline
--------	--------	-------------	----------

	Ask other groups for samples of their statements or find relevant resource materials.		
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	Write our own draft statement.		
--	--------------------------------	--	--

	Circulate the draft statement for review to key people.		
--	---	--	--

	Revise the statement.		
--	-----------------------	--	--

	Get the topic on the agenda for a future board meeting.		
--	---	--	--

	Present to the board for approval. (Consider including a short backgrounder with information on the rationale for volunteer involvement, the benefits, potential costs, and any other issues.)		
--	--	--	--

	Once approved, start communicating the statement to our staff, volunteers, and public (e.g., post it on your office wall, put it in your newsletters, add it to your orientation materials).		
--	--	--	--

	Other ideas:		
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**Objective #2: Include volunteers in planning processes.**

Done ✓

Action

Lead person

Deadline

Review the different planning processes that our organization regularly carries out. Identify the level of non-board volunteer input and involvement in these processes. Write a brief summary of this information.

Hold a meeting with key staff, volunteers, and board members to come up with ideas for getting additional volunteer input into these processes. Get agreement on which ideas we want to implement.

Write down the agreed processes. Identify places these can be included to ensure it happens year to year (e.g., in a policy manual, in board orientation materials, in a volunteer handbook) and get this information included in these places.

Draft any necessary survey templates for getting volunteer involvement.

Other ideas:

**Objective #3: Provide adequate resources (money, time, space, equipment, and insurance) for the volunteer program.**

Done ✓	Action	Lead person	Deadline
	Meet with key people to discuss expenses that are specific to volunteers in our group.		
	Draft a budget for our volunteer program and circulate for feedback.		
	Integrate this budget into our group's overall budget and get it approved by the board.		
	Identify the key space and equipment needs of our current volunteers, and expected future volunteers. Identify steps we can take to meet any shortfalls (e.g., getting donations of used equipment from businesses, providing a coat rack for volunteers).		
	Determine if our group has any insurance coverage. If so, does it cover volunteers and staff? Talk to an insurance agent to identify any gaps. Talk to other groups about their coverage.		
	Other ideas:		

**Objective #4: Set and regularly evaluate goals for volunteer involvement in the group.**

Done ✓

Action

Lead person

Deadline

Hold a brainstorming meeting to get ideas for our volunteer program goals for the next 1-3 years.

Use the ideas to draft short and long-term goals. Circulate for discussion.

Adopt a final list of goals that will guide our volunteer program in the next 1-3 years. Get it approved by appropriate people (e.g., board, senior staff).

After a year, review and evaluate our volunteer program in light of the goals. Solicit volunteer input.

Set new goals based on our evaluation. Get it approved by the appropriate people (e.g., board, senior staff).

Other ideas:

## *Resources*

Read "Exploring the Value of Rural Volunteers" by going to [www.torc.on.ca/torceng/memact/VRVToolkit.htm](http://www.torc.on.ca/torceng/memact/VRVToolkit.htm) and clicking on Tool #2.

See the "Primer for Directors of Not-for-Profit Corporations (Rights, Duties, and Practices)." This online primer is detailed and lengthy, but the Table of Contents allows you to jump to sections relevant to your needs. Look for "insurance" in Chapter Six. [http://strategis.ic.gc.ca/epic/internet/incilp-pdci.nsf/vwGeneratedInterE/h\\_cl00688e.html](http://strategis.ic.gc.ca/epic/internet/incilp-pdci.nsf/vwGeneratedInterE/h_cl00688e.html)

For information on insurance for volunteers and their groups, go to Chapter Five of "Volunteers and the Law" at [www.publiclegaled.bc.ca/volunteer](http://www.publiclegaled.bc.ca/volunteer).

## *The Canadian Code for Volunteer Involvement*

*Best Practice 1: Valuing the Role of Volunteers is based on the national standard set out in the Canadian Code for Volunteer Involvement. If you would like to see where your group stands compared to this national standard, review the checklist below.*

### *Code Organizational Standard 1*

The board of directors and senior management acknowledge and support the vital role of volunteers in achieving the organization's mission.

- The board of directors adopts a statement declaring the vital role of volunteers in achieving the organization's mission.
- The organization's planning process incorporates volunteer involvement.
- The board has approved the overall goals for volunteer involvement.
- A budget is allocated for volunteer involvement.
- Adequate space and equipment are allocated for volunteers to perform their assignments.
- Appropriate insurance is purchased to minimize volunteer liability.
- Volunteer involvement is evaluated regularly.

## Best Practice 2: Defining Rules and Expectations

### *A snapshot*

#### *Does your group have policies and procedures for your volunteers?*

Can just anyone volunteer for your group? How does your group screen out volunteers who might pose a risk to you or your clients? Are volunteers reimbursed for expenses? Do all volunteers have to fill out an application form? Are volunteers invited to participate in your planning activities?

Policies define your group's answers to these questions. They outline your group's rules, beliefs, and values, and its expectations of volunteers. They help you treat everyone fairly. Most importantly, you can protect your group from liability by writing policies that specify the steps that must be followed to protect your clients and volunteers.

Writing policies is simple to do. Start with examples from similar groups and focus on the most pressing issues. Involve others in the process and communicate the results to all staff and volunteers. And don't put the policies on the shelf - use them and update them!

*Much of the material in this section has been adapted from By Definition: Policies For Volunteer Programs by Linda L. Graff (1992) with permission from the author. Copies of the book are available from Energizeinc.com (<http://www.energizeinc.com/store/1-129-E-1>); hardcopies of the book are available from the author Linda L. Graff (<http://www.lindagraff.ca/BDP DFVP.html>).*

### *Assess your volunteer program performance*

(Circle "YES" or "NO" for each question)

Comments

Does your group have policies and procedures in place for your volunteers (e.g., dealing with things such as risk management, orientation, training, selection, and supervision)?

YES    NO

Do you have a record-keeping system in place for your volunteers (e.g., for their applications, resumes, records checks, and confidential information)?

YES    NO

Are your volunteer policies regularly reviewed with input from volunteers and the board (and staff, if applicable)?

YES    NO

Do you believe your volunteers are generally aware of any group policies that affect them?

YES    NO

Do you believe your volunteer policies are applied fairly and consistently?

YES    NO

*If you answered **NO** to any of these questions, work through this section of the guide.*

*If you answered **YES** to all of the questions and feel comfortable that your group has up-to-date and relevant policies and procedures for your volunteer program, consider going on to the next best practice.*

*If you're unsure, review the checklist from the Canadian Code for Volunteer Involvement on the last page of this section for suggestions on how your group could get better at this best practice.*

## TIP

### Policies vs. Procedures

*Policy statements define "what" the group believes is important or "what" should be done. Procedures outline "how" the policy will be put into practice. The procedure should specify who is responsible for the actions that must be carried out.*

#### **Sample #1**

*Policy: An evaluation of the volunteer program will occur every year.*

#### *Procedures:*

- 1. The coordinator of volunteers will circulate a volunteer feedback form to all volunteers annually.*
- 2. The data will be reviewed and discussed with the volunteer management committee at its June meeting.*
- 3. New goals will be set for the program based on the feedback.*

#### **Sample #2**

*Policy: A written job description will be provided for every volunteer position.*

#### *Procedures:*

- 1. A binder with all current volunteer job descriptions will be made available at the front desk.*
- 2. Each job description will include the job title; link to mission; description of duties; required skills; time required; training information; and benefits.*

## *Defining rules and expectations*

### *The longer story*

Many people think of policies and procedures as a bunch of unnecessary red tape that limits what people can do. However, people should try looking at policies and procedures as valuable communications tools that help to create a place where everyone knows the rules of the game. Policies and procedures provide a valuable road map that describes your group's beliefs and values, its rules, and its expectations of its volunteers.

Policies also help you manage risk and ensure everyone is treated consistently and fairly. For example, maybe your group has volunteers teaching young children after school or cooking meals for seniors in their homes. If this is the case, you might develop a policy statement that says all volunteers working in these high-risk assignments must go through a criminal record check. This will ensure you treat all volunteers the same and will help you minimize the risk to your clients, your group, and the volunteer. It will also help your volunteers understand that you're not picking on them personally.

#### Policies:

- Apply to everyone associated with the group (board, staff, volunteers, and clients).
- Define the boundary of what is acceptable - and what isn't.
- Imply there will be consequences if a policy is not followed.

Policies for a volunteer program might be broad in nature. For example, a policy may state that your organization is committed to involving volunteers in planning activities and seek their feedback on new initiatives, as you value volunteer input.

They may also be much more specific. A policy might state that all new volunteers must fill out an application form and that their references will be checked. Policies define your group's views and intentions as well as its rules and steps that must be followed.

A policy will have at least one of the four following functions:

1. **risk management** (what steps should be taken to protect the group, its clients, and its volunteers?);
2. **statements of belief and values** (what are the group's positions? what is its philosophy about volunteers? what is its general approach to its business?);



3. **rules** (what should happen in particular situations? what are the minimum standards to be followed?);
4. **program improvement** (what steps should be followed to gather feedback on the program? what process will be followed to review program policies?)

Your group may have made a lot of formal or informal decisions over the years about how volunteers should be treated, what screening processes they might go through, what training they should receive, and so on. Policies and procedures are basically a written record of these decisions. By gathering all of these decisions in one place, it will be easier to communicate them to newcomers and to provide continuity over time.

### *Action planning*

#### **Objective #1: Develop and approve policies and procedures for the volunteer program.**

*(NOTE: If you already have policies and procedures for your volunteer program, skip to Objective #2.)*

To develop policies, it is a good idea to involve a number of people in your organization so you can ensure you are getting a broad picture and are being consistent with any other policies your group has. It is also great to have others share in the work!

You may also want to involve people currently outside of your group. For example, are there potential volunteers with policy-writing experience in your community that you could get to help you with this task?

One thing that will really help you save time and energy is getting examples of policies and procedures from similar groups and templates from other resource materials (see the resource list at the end of the section). Example policies will give you lots of ideas of what you might need to cover and how you can write your policies.

However, policies are going to differ from group to group so don't just adopt someone else's policies and procedures. Start by developing an outline for the policies you want to include. Ask yourself why you might need a policy. What is the issue you are trying to address? Is the policy necessary? Is it something that could be covered in a procedure? Is it really about "what" we should do (a policy) or is it more about "how" we should do something (a procedure)?

## **Food for Thought**

*"Using a few examples of policies from other volunteer programs, I just sat down and started revising them to fit my group. The policies might not be perfect this first time around, but they will provide a good framework I can work with."*

*Heather Dundas, Innovators in the Schools, Yukon College*

## TIP

### *Policy template*

*There are different ways to present your final policies and procedures.*

*The basic elements you should include are:*

- *Policy Title*
- *Policy Statement*
- *Procedures*

*Additionally, you might want to include:*

- *Purpose of policy (a short statement to say why the policy is necessary. This can help build understanding of your policies.)*
- *A section heading (You might sort your policies into sections such as "goals and strategies" or "standards of practice.")*
- *A policy number*
- *Date of approval and any dates of review (This will allow you to make sure the policy is up to date.)*
- *Cross reference to the number of the standard in the Canadian Code for Volunteer Involvement that your policy meets.*
- *Cross reference to any other relevant policies in other parts of your organization (e.g., personnel policies, anti-discrimination policies)*

Once you have your first list, begin writing policies on the most pressing issues. When you write, use plain, clear, and concise language. Put your statements in the present tense and use words that clearly direct what the group or people are supposed to do. Most importantly, be brief! You want people to read and use what you write!

Make sure that your policies are consistent with human rights legislation and other laws in your area. For example, if you have a procedure that outlines what questions should be on a volunteer application form, remember that there are some things you can't ask because of human rights legislation. There are also certain ways you must handle the information you collect from volunteers to be consistent with privacy and information laws. Consider getting a volunteer with a legal background to read over your policies once they are done.

In most small groups, the board will want to approve all of the policies, but not necessarily the more detailed procedures. In larger groups, the board may only approve the policies that relate to the organization-wide positions and statements of belief or values. This type of board might leave the approval of more program-specific policies to senior staff. Be clear on what your own group's process is and make sure you get all the necessary approvals.

### **Objective #2: Regularly communicate, review, and update volunteer policies and procedures.**

If you already have your policies in place - or once you have them completed - it is really important to make sure all staff and volunteers understand the policies relevant to their jobs. After all, there's no point in defining and writing down your rules and expectations if you don't plan on communicating them!

For example, do your volunteers know whether or not they should speak to the media if they are approached to talk about your organization's position on a controversial issue? If volunteers are offered money by clients for the work they are doing, is it clear how they are supposed to handle the situation? If a staff member feels a volunteer is causing some problems for the group, is the staff member familiar with the process to follow to ensure the issue is dealt with fairly?

The first step in communicating your policies and procedures is to make sure they are written in plain language. Then make sure they are accessible to people.

You could create a couple of binders or booklets with all your policies and procedures and encourage new volunteers to review these binders (some will, some won't). Or you could separate out the policy statements from the more detailed

procedures and include this shorter version in a volunteer (and staff) orientation package.

If you provide training to volunteers working in high-risk jobs, be sure to set some time aside to talk about the policies that directly apply to their work. You may want people in these positions to actually sign something saying they have read the policies (for insurance and risk management). Consider holding a test to make sure people understand the policies - and provide a few fun prizes to encourage people to study up!

Make sure you don't put your policies on the shelf - use, review, and update them! If you hear someone saying a policy is no longer relevant to how you deal with volunteers or to what the risks in the real world are, then it's time to review what you have and figure out what needs to be improved.

You might also hear someone saying, the policy is not flexible enough, or it's a downer for volunteers, or it's too unwieldy to implement. These comments are valuable as they tell you that your group might not have achieved the balance between managing your risk and making your volunteers feel welcomed! Ask for more details on why the person is saying these things.

At least once a year, you should get feedback from staff and volunteers and review your policies. Ask yourself what each policy is meant to achieve and evaluate whether or not it is working!

Your review might also indicate that you have a gap in your policies. Perhaps there is an area where more definition is needed to provide clarity and safety for your organization, clients, and volunteers. Keep notes as these things arise, so you are prepared when it is time for a review.

## *Conclusion*

Policies might not be the most exciting aspect of volunteer management but they will help you avoid problems and help you treat everyone fairly and consistently. This consistency helps build strong, solid relationships among staff, volunteers, and your clients. Developing policies and procedures is worth the effort!

As you complete these objectives, you are building the foundation for a strong volunteer program. The next step in this foundation building is to make sure there is a lead person or committee to guide the way!

### *Action plans*

#### **Objective #1: Develop and approve policies and procedures for the volunteer program.**

Done ✓	Action	Lead person	Deadline
	Identify who will participate in researching and writing the policies (one person, a committee).		
	Gather sample volunteer policies and procedures from other groups and from the list of resources.		
	Using the gathered info, develop a draft list of all the volunteer policies we think should be developed in our group (Hint: avoid getting bogged down in this step!).		
	Write the policies (this can be done by one person or shared among many).		
	Circulate drafts of the policies to key people (e.g., volunteers, other staff, possibly board members) and get feedback.		
	Based on the feedback, rewrite the policies and add any new ones that have been suggested.		
	Submit policies for approval to the right body (this is most often the board).		
	Other ideas:		

**Objective #2: Regularly communicate, review, and update volunteer policies and procedures.**

Done ✓	Action	Lead person	Deadline
	Develop a plan for how we can communicate our policies (e.g., prepare binders, add to orientation materials, post on Web site, include in training). Assign responsibility and set timelines for each part of the plan.		
	Include a policy about the need to regularly review and revise what we have! The procedure for this policy will specify who should lead this process and how often.		
	Add a question about our policies and procedures on any volunteer feedback forms we use (e.g., is the volunteer aware of our policies? Do they think they are fair? Any suggestions for improvement?).		
	Define a process for the next review of the policies (including timelines, responsibilities, and who to involve).		
	Other ideas:		

## *Resources*

Sample volunteer screening policies can be found on Volunteer Canada's Web site:

[www.volunteer.ca/volunteer/pdf/screeningpolicy.rtf](http://www.volunteer.ca/volunteer/pdf/screeningpolicy.rtf)

A list of volunteer program policies and samples can be found on Volunteer Calgary's Web site:

[www.volunteercalgary.ab.ca/ResourceCentre/policies/index.html](http://www.volunteercalgary.ab.ca/ResourceCentre/policies/index.html)

Additional samples of volunteer management policies are available at:

[www.casanet.org/program-management/volunteer-manage/sample-manage.htm](http://www.casanet.org/program-management/volunteer-manage/sample-manage.htm)

A list of possible volunteer program policies relating to risk management can be found on the Volunteer BC Web site:

[www.volunteerbc.bc.ca/riskmanagement/pdf/policylist.pdf](http://www.volunteerbc.bc.ca/riskmanagement/pdf/policylist.pdf)

## *The Canadian Code for Volunteer Involvement*

*Best Practice 2: Defining Rules and Expectations is based on the national standard set out in the Canadian Code for Volunteer Involvement. If you would like to see where your group stands compared to this national standard, review the checklist below.*

### *Code Organizational Standard 2*

Policies and procedures are adopted by the organization to provide a framework that defines and supports the involvement of volunteers.

- Governance and operational policies are in place and are reviewed regularly with input from board, staff, and volunteers.
- Standardized administrative procedures and records management practices are utilized by the volunteer department or program.
- Policies and procedures are communicated to all staff and volunteers.
- Policies and procedures are followed consistently and equitably.
- Policies and procedures are consistent with national and provincial Human Rights Codes, The Freedom of Information and Protection of Privacy Act, and provincial employment standards legislation.

## Best Practice 3: Developing Volunteer Management Skills

### *A snapshot*

#### *Who's in charge of your group's volunteer program?*

If your group really wants to effectively involve volunteers in your work, you can't just wing it. It's important that someone pay attention to how to attract and keep your volunteers. It could be a staff person, a volunteer, or even a committee.

The responsible person or committee needs to develop a core set of skills, including writing recruitment messages, designing volunteer jobs, providing feedback to volunteers, creatively recognizing volunteer contributions, resolving conflicts, avoiding risks, developing orientation and training materials, and motivating others to help out! This person or committee should also be a voice for volunteer interests within your group.

To build these skills within your group, look for the Web sites of different volunteer centres near you or check out your library for access to volunteer management resources. Look for training workshops in your area. Ask people who work well with volunteers for tips. Most importantly, ask the volunteers you work with for feedback on how you're doing!

*If you answered **NO** to any of these questions, work through this section of the guide.*

*If you answered **YES** to all of the questions and feel comfortable that there is someone with the necessary skills and the clear responsibility for managing volunteers in your group, consider going on to the next section.*

*If you're unsure, review the checklist from the Canadian Code for Volunteer Involvement at the end of this section for suggestions on how your group could get better at this best practice.*

### *Assess your volunteer program performance*

(Circle "YES" or "NO" for each question)

Comments

Is someone in your group (a person or a committee) designated to be responsible for managing volunteers and the volunteer program?

YES    NO

Is there a clear job description (or terms of reference) for the responsible person or committee?

YES    NO

Does your group provide opportunities for the people managing volunteers in your group to build their skills and knowledge about volunteer management?

YES    NO

Does someone in your group act as a voice for volunteer interests in your group (e.g., by voicing volunteer concerns at meetings or during planning processes)?

YES    NO

Are volunteers asked for feedback on how well the person or committee is doing at managing volunteers?

YES    NO



## *Developing volunteer management skills*

### *The longer story*

Increasingly, nonprofit groups are setting up volunteer programs to help them more effectively recruit, select, supervise, and reward a range of volunteers. These groups have recognized that volunteers are a tremendous asset to their group and that they should focus on how best to attract and keep this resource.

Few small groups have the luxury of having a dedicated staff person to head up a volunteer program. Nonetheless, it is important to have someone - a volunteer, a staff person, a board member, or even a committee - clearly designated as responsible for paying attention to volunteers and the systems that support them.

This person or committee should have a strong commitment to volunteers, recognizing the value of volunteers and being willing to put practices into place that will help volunteers walk in the door and then stay to contribute their time and skills.

Doing the job well requires some know-how. The responsible person or committee needs to be able to develop recruitment messages, design volunteer jobs, provide feedback to volunteers, creatively recognize volunteer contributions, resolve conflicts, develop orientation and training materials, and motivate others to help out! Ideally, the person will also represent volunteer interests in the organization's planning activities and management decisions.

This diversity of skills must be developed within your group if you want to effectively work with volunteers. Some people have wonderful interpersonal communication strengths that will help them support and guide volunteers, whether in teams or on a one-on-one basis. They should also learn the different things that motivate people to volunteer, how to develop volunteer positions that will match these motivations, and how to find and keep people in these positions!

## **TIP**

### *Which skills are needed?*

*Below is a list of skills that might come in handy when managing a volunteer program. Which do you think are important? Does the designated person have these abilities? Which abilities should you help build in your group?*

*Visioning and strategic planning*  
*Developing and maintaining systems*  
*Marketing*  
*Human resource management*  
*Training*  
*Supervising*  
*Motivating and recognizing*  
*Maintaining interpersonal communications*  
*Administering programs*  
*Managing finances*  
*Doing public relations*  
*Networking*

*Here are some personal attributes that people working with volunteers should also have. Can you think of others?*

*Diplomacy*  
*Creativity*  
*Patience*  
*Sense of humour*  
*Flexibility*  
*Openness*

### *Action planning*

#### **Objective #1: Define who will be responsible for your volunteer program and what that job entails.**

If your group currently doesn't have someone responsible for your volunteer program, you may think the first step is to find someone to fill these shoes. However, what you should do first is develop a clear job description for the position.

This doesn't mean you have to be planning on hiring someone. As you will see in Best Practice 5: Creating Clear Assignments, it is just as important to develop job descriptions for volunteers as it is for staff.

Outlining the duties, responsibilities, required skills, time required, benefits, and purpose of this position will ensure everyone's expectations are clear. It will also help you identify who the best person for the job might be and target your recruitment.

It may be that the best approach for your group is to have a committee share the workload. This volunteer management committee should also have a job description (often called "terms of reference") that outlines what it is expected to do. Individual committee members might even take on different roles, each with its own job description. This would help ensure that nothing falls between the cracks and that people know who to talk to about various situations (e.g., who deals with recruitment and who deals with policy and planning).

In many small groups, staff members are doing volunteer coordination or management as just one part of the job. However, the job description will often not mention this role - they are managing the volunteer program off the side of their desks.

If this is your group's situation, it is important to take the steps to revise the job descriptions and clearly identify each staff member's volunteer responsibilities. This can help them defend the fact they should be doing this work during work hours! If your group wants to do more work on its volunteer program, you may have to take some tasks out of certain job descriptions to make room for volunteer responsibilities (or increase the hours of the job, if it's part-time). Revising the job descriptions will also help ensure that your staff members' ability to do this work is discussed during a performance evaluation.

The title "Manager of Volunteers" is used in this guide to describe the person charged with the task of managing volunteers. There are other titles your group might prefer to use (such as Coordinator of Volunteers, Volunteer Program Manager, Director of Volunteer Resources). In many small groups, the role of managing volunteers might be integrated into another job position, such as Office Manager. Consider inserting "and Volunteer" into this type of job title to help raise the profile of this important role.

If you have decided to set up a "Volunteer Management" committee instead of assigning one staff member or volunteer the responsibility for these tasks, think of your committee when you read "Manager of Volunteers" in this guide.

Volunteer management is a task that requires time. It can also reap huge benefits for your organization and volunteers if it is done well. Therefore, people managing your volunteers and program should be acknowledged for their work. Providing them with a job description indicates that this is serious work that deserves focused attention.

If this job is vacant in your group, once you have a job description, spend time finding the right person for the job. Be patient! You are recruiting someone who will be the main contact in your group for volunteers.

Once you find someone, you might have to amend the description based on the best candidate's needs and interests, but you will have a valuable document to start from.

#### **Objective #2: Build your volunteer management skills and knowledge.**

The field of volunteer management is always changing. Over the years, volunteers have become more selective about how they spend their time. In Canada, there were fewer people volunteering in 2000 than there were in 1997. The trend seems to be that individual volunteers are also contributing fewer hours than they used to.

At the same time, there are new groups of volunteers getting involved for different reasons. Youth tend to be looking for volunteer positions that will help them build their employment skills. New Canadians might be looking for positions where they can improve their language skills and increase their social contacts. There are now people volunteering their time through e-mail and the Internet. These "virtual volunteers" may never even come into a group's office.

## **TIP**

*An outline of a **job description** for your "coordinator" or "manager" of volunteers:*

**- Position title:**

**- Reports to:**

**- Purpose of position:**

**- Responsibilities and duties:**

*(Identify the program and administrative responsibilities, specific duties related to working with volunteers, other staff, and the community.)*

**- Required skills and qualifications:**

*(List interpersonal skills, knowledge, and abilities the person should have to start the position.)*

**- Time required:**

*(Outline how many hours a week or specific times that must be worked.)*

**- Training to be provided:**

*(Identify what training you will provide to help build the skills required.)*

**- Benefits:**

*(What will the volunteer or staff person get in exchange for doing this work?)*

These trends show that there are both some challenges (fewer volunteers with less time) and opportunities (new types of volunteers). It is important that your manager of volunteers keeps up on these trends so your program can adapt to these changes.

It is unlikely that any one person will have the full range of skills, abilities, and knowledge that an ideal manager of volunteers would have. Like any field of expertise, there is always room to grow and develop, even for the most qualified. You can keep your manager of volunteers both engaged and effective by providing new opportunities for learning.

There are a number of valuable newsletters, books, and Web sites to help you build these skills within your group. There may be training workshops in your area. You might want to ask for tips from people you see working effectively with volunteers. Most regions have a volunteer centre or bureau that can provide a wealth of information, training opportunities, and an important connection to other managers of volunteers.

### **Objective #3: Conduct a performance review of your manager.**

Whether you have one person or a committee responsible for managing volunteers, the group should do an annual review of the manager's performance. Effective performance reviews provide a great opportunity for two-way feedback between the manager of volunteers and the group he or she is working with (for more on giving and receiving feedback, check out Best Practice 8: Providing supervision).

The review should focus on what is working well. What is the manager doing well, and how can the group help her do even better? This includes looking at the challenges the manager faces and coming up with ways to overcome the barriers to being effective.

For example, a review may highlight that the manager is feeling isolated and not supported in her role. The outcome of the discussion may include a plan of action for the manager to take some time to network at least once a month with a few other people doing volunteer management in other groups. Maybe another action would be that the group agrees to dedicate some travel dollars to help the manager get to a training event where she can meet others doing the same work and build her skills.

The review can also set out some performance goals that the manager will focus on in the coming year. Perhaps there might be a goal to increase the number of volunteers in the program or to improve the volunteer records management

system. The ability of the manager to achieve these goals can then be discussed as part of the next review.

Before sitting down for a review, the people doing the review should seek input from the key people the manager or committee works with: volunteers and other staff. What do they like about the volunteer program and the work done by the manager? Do they feel that the manager is representing their interests in the group? What suggestions do they have for improvements? There may also be useful information from any other surveys or feedback forms collected from volunteers since the last review.

By the time a performance review rolls around, there really shouldn't be any surprises. Hopefully, someone has been providing regular feedback to the person managing the volunteers, and it isn't left to one annual meeting. As we will see later in this guide, regular feedback and recognition are important tools for keeping your volunteers; they are also important tools for keeping your manager of volunteers, whether paid or unpaid.

### *Conclusion*

The first three Best Practices sections of this guide have focused on laying the foundation for your program. You have provided a very strong base for your program if the board has acknowledged the contributions and vital role of volunteers in your group, you have laid out your rules and expectations in policies and procedures, and you have ensured a qualified person or committee is designated as responsible for your volunteer program.

The next three sections deal with how to develop rewarding and safe jobs for volunteers and how to get the right people in them!

## **Food for Thought**

*Sometimes staff or other volunteers expect the person responsible for managing volunteers to produce volunteers on demand. However, a manager of volunteers is not like a bank machine that can just produce a valuable resource upon request!*

*Everyone in the group must take responsibility for how well the group attracts and keeps its volunteers. Everyone must also help identify the tasks that volunteers will be needed for - well before the need arrives!*

*Managers of volunteers should also be involved in program planning decisions so they can anticipate expectations for volunteer support and start working on things such as job descriptions and recruitment messages.*

### *Action plans*

**Objective #1: Define who will be responsible for your volunteer program and what that job entails.**

Done ✓

Action

Lead person

Deadline

Discuss with key people what different tasks a volunteer manager (or committee) should be responsible for and what minimum skills he or she should have.

Draft a job description and circulate for feedback to key people.

Finalize the job description.

(If job is vacant) Recruit the right person for the job. (Develop a message, spread the word, target likely candidates, get them to apply, interview them, and select one.)

Provide orientation to the new person. Provide relevant material on the history of our volunteer program to date and any goals we have set for the future.

Other ideas:

## Objective #2: Build your volunteer management skills & knowledge.

Done ✓

Action

Lead person

Deadline

Identify the main gaps in the skills and knowledge of our manager of volunteers.

Identify training and learning opportunities for our manager and other staff or volunteers (e.g., books, Web sites, training courses).

Draft a budget to ensure learning opportunities are accessed every year.

Get the budget approved.

Implement our planned training and development activities (e.g., purchase library materials, join a volunteer centre, bookmark key Websites, and plan to attend future training activities).

Other ideas:

**Objective #3: Conduct a performance review of your manager.**

Done ✓

Action

Lead person

Deadline

Identify who will conduct a performance review (individual or committee).

Set up a process for collecting feedback from volunteers (and staff, if relevant).

Gather input from key people and summarize.

Hold a meeting between the manager of volunteers and the identified review committee to talk about what is working well and what the challenges are.

Write up the outcomes of the meeting and agreed-upon actions or goals for the next year and get them signed by the manager of volunteers.

Ensure the review happens in a year.

Other ideas:



## *Resources*

The Volunteer Canada Web site provides links to other volunteer centres and information on working with volunteers. There is also a discussion board for people working with volunteers: [www.volunteer.ca](http://www.volunteer.ca)

Canadian Administrators of Volunteer Resources has information for employers on qualifications and job descriptions for managers of volunteers. Standards of practice are also available: [www.cavr.org](http://www.cavr.org).

The Voluntary Sector Knowledge Network has a page on managing both staff and volunteers. It includes links to information on job descriptions, training and development, and performance evaluations: [www.vskn.ca/hrm.htm](http://www.vskn.ca/hrm.htm)

Volunteer Today is a monthly e-newsletter for those that manage the work of volunteers. Subscribe by going to: [www.volunteertoday.com](http://www.volunteertoday.com)

Read the article: "How do I Staff Our Volunteer Program?" by going to [www.genie.org](http://www.genie.org), and clicking on volunteer management, then FAQ #03.

## *The Canadian Code for Volunteer Involvement*

*Best Practice 3: Developing Volunteer Management Skills is based on the national standard set out in the Canadian Code for Volunteer Involvement. If you would like to see where your group stands compared to this national standard, go through the checklist below.*

### *Code Organizational Standard 3*

A qualified person is designated to be responsible for the volunteer program.

- The designated person has an appropriate level of education and experience to manage the volunteer program.
- A written job description for the designated person is developed and reviewed regularly.
- The designated person is a member of the management or administrative team.
- The designated person works collaboratively with staff and the local volunteer centre to encourage the effectiveness of the volunteer program.
- Professional development opportunities are provided on a regular basis.
- The performance of the designated person is reviewed regularly and includes feedback from staff and volunteers.

## Best Practice 4: Reducing Client and Group Risk

*A snapshot*

*Does your group screen your volunteers?*

It's sad but true - some volunteers might pose a risk to your clients or organization. They could physically harm people or steal from you. What are you doing to reduce these risks?

You should be screening all volunteers to some degree. This might mean getting everyone to fill out an application form and provide references. You might require all regular volunteers to go through a short interview. For high-risk jobs, you might also want to check their criminal record or driver's record. You can continue to minimize your risks by regularly supervising and evaluating your volunteers.

A low-risk job such as stuffing envelopes will not require the same screening as a high-risk job such as teaching kids in an unsupervised setting or managing the cash at a fundraiser. You should review every volunteer assignment to figure out the level of risk, and then screen based on the risk.

### *Assess your volunteer program performance*

(Circle "YES" or "NO" for each question)

Comments

Does your group review each volunteer assignment to assess how much risk might be involved in the position?

YES    NO

Do you have an application form that every potential volunteer must fill out?

YES    NO

Are the steps you take to screen (scrutinize, check out) your volunteers determined by the level of risk involved in their assignment?

YES    NO

Once volunteers are in a position, does someone check in now and again to make sure they are doing a good job and following the rules?

YES    NO

Does your group consistently tell prospective volunteers that a screening process is in place?

YES    NO

*If you answered **NO** to any of these questions, work through this section of the guide.*

*If you answered **YES** to all of the questions and feel comfortable that there is someone with the necessary skills and the clear responsibility for managing volunteers in your group, consider going on to the next section.*

*If you're unsure, review the checklist from the Canadian Code for Volunteer Involvement at the end of this section for suggestions on how your group could get better at this best practice.*

## Definitions

### **Volunteer Screening**

*Volunteer screening is an ongoing ten-step process designed to identify any person (volunteer or staff) who may harm children or vulnerable adults. Volunteer screening serves two main purposes: to create and maintain a safe environment; to ensure an appropriate match between volunteer and task.*

### **Vulnerable Person**

*A term used to denote individuals who have difficulty protecting themselves and are therefore at greater risk of harm. People may be vulnerable because of age, disability, handicap, or circumstances.*

*From: Valuing the Rural Volunteer, a toolkit prepared by the Ontario Rural Council (p. 63)*  
[www.torc.on.ca/torceng/memact/VRVToolkit.htm](http://www.torc.on.ca/torceng/memact/VRVToolkit.htm)

### *The longer story*

Do you think a business would hire a janitor to go into its building at night without doing an interview and checking references? Would a school hire teachers without making sure they haven't been convicted of abusing children? It's highly unlikely.

Yet volunteer groups are regularly "hiring" volunteers to do things such as coaching kids, delivering meals to people's homes, or managing their finances. These volunteers pose just as much of a risk to the clients and group as a staff person does.

If your group provides services to people in your community, you have a duty of care to take reasonable steps to protect your clients from harm and to protect their interests. Any ethical and moral group would want to do this. But it is also a legal obligation. If your clients are vulnerable because of their age or abilities, make double sure that you have practices in place to reduce the risks. Your group can face serious legal and financial consequences if it fails to take reasonable steps to protect your clients from harm.

It's an unfortunate reality that some potential volunteers might pose a risk to your clients, other volunteers and staff, or your organization. If you want to do a good job at protecting everyone, you should screen your volunteers to help you make sure you get the right person for the job.

Sometimes people equate screening with doing Police Records Checks (PRCs). But these types of checks are just one small step in a ten-step screening process. On their own, a police records check cannot possibly help you weed out all volunteers who might pose a risk to your clients. Other steps must be put into place.

Ideally, screening starts before you even start looking for volunteers to fill a gap in your organization's work. First ask yourself what could go wrong. And then look at what you can do to avoid this potential wrong from happening.

For example, perhaps your group wants to start a program to take youth-at-risk out on wilderness trips. When you ask yourself what could go wrong, the list could be quite long. You might decide to eliminate the risk entirely by not running the program at all. More likely, you would take the time to carefully design the program and the volunteer jobs to help protect everyone. For example, you might decide to have one volunteer for every five clients instead of one for every ten. You probably would want to make sure those volunteers have some minimum qualifications (e.g., first aid, wilderness experience). And you might decide it is

important that all volunteers - and staff members - go through a police records check to help ensure they do not pose a risk to the youth. These are just a few examples of how you can start to manage your risk in this type of situation.

On the other hand, if you are starting a program where volunteers will be reading to four-year-olds in a library full of people, with a staff supervisor on hand at all times, you may determine that little could go wrong, as the setting is safe, and there is ample supervision. Those volunteers may only have to fill out an application form and have their references checked.

But if that volunteer is also assigned the responsibility of picking the kids up in a van before the program, then you should implement more in-depth screening steps, such as a police records check, as the volunteer will have unsupervised access to the children. So the design of the job affects the degree of risk, and the degree of risk defines the amount of screening you ought to do.

For example, on a scale of 1-5, how vulnerable is your client in a new program you are creating? If the client is a young child, you would likely rate this type of risk as high, perhaps a 4 or 5. If there is a lot of supervision, then the level of supervision risk might be a 1 or 2. The two scores should be looked at together with the others in your overall risk assessment.

Every volunteer and paid position should be assessed for the level of risk and screened according to a predetermined process. An effective process helps your group decide if an individual poses a risk and guides what you will do about it. The selection steps in the screening process also give you an opportunity to determine what assignment your new volunteer is best suited to take on.

Ultimately, a good screening process both respects the individual volunteer's rights and fulfills the responsibility of the organization not to put others at risk.

### *Action planning*

#### **Objective #1: Define your group's screening process.**

The ten-step screening process can apply in all groups, but each group should adapt it to its own needs. Decide who will be responsible for determining the risk in a new program. How will new jobs be designed? Will any of your volunteers have to go through a police records check? What happens if you find out a prospective volunteer was convicted of an unrelated crime (e.g., you find out a potential grief support worker was convicted of marijuana possession when he was 19)?

## **TIP**

*Volunteer Canada has published "Safe Steps: A Volunteer Screening Process." This booklet outlines ten steps of screening:*

*Before you select*

- 1. Determining the risk*
- 2. Position design & description*
- 3. Recruitment process*

*The selection process*

- 4. Application form*
- 5. Interviews*
- 6. Reference checks*
- 7. Police Records Checks*

*Managing the volunteer*

- 8. Orientation and training*
- 9. Supervision/evaluation*
- 10. Participant follow-up*

## Food for Thought

### *The Sliding Scale Rule*

*The thoroughness of the screening process should increase with the demands of the position, including:*

- *the vulnerability of the client;*
- *the nature and requirements of the tasks to be assigned;*
- *the intensity of the relationship between the volunteer and client.*

*Johnstone, Ginette (ed.) (1999).  
Management of Volunteer Services  
in Canada: The Text, 2nd edition.  
Carp, ON: Johnstone Training  
and Consultation Inc.*

### *Before you select a volunteer*

To start, develop a process to help your group identify and assess the potential risks faced by your organization. This includes being able to come up with a strategy for eliminating, minimizing, or transferring the risk. What steps will you then take to decide if your group can live with the risk? It is important to set up a process to make sure these questions get dealt with on a regular and consistent basis.

The next screening step involves effective job design and clear job descriptions. For example, if you have a volunteer position working with a vulnerable client and the opportunity for isolation is high, you may choose to reduce this risk by increasing supervision or designing the position so that volunteers will always work in pairs. Your job description should reflect your design choices (*for more on job design and descriptions see Best Practice 5: Creating Clear Assignments*).

When you are ready to recruit, it is important that your process ensures that people are informed that screening procedures are in place. It's easier to do this if you have a formal recruitment process (e.g., you post notices, provide job descriptions, and get interested candidates to fill out an application).

If your recruitment process is more informal and typically relies on word of mouth, the people spreading the word are less likely to consistently outline the screening requirements. Try to provide them with some paperwork that outlines the screening requirements of your group so while they are spreading the word about volunteer opportunities, they can at least flag that screening processes are in place.

If you notify people that screening will occur, this helps them understand that you are taking steps to protect the people you work with and that everyone will be treated the same. It may also cause some people to self-select themselves out of the job if they are concerned about getting through the process.

Whatever you do, don't yell, "Help, we are desperate for volunteers!" This opens the gate to everyone and anyone and makes it harder to say "no" after you screen them.

### *The selection process*

The next step in a screening process relates to the selection of your volunteers. At minimum, all volunteers should fill out an application form. This provides you with basic data on their contact information, skills and qualifications, their interests and motivation for wanting to volunteer with your group, and their references. People should also attend an interview (even by phone) if they are working with your clients. For special event or other short-term volunteers who are working in low-risk positions, your group might decide this level of contact is not necessary.

More in-depth screening in the selection stage can involve interviewing volunteers, checking their personal and work references, and doing police or driver records checks. There are many resources available to provide guidance on how to go through each of these steps. The important part is to treat everyone fairly and consistently. If you have three people interested in the same type of job, make sure they all go through the same screening process.

### *Managing the volunteer*

Screening doesn't stop once you select your volunteers. The management of your volunteers includes some important steps that will help you continue to manage your risk. Orientation and training will help you ensure the volunteers are aware of the boundaries of their assignment and the consequences of stepping over the line. Training can provide additional tools and procedures to deal with any risks that may arise during the job (e.g., first aid training, safety procedures).

Ongoing screening also includes providing supervision and conducting performance evaluations. Someone in your group should be assigned the responsibility of checking in with volunteers, particularly those in high-risk positions. Regular feedback and check-ins help you make sure the boundaries of the job are being respected and provide an opportunity to discuss any concerns or ideas for improvement that the volunteer or the supervisor might have.

Ideally, someone in your group will sit down with all of your regular volunteers once a year to go through a more in-depth evaluation process. The results should be documented to show you have followed this important screening process and to help ensure the volunteer and supervisor have the same understanding of what was discussed. In some cases, there may be adequate concerns to lead the supervisor to reassign or dismiss the volunteer (for more information on performance management of volunteers, see Best Practice 8: Providing Supervision).

## **TIP**

### ***Risk continuum***

*A simple tool that you could adopt as standard procedure is a "risk continuum." A continuum would look at the level of risk for a number of different types of risk. The types of risk include:*

- *the vulnerability of the participants;*
- *the opportunity for isolation of a participant;*
- *the level of power and authority the volunteer has over the participant;*
- *the level of supervision of the volunteer (the less supervision, the higher the risk);*
- *the danger inherent in the activity (to the volunteer or participant).*

*If you rank the level of risk for each of these factors on a scale of 1-5 (or 1-10), it will highlight where your greatest risks lie.*

## TIP

### *Volunteer application forms*

*There is a range of information you might want to gather on a volunteer application form:*

- *information to help you screen the volunteer for risk (e.g., the volunteer's contact information, names and contact information for references, the volunteer's relevant training or skills);*
- *information that will help you place volunteers in positions they will find rewarding and that they are well-suited for (e.g., ask about why they are interested in volunteering for you, what they hope to gain, what skills they would like to learn and/or offer to share);*
- *their availability for work and the best way to contact them.*

*There is some information that you can't collect (on a form or in an interview) because it would be against most human rights legislation. For example, don't ask about the person's gender, national or ethnic origin, race, sexual orientation, marital status, religion, unrelated physical handicaps, and unrelated criminal records.*

*There are many templates available for volunteer application forms. Ask other groups in your community for examples of theirs. Also see the resources listed at the end of this section.*

A final step in screening is to follow up with the participants the volunteer is working with. Regular contact with vulnerable clients or their families will help to highlight any concerns. Let your volunteers know that following-up with the people they are working with is a standard part of the process, so they won't feel that you are singling them out. Also consider establishing a schedule for doing random spot checks, particularly for volunteers that typically work with a client in an isolated setting. These spot checks would serve to protect your volunteer, as much as the client.

### **Objective #2: Assess all current volunteer job descriptions and apply a screening process where appropriate.**

So, you now have a new screening process in place. What should you do about that coach that has been working in unsupervised situations with kids for 10 years for you? What about the volunteer who has been going into seniors' homes to help cook and clean for the last six years? How can you dare ask them to go through a police records check? Can you really start doing random spot checks?

If you have been operating without much of a screening process in place and now you have a brand new one, you'll have to decide how to deal with screening volunteers who are already working for you.

One approach is to phase in your new process. All new volunteers could be subject to it right away, but consider phasing it in over a year or more to apply to your current volunteers.

If you phase the process in, you can start to raise awareness among your current volunteers of your new process and let them know that this is a new standard process that everyone will have to go through to help protect the interests of your clients and your group.

Meet with each person, if you can, one-on-one (e.g., as part of an annual evaluation meeting) and explain the importance of treating everyone fairly and the same. If you make one exception, you will be asked to make a number of exceptions. Show them a checklist of steps that everyone in positions like theirs will have to go through. Maybe ask them to help you model best practices in risk management by going through this process.

If you really feel that you must "grandfather in" your current volunteers, so that the new process will not be applied retroactively to them, be consistent about who is exempted from the process. This is not a recommended approach;



however, if you choose this route, treat everyone the same and do not single individuals out. Base your exemptions on some clear criteria.

You might want to tell the people you have exempted that you will screen them if they change assignments within your group (e.g., if they move from being a driver of the team to being a coach). This change in jobs will provide a strong justification for applying the new process.

### *Conclusion*

Admittedly, dealing with risk management is not the fun side of volunteer management! But it is critical. Taking the time to outline clear and consistent screening procedures will help you protect the people you work with and prevent future crises that could be a lot less fun! The time you invest in improving this best practice is definitely time well spent!

## **Food for Thought**

*Would you have suspected a provincial police officer, a school bus driver, a church camp counsellor of abusing his position of trust? Gary Blair Walker held all of these positions and more during the 33 years that he abused over 150 boys in his care. In 1994, he was sentenced to an indefinite prison term for sexual assault. Organizations must decide what screening measures they will employ based on the level of risk in the position. Given the previous example, it is obvious that screening must be applied consistently, regardless of the applicant's background.*

*Screening - 10 steps to safety,  
[www.volunteer.ca/volcan/eng/  
content/screening/screening\\_  
room1.htm](http://www.volunteer.ca/volcan/eng/content/screening/screening_room1.htm)*

### *Action plans*

#### **Objective #1: Define your group's screening process.**

Done ✓

Action

Lead person

Deadline

Identify who will work on designing a screening process (e.g., set up a committee, recruit volunteers with skills in this area, assign to staff).

Collect resources and additional information on the 10 steps of screening. Share the information with the committee.

Review the 10-step process and determine what we are doing now, and what gaps we need to fill.

Assign responsibilities for working on filling gaps in the three stages of screening (i.e., before selection, selection, and managing volunteers). This includes responsibility for writing out a draft process, and developing forms and procedures to be followed.

Gather all the information into one draft document for the committee to review and comment on.

Make final revisions.

Get the final process approved by key decision-makers in the group.

Ensure staff, volunteers, and participants are aware of the new screening process (e.g., integrate it into orientation and training materials, put an article in your newsletter, discuss at a staff meeting).

Get the new process integrated into your policies and procedures (if they exist yet. See Best Practice 2).

Other ideas:

**Objective #2: Assess all current volunteer job descriptions and apply a screening process where appropriate.**

Done ✓	Action	Lead person	Deadline
	Decide who the new screening process will apply to and set a deadline for applying the process to these people.		
	Inform current volunteers of the new process and any requirements or exemptions that apply to them.		
	If we are retroactively screening our current volunteers, meet with them to discuss the process and determine the steps they'll have to go through (based on risk assessment of their position).		
	Assign a committee or person with the responsibility for dealing with any situations that result in a current volunteer not meeting our standards.		
	Review the implementation of the process when the deadline comes up. Make sure everyone has gone through the necessary steps.		
	Other ideas:		

### *Resources*

To see a sample of a volunteer application form, go to [www.bc.cancer.ca](http://www.bc.cancer.ca) and click on "volunteering" then "apply."

For tips on effective interviewing for volunteering, see the online article by Steve McCurley:

[www.casanet.org/program-management/volunteer-manage/volinter.htm](http://www.casanet.org/program-management/volunteer-manage/volinter.htm).

A range of information on application forms, interviewing, doing reference checks, and more is available at [www.brightonhovevolunteers.org.uk/goodpractice/index.htm](http://www.brightonhovevolunteers.org.uk/goodpractice/index.htm). Look under "forms" and "recruitment".

For information on the 10-step process and other valuable screening information, go to Volunteer Canada's site [www.volunteer.ca](http://www.volunteer.ca) and look for "Screening" under the Fast Find menu.

### *The Canadian Code for Volunteer Involvement*

*Best Practice 4: Reducing Client and Group Risk is based on the national standard set out in the Canadian Code for Volunteer Involvement. If you would like to see where your group stands compared to this national standard, review the checklist below.*

#### *Code Organizational Standard 4*

A screening process is in place that is clearly communicated and consistently applied.

- Screening is considered to be an essential process that continues throughout the volunteer involvement with the organization.
- All volunteer assignments are assessed for level of risk.
- Screening measures are used according to the level of risk of the assignment.
- All volunteers complete an application form and attend an interview.
- Screening procedures are delivered consistently with no exceptions made for certain individuals or positions.

## Best Practice 5: Creating Clear Assignments

### *A snapshot*

#### *Do you have job descriptions for your volunteers?*

How do you tell potential volunteers what you'd like them to do, what qualifications they need, how many hours you want them to work, or what they will get in return? A good job description can do all of these things.

Volunteers deserve a job title and a clear job description. After all, the word "volunteer" reflects what they get paid, not what they do. Tell the volunteers the purpose of their job and how it will help your group achieve its goals. Think about what motivates volunteers to get involved and about what tasks need doing in your group. Combine these needs as you design new jobs.

If you have clear job assignments, it will be easier to recruit volunteers. Job descriptions also help you identify the level of risk involved in each job and what you should do about it.

*If you answered **NO** to any of these questions, work through this section of the guide.*

*If you answered **YES** to all of the questions and feel comfortable that there is someone with the necessary skills and the clear responsibility for managing volunteers in your group, consider going on to the next section.*

*If you're unsure, review the checklist from the Canadian Code for Volunteer Involvement at the end of this section for suggestions on how your group could get better at this best practice.*

### *Assess your volunteer program performance*

(Circle "YES or "NO" for each question)

Comments

Would you say that all of your volunteers are doing work that contributes to your group achieving its mission?

YES    NO

Have people in your group spent time talking about how volunteers can best help your group get its work done?

YES    NO

Do you have job descriptions for your volunteers?

YES    NO

Do you feel you have a range of volunteer assignments that a range of people can get involved in?

YES    NO

Would you say your volunteers generally know what is expected of them?

YES    NO

When you reach out to recruit volunteers, do you recruit for specific jobs or assignments you want new volunteers to take on?

YES    NO

### *The longer story*

When hiring paid staff, an organization or business usually has a job description that outlines the tasks and responsibilities, the required skills and knowledge, the hours of work, and the available wages and benefits. This job description tells people who might apply what they will be expected to do and what rewards they can expect in return.

Job descriptions should also be used when you are trying to find volunteers to help your group. If you want to effectively recruit people with the right skills and motivations to help with your work, it's critical that you first clearly define what you want them to do.

Before you sit down to write a job description, you want to ensure that the work you will be asking a volunteer (or a staff person) to do is work that will help fulfil your group's goals. In other words, don't just come up with positions for volunteers that only loosely relate to your group's purpose. Many volunteers get involved because they really believe in the work that their group of choice is doing. So you want to make sure they will be able to see how their particular job is contributing to the overall goals of the group.

To ensure volunteer efforts are helping you achieve your goals effectively, your group should go through a job design process.

Job design involves sorting all of the work your group does - or should be doing - into key areas of work and then into tasks related to each key area. These tasks can then be grouped into individual job assignments. Some of these assignments might be done by paid staff and others might be done by volunteers.

The job assignments you come up with should always be aimed at helping your group achieve its goals. However, job design should also consider volunteer needs. Volunteers have different motivations for taking on jobs in a group. It is important that your jobs provide the type of rewards that will meet volunteer interests and needs. Otherwise you will have a hard time finding and keeping people.

## **Food for Thought**

*"If you want people to do a good job, give them a good job to do."*

*Frederick Herzberg*

## **Definitions**

### ***Job design***

*Job design is the process you go through to identify what work needs to be done to help your group accomplish its mission. It breaks the work into manageable units that can then be assigned to staff or volunteers.*

### ***Job description***

*A job description is an outline of the tasks and responsibilities that will be assigned to an individual. Job descriptions are the written results of a job design process.*

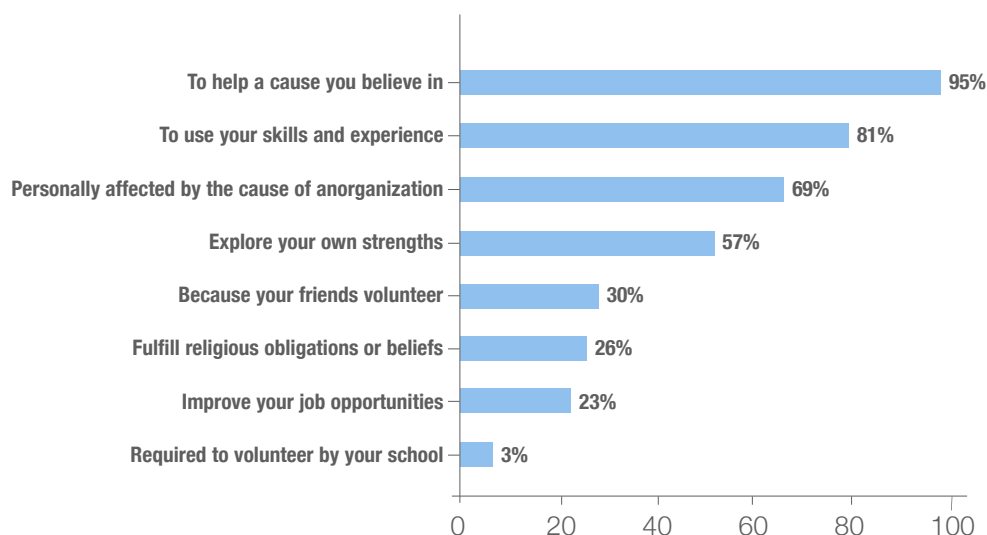
## TIP

### Five-step job design process

1. Review the mandate or mission of your group (the reason your group exists).
2. Look at the different functions and associated tasks that your group does to help you achieve your mission or mandate.
3. Consider your current and potential pool of volunteers.  
Identify the skills and qualifications that will be needed to perform the various tasks and functions.
4. Define and write clear job descriptions.
5. Match volunteers to the jobs or assignments.

*Volunteer Canada (2001). A Matter of Design: Job design theory and application to the voluntary sector. Ottawa, ON*

### Motivations for Volunteering



Based on Caring Canadians, Involved Canadians: Highlights from the 2000 National Survey of Giving, Volunteering, and Participating. Ottawa, Minister of Industry.

For example, some volunteers want to learn new skills that will make them more employable, so you can try to cluster certain tasks in one job assignment to make it meet this need. Other volunteers are mostly interested in meeting new people and will want to take on tasks that involve working with others. Some people might want tasks that they can do at home because they have young children at home or live far from your office. What tasks can you put together to create rewarding jobs for volunteers who can't make it into your office?

A good job design process will take these varying needs into account. Once a volunteer is placed in a job, the assignments can be modified based on the person's specific skills and interests. However, your group should be clear on what is negotiable and what really must be done in that position. You don't want to be spending your time managing a volunteer who is doing little to meet your group's goals even if the work is very rewarding for the volunteer. For example, a volunteer may be learning all sorts of new computer skills, but if he or she is taking lots of staff time to be trained or is working on things, such as developing a Web site, that your group isn't even sure it needs or can keep up to date, then the work isn't benefiting your group.

Once you have outlined your job assignments, do a risk assessment of the position before trying to fill the position (see Best Practice 4: Reducing Client and Group Risk). If the assignment requires working with vulnerable clients or in risky situations, modify the job to include mandatory training or frequent supervision, or drop some tasks that will prove too risky to the volunteer or the client. Your risk assessment of a job assignment will also help you determine the



screening steps the volunteer will have to go through (e.g., a police records check, an interview, reference checks, etc.).

### *Action planning*

#### **Objective #1: Design your jobs.**

Job design involves looking at the mandate of your group and determining what key things you are doing to fulfil your mission. These key activities are called **functions** (e.g., fundraising, research, public education, counselling services, etc.). Before going any further, make sure that the functions you identify are all still relevant. Consider whether there are other functions you should include to achieve your mandate.

Once you have identified your main function areas, break each one down into different component parts. For example, if public education is a key function of your group, some **components** of that function might include:

- giving regular school presentations;
- producing a newsletter;
- maintaining a resource library;
- hosting an annual conference.

Each component then needs to be broken down further into tasks. For example, if a component area is giving school presentations, the tasks might include:

- informing teachers of the availability of speakers from your group;
- setting up times for talks with teachers;
- preparing handouts and exercises for the students;
- delivering the talk;
- preparing and collecting an evaluation form;
- following up with the teacher.

Once you have identified these tasks, they can be combined into one or a number of job assignments. In the example of the tasks for giving school presentations, it might make sense to group all the tasks in one job - the same person can organize and deliver the talk.

However, it might also make sense to create two positions - one position for organizing the talks and another for delivering them. Then you can look for one person who is a good organizer and one or more people who are skilled presenters. As each job will require less time from one person and just one skill set, it should be easier to fill the positions if you divide the work.

## **Food for Thought**

- *Volunteers contributed an average of 162 hours each during the year, up from 149 hours in 1997.*
- *In total, Canadians volunteered 1.05 billion hours during the year. This is equivalent to 549,000 full-time jobs - roughly equal to the employed labour force of Manitoba.*
- *Over one-third (34%) of all volunteer hours were contributed by the 5% of volunteers who gave 596 hours or more of their time.*
- *Another 39% of all hours were contributed by the 20% of volunteers who gave between 188 and 595 hours during the year.*

*Hall, M., L. McKeown, et al. (2001). Caring Canadians, Involved Canadians: Highlights from the 2000 National Survey of Giving, Volunteering, and Participating. Ottawa, Minister of Industry: 83.*

*Results of the National Survey of Giving, Volunteering and Participating are based on reports of charitable giving and volunteering over the one-year period from October 1, 1999, to September 30, 2000, by Canadians aged 15 and older.*  
[www.givingandvolunteering.ca](http://www.givingandvolunteering.ca)

## TIP

### *Staff and volunteers working together*

*Some staff may be resistant to working with volunteers. They might feel volunteers take too much time to work with, are not dependable, are there to do the "dirty work," are just free labour, or are out to get one of the staff jobs.*

*To help overcome this resistance:*

- *Ensure volunteers are given proper orientation and training and involve staff in the training.*
- *Develop schedules for the volunteers' work and come up with a back-up plan for times they don't show up.*
- *Get staff input in the design of volunteer assignments.*
- *Do evaluations of volunteers and ask for staff feedback to help with the evaluation.*
- *Involve staff in volunteer recognition and social activities.*

*Johnstone, Ginette (ed.) (1999). Management of Volunteer Services in Canada: The Text, 2nd edition. Carp, ON: Johnstone Training and Consultation Inc.*

If you end up with two job descriptions, it is possible they might both be taken on by one skilled and keen volunteer. However, if this person leaves, you will still have two distinct jobs that can be filled by two people with different sets of skills or another keener who wants both positions.

The combination of tasks will determine what skills and knowledge the job requires, and what time commitment will be involved. To effectively involve volunteers in your group, it is good to create a variety of jobs, requiring a variety of skills and a variety of time commitments. Some people may only have an hour a week to contribute, while others may have a day a week. Some may want something that lasts only two months while others may prefer seasonal assignments.

Both paid staff and current volunteers should be consulted when trying to identify opportunities for volunteer assignments. What tasks do people need help with? What core tasks in their positions are not being completed due to a lack of time? What work in other areas of the organization is not getting done?

If you have staff in your group, perhaps they might feel they don't have time to figure out what volunteers can do for them. Or they don't want to spend time supervising volunteers.

It is important that your staff learn to see the tangible benefits that volunteers can provide. Ask staff to think about what they have always wanted to do but can never find time to do. If volunteers did other parts of their job, maybe they could get to those big-picture things they keep setting aside!

Staff should ask themselves what they would ask a full-time assistant to do if they were provided with one tomorrow. Perhaps some of the tasks they identify can be organized into a rewarding volunteer position or two. Can staff identify what skills an ideal co-worker would have if they were able to share their job responsibilities? The answers to these questions will help your group design volunteer jobs and identify the required skills and qualifications you need to recruit for.

## Objective #2: Prepare job descriptions.

A volunteer job description is a great communications tool. It can quickly tell someone interested in volunteering what you need to have done, what time is required, and what skills are necessary. It makes sure that your group's expectations are clear and helps volunteers understand how they can help you achieve your mission.

A volunteer job description will contain much of the same core information that a paid staff job description will have.

The core areas that are included in most job descriptions include a job title, a list of tasks or responsibilities, an outline of hours or time required, a list of required skills and qualifications, perhaps an indication of the decision-making authority of the position, and the supervisor's title or name. Ideally, both staff and volunteer positions will also include a description of the main purpose or function of the job so the person can see how the job supports the mandate of the organization.

But there are also some notable differences between paid and volunteer job descriptions. For example, volunteer job descriptions may also include what training and development they can expect to get in the position.

More importantly, the description should describe the benefits the volunteers will get in exchange for their work. Obviously they are not going to get a wage or health plan benefits. So what are they getting in exchange for their contribution? The benefits section should address what motivates volunteers to get involved. You might note that the job will provide a chance to learn new skills, get training, meet or help new people, or even feel good about contributing to an important cause or helping people in need.

Develop a template for your volunteer job descriptions so that all position descriptions will cover the same information. Once you have written up a few volunteer assignments, consider keeping them in a central location (e.g., in a binder at the front desk). That way, when new volunteers walk in the door, they can flip through this resource to see what volunteer opportunities your group has available.

## TIP

### *Job description form*

*Below is a list of items you could include on a job description form for your group. Before you decide which ones to use, consider asking your volunteers what they want to know!*

- *Job title*
- *Purpose of job (how it links to the mandate)*
- *Tasks (or duties and responsibilities)*
- *Reports to (or supervisor)*
- *Time commitment/hours of work*
- *Skills and qualifications*
- *Training provided*
- *Authority or decision-making processes*
- *Policies related to the position*
- *Work location/conditions of work*
- *Evaluation period or process*
- *Benefits!*
- *Space for you and the volunteer to sign, indicating you both agree to this job description*
- *Length of the assignment*

*When you write your job description, use short sentences or point form, use action verbs, write the duties in the present tense, and describe only one point at a time.*

## Food for Thought

### *What youth volunteers do*

*The two most common youth volunteer activities are:*

- *organizing or supervising events (53% of youth volunteers);*
- *campaigning or raising funds (39%).*

*(Note: Many youth volunteer for more than one type of activity.)*

*Hall, M., L. McKeown, et al. (2001). Caring Canadians, Involved Canadians: Highlights from the 2000 National Survey of Giving, Volunteering, and Participating. Ottawa, Minister of Industry: 83.*

When you have a volunteer you want to place in a position - who has gone through the necessary screening steps - you and the volunteer should sign off on the job description. This makes the assignment feel like a contract that both you and the volunteer have agreed to. It helps clarify expectations and lets the volunteer know that this work is important to the group.

You might want to define a limited term for the job, even if it deals with ongoing work (e.g., a one-year term, renewable upon agreement). Once the term is up, the volunteer may want to renew it or may choose to move on to something else. It provides an opportunity for the volunteer or the group to make a guilt-free change! Volunteers shouldn't be made to feel like quitters simply because they want to move on to something different.

### **Objective #3: Monitor and redesign your jobs.**

Once you have worked through the job design process and have volunteer assignments in place, you will have to monitor how things are going and figure out what changes should be made.

Is there a job that you just can't fill? Start asking people who considered taking it on, what prevented them from committing to it. Is there a job that volunteers keep quitting? Ask the volunteers who are leaving, why they are leaving and what recommendations they have for changing the job assignment to make it more rewarding (see Best Practice 8: Providing Supervision).

When you are interviewing a volunteer for a job, it's okay to negotiate changes to the job description. Once you have a volunteer in the position, you may also find a need to modify the job based on the person's interests and skills, and based on the volunteer's own ideas for how to improve the job. Be sure you don't lose track of any critical tasks that you might take out of the job description. You may want to use these tasks to design a new job for someone else.

Sometimes you might have a great volunteer who comes to you with a skill base or interest in work that you don't have a job designed to meet. If you can, work together to define a rewarding job for this volunteer. However, remember that the bottom line is that you need people working to help your mission. Don't make work if it takes too much away from your core activities. At times, you may end up referring volunteers to other organizations that might make better use of their time and skills. Referrals like this help to build the whole volunteer community as it keeps the person engaged.

### *Conclusion*

Once you have defined clear volunteer assignments, you have taken an important first step in successful volunteer recruitment. Once you have completed this best practice, you are well on your way to completing the next one on recruiting volunteers. Congratulations!

### *Action plans*

#### **Objective #1: Design your jobs.**

Done ✓	Action	Lead person	Deadline
	Determine who is going to be involved in the job design process and get them together (e.g., staff, board, and/or volunteers).		
	Review the mandate of our group. Identify the main functions we are doing to meet our mandate. Confirm they are still relevant (and identify new areas if needed).		
	Determine how we are going to break each function down into components and task (will one committee do it all or can different people work on breaking different functions into tasks?).		
	Determine which tasks staff are doing and should be doing. Sort other tasks into volunteer assignments (see Objective #2 for steps on writing job descriptions).		
	Determine what skills and qualifications are needed for each job assignment.		
	Do a reality check - are these volunteer assignments practical and will they be rewarding for volunteers? Is it realistic to expect to find volunteers to fill them? Are we offering a range of opportunities? Can the tasks be combined differently to make them more realistic?		
	Do a risk assessment of each job assignment. Take steps to redefine the tasks or approach of the assignment if needed.		
	Other ideas:		

**Objective #2: Prepare job descriptions.**

Done ✓	Action	Lead person	Deadline
	Develop a draft job description template.		
	Circulate to key people (staff and volunteers) for feedback.		
	Finalize the form and get necessary approvals.		
	Begin writing up volunteer assignments (based on work done under Objective #1 or current volunteer jobs).		
	Set up a binder or file so new volunteers can see what assignments are available.		
	Other ideas:		

### Objective #3: Monitor and redesign your jobs.

Done ✓

Action

Lead person

Deadline

Put dates on all vacant jobs and review ones we haven't filled in a reasonable time period. (Talk to volunteers who considered but rejected the job.)

Keep notes on volunteer turnover and identify jobs people keep leaving. Talk to volunteers who have left the job. Redesign job(s) based on their input.

Talk to ongoing volunteers annually about their jobs. Make adjustments to their job descriptions, if needed.

Set up a system for tracking new tasks that come up or are taken out of other volunteer positions. Periodically design new jobs.

Other ideas:



## *Resources*

"A Matter of Design: Job design theory and application to the voluntary sector" Volunteer Canada, 2001 (59 pp). Order or download a PDF file from [www.volunteer.ca](http://www.volunteer.ca). This booklet outlines the key steps in job design analysis.

"Building Staff/Volunteer Relations" by Ivan H. Scheier, 1993. This book has some interesting tools to help staff decide what they can delegate and what they would really like to do if they could free up some time. Order a hard copy or electronic copy through the bookstore at [www.energizeinc.com](http://www.energizeinc.com).

For a sample of a volunteer job description, go to [www.thecentre.ab.ca](http://www.thecentre.ab.ca) and click on "volunteers."

Read "How Do I Develop Creative Volunteer Jobs" by going to [www.genie.org](http://www.genie.org) and clicking on Volunteer Management, then look at FAQ #04. Also check out FAQ #01 on creating volunteer and staff partnerships.

Find out how to develop an online volunteer program. Go to [www.energizeinc.com/art/subj/inter.html](http://www.energizeinc.com/art/subj/inter.html) and look for the free, online "The Virtual Volunteering Guidebook."

### *The Canadian Code for Volunteer Involvement*

*Best Practice 5: Creating Clear Assignments* is based on the national standard set out in the *Canadian Code for Volunteer Involvement*. If you would like to see where your group stands compared to this national standard, review the checklist below.

#### *Code Organizational Standard 5*

Volunteer assignments address the purpose of the organization and involve volunteers in meaningful ways, reflecting their various abilities, needs, and backgrounds.

- Volunteers and staff (and unions) are consulted when developing new assignments.
- Volunteer assignments have written descriptions that include duties, responsibilities, skills needed, time required, and benefits.
- Volunteer assignments are developed to reflect the needs of the organization and the needs of the volunteers.
- Volunteer assignments are reviewed periodically with staff and volunteers (and unions) to ensure relevance and value.
- Volunteers with special requirements or challenges can become involved with the organization.
- The level of risk is assessed and minimized for all volunteer assignments.

## Best Practice 6: Reaching Beyond the Circle

### *A snapshot*

#### *How do you recruit your volunteers?*

Simply saying "We need help!" isn't a very effective way to recruit volunteers.

Before your group asks people to get involved, think about what you need people to do and what volunteers would like to do. Write job descriptions that reflect these tasks and then let people know what jobs are available and what skills you are looking for.

There are many ways to get the word out. Try targeting places where your ideal volunteers are likely to work or play. If you are recruiting for sports coaches, spread the word through other sports organizations or post notices at local gyms. If you are looking for literacy tutors, perhaps you could put your message on free bookmarks at the library! By reaching beyond your usual circle of members and volunteers, you will bring in volunteers that reflect the diversity of people your group serves.

*If you answered **NO** to any of these questions, work through this section of the guide.*

*If you answered **YES** to all of the questions and feel comfortable that there is someone with the necessary skills and the clear responsibility for managing volunteers in your group, consider going on to the next section.*

*If you're unsure, review the checklist from the Canadian Code for Volunteer Involvement at the end of this section for suggestions on how your group could get better at this best practice.*

### *Assess your volunteer program performance*

(Circle "YES" or "NO" for each question)

Comments

Do you think your group does a good job of recruiting volunteers?

YES    NO

When recruiting volunteers, does your group realistically and clearly describe the job you expect the volunteer to do?

YES    NO

Does your group use a variety of techniques to recruit volunteers?

YES    NO

Does your group try to recruit people with a diverse range of backgrounds and experiences?

YES    NO

Do you feel you select volunteers based on the actual requirements for the job?

YES    NO

### *The longer story*

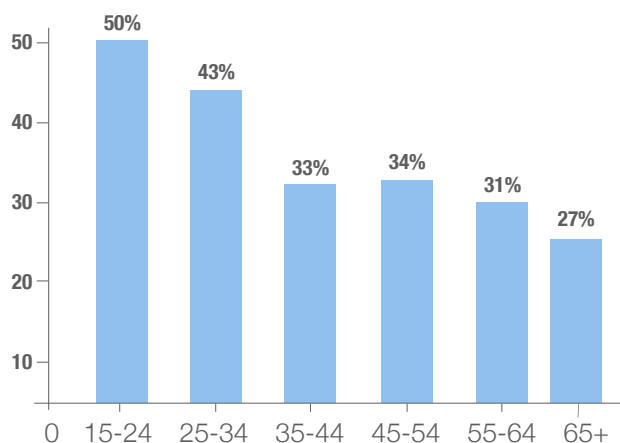
In many small and rural communities, finding enough volunteers to do all the work is a real challenge. Many volunteers take on a variety of tasks, often for a variety of groups. Burnout is a big problem.

So recruitment can be a real struggle as the competition for volunteers is high. Volunteers will gravitate towards volunteer activities that offer the most personal rewards for them. If your group is controversial in your small community, people may be willing to help you out in a non-public way.

Your challenge is to sell the work you need done in a way that will attract the type of volunteer you are looking for.

### *Nobody asked*

Younger Canadians are more likely to say that they did not volunteer because they had not personally been asked to do so. Almost half (49%) of non-volunteers aged 15 to 24 cited this as a reason for not volunteering, compared to just 27% of those aged 65 and over.



Hall, M., L. McKeown, et al. (2001). *Caring Canadians, Involved Canadians: Highlights from the 2000 National Survey of Giving, Volunteering, and Participating*. Ottawa, Minister of Industry: 83.

## **Food for Thought**

*The goal of recruitment is to find the right number and the right type of volunteers.*

Instead of trying to find a bunch of volunteers to do a bunch of work, you should first define the various jobs that have to be done, then recruit to fill those jobs. These jobs should help you fulfil your group's goals but should also address the reasons people volunteer (see *Best Practice 5: Creating Clear Assignments*).

If you ask someone to volunteer for you, the first thing they will ask is "to do what?" If you are recruiting person-to-person, you can respond immediately. If you're not, then let the job title and recruitment message answer that question right up front! Recruitment will be much easier once you have created assignments that volunteers will get a lot out of.

Once you have your jobs defined, think about who your ideal people for the jobs would be. What kind of skills and qualifications would they have? Who is likely to be interested in your group's work? If you are looking for people with specific skills or attributes, target your audience carefully.

Draft recruitment messages that realistically outline available volunteer assignments and the skills required for each position. Talk about the importance of the work and how the volunteers can help meet the need. Also outline the benefits of the jobs for the volunteers. Be clear in your message that screening procedures are in place (See *Best Practice 4: Reducing Client and Group Risk*).

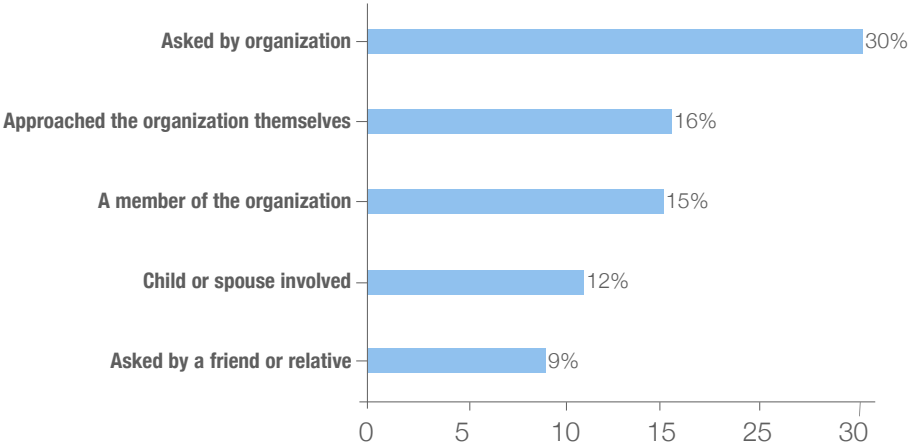
Your group can use a number of techniques to get your message out, including posters, brochures, advertisements, public service announcements, mall displays, public information sessions, or word of mouth. Keep in mind that blanketing the community with your messages isn't usually as effective as targeting places where your ideal volunteers are likely to work or play.

By reaching out to diverse sources, you are also more likely to build a volunteer force that represents the diversity of the community you serve.

If people are interested in the position, go through a selection process to be sure they fit the job and the job fits them. Address their interests and concerns, but also make sure you are getting people who can help contribute to your work. In your one-on-one discussions with potential volunteers, highlight that you're not asking for a favour but offering them an opportunity you hope they'll wish to accept.

As you talk to some volunteers, you may realize they would be better suited to another job - perhaps even a more challenging one. Set the volunteers up for success by being clear about what will be involved. You could end up frustrating everyone if you have glossed over the real amount of work involved. Even if volunteers turn you down, they will feel flattered that you thought they had something to offer your group. Don't be disheartened. You have to ask people to volunteer, and some are bound to say no! Consider asking people why they didn't choose to take on the job you were recruiting for. You may learn some valuable tips for the next person you ask.

**Percentages of Volunteering Events by the Method of Involment in Volunteering**



Based on Caring Canadians, Involved Canadians: Highlights from the 2000 National Survey of Giving, Volunteering, and Participating. Ottawa, Minister of Industry.

## Food for Thought

### How volunteers get involved

*According to a national survey, more volunteers get involved because they were asked by an organization (30%) than in any other way.*

*But those volunteers who first became involved by approaching an organization on their own (16% of volunteers) contributed almost 50% more hours on average than those who were asked by an organization to volunteer (134 vs. 89 respectively).*

*Hall, M., L. McKeown, et al. (2001). Caring Canadians, Involved Canadians: Highlights from the 2000 National Survey of Giving, Volunteering, and Participating. Ottawa, Minister of Industry: 83.*

## Food for Thought

### *Keeping in touch*

*The trend to more short-term and episodic volunteering has made maintaining communications with volunteers more important than ever. Short-term and episodic volunteers may spend only a few days or a few weeks at your organization, organizing or volunteering for a special event or participating in a specific project. These volunteers may be interested in volunteering again in the future - if they know how and when they can get involved. It's critical to keep a good database on these people. Send them one-page updates by mail, fax, or e-mail about upcoming volunteer opportunities.*

*McClintock, Norah (2004).  
Understanding Canadian  
Volunteers. Toronto, ON: The  
Canadian Centre for Philanthropy.*

### *Action Planning*

#### **Objective #1: Develop a recruitment strategy.**

Once you have outlined one or more volunteer jobs that you want to fill, develop a recruitment strategy that will help you get the right person for the job. To help you do this time and time again, spend some time creating forms and templates that you can work through for each new volunteer job.

First of all, develop a set of questions that will help you look at each job and ask yourself what type of people would be most suitable for this job:

- What skills must they have?
- Must they have training and experience?
- Are there personal characteristics they must have (e.g., be outgoing and comfortable meeting people or be a good listener)?

When you figure out what your ideal volunteers for any given job are like, ask yourself what do you know about such people:

- What interests are they likely to have?
- What other activities might they be involved in?
- What kind of job might they have?
- What are their motivations for volunteering?
- What needs might they have (e.g., transportation, childcare, language support)?

Once you have a better picture of who your potential volunteers are, it is easier to figure out where you might find them!

For example, if you are looking for people to help run your office, consider approaching the teachers of business administration programs at a nearby school or college to let them know you are looking for volunteers. Some of their students may see this as an opportunity to build their skills. If you run an animal shelter and are looking for regular dog walkers, maybe the seniors' centre might be a place to find suitable volunteers. However, if you are looking to fill volunteer positions that almost anyone can do or quickly learn to do (such as setting and cleaning up for a large event), it might be suitable to broadcast your message far



## TIP

### *Recruitment opportunities*

*The best sources of new volunteers are current and past volunteers who have had good experiences working with your organization. Here are other sources you may want to renew, adapt, or develop:*

- *volunteer clearinghouses;*
- *professional and business organizations whose members have relevant skills and interests;*
- *local newspapers that will accept notices and free advertising;*
- *periodicals willing to publish stories about your efforts, including volunteer experiences;*
- *volunteer-oriented Web sites and newsletters;*
- *churches, synagogues, mosques, and other places of worship;*
- *personal and professional networks of staff and board members;*
- *grantmakers and their networks;*
- *contacts through institutions, organizations, groups, and individuals served;*
- *informal conversations;*
- *suggestions from current and previous effective volunteers (e.g., campaign of "each one, bring one");*
- *your own ideas.*

*"Volunteer Management: Recruiting, Retaining, and Training" by Ruth M. Schimel, Ph.D. [www.recipesforaction.com/schimellode/resources/a\\_volunteer.html](http://www.recipesforaction.com/schimellode/resources/a_volunteer.html)*

and wide.

When looking at who might volunteer, don't forget to look at who your group serves. If you have a particular type of client, are there people from that part of the community volunteering for your group? Are the people that are closely connected to your clients volunteering for your group?

Don't forget to look at other parts of your community that might be underrepresented in the volunteer force. Trends show new Canadians are looking to build their language skills and work skills. Youth are looking to increase their job skills, and many high schools offer credits to students who volunteer. People with disabilities are seeing volunteering as a way to get involved in their community. Are you taking advantage of these trends when you are recruiting?

Once you have decided who you want to target, it is time to write your recruitment message. The length of it will depend on how you are going to communicate it, but each message should try to convey:

- what problem the volunteer job will help address;
- what skills or knowledge the volunteers must bring to the job;
- what they will get out of the assignment;
- that screening measures are in place;
- contact information.

Then you must get the message out. Based on what you know about the people you would like to involve, ask yourself, where do you think you might find them and what is the best way to contact them? Would posters work? Should you ask people one-on-one? Who is the best person to ask them? Would holding a public meeting to recruit a large number of volunteers work? Do you have access to free advertising in the paper or on the radio? If you are looking for professional people (e.g., lawyers or accountants), could you ask their professional association to put a notice in their newsletter?

Remember that there is a diversity of people out there, with a variety of reasons for getting involved. Don't feel shy about reaching out and asking more people to get involved. Even if a job assignment might not be something you would be interested in doing, there are many who might want just that type of involvement in your group.

## TIP

### **Recruitment messages**

*The body of the message presents information in an order that psychologically matches how people will think about the offer:*

*Need: Is there a problem?*

*Solution: Can this job help solve it?*

*Fears/Questions: Will I be capable of helping with it?*

*Benefits: What's in it for me?*

*Contact Point: How do I get involved?*

[www.casanet.org/program-management/volunteer-manage/message/htm](http://www.casanet.org/program-management/volunteer-manage/message/htm)

### **Sample messages**

*"Agency serving low-income youth-at-risk looking for photographer with equipment to volunteer taking photographs at our first graduation ceremony! Agency will pay for developing, etc. Help make this event a wonderful memory. Call Seattle Youth Initiative, 382-5011, ask for Patty."*

*"Cablearn cable channel 27 seeks daytime volunteers to assist with marketing, educational programming, program development, and underwriting or research in educational video techniques. Good experience or background for educators interested in video. Call 545-TV27 weekdays."*

[www.casanet.org/program-management/volunteer-manage/vlrcpote.htm](http://www.casanet.org/program-management/volunteer-manage/vlrcpote.htm)

*For more samples, try searching for "Volunteers Wanted" on the Internet to see how other groups are making their pitch!*

### **Objective #2: Establish a consistent selection process.**

Before you head out to recruit lots of new people, make sure you have a process in place to respond to their interest in volunteering with you! In other words, if you are going to reach out, be ready to receive! Respond quickly to volunteer inquiries and get the volunteer involved sooner, not later. People are turned off if their offer to volunteer is not followed up quickly.

However, if you get volunteers coming to you without being recruited, be honest if you don't have a good match for them at the time.

As discussed in Best Practice 4: Reducing Client and Group Risk, it is important to have a screening process in place for all new volunteers. This is designed to protect your group and its clients from harm. Do not just accept any interested people who walk through the door without first ensuring they are the volunteers best suited to the work.

There are a number of steps in the screening process that help you reduce potential risk. These steps also help you figure out which jobs the interested person is best suited for. A good application form will gather information on the skills and knowledge the person is offering to share with your group. It should also indicate what the volunteer wants to learn and what type of work he or she would most like to do.

Once volunteers have filled out an application form, it's a good idea to interview them. If they have expressed an interest in a volunteer assignment you have just advertised, you can decide if they are capable of taking it on by talking to them in person. Perhaps you will find out that they might be able and willing to take on a more challenging assignment you have available!

An interview is not an inquisition - it's an opportunity to effectively match volunteers to rewarding positions. Explore the volunteers' reasons for volunteering with your group and what they would like to get out of it. Ask about their experience in previous volunteer positions. Get a picture of who they are. What you learn in the interview will help you figure out how to keep them interested and involved for the long term.

An interview is also a time to provide some basic orientation to your group and the work that it does. Ask if they have any questions about your group's history or mission or the type of work that you do. Answer any questions about the assignment they may take on.

Depending on the job you are trying to fill and the risk involved, you may want to take additional screening steps before selecting a volunteer. Follow any guidelines you have developed before offering the person the position.

It is important that you treat all of your volunteers fairly and consistently. If two volunteers want to take on a position in your group, they should both have to go through the same steps in the process.

### *Conclusion*

Once you have Best Practice 4, 5, and 6 in place, you have the systems to help you get the right person for the right job! The remaining sections in this guide will help you develop an environment that will help you keep your volunteers!

## **TIP**

### *Interview technique*

- *Use open-ended questions that do not ask for yes/no answers.*
- *Repeat what the prospective volunteer has said using your own words to clarify what you have understood, then wait for confirmation that you got it right.*
- *Attend. Use eye contact, an attentive posture, and occasional nods to show you are listening.*
- *Use prepared questions, so that each volunteer gets the same chance, and you can make fair comparisons.*
- *Use hypothetical situations from your group, asking "What would you do if . . . ?"*
- *Express concerns of previous volunteers and how you responded. This can stimulate questions and concerns, provided you do not indirectly suggest that you've heard all possible concerns.*

*Tip — continued on following page*

(cont'd)

### Interview technique

#### Don'ts

- Don't ask about: age, sex, race, religion, marital status, sexual orientation, children, disabilities.  
(see provincial Human Rights Codes)
- Don't promise what you can't deliver.
- Don't stereotype or make assumptions.
- Don't misread messages.  
If you are unsure what someone is saying, repeat what they said, starting with, "Are you saying . . . ?"
- Don't rush. Leave ample time for the interviewee's questions.
- Don't ignore your intuition, but check it out with careful questioning.
- Don't waste time.
- Don't get deflected into talking about yourself, your opinions, your experiences with the group.
- Don't talk too much. You aren't the one being interviewed.

*CAP volunteers: A Growing Need:*

*Jean Carter, 2000.*

<http://cap.ic.gc.ca/english/vol.htm#G>

### Action plans

#### Objective #1: Develop a recruitment strategy.

Done ✓

Action

Lead person

Deadline

Develop a standard set of questions we should ask ourselves for every volunteer assignment we want to fill (e.g., the type of person we want, what they might be like, why they might volunteer, where they might be found, the best way to approach them).

Develop an outline for writing recruitment messages. Prepare a few examples for current or upcoming volunteer positions.

Create a list of all the ways we currently recruit volunteers. Get a few people together and brainstorm other approaches we could use.

Identify new groups of volunteers we could target (e.g., older adults, youth, new Canadians, friends of clients, etc.).

Put the questions, recruitment message outline, and list of ways to contact people in one file or binder for future reference.

Identify the volunteer assignments we want to fill now and go through each step.

Evaluate each new approach and amend the templates as necessary.

Other ideas:

**Objective #2: Establish a consistent selection process.**

Done ✓	Action	Lead person	Deadline
	Identify the key contact for recruitment efforts and ensure there is a system in place to respond quickly to volunteers interested in our positions.		
	If we don't have one, draft a volunteer application form and get feedback on it.		
	Finalize the volunteer application form and make copies easily available.		
	Develop a list of questions we will ask in all interviews and a form for keeping notes. Decide who will do the interviewing and make sure they have the forms and questions.		
	Review how well the application form and interview process is working and make any changes.		
	Other ideas:		

## *Resources*

For a number of short articles on recruitment techniques, writing recruitment messages, sample messages, and more, go to [www.casanet.org/program-management/volunteer-manage/index.htm](http://www.casanet.org/program-management/volunteer-manage/index.htm)

To find practical tips on recruitment, go to the Brighton & Hove Volunteer Bureau's online Good Practice Guide for volunteer management at [www.brightonhovevolunteers.org.uk/goodpractice](http://www.brightonhovevolunteers.org.uk/goodpractice) and click on "recruitment."

Download helpful booklets on working with families, youth, people with disabilities, new Canadians, and older adult volunteers. Visit [www.volunteer.ca](http://www.volunteer.ca).

Download a two-page interview form at [www.brightonhovevolunteers.org.uk/goodpractice/pdf/form7.pdf](http://www.brightonhovevolunteers.org.uk/goodpractice/pdf/form7.pdf).

Get some good tips on interviewing for positions with notable responsibilities. Read "Volunteer Interviewing Scenarios" at [www.casanet.org/program-management/volunteer-manage/vlinscen.htm](http://www.casanet.org/program-management/volunteer-manage/vlinscen.htm).

## *The Canadian Code for Volunteer Involvement*

*Best Practice 6: Reaching Beyond the Circle is based on the national standard set out in the Canadian Code for Volunteer Involvement. If you would like to see where your group stands compared to this national standard, review the checklist below.*

### Code Organizational Standard 6

Volunteer recruitment and selection reaches out to diverse sources of volunteers.

- Recruitment messages are realistic and clear about the volunteer assignment expectations.
- Various techniques are used to recruit volunteers.
- Recruitment messages advise that screening procedures are in place.
- Genuine effort is made to recruit and select volunteers from a broad range of backgrounds and experiences to represent the community served by the organization.
- Selection of volunteers is based on actual requirements and pre-determined screening measures.

## Best Practice 7: Orienting and Training Volunteers

### *A snapshot*

#### *Do your volunteers know what's going on?*

If someone asked your volunteers about your group's goals and its programs, would they know how to answer?

All volunteers should get information on the history, mission, and structure of your organization. It will help them raise your group's profile when people ask about their volunteer work. More importantly, the volunteers will know where they fit in and how they are contributing to your group.

Volunteers also need training and information related to their assignments. For example, new board members might need copies of past minutes or training on reading financial statements. A coach may require training on teaching ball-handling skills to kids. A new event coordinator will need information on past events. All of these volunteers should get the same orientation to your group, but different training. Providing ongoing training to your volunteers will help keep them interested in their work.

*If you answered NO to any of these questions, work through this section of the guide.*

*If you answered YES to all of the questions and feel comfortable that there is someone with the necessary skills and the clear responsibility for managing volunteers in your group, consider going on to the next section.*

*If you're unsure, review the checklist from the Canadian Code for Volunteer Involvement at the end of this section for suggestions on how your group could get better at this best practice.*

### *Assess your volunteer program performance*

(Circle "YES" or "NO" for each question)

Comments

Do all new volunteers receive some kind of orientation to the history, mission, and work of your group?

YES    NO

If your volunteers were asked to explain the main purpose or goals of your organization, do you think they would all be able to answer?

YES    NO

Do you feel confident that all volunteers in your group (including board members) are receiving the information and training they need to do their job?

YES    NO

Are your volunteers provided with ongoing opportunities to participate in training or other activities to help them learn something new?

YES    NO



### *The longer story*

An orientation for your volunteers can provide the same kind of helpful tour of your group. Every volunteer, including board members, should receive the benefits of an orientation to your group. This involves helping people understand how the group operates, what it is trying to achieve, and who is involved. Providing your volunteers with information on things such as the group's history, mission, and structure will give your volunteers a better sense of how they fit in and how their work supports your purpose. If you want to help ensure your volunteers will stay on, give them an orientation.

Groups may choose to do their orientations in different ways. You could give presentations at meetings, share information in volunteer interviews, or write the information in pamphlets, volunteer handbooks, or orientation kits. You may want to use more than one approach, and the level of detail you get into will vary, depending on the tool you use. Your approach will also be influenced by how many volunteers you have to orient and how often.

Training is different from orientation. Training involves providing the information and skills that volunteers need to do their specific job. For example, new board members may need information such as the most recent strategic plan or training on how to read financial statements. On the other hand, a volunteer tutor may require training on how to help kids learn to read. A new fundraiser will need files on past fundraising activities. All of these volunteers should get the same orientation materials but different types of training.

Training provides an opportunity to let volunteers know about the limits of their assignments and the relevant policies and safety precautions they must abide by. For example, may volunteers receive gifts from clients they work with? If the media asks your volunteer event coordinator for a comment at one of your public meetings, can he or she speak on your behalf? What do board members have to know about their legal responsibilities? These things must be explained when you are training volunteers for their jobs.

Training should also be ongoing for as long as the volunteer is working with you. What information or training can you give volunteers access to so they will stay stimulated and feel they are learning and growing? Can you send them to workshops where they can build their skills? Are there other assignments you can offer them to keep them engaged and challenged? Training is a great way to reward your volunteers for work well done and to keep them engaged in your group.

## Definitions

### **Orientation**

*Orientation is the welcome to an organization that every volunteer (and staff) should get. It should explain the history, mission, structure, and goals of your group.*

### **Training**

*Training involves formal and informal activities that prepare people to do the jobs. It can involve providing information, or conducting training and educational activities.*

*When you first move to a new town, it is great to have someone local show you around. The local person can tell you a lot more about the town than you would learn from a map or brochure. Your personal guide can give you the pertinent history and current tips on places to hang out or shop. This is the truly useful stuff that never makes it into the tourist pamphlet!*

## TIP

### ***Orienting and training special event volunteers***

*Most organizations host some type of special event over the course of a year, whether it is an outdoor festival, a charity sporting event, or another event requiring large numbers of volunteers. Volunteers involved in this type of activity also require orientation and training. Below are some ideas for making this training more effective and time-efficient.*

- *Engage leaders from among your volunteers to facilitate the event.*
- *Spend time training your leaders on the relevant details of your organization and the specifics of the event, including emergency procedures.*
- *Do a walk-through of the event with your leaders.*
- *When they feel comfortable with the knowledge they have learned from you, they can begin to train larger groups of volunteers. Volunteers might be divided into smaller groups based on their roles and responsibilities in the event.*
- *Make yourself readily available to your leaders so they can ask questions and voice any concerns they may have.*

## *Action Planning*

### **Objective #1: Develop your orientation materials and process.**

There are three key areas to cover in your orientation activities. First, make sure the volunteer is aware of the purpose of your group. In addition to outlining the mission, values, and history of your group, you should describe the different programs you have, the clients you serve, and the future goals of the group.

This information will help your volunteers see how their efforts help the whole group achieve its purpose. Your volunteers are like ambassadors in your community. When people learn they are volunteering with you, volunteers may be asked questions about what the group does and is trying to achieve. Make sure they have the answers you want the public to hear.

This type of information can be useful to provide on an ongoing basis. If your group is dealing with a hot or very public issue, provide a briefing to your volunteers so they can talk intelligently to others about the topic or activity. Being kept in the loop like this makes them feel like members of the team and helps them communicate the issue to the broader community.

The second focus of your orientation should be on the practical details of how your group works. If you have an office, show your volunteers the basics of the facility (e.g., tell them where the coffee is, where they can hang their coat, how to deal with recycling of materials, or which phone they can use if needed). Provide information on the different roles people play in your group and who they should go to if they have a question. Let them know about upcoming events. Give them an overview of the whole volunteer program.

The third thing you should do is introduce your volunteers! Make sure they meet the people they will be working with and seeing around the office. Make them feel welcome. Also be sensitive to how people communicate differently and how the level of comfort in different situations can vary. Try to reflect these differences as you help people start working together.

These three steps can be accomplished in a variety of ways. A group may have a basic pamphlet that provides information that explains that group's history and purpose to both volunteers and members of the public. Interviews with volunteers are another way to orient volunteers to your work before they actually join your team. Perhaps you might host an information night for prospective volunteers every few months. If your group is organizing a large event, organizers may choose to hold one or two orientation sessions leading up to the event to bring everyone up to speed on what the event is about and how it supports your group. Sessions like these tend to be a combination of orientation and training as they provide general information about the group and specifics about the

event that only that group of volunteers needs to know about. Orientation doesn't have to be dry and factual. Consider ways you can jazz up your approach. Can you create a trivia quiz or crossword about your organization that will engage new volunteers? Can you make it more social so new volunteers will meet others coming into the organization? Can you use photos to highlight some great successes that volunteers helped achieve? Remember, a volunteer's first significant impression of your group might come through your orientation materials and activities. Try to make it engaging!

### **Objective #2: Develop a training plan**

Training may be viewed by many small groups as a luxury that they just can't afford. But volunteer training does not have to be a big ticket item. In fact, it can often be done for free.

First, identify the skills and knowledge your volunteers will need to do a good job. What skills do they bring to the position, and what gaps do you need to fill? These identified gaps are the areas you should provide training in.

One way to figure out what training to provide to your volunteers is to ask your current volunteers what training or information they wished they'd had when they started and what they feel they still need.

Take reasonable steps to provide training in these areas. If you don't, your volunteers could end up feeling unsupported and overwhelmed. Training will help them feel grounded in what you have asked them to do.

Training is also an important tool for managing risk. In some cases, volunteers may require some basic first aid training or other health and safety training to help protect them and your clients. For example, if they are helping people in and out of bed or wheelchairs, they must learn proper approaches for their own good and the client's. Other volunteers might have to learn what to do if a client or member of the public starts to intimidate them. Do your volunteers know how to handle the range of situations they are likely to face in their job? Make sure they are aware of the boundaries of their assignment - the things they can and can't do.

Some training can easily be provided by your group. It may involve providing the right files to a new researcher or spending half an hour showing concession volunteers the ropes. Outgoing board members could do an evening training session for incoming members, or old and new members could meet one-on-one. You could send out short bits of training-related information you

## **Food for Thought**

### *A note on boards*

*More than four in ten (41%) volunteers are members of a charity or nonprofit board of directors - the body that bears the ultimate responsibility for the organization. It's not unusual, especially in small organizations, to find that a significant number of board members have never served on a board before. It's especially important, then, to pay special attention to training for board members and making sure that they understand their duties and responsibilities.*

*McClintock, Norah (2004). Understanding Canadian Volunteers. Toronto, ON: The Canadian Centre for Philanthropy.*

pick up in your reading in regular e-mails to volunteers. Some of these activities happen off the cuff - the challenge is to make them predictable and consistent.

Look outside your group to tap into other resources in your area or online. Are there businesses or government training programs that would provide a free or cheap seat to one of your volunteers? Can you create a volunteer trainer position and then recruit some skilled people in your area? Are there others in your community that need to do similar training? Can you team up with them?

In some communities, groups that require similar skills have each taken on responsibility for organizing training sessions on relevant topics. For example, groups that provide counselling services might band together to provide sessions on interpersonal communications, active listening, and avoiding burnout. Large sports events might want to hold regular joint trainings to keep a qualified pool of timekeepers, judges, coaches, first aid attendants, and so on.

Training can be provided at different times during the volunteer's involvement with your group. In some cases, you'll want to train volunteers in the skills they'll need to do the job before they even start. For example, you wouldn't want to ask volunteers to answer crisis line calls before they have had some training on how to deal with such situations. You would likely want wilderness guides to have first aid training before they head out on a trip with a group of youth.

Other training can happen on the job. Staff or other volunteers might be assigned to new volunteers to show them the ropes. Setting up a mentoring situation allows the experienced person to demonstrate the best approach to the work, and then to step back and observe new volunteers at work. Or there may be formal training activities that new volunteers will be asked to attend in the first six months of their assignment.

Even volunteers who are fully up to speed on their jobs and are having no problems with their work should be provided with new training and learning opportunities. People often volunteer because they want to learn more - which means they may move on if they feel they have reached a plateau in their learning. Providing access to training is one way to acknowledge the good work that the volunteer has been doing and to keep volunteers engaged.

Volunteers can also train each other. If you have a group of volunteers doing similar work, maybe you could set up a support group or host regular potluck dinners where they will have a chance to share ideas and stories about what has worked for them in their work. Volunteers can also help pull together resources such as "how-to" booklets on topics they once needed help with (e.g., how to

run the office equipment, do a mail out, organize a public talk, manage the library, or keep minutes!).

When providing training opportunities, be sure you are consistent in your approach and transparent in your decisions. If you provide access to computer training for one office helper and not another, you might create some resentment. It will help if people are aware of the reasons for your decision; it is even better if you have guidelines to base these decisions on.

### *Conclusion*

If you are providing effective orientation and training to your volunteers, they will understand how they fit into your organization and will have the tools to help them get their work done. This is the first step in making your volunteers feel welcome in your organization and helps create an important sense of belonging. The next step is to provide ongoing support through regular supervision and feedback.

## **TIP**

### ***Questions to help you assess your group's training needs***

- *What do your volunteers need to know or be able to do in their jobs?*
- *What skills or knowledge do they bring to the job?*
- *Where are the gaps?*

### ***Questions to help you develop your training plan***

- *What should the volunteers have learned by the end of the training?*
- *What's the best way to deliver what they need to know? (e.g., hands-on experience, role playing, written information, mentoring, formal courses, etc.). Keep in mind that people learn in different ways. A blended approach might be best.*
- *Who will do the training?*
- *How much time is required?*
- *What other resources are needed?*
- *How will we evaluate the training we deliver?*

### *Action Plans*

#### **Objective #1: Develop your orientation materials and process.**

Done ✓

Action

Lead person

Deadline

Decide which approaches to orientation we want to use for our group (e.g. pamphlet, handbook, interviews, regular sessions).

Outline the key information we want to cover in our orientation materials.

Draft orientation materials (e.g., written and verbal).

Circulate draft materials for feedback to key people.

Revise orientation materials.

Develop procedures for ensuring materials will be available to new volunteers (e.g., who will hand out materials, how often there will be orientation meetings, who is responsible for showing people around).

Get feedback from volunteers and revise materials after a good trial run.

Other ideas:

## Objective #2: Develop a training plan

Done ✓

Action

Lead person

Deadline

List all the volunteer positions in the group. Identify the skills or knowledge each position should have. Identify the gaps between what people should have, and what they do have.

Identify current training opportunities to meet identified needs. These could be in our office, in our area, and online (e.g., on-the-job, written materials, mentoring, formal workshops). Brainstorm other training that we could make happen (e.g., through partnerships with other groups, by developing some ourselves).

Develop a training plan. It will outline what people need to learn, how we can best train them in that area, who will do the training, how long it will take, how much it might cost, and how we will evaluate if the training worked.

Develop a budget for volunteer training and get it approved.

Develop guidelines for deciding who will get access to non-mandatory training.

Other ideas:

## *Resources*

See the "induction and training" button at [www.brightonhovevolunteers.org.uk/goodpractice](http://www.brightonhovevolunteers.org.uk/goodpractice) to learn some specific tips on effective orientation and training approaches.

For tips on doing training yourself, check out [www.volunteertoday.com](http://www.volunteertoday.com). Click on "training" in the menu for the latest article on training or search the archives.

For board development information, go to the United Way of Canada's Board Development site [www.boarddevelopment.org](http://www.boarddevelopment.org) or Mentoring Canada's online training course at [www.mentoringcanada.ca/resources/training.html](http://www.mentoringcanada.ca/resources/training.html)

## *The Canadian Code for Volunteer Involvement*

*Best Practice 7: Orienting and Training Volunteers is based on the national standard set out in the Canadian Code for Volunteer Involvement. If you would like to see where your group stands compared to this national standard, review the checklist below.*

### *Code Organizational Standard 7*

Volunteers receive an orientation to the organization, and to its policies and procedures, and receive training for their volunteer assignments.

- Volunteers receive information on the history, mission, and structure of the organization.
- Volunteers receive information on the policies and procedures that relate to their assignment.
- Volunteers are given adequate training for performing their assignment without putting themselves or others at risk.
- Volunteers are informed of the boundaries and limits of their assignments.
- Volunteers have ongoing training opportunities to upgrade their skills and to learn of changes in the organization.



## Best Practice 8: Providing Supervision

### *A snapshot*

#### *Is someone supervising each volunteer in your group?*

Like paid staff, volunteers require direction and feedback on how they are doing. They need someone to say, "Good job!" or, "How's the job going?" or, "You don't seem to be enjoying this task. What would work better for you?"

Volunteers also need someone who will respond when they say, "I have an idea for improving this program" or, "I feel like I am wasting my time" or, "I'm ready for more of a challenge."

In other words, they need an assigned supervisor. Volunteers in more complex or risky positions should get more supervision. For example, someone running an information table at a workshop will require less supervision than someone staffing a crisis line. To help ensure volunteers feel that they belong and know what they are doing, the supervisor should regularly check in to both give and receive feedback.

*If you answered **NO** to any of these questions, work through this section of the guide.*

*If you answered **YES** to all of the questions and feel comfortable that there is someone with the necessary skills and the clear responsibility for managing volunteers in your group, consider going on to the next section.*

*If you're unsure, review the checklist from the Canadian Code for Volunteer Involvement at the end of this section for suggestions on how your group could get better at this best practice.*

### *Assess your volunteer program performance*

(Circle "YES or "NO" for each question)

Comments

Are your volunteers receiving regular feedback on the work they are doing?

YES    NO

Do you think that your volunteers are generally given enough opportunities to provide feedback to your group about their experiences and ideas?

YES    NO

Do you think every volunteer in your group knows who to go to for direction and feedback?

YES    NO

Do you generally feel your volunteers are getting adequate supervision, especially any volunteers in higher-risk positions?

YES    NO

Does your group have a process in place for dismissing your volunteers in case they just aren't working out or are causing problems?

YES    NO

### *The longer story*

For some people, "supervision" is a word that makes them think of overbearing bosses and a one-way flow of instructions.

However, effective supervision is essentially about building relationships. It's about helping your volunteers get a handle on what they are supposed to be doing, letting them know when they are doing well, and providing them with direction when they need it. It's about supporting the volunteers so they can contribute effectively to your group's needs, while also striving to meet the volunteers' motivations for being there. This role can be played by a staff person or another volunteer.

The level of supervision that each volunteer requires will change from assignment to assignment. Someone volunteering for a one-day event may require just a few check-ins over the course of the day. Long-term volunteers who are working intensively with high-risk clients may require weekly meetings to debrief and get feedback on their work.

Volunteers should be introduced to their supervisor when they first start their assignment. The initial role of the supervisor is to help the volunteers *feel welcome* and ensure they have what they need to get started. Even if the volunteers work in a different location, a supervisor can be in touch by e-mail and phone to provide support.

The most important job of the supervisor is to ensure a two-way flow of communication with the volunteers for the whole time they are involved with your group. Volunteers should get regular *feedback* from their supervisor to help them improve their work and as a recognition of their contributions. At the same time, the supervisor should be frequently encouraging volunteers to provide feedback related to both the assignment and issues affecting the whole organization.

In addition to the ongoing giving and receiving of feedback, be sure to do *performance evaluations* for your regular volunteers. Although this might sound like a nightmare to many readers, performance evaluations can be done in an informal and relaxed manner. It is not about policing the volunteer. It is about taking the time to consciously check in to ensure that both the needs of the group and the volunteers are being met. If you are not comfortable with the words "performance evaluation," you could call it an annual check-in or job review.

## **Food for Thought**

*"Voluntary health agencies and other nonprofit organizations have long recognized the importance of cultivating donors and knowing their donors' needs, wants, and interests. It has become just as important to cultivate and then get to know both paid staff and volunteers in the same way. If their needs and interests are not met, they may simply choose to go elsewhere."*

*Roadmap to Managing Volunteer Systems: From Grassroots to National. National Health Council, Inc., 2000. Found in the Energize, Inc. Web site library at <http://www.energizeinc.com/art.html>.*

## TIP

### *How to give feedback*

1. *Prepare: Think carefully about what you want to say.*
2. *Try to be helpful: Make sure you are speaking from a desire to help.*
3. *Choose an appropriate time and place: Make sure the person receiving the feedback feels ready for it.*
4. *Watch how the person is being affected: Tune into the person's body language.*
5. *Focus on observable behaviour: Avoid interpreting what someone's behaviour might mean.*
6. *Be specific: Don't generalize. Give concrete examples.*
7. *Be selective: Focus on what is important and what the person can actually do something about.*
8. *Speak for yourself: Avoid reporting on what others are feeling or thinking. Take responsibility for the feedback.*
9. *Balance the feedback: People don't believe just positive praise, but hearing only critical feedback will make someone feel discounted.*
10. *Allow for discussion: Make sure the person understands what you are saying. Don't expect agreement. Don't expect an immediate response.*

Occasionally, supervisors will determine that a volunteer is not well-suited to his or her job. They may work to *redesign* the job or *reassign* the person to another position. Some situations require the *dismissal* of a volunteer. Ideally, there are policies and procedures to guide this process to help ensure things are done consistently and respectfully.

### *Action Planning*

#### **Objective #1: Develop an approach for supervising your volunteers.**

Volunteers and staff in small groups typically have little time to spare, and the idea of adding on supervisory responsibilities may seem overwhelming. However, it is better to spend the time working well with the volunteers you have recruited, oriented, and trained than it is to have to go out and find new volunteers. In the long run, time spent on supervision pays off.

Additionally, supervision is a responsibility that can be shared by many in your organization. One volunteer may have two distinct areas of responsibility and so could be supervised by two different people.

It makes sense to ask the person working most with a particular group of volunteers to be its supervisor. For example, if you have a volunteer chairperson working with a committee of other volunteers, talk to the chairperson about the role of supervisor and see if he or she will take this on. Sometimes a volunteer chairperson might do this without being asked. However, if you add "volunteer supervisor" into the chairperson's job description, you can help ensure the work will get done.

Or, instead of tagging supervisory responsibilities on to an existing job assignment, can you create specific volunteer supervisor positions? For example, if you have a group of volunteer door-to-door canvassers, one volunteer could have the principle role of providing supervision to the rest. If you have a speaker's bureau set up, perhaps one of the experienced speakers could be asked to take on a supervisory role for the other speakers. An experienced volunteer might be looking for just this kind of added challenge.

Supervision does not have to be a time-consuming job. The important thing is that each volunteer has someone who is clearly responsible for providing guidance and feedback. This minimizes confusion and prevents volunteers from falling through the cracks. It doesn't take a lot of time to provide feedback and to check in to see how people are doing. But people need to know this role is expected of them.

It also takes some skill to be an effective supervisor. Essentially, supervising is about communicating well and solving problems as needed. To help people prepare for the role of supervisor, consider organizing a training activity or gathering basic "how-to" materials. Maybe invite a supervisor from a local business or organization to talk with your supervisors over lunch one day. You could also find "tips for supervisors" on the Internet and send out a few each month in an e-mail.

Of course there are two people involved in a supervisory situation - the supervisor and the volunteer. It is good to explain to volunteers that supervision will be provided to support them in their work. Encourage the volunteers to regularly provide feedback to their supervisor about their experience. The volunteers will likely appreciate knowing that your group has open lines of communication and that they will have someone they can call on for help.

#### **Objective #2: Establish a performance evaluation process.**

Volunteers are involved in your group to work on specific tasks that will help your group achieve its mission. So now and again, volunteers and their supervisors should have a focused discussion to see if the assigned tasks are being completed and to talk about how the volunteers feel about their work. In other words, they should go through a performance evaluation.

It seems like performance evaluations often happen when things are not going well. When time is tight, priority for evaluations is given to problem employees or staff. The people doing a good job miss out on the chance to have a focused discussion about their performance and experience in the job. So performance evaluations have received a bit of a bad rap, as they often deal with the bad, not the good.

Evaluations really should be viewed in a more positive light. Discussions on performance provide a key opportunity for the volunteer and supervisor to identify what is working, what isn't, and what can be changed. If you go through this process, it shows your volunteers that your group cares about the quality of work that is being done.

Volunteers are spending time doing work for your group for a variety of reasons. The performance evaluation offers a great opportunity for you to make sure their motivations are still being met by the group. Paid staff might get more money or holidays after a positive evaluation. What can you do for your volunteers? Imagine, for example, that a volunteer signed on with your group largely to meet new people and work for your cause. A performance evaluation is a good time for you to see if these motivations are being met or if they have changed at all.

## **TIP**

### ***How to receive feedback***

- 1. Be open to learning: Adopt a mindset of discovery and learning.*
- 2. Really listen: Fully listening does not imply you have to agree with everything or will have to change anything.*
- 3. Restate and clarify: Ask for more information if needed. Restate what you are hearing to ensure you understand what is intended.*
- 4. Allow yourself time to take in the feedback.*
- 5. Don't leap to your defence: If you are feeling defensive, hold off responding to the feedback. But respond when you are ready, so that the interaction is completed.*
- 6. Acknowledge the giver of the feedback: It is not easy to give feedback. Thank him or her for taking the time to provide it.*
- 7. Breathe.*

## TIP

### *Volunteer self-evaluation forms*

*You may want to create a self-evaluation form that volunteers would fill out before having an evaluation meeting with their supervisor.*

*The form might include questions about the following topics:*

- *satisfaction with their volunteer experience and work;*
- *use of the volunteer's talents and skills;*
- *adequacy of training and orientation;*
- *desire for new challenges or learning experiences;*
- *ideas for change to the job or organization;*
- *satisfaction with supervision;*
- *feeling of belonging and value to the group;*
- *preferred form of recognition;*
- *greatest challenges they face*
- *key successes or achievements to date;*
- *future goals.*

Perhaps a volunteer might say that he feels he's not doing important work to help the cause. Or maybe he will identify something new that he would like to learn, such as getting better at public speaking or understanding a key issue your group is working on. This information is critical if you want to keep this volunteer involved. You should come up with a plan to address these issues or risk losing your volunteer.

In some cases, a volunteer may not be living up to your expectations. This may be because she is not even sure what your expectations are! A job description is one way to communicate your expectations. However, it doesn't provide the detail a volunteer might need to understand what she should be doing. For example, a job description may talk about the volunteer answering the phone for the group, but it doesn't tell the volunteer what you would like her to say or how you would like her to deliver the message. If the volunteer isn't living up to your expectations, the first step is to clarify what you expect. This should happen through regular supervision and the performance evaluation.

If you conclude that a volunteer's poor performance is not about misunderstood expectations, describe the actions or behaviour that concern you. Avoid jumping to conclusions about what is making the volunteer behave this way. Just talk about what it is you are observing.

Together, identify specific actions that might solve the problem. Focus on behaviours that can be changed. You may come up with a set of actions for both the volunteer and the group. For example, actions for a volunteer might include being on time by leaving home earlier, interrupting clients less frequently, or attending committee meetings more often. Actions for the group could include providing the volunteer with training in a specific area, checking in more frequently, or changing the hours of the volunteer's shifts.

In some cases, the evaluation (and ongoing supervision) may indicate that the volunteer is not suited to the job. There may be an opportunity to *redesign* the job description to suit everyone's needs. Or you may want to completely *reassign* the volunteer to another job. If you can't find a suitable position within your group, you might want to *refer* the volunteer to another organization that may have positions more in line with the volunteer's motivations and talents. Helping a volunteer find a rewarding position elsewhere helps build the whole volunteer community.

A performance evaluation should result in a written action plan that outlines both what the volunteer and the group commit to doing. This ensures everyone's expectations are understood and provides a starting point for the next performance evaluation.

There are a number of tools that can help the evaluation process. You could develop a volunteer self-assessment form to help volunteers prepare for an evaluation meeting and to provide important feedback for your group (see box). You can also develop a form for writing up the results of a performance evaluation.

For short-term volunteers, going through an evaluation meeting might not be possible. However, supervisors should be encouraged to provide feedback to each volunteer and to get volunteers to fill out an evaluation form about their experience volunteering with the group. If you have annual events that involve many of the same volunteers year to year, it might be worth collecting their ideas and tracking their performance (particularly in the case of those who did not carry their weight during the event).

### **Objective #3: Get ready to deal with dismissal.**

It is possible that you may face situations where you must immediately dismiss a volunteer. The volunteer may have crossed a clear boundary and exposed a client to serious and unacceptable risk. There might also be other issues you face, such as theft, alcohol or drug abuse, or harassment of staff, volunteers, and clients.

In these situations, you may want to let a volunteer go without any warning (your policies should define which situations will result in immediate dismissal). Or you may want to suspend them until you have enough information to make a decision.

Fortunately, these situations are very rare, particularly if you have spent time carefully screening and selecting your volunteers.

Occasionally, you may also face a situation where a volunteer is just not working out. Sometimes it might be due to poor performance that you have not been able to improve through training, feedback, or performance evaluations. Or the volunteer may have broken a rule and deserves some kind of action or reprimand (e.g., broke confidentiality or spoke without permission to the media on behalf of the group).

When you have reached this stage, your first step is to provide a *verbal warning* to the volunteer. Explain what must change and what the consequences will be if it doesn't. This warning should be documented, in case you have to go to the next stage.

## **Food for Thought**

*Don't get discouraged if long-time volunteers resist performance reviews. Always start where you find interest and openness to a new idea. Work with new volunteers and those who look for performance feedback. Once others see the benefits people are enjoying from personal performance review, they may agree to participate.*

*Johnstone, Ginette (ed.) (1999). Management of Volunteer Services in Canada: The Text, 2nd edition. Carp, ON: Johnstone Training and Consultation Inc.*

## TIP

### *A powerful question*

*It is important to note that motivational needs change over time and that, to be successful in retaining volunteers, we must be aware when those needs have changed . . . [W]e must stay in touch with the volunteer to notice when the original needs are met or have changed.*

### *A powerful question to ask volunteers when we suspect that this is happening is:*

*"What can we do, as an agency (or as individuals), to keep you involved? You are very important to us, and I sense that your interest is waning."*

*How to Succeed With Volunteers-in-Parks: 60 Minute Module Series, Motivation Training Guide by National Parks Service, Volunteers-in-Parks Program. [www.nps.gov/volunteers/modules.htm](http://www.nps.gov/volunteers/modules.htm)*

If the work or behaviour of the volunteer is still unacceptable, a *written warning* comes next. Outline your concerns and state what the volunteer must do to address the behaviour. If it's relevant, state a time frame (e.g., immediately or within three months). Meet with the volunteer to go over the letter.

The final stage is to hold a *firing interview* with the volunteer. The supervisor should hold the interview but should ideally be accompanied by a third person as a witness. Be clear about what you want to say before the meeting starts. Senior management or the chair of the board should likely be informed of the situation in advance, in case there are future repercussions.

The goal of this final meeting isn't to fix the problem; it's to let the volunteer go. Tell the volunteer that his behaviour indicates he no longer wants to work with your group and, therefore, you must let him go. Don't apologize, and avoid beating around the bush with niceties. Be sure the volunteer clearly gets the message. If there are sincere, positive contributions the volunteer has made to your group, you can describe these. But don't stray from your purpose.

Firing a volunteer will never be an easy thing to do. However, in most cases it is easier than keeping a poor performer on. It will also be easier to do if you have policies and procedures to guide you through the process and if you have let all volunteers know during orientation that dismissal is an option.

## *Conclusion*

Effective supervision of your volunteers is fundamental to providing them with a constructive and rewarding work environment. Provide ongoing feedback and support to your volunteers and be a sounding board for their concerns. Occasional evaluation meetings will help everyone focus on and address any key issues.

The next sections in this guide provide additional ideas on building the commitment and engagement of volunteers in your group.



## Action Plans

### Objective #1: Develop an approach for supervising your volunteers.

Done	Action	Lead person	Deadline
	List all the volunteer positions in our group and organize them into natural groupings (e.g., people helping run the office, different committee members, people working directly with clients, etc.).		
	Identify any current supervisors and the positions they supervise. Identify the remaining volunteer positions that are not being supervised.		
	Brainstorm who might supervise them (current and new positions).		
	As needed, amend job descriptions (of staff and volunteers) to add in supervisory responsibilities.		
	Identify training and information we can make available to help people provide effective supervision.		
	Review our interview and orientation processes and be sure that we talk about supervision and why it is important in our group.		
	Other ideas:		

## Food for Thought

*"There are several rationales for firing volunteers. One is that the bottom line is the ability to deliver quality service to the clients of the agency, and any barrier to that delivery is not allowable . . . . A second rationale has to do with giving meaning and value to volunteer service. By denying that there is a "right" and a "wrong" way to do a volunteer job, one conveys the impression that the volunteer work done is irrelevant and insignificant."*

*McCurley, Steve and Rick Lynch (1996). Volunteer Management: Mobilizing all the resources of the community. Illinois: Heritage Arts Publishing.*

**Objective #2: Establish a performance evaluation process.**

Done ✓

Action

Lead person

Deadline

Establish guidelines for performance evaluations for volunteers. Include a time line for when evaluations should be done for new and current volunteers, short and long-term volunteers. Get input from our volunteers.

List and then develop any forms we need for the process (e.g., volunteer self-assessment form, performance evaluation report form, evaluations for short-term volunteers).

Ensure all people supervising volunteers are aware of the need to do evaluations for regular volunteers.

Follow-up after a year to see how the process is going.

Other ideas:

**Objective #3: Get ready to deal with dismissal.**

Done ✓	Action	Lead person	Deadline
	Discuss with key people in our group which situations will require the immediate dismissal of volunteers and write these down as part of our dismissal policy and procedures.		
	Define the steps we will go through for volunteers who are not behaving or performing adequately (e.g., verbal and written warnings, firing interviews, informing decision-makers). Add to the policy and procedures.		
	Communicate these procedures to staff and volunteers.		
	Other ideas:		

## *Resources*

For access to online articles and book titles, go to [www.energizeinc.com/art/subj/super.html](http://www.energizeinc.com/art/subj/super.html).

A free online guide called "Becoming a Better Supervisor: A Resource Guide for Community Service Supervisors" has lots of practical tips and case studies to help improve supervision skills in your group. Go to [http://nationalservice-sources.org/resources/online\\_pubs/program\\_management/index.php](http://nationalservice-sources.org/resources/online_pubs/program_management/index.php).

For a book full of tips, case studies, and feedback from volunteers, see "Supervising Volunteers: An Action Guide for Making Your Job Easier" by Jarene Frances Lee, 1999. Go to [www.energizeinc.com](http://www.energizeinc.com) to order.

## *The Canadian Code for Volunteer Involvement*

*Best Practice 8: Providing Supervision is based on the national standard set out in the Canadian Code for Volunteer Involvement. If you would like to see where your group stands compared to this national standard, review the checklist below.*

### *Code Organizational Standard 8*

Volunteers receive appropriate levels of supervision according to their task and are given regular opportunities to give and receive feedback.

- The complexity and risk of each assignment determines the level of supervision.
- Volunteers are assigned and introduced to their supervisors at the commencement of their assignment.
- The performance of volunteers is evaluated on a regular basis.
- Random spot checks with volunteers (and clients) are used to check in on volunteer performance.
- Volunteers are given and encouraged to use mechanisms for providing input to the organization.
- Records are kept for each volunteer using a confidential, secure system.
- Situations requiring reprimand and dismissal follow policies and procedures fairly and consistently while respecting the safety and dignity of all concerned.

## Best Practice 9: Making Volunteers Feel They Belong

### *A snapshot*

#### *Do your volunteers feel that they're part of the team?*

Have you ever heard one of your volunteers say, "I'm just a volunteer!" or, "They expect too much for free!" If so, they're probably not feeling like an equal member of your team.

To help volunteers feel that they belong on your team, show them you want their input and involvement. Invite your volunteers to staff meetings. Send them e-mails about developments in the organization. Invite them to provide input into your planning processes. Invite them to the staff Christmas party.

Efforts like these show volunteers you value them for much more than the time they put in. And if they feel valued and engaged in their work, they are more likely to hang around. As the recruiting and training of new volunteers takes time and energy, it is worth making the effort to make your volunteers feel they belong.

*If you answered NO to any of these questions, work through this section of the guide.*

*If you answered YES to all of the questions and feel comfortable that there is someone with the necessary skills and the clear responsibility for managing volunteers in your group, consider going on to the next section.*

*If you're unsure, review the checklist from the Canadian Code for Volunteer Involvement at the end of this section for suggestions on how your group could get better at this best practice.*

*Assess your volunteer program performance*

(Circle "YES" or "NO" for each question) Comments

Do you think most of your volunteers feel they are members of your team?  
YES      NO

Are volunteers (other than your board members) asked for input when your group is evaluating its performance or planning for the future?  
YES      NO

Do you frequently invite your volunteers to group meetings and social activities?  
YES      NO

Is someone in your group paying attention to how your volunteers can be given opportunities to take on new responsibilities and grow within your group?  
YES      NO

### *The longer story*

When volunteers feel connected and valued for their contributions, they develop a sense of belonging, a sense of being part of a team. If you can develop this feeling among your volunteers, you will build a good crew to work with for the long term.

However, if you are hearing your volunteers saying, "I'm just a volunteer!" or, "What do you expect for free!?" you may have a problem on your hands. If this is your situation, it's time to look at the environment you have created for your volunteers and to figure out what you can change. Why do your volunteers have these attitudes?

To help people feel like members of your team, one of the most important things you can do is share information with them. If volunteers feel that they don't know what is going on and are always finding out about things secondhand or after the fact, then they are going to feel outside the circle. It will make them feel isolated and second class compared to those who are "in the know." Regular communication will help everyone feel like they are in the loop.

Another way to keep volunteers engaged is to involve them in decisions that affect their work and the direction of your group. If you are holding a strategic planning meeting, invite volunteers (in addition to your board members) to get involved. If volunteers provide ideas for improvement to their supervisors, make sure they can see that their input is taken seriously.

If you have paid staff, they should build their understanding of how to work effectively with volunteers. It is also important that your unpaid staff - your volunteers - are treated with respect and given most of the same benefits that paid staff get (e.g., access to training and travel to conferences, reimbursement of expenses, a place to hang their coats or park their cars!).

Volunteers are also more likely to stay involved if they are engaged by their work. As they get comfortable with their assignment, look for opportunities to give them more autonomy and responsibility if they want it. Giving volunteers new challenges tells them you think they are doing a good job and helps keep their interest up.

Like any sports team, players who get to be part of the action stay enthusiastic about the game. Players who only get to warm the bench will likely find another game to get involved in. As recruiting and training new volunteers to replace outgoing players takes time and energy, it is worth spending as much effort, if not more, on the people currently volunteering with your group. Make sure

## **Food for Thought**

*Perhaps the most important aspect of building a sense of equality is open and free communication. This includes adding volunteers to the newsletter mailing lists, making sure they are copied on correspondence that involves their work, or taking the time to update a volunteer on what has happened since she was last there.*

*McCurley, Steve and Rick Lynch (1996). Volunteer Management: Mobilizing all the resources of the community. Illinois: Heritage Arts Publishing.*

## Food for Thought

### *Characteristics of successful organizations*

- *There is a sense of purpose.*
- *There is an alignment of people around the purpose.*
- *There is concern for personal performance and growth.*
- *There is a commitment to creating a positive environment.*
- *There is an effective structure.*
- *There is a clear line of authority and a strong, sensitive leader.*
- *There is a good level of communication.*

*Johnstone, Ginette (ed.) (1999). Management of Volunteer Services in Canada: The Text, 2nd edition. Carp, ON: Johnstone Training and Consultation Inc.*

they feel that they are active and valued members of your team and not bench warmers.

### *Action Planning*

#### **Objective #1: Strengthen communication with your volunteers.**

Communication is about a two-way flow of information. Be sure to get information both to your volunteers and from your volunteers.

There are numerous ways to help volunteers keep up to date on your group's activities, particularly the programs they might be involved with. You may already be using many of these tools in some form. It might be worth taking a second look at how you are using them. Can you improve what you are doing to make sure you are meeting the needs of volunteers?

Some ways to communicate with your volunteers:

- A volunteer newsletter or a section for volunteers in a broader newsletter
- Regular but brief e-mails
- A bulletin board in your office (e.g., for information on activities of your group, notices for volunteers and staff, posters for coming training activities in your community)
- Mail slots for your volunteers
- A reading file for volunteers of interesting materials related to your group and its issues
- Phone calls to check in or remind people of upcoming events
- A discussion board on your Web site
- A suggestion box

You can use these tools to share information about things such as upcoming events or training workshops. However, it is also important to let your volunteers know about developments in your group.

For example, if you have decided to start a new program or if your group recently received a large grant for a long-awaited project, let your volunteers in on this news! If you have received some news coverage or have just published a research paper, share this information with volunteers. Don't be afraid to share your setbacks as well-being part of a team means being part of the victories and the losses.



Volunteers can also use some of these tools to communicate with you and with other volunteers. A Web site discussion board could be hosted by volunteers and could explore challenging issues your group is dealing with. A suggestion box could allow volunteers to submit ideas for new programs or approaches to your work. Potlucks every few months could bring volunteers together to explore ways to improve their work or to discuss an issue the organization is tackling.

Remember that communication is a two-way process, so find ways to keep the information flowing in both directions.

### **Objective #2: Give volunteers a voice in your day-to-day decisions.**

As mentioned in Best Practice 1: Valuing the Role of Volunteers, it is important to involve volunteers in the planning and evaluation activities of your group, as they have a different view of the organization than staff and board members.

You can also look at how you might involve volunteers in the more day-to-day work and decisions in your group. For example, organizations with staff frequently hold staff meetings so everyone can be up to speed on what others in the group are doing and to get help dealing with any challenges they are facing. If your group has staff meetings, do you invite volunteers to attend them? Are they at convenient times for the volunteers as well as the staff?

Not all volunteers will want to attend, and volunteers who don't work in the office might not benefit. But imagine if you were a volunteer receptionist or librarian and were never invited to meetings held during your shift.

Why do people even hold staff meetings? Usually it's to improve coordination, get everyone up to speed on what is going on, and tackle any problems or concerns. Volunteers need the same type of communication and outlet for their concerns. If you are a volunteer-only group, consider holding regular meetings for the non-board volunteers who are keeping your group rolling along.

In addition to meetings, you should use other ways of involving volunteers in your work. When your board or staff are preparing to make a substantial decision for the group, think about how you can gather volunteer input and feedback on the ideas being discussed.

Most annual general meetings are not really events where anyone can have a substantial influence on the direction of a group. Consider inviting volunteers to a regular board planning meeting. Or use regular or issue-specific e-mail surveys as a quick and easy way to provide your volunteers with a voice in important

## **TIP**

### ***Chips and chat***

*"Each year before our busy season starts, we host a feedback session where we invite all our volunteers to our office for dinner and discussion. In the past, we have called these sessions "chips and chat" and "pizza and parley." These evenings are a chance for our volunteers to share what they think about how we are doing as an organization and where we should be moving to in the future. It gives them a sense of ownership and stake in the organization. It also lets them know that we as managers are interested and listening to what they have to say and that we care about their opinions."*

*Drew Gulyas, Assistant Camp Director, Camp Oochigeas*

*Story found at  
<http://energizeinc.com/ideas.html>*

## Food for Thought

### *Standards of practice:*

#### *Volunteer/employee relations*

- *Staff and volunteers are trained in developing positive, mutually beneficial relationships.*
- *Staff responsibilities regarding volunteers are clearly defined.*
- *Staff is involved in volunteer programming and activities.*
- *Staff is recognized for their excellence in working with volunteers.*
- *Volunteers are kept informed about important developments within the organization and are treated with respect as valued team members.*
- *Volunteers are encouraged to voice opinions and make suggestions when appropriate. Suggestions are taken into consideration when planning programs.*
- *Volunteers participate in staff meetings and events, when appropriate.*
- *When possible, the Administrator of Volunteer Resources attends orientations for new staff to provide information about volunteer resources and to review staff involvement with volunteers.*
- *In unionized settings, policies regarding volunteer involvement during labour disruptions are in place.*

*Administrators of Volunteer Resources BC, 2001, [www.avrbc.org](http://www.avrbc.org).*

decisions (even if they do not reply, you have given your volunteers an important opportunity that they will appreciate). You may also want to phone volunteers who will be directly affected by a decision to first get their input and response.

In the end, your decisions will be stronger and have more support from the different players in your group.

#### **Objective #3: Support staff in their work with volunteers.**

If you have paid staff, they are often the people supervising volunteers in your group. It is important that they get training and information on how to work effectively with volunteers.

For example, staff should know how to recognize the variety of reasons people choose to volunteer their time. They should also know how they can help ensure the volunteers' motivations are being met. Staff should also get tips and training in how to supervise and evaluate the volunteers they work with and how to effectively recognize volunteer efforts.

The next section of the guide talks more about how your group can recognize the contributions of volunteers. However, it is important to highlight here that staff who effectively work with volunteers should also be valued and recognized. It is a skill and practice that makes a world of difference in a volunteer's experience with your group, so do what you can to strengthen your staff's abilities to engage volunteers and reward them when they do well!

### *Conclusion*

Ensuring your volunteers feel like members of your team is an ongoing process with no clear beginning or end. Like any coach, your job is to keep people motivated as individuals, while also working to build strong relationships among the players. You don't want some players to feel second class, so be on the lookout for how you can balance the diversity of needs, expectations, and levels of involvement in your team.

One way to do this is to provide frequent recognition for everyone's contributions. For more tips on how to do this for your volunteers, see the next section, Best Practice 10: Recognizing Volunteer Contributions.

### *Action plans*

#### **Objective #1: Strengthen communication with your volunteers.**

Done	Action	Lead person	Deadline
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	List all the communications tools our group now uses. Ask volunteers and staff for their feedback and ideas on how useful these tools are for communicating with volunteers. What could we do better? What kind of information would volunteers like more or less of?		
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	Evaluate each tool based on the feedback. What do we have to change? Brainstorm new tools we could use. Identify the resources (money and people) we have to help with our communications.		
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	Make changes based on our evaluation and new ideas.		
--	---	--	--

	Other ideas:		
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**Objective #2: Give volunteers a voice in your day-to-day decisions.**

Done ✓

Action

Lead person

Deadline

Look at some of the key decisions we have made in the last 6-12 months. Identify all the ways volunteers have had input into our decisions.

Discuss with key people whether or not we have had adequate volunteer involvement in these decisions. How can we do better?

Brainstorm other ways we could get volunteer ideas, feedback, and active involvement in our decisions. Decide if we want to try using some new approaches.

Improve our current approaches and implement any new ideas.

Evaluate whether or not we have achieved an increase in the level of involvement of volunteers in our decisions.

Other ideas:

**Objective #3: Support staff in their work with volunteers.**

Done ✓	Action	Lead person	Deadline
	Host a discussion with all our staff about working with volunteers. Encourage a discussion of challenges and successes.		
	Provide introductory information on how to work effectively with volunteers (consider making a series of 10-15-minute presentations at staff meetings for a few months to cover key points of volunteer management).		
	Track any volunteer management training available in our community or online and ensure staff are provided with opportunities to get involved.		
	Develop an approach to recognizing staff who work well with our volunteers.		
	Track staff performance in working with volunteers. Get volunteer feedback.		
	Other ideas:		

### *Resources*

For a book full of tips, case studies, and feedback on working with volunteers, see "Supervising Volunteers: An Action Guide for Making Your Job Easier" by Jarene Frances Lee, 1999. Go to [www.energizeinc.com](http://www.energizeinc.com) to order.

Also look for the book "Building Staff/Volunteer Relations" by Ivan Scheier. Go to the bookstore at [www.energizeinc.com](http://www.energizeinc.com) (an electronic or hard copy can be ordered on this site).

The online article "Practical Leadership Concepts" talks about building teams among volunteer ambulance services. The PERFORM model provides team-building approaches relevant to all volunteers. Go to:  
[www.ruralhealthresources.com/EMSreview/Practical\\_Leadership\\_Concepts.htm](http://www.ruralhealthresources.com/EMSreview/Practical_Leadership_Concepts.htm)

For a short article on "How Do I Build a Stronger Staff/Volunteer Partnership" by Ivan Scheier, go to [www.genie.org](http://www.genie.org) and click on volunteer management in the FAQs menu.

### *The Canadian Code for Volunteer Involvement*

*Best Practice 9: Making Volunteers Feel They Belong is based on the national standard set out in the Canadian Code for Volunteer Involvement. If you would like to see where your group stands compared to this national standard, review the checklist below.*

#### *Code Organizational Standard 9*

Volunteers are welcomed and treated as valued and integral members of the organization's human resources.

- Staff is given training and recognition for working effectively with volunteers.
- Input from volunteers is welcomed and is solicited for the organization's planning and evaluation.
- Volunteers are encouraged to grow within the organization.
- Volunteers are included as equal members of the team.

## Best Practice 10: Recognizing Volunteer Contributions

### *A snapshot*

*Do you regularly show your volunteers you are grateful for their help?*

The best way to keep your volunteers is to frequently acknowledge their contributions to your group.

Formal types of recognition, such as awards or certificates, can help your group publicly demonstrate its gratitude to its volunteers.

Or you can be more informal and match the reward to the individual and achievement. You can send a card to thank a volunteer for just finishing a specific job. Don't wait for months to pass - if several volunteers are moving your office, buy them a pizza when they are done! Consider linking the reward to the individual. If your volunteer librarian needs to get some time away from books, consider giving him a free movie pass. Be creative, but make sure the type of recognition is important to the volunteers (ask them what they prefer!).

*If you answered **NO** to any of these questions, work through this section of the guide.*

*If you answered **YES** to all of the questions and feel comfortable that there is someone with the necessary skills and the clear responsibility for managing volunteers in your group, consider going on to the next section.*

*If you're unsure, review the checklist from the Canadian Code for Volunteer Involvement at the end of this section for suggestions on how your group could get better at this best practice.*

### *Assess your volunteer program performance*

(Circle "YES" or "NO" for each question)

Comments

Does your board or staff publicly acknowledge the efforts of volunteers in your group?

YES    NO

Do you feel that volunteers are frequently thanked for their contributions?

YES    NO

Would you say that your volunteers feel the type of recognition or thanks they receive is meaningful to them?

YES    NO

Do you think the recognition or thanks your volunteers receive is generally appropriate?

YES    NO



### *The longer story*

If you want to keep your volunteers, one of the best things you can do is to frequently recognize their contributions.

There are dozens and dozens of different ways you can do this! You can offer discounts on memberships, provide access to more training, invite people to social events, offer them a more challenging assignment, give them a gift certificate, take them out for coffee, send a personalized card, and so on, and so on!

Most importantly, the type of recognition you use should be meaningful to your volunteers. So ask the people that know most about what is meaningful - ask your volunteers.

Some forms of recognition are more formal and more public than others. For example, some groups have volunteer of the year awards or annual dinners for their volunteers. Some may have a regular column in their newsletter to profile a deserving volunteer.

If you give out volunteer awards or certificates, have clear criteria about how a volunteer becomes eligible for the reward and how the decisions are made. You want everyone to support the decision in the end, so make your reasons clear and follow pre-defined guidelines.

Formal recognition is also a good way for your group to publicly demonstrate its commitment to volunteers. People outside your group will realize the importance you place on volunteering and may be attracted to your organization as a result.

Informal forms of recognition tend to be more spontaneous and oriented to individuals and their achievements. If a volunteer has just finished a big job, you might want to send a thank-you card. If you do, be sure to describe his or her specific achievement and how it helped the group. For example, if people have just helped paint your office, don't just say "thanks." Tell them it has made it a much more enjoyable place to work and visit. If a volunteer has just completed a series of public education talks, thank her for increasing the profile of your group and the issues it is tackling. Provide specifics on what you liked about her efforts and the results.

And don't wait for months to pass; recognize volunteers soon after their achievements. So if several volunteers just finished moving your office, buy them a pizza! Also, be spontaneous and creative. If your office librarian has been cataloguing your whole library, she might appreciate some time away from books. Consider giving her a free movie pass to recognize her efforts!

## **Food for Thought**

*Powerful and meaningful recognition begins when we recognize the talents and desires of prospective volunteers and offer them the job that responds to the motivational needs they are looking to fill through volunteering. The remainder of meaningful recognition is the myriad of ways we formally and informally say, "I noticed," "Congratulations," and "Thank you."*

*How to Succeed With Volunteers-in-Parks: 60 Minute Module Series, Motivation Training Guide: National Parks Service, Volunteers-in-Parks Program,*  
[www.nps.gov/volunteers/modules.htm](http://www.nps.gov/volunteers/modules.htm)

## TIP

### ***Pat on the back***

*"Here's a very inexpensive recognition idea that should work for any type of organization. I simply drew around my hand on a plain piece of paper; printed 'Here's a pat on the back for \_\_\_\_\_' for all the hard work and effort you've made here at First UU" on it, then copied it on to colored paper (two on each page). The teens at our church helped me cut them out. We invited anyone who wished to give a public "pat on the back" to someone special to write their name on the handprint and tape it on a wall we had decorated. We had over 450 pats once we were finished. It was a very visible, but inexpensive way to recognize a large group of volunteers."*

*Karol Haynes, Volunteer Coordinator,  
First Unitarian Universalist Society of  
Syracuse, New York/USA.*

### ***Beach party***

*"We used a beach party theme for our annual meeting and decorated beach pails with the names of each outgoing board member, along with the agency's name. Then we filled them with bright, inexpensive sunglasses, candy bars, bottles of bubbles, and a water gun with a note that said, 'Thanks for all your hard work! Now it's time to play!'"*

*Katherine Scoggins, Executive  
Director, Shepherd Center of  
Kingsport TN, USA*

*Stories found at*

*<http://energizeinc.com/ideas.html>*

Recognition isn't about the item the volunteer receives - it's really about the appreciation and respect that comes with it. Be sure to show it!

### ***Action Planning***

#### **Objective #1: Strengthen your recognition activities.**

Most groups have delivered some type of recognition for their volunteers, from annual celebrations, to social events, to daily thank you's.

Formal forms of recognition, such as certificates, awards, or other ceremonies, are usually the most visible forms of recognition. People who volunteer because they are achievement-motivated particularly like this type of public recognition of their efforts. They appreciate the public demonstration of how much you value their work. It also helps your group highlight the importance it places on volunteers.

Other people who are more motivated by the social connections to others in the group are less inclined to want to be singled out. They likely prefer recognition efforts such as potluck dinners, opportunities to work more with others, or hats and T-shirts that help identify them as part of your group.

People who like to have an impact on other people or on a cause are more likely to appreciate recognition that gives them opportunities to have an influence. They may appreciate promotions to more difficult tasks or opportunities to teach others in your group. They might like having their achievements quantified and noted in your newsletter (e.g., highlight who sold the greatest number of raffle tickets or recruited the most members).

As you can see, it is important to provide a range of recognition approaches to appeal to the range of people volunteering for your group. It also helps if you know your volunteers well. If you have gone through an application and interview process, and performance evaluations, you have likely learned some valuable information about what makes your volunteers tick. Be sure to track this!

It is critical that recognition is done on an ongoing basis, not just once or twice a year. If you have supervisors working with your volunteers, they should be providing regular feedback to your volunteers (see Best Practice 8: Providing Supervising). The verbal "pats on the back" that should come from supervisors are incredibly important. People supervising volunteers can also make use of simple tools such as writing thank-you cards, naming the coffee pot after a volunteer who "pours" his heart into his work, handing out candies, or calling a radio station to dedicate a rock song to a volunteer who rocks.

Another important tip about recognition is to only give it when it is truly deserved. Otherwise, people will lose respect for the person giving the recognition and the person receiving it may end up feeling pretty uncomfortable.

Recognition is one of the most fun and creative parts of volunteer management! Involve others in brainstorming the wild and wacky. Be sure to involve some volunteers in this process; you will quickly identify which activities you want to avoid by their groans or comments such as, "don't you dare do that to me!"

### *Conclusion*

Keeping your volunteers is a huge challenge in any community, particularly in small ones where people are asked to wear many hats. The more rewarded and appreciated they feel, the more likely they are to stay.

If you have successfully implemented the last four Best Practices, you have done a great job at creating an environment that makes volunteers feel that they belong. They will want to stay and keep contributing! Congratulations!

## **TIP**

*Tie recognition to motivation to tailor meaningful thank-you's for your volunteers*

*The NSGVP makes it clear that some people volunteer for job readiness skills, some are motivated by a desire to learn, and others do it because they believe in the cause. Take this into account when it comes time to recognize your volunteers.*

*If volunteers want to acquire job-related skills, supply them with a reference letter that outlines their skills. If volunteers are motivated by a desire for more knowledge, give them an opportunity to attend a conference or workshop. Plan a thank-you tea or dinner for cause-motivated volunteers.*

*Hall, M., L. McKeown, et al. (2001). Caring Canadians, Involved Canadians: Highlights from the 2000 National Survey of Giving, Volunteering, and Participating. Ottawa, Minister of Industry: 83.*

Food for Thought

"Recognition is more intangible than tangible; it is best built on a relationship of respect and appreciation that is transmitted in everyday language and action."

Vineyard, Sue (1996) Stop Managing Volunteers! Illinois: Heritage Arts Publishing.

Action Plans

Objective #1: Strengthen your recognition activities.

Done ✓	Action	Lead person	Deadline
	List all the formal and informal recognition activities we do now. Identify any major gaps. Identify any that help us publicly acknowledge our volunteers.		
	Identify the different motivations people have for volunteering with us (e.g., to gain job skills, to meet people, to work for the cause, to learn something new, to make a difference).		
	Research other ideas for recognition (e.g., from other groups in the community, books, Internet sites).		
	Share information on other ideas with key people and together brainstorm a list of formal and a list of informal recognition activities that we could do for each main volunteer motivation area. (Involve a number of volunteers to make sure the list is meaningful.) Have people prioritize the most important ones.		
	Identify the money or other resources we will need for the recognition activities we want to use. Get a budget approved if necessary.		
	Prepare any materials or get any donations we might need to help develop our recognition activities.		
	Ensure supervisors of volunteers have the range of tools they need to recognize their volunteers on an ongoing basis.		
	Make a note of any feedback we get from volunteers on recognition. Keep track of new ideas.		
	Based on feedback and new ideas, review our recognition program, and make changes as needed.		
	Other ideas:		

## *Resources*

For many great recognition ideas from volunteer managers, check out <http://energizeinc.com/ideas.html>. You can also visit [www.volunteer.ca](http://www.volunteer.ca) for more recognition ideas.

You can access some great electronic books on recognition - or order hard copies - through the bookstore at [www.energizeinc.com](http://www.energizeinc.com).

Search the archives of the online newsletter, "Volunteer Today" for tips and information on recognition. Go to [www.volunteertoday.com](http://www.volunteertoday.com).

## *The Canadian Code for Volunteer Involvement*

*Best Practice 10: Recognizing Volunteer Contributions is based on the national standard set out in the Canadian Code for Volunteer Involvement. If you would like to see where your group stands compared to this national standard, review the checklist below.*

### *Code Organizational Standard 10*

The contributions of volunteers are regularly acknowledged with formal and informal recognition methods.

- Senior management publicly acknowledges the efforts of volunteers.
- Formal methods of recognition are delivered consistently.
- Informal methods of recognition are delivered in a timely and appropriate manner.

