

## A Standards Framework for Managing Volunteers

Trevor Boutall and Sarah Pollet

### BACKGROUND

“Volunteer managers are key players on the volunteering stage. It is they who recruit, train and support the volunteers, and enable them to deliver myriad services to countless thousands of people. Less tangibly, they can create the environment in which volunteering can flourish and expand.”<sup>1</sup>

There are approximately 141,000 registered voluntary and community organisations in the UK, with over 3 million volunteer staff contributing in excess of 90 million hours of time each year<sup>2</sup>.

Since the appointment of the first voluntary services organisers and co-ordinators in the early 1960s, the management of volunteers has become increasingly formalised, with over 80% of UK volunteer-involving organisations having a volunteer manager<sup>3</sup>.

However, the 1997 National Survey of Volunteering found that 71% of respondents agreed that “things could be better organised,” and a third of respondents “sometimes got bored or lost interest.”<sup>4</sup> Volunteer managers clearly have the leverage to use the resources of volunteer staff more effectively, to help volunteers meet their individual motivations for volunteering, and to retain the services of volunteers at a time when high levels of employment and government schemes like the New Deal are making it more difficult to recruit and retain volunteers.

### The Voluntary Sector National Training

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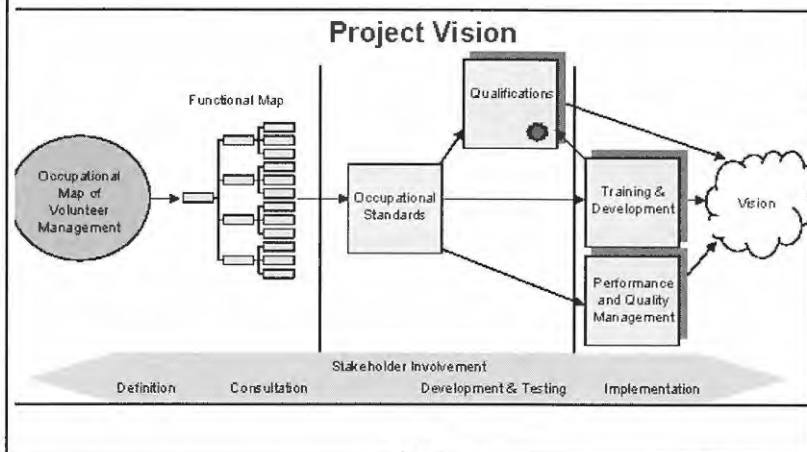
Organisation (VSNTO), the organisation responsible for ensuring the availability of appropriate training and qualifications for all those who work in the voluntary sector in the four nations of the UK, identified that three quarters of voluntary organisations needed to improve their management skills<sup>5</sup>. VSNTO has therefore made the development of National Occupational Standards<sup>6</sup> and relevant qualifications for those who manage volunteers one of its three priority areas for development (together with fundraising and trustees).

In January 2002, VSNTO appointed The Management Standards Consultancy to research an occupational and functional map for the recruitment and management of volunteers, and to develop appropriate National Occupational Standards and qualifications (see Figure 1). Using a wide range of research techniques (desk and Internet research, technical working groups, focus groups, structured interviews, and postal/e-mail questionnaires), our first job was to identify the nature of management in the voluntary sector and define the role and functions of volunteer managers.

### The Distinctive Nature of Management in the Voluntary Sector

Although the voluntary sector is so diverse, it is possible to make some broad generalisations about what makes the sector distinctive

**Figure 1:  
The Standards Development Process**



and provides common and particular challenges to those managing volunteers.

Voluntary organisations are organisations with a very strong sense of purpose. People are working for the organisation primarily because they share its values, believe strongly in its mission, and want to help the organisation to achieve it. External pressures, particularly the conditions associated with contract funding, may sometimes be in conflict with the organisation's values and purpose, and it is a challenge for management to protect its ethical position, or at least to strike a balance, in order to serve its client group without compromising its integrity.

One of the values of voluntary organisations tends to be a profound respect for diversity; volunteers often volunteer their services to the organisation where they are accepted for who they are, and feel comfortable in an environment where unorthodox or idiosyncratic behaviour is accepted without comment. Another value consistently found in voluntary organisations is user-focused service, and a conscious effort to involve users, as well as staff, volunteers, funders, and other stakeholders, in decision-making processes.

People working for voluntary organisations tend to be personally highly motivated to work and claim that they get a high level of job satisfaction. However, in a sector where most workers are volunteers and the others are comparatively low paid, motivation is the key tool used to enable people to perform effectively and deliver results. Managers need

to spend time helping volunteers understand and articulate their motivations, and ensure the work that they are doing meets their expectations. Because there is no contract of employment with volunteers (although there may well be other forms of agreement), they can quickly "vote with their feet" if dissatisfied.

Many voluntary organisations view volun-

teers as customers with needs to be met. They make conscious efforts to understand volunteers' needs and what they hope to experience or gain from working with the organisation. Volunteer managers then try to find suitable placements, either within their own or other organisations, to meet the volunteers' expectations and make effective use of the skills and competence these voluntary resources can offer. This is significantly different from the recruitment of paid staff for an organisation, where the key priority is to fill a vacancy with a "qualified" applicant, and little thought may be given to the opportunities that may be available for other applicants which are not suited to the advertised post.

Organisations with successful volunteer policies also have systems and practices which take full account of the nature of volunteering. Volunteers may be giving a few hours, days, or weeks of their time to the cause and clients of the organisation. They do not want to spend time on bureaucratic form-filling, training, and meetings unrelated to their purpose for volunteering. However, their credentials do need to be checked (quite rigorously, sometimes, particularly when dealing with vulnerable groups), they do need to be properly inducted into the organisation, its procedures and health and safety requirements, and they do need to be made to feel part of the organisation's decision-making process, not an expendable afterthought. This requires creative thinking to get the right balance and flexible scheduling so that volunteers can be

effectively involved in the decisions affecting the organisation.

Working with volunteers can be more risky than working with paid staff in a number of ways. The same legal and professional safeguards are not in place (apart from health and safety legislation). There is no contract of employment, and so there is limited legal redress in the event of a gross breach of conduct or other misdemeanour by the volunteer, or if the volunteer leaves without notice, seriously jeopardising their clients. Volunteers may not have the same professional qualifications or work to the same professional codes of ethics as their paid colleagues. To minimise the exposure, volunteer managers need to ensure that volunteering agreements, codes of practice, and custom-made disciplinary and grievance procedures are in place.

In the voluntary sector, partnership working, as opposed to competitive activity, is the norm. This is partly a function of the sectors in which voluntary organisations work, (such as health or social care with the need to provide integrated services for clients), partly a funding imperative (not having enough cash to do everything), and partly a result of Government policy promoting partnership working, particularly at local community level.

While there are as many organisational structures as there are organisations in the voluntary sector, it is fair to say that, apart from the very large charities, they have flat structures, i.e. managers have a very broad span of control, a wide variety of responsibilities to meet, and little opportunity for career progression within the same organisation. All these factors provide challenges to volunteer managers, as does the need to work with management committees, most of the members of which will be volunteers themselves, often with a limited grasp of the day-to-day exigencies of delivering services.

## THE ROLE AND FUNCTIONS OF VOLUNTEER MANAGERS

Since the first appointment of volunteer co-ordinators in the UK in the 1960s, the role of volunteer management has increased

dramatically due to the increase in numbers of volunteers, the greater complexity of the functions volunteers carry out, the heavier demands of legislation, and the greater accountability demanded by project funders. The role now includes formalised recruitment, selection, vetting and induction procedures, appropriate deployment of volunteers to tasks, and the provision of support, training and development and mentoring to volunteers on personal and career matters.

Of the 550,000 employees working for general charities in the UK, approximately 112,000 (20%) are in management positions<sup>7</sup>. With 3 million volunteers this gives a ratio of volunteers to managers of 27:1, but only a proportion of these are volunteer managers. It is not unusual to find that one volunteer manager is responsible for well over 100 volunteers. When the volunteer-involving organisations in the public and private sectors are also taken into account, the number of *paid* volunteer managers in the UK is estimated to be in excess of 100,000. There are no statistics to indicate how many *unpaid* volunteer managers there are, but the number could easily double to nearly a quarter of a million. However, not all of these will adopt the same formal management techniques.

In a small organisation, one person, perhaps a volunteer herself or himself, may run the whole show, getting the funding, recruiting and managing the volunteers, supervising service delivery, and keeping the accounts. As a delegate at one of the focus groups said: "In a small agency, the volunteer manager might do anything from changing the spark plugs on the van to making a lottery bid application, then meeting the Queen...and all in one day." The time that can be spent on formal volunteer management will be minimal.

In a larger organisation, the volunteer manager's role may be more closely defined, and indeed there may be layers of management with voluntary "volunteer leaders" working closely with a small team, reporting to a volunteer manager who is responsible for recruitment, resourcing and rostering, who in turn reports to a regional manager or senior manager with more of a strategic responsibility.

ty for volunteering. Clearer job descriptions and performance management systems become evident as the organisations become larger.

Figure 2 was developed as a means of capturing the variety of roles and responsibilities different volunteer managers have to ensure these were all taken into account when developing the standards.

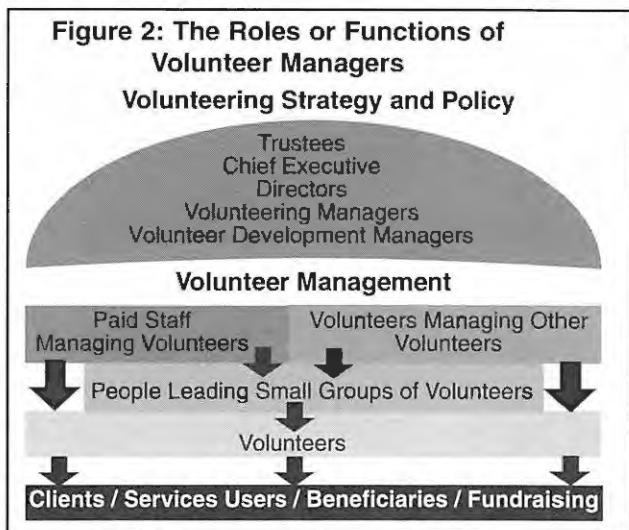


Figure 2 portrays organisations delivering on their mission — delivering services to clients and other beneficiaries — with the help of volunteers. The volunteer contribution may be co-ordinated by unpaid volunteer leaders, who in turn are managed by paid or unpaid volunteer managers. Alternatively, the volunteers may be managed directly by paid or unpaid volunteer managers. All these activities are referred to as “volunteer management.”

However, organisations also have responsibilities for determining volunteering strategy (“Why should we be using volunteers to help deliver our corporate objectives?”) and volunteering policy (“How should we be using volunteers?”). In small and medium-sized organisations, these may be carried out by the same individuals who are directly managing volunteers, or they may be carried out by others such as trustees, chief executives, directors, or other senior managers with titles such as Volunteering Manager or Volunteer Development Manager.

Our project covered all individuals, paid or unpaid, who as a routine part of their work

regularly recruit, select, and support volunteers. Individual roles vary significantly and may include strategic and policy making functions as well as service delivery functions.

One respondent to the postal consultation succinctly expressed her experience of different volunteer manager roles: “The role of volunteer co-coordinator/manager varies from organisation to organisation. In [a large national children’s charity] I take no part in strategic development as it is a hierarchical culture. However, whilst working in [a smaller women’s action group] as a volunteer co-ordinator the opposite was the case. As part of the collective system, I had an equal input into all levels of planning and reviewing through quite formal processes.”

In order to tease out of this diversity the recognisable functions of volunteer managers wherever they work, we used the functional analysis methodology. This starts with gaining consensus about the Key Purpose of Volunteer Management, which, after a number of iterations, was agreed as:

*To enable volunteers to make their full contribution to the organisation’s goals and provide opportunities for them to develop related skills and interests.*

To complete the functional analysis, we consistently asked the question: “What has to happen to enable volunteers to make their full contribution to the organisation’s goals and provide opportunities for them to develop related skills and interests?” This led to the identification of six Key Areas of activity.

Volunteer managers:

- A. Develop and evaluate strategies and policies that support volunteering.
- B. Promote volunteering.
- C. Recruit and induct volunteers.
- D. Manage and develop volunteers.
- E. Manage yourself, your relationships and your responsibilities.
- F. Provide support to volunteering.

For each of these Key Areas, the question was asked: *What has to happen for this outcome to be achieved?* This led to the identification of 39 functions or activities — a “Func-

tional Map” of Managing Volunteers<sup>8</sup> — for which Units of National Occupational Standards would need to be developed.

### National Occupational Standards for Managing Volunteers

The National Occupational Standards for Managing Volunteers describe the standards of performance volunteer managers should achieve when they are carrying out their work and the knowledge and skills they need to perform competently.

We developed these National Occupational Standards through focus groups with volunteer managers and their bosses, helping them to articulate what competent performance of each function/activity looks like. With such a

diverse sector, we found a rich variety of approaches which we tried to encapsulate within draft Units of National Occupational Standards. These draft Units were piloted by individual managers to test whether they accurately described the performance expected of them and the knowledge and skills required. A technical working group of volunteer managers, trainers, and representatives from umbrella organisations helped us to resolve areas of conflicting feedback from the pilot and develop a standard form of expression for the Units.

Each Unit comprises:

- Unit Title
- Introduction — describing what the unit is about, who it is for, how it relates to

**Figure 3: An Example of a Unit of National Occupational Standards**

#### **B1 CHAMPION VOLUNTEERING WITHIN YOUR ORGANISATION**

##### **Introduction**

As a volunteer manager, you may well find that it falls to you to act as the “champion” for volunteering within your organisation. To do this effectively, you need to help key people such as trustees and committee members, managers, and employee representatives understand the role of volunteers and the contribution they can make to achieving your organisation’s goals. You also need to help other members of your organisation, particularly staff and other volunteers, understand their responsibility to support volunteers and how they can do this effectively. You may also need to take very practical steps to try to improve your organisation’s structures, policies, and practices if these are preventing volunteers from making their full contribution.

**To champion volunteering within your organisation, you need to:**

- B1.1 Promote volunteering to key people in your organisation
- B1.2 Help members of your organisation support volunteers
- B1.3 Identify and reduce barriers to volunteering in your organisation.

This unit links closely with unit B2 Involve, motivate, and retain volunteers which is about promoting volunteering to the volunteers themselves and with unit B3 Develop relationships with individuals and organisations that can support your volunteering strategy which covers working with external organisations that can support your volunteering work.

This is an optional unit in Volunteer Management NVQs and SVQs at level 4.

##### **PERFORMANCE STANDARDS**

#### **B1.1 Promote volunteering to key people in your organisation**

To perform to the standard you need to:

- identify the role of volunteers within your organisation’s strategies and plans
- communicate the role of volunteers and the contribution they can make to the organisation’s goals to key people in your organisation in ways that gain their understanding, enthusiasm, and support
- identify, quantify, and communicate the contribution that volunteers make to your organisation’s goals.

#### **B1.2 Help members of your organisation support volunteers**

To perform to the standard you need to:

- help members of your organisation
- understand their attitudes to volunteers and the reasons for these attitudes
- think creatively about how volunteers can make effective contributions
- adopt attitudes that support volunteers in making effective contributions
- communicate clearly to members of your organisation the roles and responsibilities of volunteers and their roles and responsibilities in supporting volunteers
- provide appropriate opportunities for members of your organisation to develop the competences they

need to support volunteers effectively

- encourage behaviour that helps and discourage behaviour that hinders volunteers in making effective contributions.

### **B1.3 Identify and reduce barriers to volunteering in your organisation**

To perform to the standard you need to:

- monitor the impact of your organisation's structures, policies, and practices on volunteering
- monitor the level of support volunteers receive from members of your organisation
- analyse monitoring information to identify and prioritise any issues that prevent volunteers from making their full contribution
- work with relevant people to identify and recommend improvements to your organisation's structures, policies, or practices or the support volunteers receive to ensure volunteers are able to make their full contribution.

## **KNOWLEDGE, UNDERSTANDING, AND SKILLS**

To perform to the standard, you need the following knowledge, understanding, and skills.

### **Analytical techniques**

- how to quantify the contribution volunteers make
- how to assess the impact of policies and practices
- how to analyse information
- how to identify priorities

### **Communication**

- how to communicate complex issues in ways that gain understanding, enthusiasm, and support

### **Involvement and motivation**

- the importance of involving relevant people in activities and how to do so
- methods of encouraging helpful and discouraging unhelpful behaviour, how to select appropriate methods or combinations of methods, and how to use them effectively

### **Learning and development**

- methods of helping people understand their attitudes to volunteers and adopt attitudes that support volunteering and how to select and use appropriate methods
- methods of helping people think creatively about how volunteers can make effective contributions and how to select and use appropriate methods
- the competences people need to be able to work effectively with volunteers
- the range of opportunities for developing competences to work effectively with volunteers and how to select appropriate opportunities

### **Monitoring and evaluation**

- methods of monitoring and evaluating volunteers' contributions to organisational goals and how to select and use appropriate techniques

### **Organisational context**

- your organisation's goals
- your organisation's strategies and plans and the specific roles and contributions of volunteers within them
- key people in your organisation — e.g. trustees and committee members, managers, employee representatives, and others — who can influence and support volunteering
- members of your organisation — e.g. trustees and committee members, managers, staff, volunteers and supporters — who can help volunteers make effective contributions to the organisation's goals
- your organisation's structures, policies, and practices

## **VOLUNTEERING**

- the variety of different roles volunteers can play and the different ways they can contribute to organisational goals
- your organisation's policies and practices relating specifically to volunteering
- the different ways in which organisational structures, policies, and practices can help or hinder volunteers
- the importance of clearly stating people's roles and responsibilities in supporting volunteers and the competences they need and how to do so.

other Units, and where it fits in the qualifications framework

- Performance Standards — two or more Elements, the main activities within the Unit, each with a series of Performance Criteria, which show what is required of volunteer managers when they are carrying out the activity
- Knowledge, Understanding, and Skills — listing what volunteer managers need to know and understand and the skills they need to possess to be effective in the Unit.

Figure 3 is an example of a Unit, B1 Champion volunteering within your organisation.

### USING THE NATIONAL OCCUPATIONAL STANDARDS

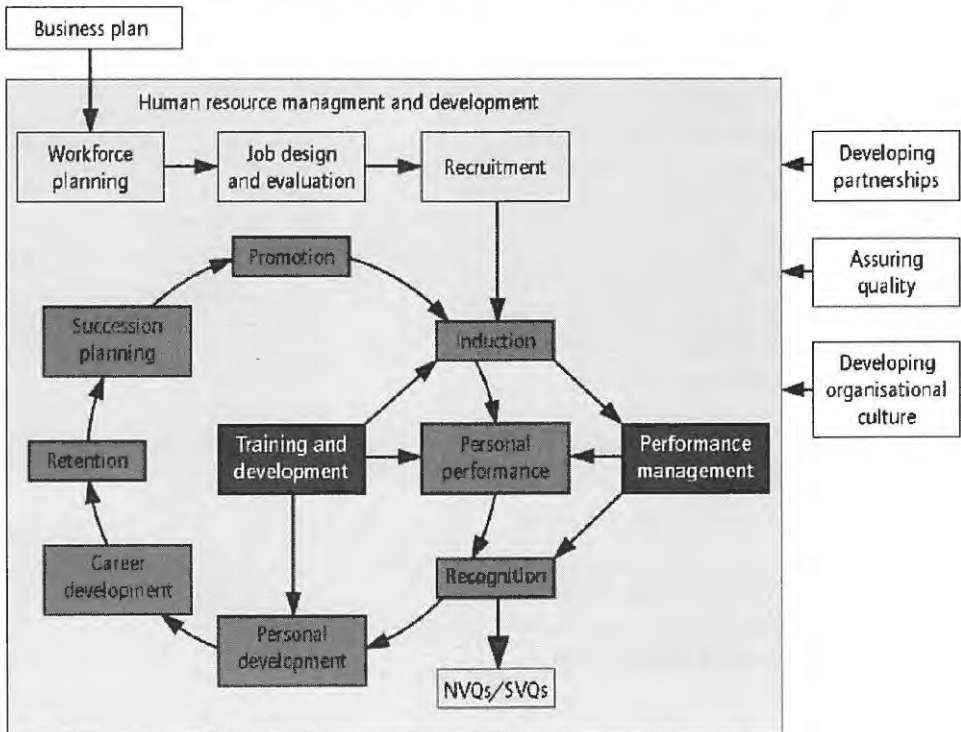
The National Occupational Standards have now been approved by the Project Steering Group and will shortly be accredited by the Department of Education and Skills for use within the National Qualifications Framework. Work is already underway with the Institute of Leadership and Management to

award National Vocational Qualifications and other certificates and diplomas to volunteer managers who can demonstrate they consistently perform to the standards.

Qualifications provide an objective measure of volunteer managers' performance, but they are only one way in which we intend to use National Occupational Standards to improve performance, enhance the professionalism and status of volunteer managers, and help them meet their key purpose to enable volunteers to make their full contribution to the organisation's goals and provide opportunities for them to develop related skills and interests. Now that the preparatory work has been completed, we plan to use the National Occupational Standards for the Recruitment and Management of Volunteers throughout the Human Resource Management and Development cycle, as shown in Figure 4, and as well as to assure quality, develop organisational culture, and improve partnership working throughout the voluntary sector and in our relationships with the public and private sectors.

This article discusses work undertaken by

**Figure 4: The Uses of National Occupational Standards**



(Figure courtesy of the Custodial Care National Training Organisation<sup>9</sup>)

The Management Standards Consultancy for the UK's Voluntary Sector National Training Organisation during 2002 and 2003. For full details of this work, refer to *A Standards Framework for Managing Volunteers: A Report to the Voluntary Sector National Training Organisation, The Management Standards Consultancy, 2002* and *National Occupational Standards for Managing Volunteers, Voluntary Sector National Training Organisation, 2003*, both downloadable from [www.voluntarysectorskills.org.uk](http://www.voluntarysectorskills.org.uk).

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## ENDNOTES

<sup>1</sup> *Delivering the Goods: The work and future direction of volunteer management*, Pat Gay, The National Centre for Volunteering, 2000

<sup>2</sup> *Delivering the Goods: The work and future direction of volunteer management*, Pat Gay, The National Centre for Volunteering, 2000

<sup>3</sup> *UK Voluntary Sector Almanac 2002*, National Council for Voluntary Organisations, 2002

<sup>4</sup> *Delivering the Goods: The work and future direction of volunteer management*, Pat Gay, The National Centre for Volunteering, 2000

<sup>5</sup> *Skills Matter: A skills foresight for the voluntary sector across England, Scotland and Wales*, VSNT0, 2000

<sup>6</sup> National Occupational Standards (NOS) describe the standard of performance expected of workers and the knowledge they need to perform to the standard. NOS are available for over 90% of workers in the UK. They form the basis of National Vocational Qualifications (NVQs) that attest to the competence of a worker in a particular role. For further information see [www.themsc.org](http://www.themsc.org).

<sup>7</sup> *UK Voluntary Sector Almanac 2002*, National Council for Voluntary Organisations, 2002

<sup>8</sup> *Functional Map of Managing Volunteers*, The Management Standards Consultancy for the Voluntary Sector National Training Organisation, 2003

<sup>9</sup> Figure taken from *National Occupational Standards in the Custodial Care Sector*, Custodial Care National Training Organisation, 2001