

Volunteer Management

A RESOURCE MANUAL
The Volunteer Centre of South Australia



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A RESOURCE MANUAL

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*The Lodge
Canberra*

13 January 1988

There are one and a half million volunteers in Australia contributing to all spheres of life. They comprise a vast resource that can easily be overlooked and whose value is often underestimated.

The production of "Volunteer Management" by the Volunteer Centre of South Australia Inc., specifically for volunteers, is an excellent way of drawing community attention to their extensive and vital role. More importantly, the launching of this resource manual is indicative of a more realistic approach to the management of volunteer effort. If volunteers are to meet their goals, sound personnel and organisational management is essential.

The manual's sympathetic and professional approach to the task of managing volunteers will be a great support to thousands of volunteers, not only in South Australia, but also, I am confident, right round Australia. The understanding and advice in "Volunteer Management" will, I believe, enable volunteer managers to bring closer together the goals of the individual volunteer and those of the group, society or organisation to which the volunteers belong.

Volunteers have been pioneers in harnessing the creativity and enthusiasm of people to tackle new and difficult tasks. The key to success in achieving results, however, is the combining of this individual enthusiasm and vision with the discipline, realism and goodwill required to work together as a team. This, as the manual points out, is the function of the volunteer manager and it is on the effectiveness of the volunteer team that the manager's success itself is assessed.

"Volunteer Management" represents a further step in a growing understanding by the volunteer movement of its own work and place in society. This understanding has been greatly enhanced in recent years by the establishment of volunteer centres in Australia and the exchange of views with volunteers from other countries.

In this Bicentennial year, as we reflect on the contribution of Australian volunteers, we can celebrate the growing strength and maturity of volunteering in Australia. I commend "Volunteer Management" to all volunteers and to all those who wish to gain a greater appreciation of volunteering in Australia and its potential to help Australia meet the challenges ahead.

Hazel Hawke

FOREWORD

This valuable Manual is a joint venture by the Volunteer Centre of South Australia Inc. and its supporters. It is based on first-hand knowledge. As well as working with volunteers, the authors have had extensive personal experience as volunteers.

The Manual will fill a gap in Australian literature on volunteering by bringing together both theory and practice. The whole spectrum of volunteering — its history, its present state and future trends — is considered.

Definitions of 'volunteer' and 'volunteering' are discussed, and the changing identity of the volunteer and the diversity of volunteer activities are examined.

The Manual's especial emphasis is on volunteer management, and in particular, the role of the volunteer manager. This position is comparatively new and the increasing number of appointments is to be welcomed. However, the role this position could, and should, play is often underestimated or misunderstood. This manual will be a valuable resource for organisations wishing to integrate volunteer management in overall planning.

People who as volunteers contribute a great deal of life experience, energy and commitment to our community, are our greatest resource. We cannot afford to overlook this resource at a time when we are identifying more clearly the needs of disadvantaged groups and when resources are scarce.

The Government of South Australia led the way in recognising the value of volunteers by including provision for 'Volunteer Community Aides' in the 1972 Community Welfare Act. It provides grants to volunteer bodies and to a wide range of community organisations which depend for service provision on the labour of volunteers.

Volunteers are a great resource, not only in the fields of health and welfare, but across the whole range of community resources. Volunteers give of their energy, time and commitment and so skilled management is essential, not only to deploy their contribution to best advantage but to look after the volunteers themselves.

I am pleased to commend this Manual to all who have an interest in the subject.



Dr. John Cornwall
Minister of Health and Welfare
South Australia
28 January 1988

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Many people have assisted in the production of the manual, those working within the Volunteer Centre, as well as friends of the Centre in South Australia and interstate. Volunteer managers in the field have been consulted and involved as 'guinea pigs' in workshops using material from the manual. We would also like to thank the seven volunteer managers who responded to the questions included in Chapter 18.

There are some among the many whom we would like to mention in particular for their help as critics, for suggesting topics and material, providing moral support and undertaking practical tasks. Of great assistance were Pat Hunt of the Department for Community Welfare, Valerie Williams of the Unley City Council, Ivan Mifsud of Minda Inc., Mary Lane of the Australian Red Cross Society, Ann Callahan of the Volunteer Centre of Victoria, Anthea Vreugdenhil, Beth Duncan, Sue Green and Geoffrey Tregenza. The State Volunteer Centres of New South Wales and Victoria have also been helpful in providing material. The manual has been largely a Volunteer Centre effort, involving both volunteers and paid staff. Special mention is made of our Executive Director, Marjon Martin, Training Officer, Georgia Anastasopoulos, Di Chessell of the Committee of Management and those who stood for hours photocopying, particularly Lorna Jolly.

In addition we wish to thank Joyce Morley, our long-suffering typist and consultant on layout, Margaret Kenny our illustrator, and Rosalie Day our editorial assistant.

Lastly, our thanks go to all those volunteers out there, who have been the inspiration for this manual.

Margaret Curtis and Joy Noble

INTRODUCTION

Volunteer effort in Australia represents a huge reservoir of energy, expertise, goodwill and commitment. One in every four persons in Australia is involved in volunteering, working in such diverse areas as the arts, sport, health, welfare, education, youth work, community development, environment, heritage and emergency services. Without this huge reservoir of effort, society as we know it today would be radically changed and diminished.

Such a force has wide significance and impact, yet until recently its enormous social, political and economic implications have been largely ignored.

Many organisations are now appointing a person to oversee the involvement of volunteers. The appointee may be on a full-time or part-time paid basis, or a volunteer. Often the job is initially performed by a volunteer on an occasional basis; in some situations this is adequate even in the long term. The title of the position may vary, particularly if the supervision of volunteer involvement includes other specific responsibilities. However, as a large element of management is involved, the title 'volunteer manager' has been used throughout this manual.

The manual should not be used as an inflexible set of solutions for all situations. Rather it presents suggestions as a starting point for action, and in addition ideas to stimulate further thought and debate.

WHO THE MANUAL IS FOR

The manual is directed primarily at volunteer managers. However, it also has relevance for:

- community leaders and policy makers
- academics, teachers and students
- politicians
- volunteers and potential volunteers.

WHY THE MANUAL HAS BEEN WRITTEN

The position of volunteer manager is a relatively new career. Over the last ten years a number of articles and books have been written on volunteering, particularly in the U.S.A. and U.K. Most of this literature concentrates either on volunteer philosophy and policy or volunteer practices. The manual addresses the urgent need to bring these two aspects together.

A recurring theme of this manual is that volunteer management requires the linking of philosophy with effective practice. The goal is for volunteers to be free to contribute as pacesetters and service providers which will lead to a dynamic and integrated society.

Volunteer managers in South Australia have been clamouring for training since the Volunteer Centre opened its doors five years ago. From tentative beginnings, the Centre

believes it has built up a degree of expertise which it hopes to share through the publication of this manual and subsequent supplements which will focus on specific areas. Experience has been gained through the following: day-to-day involvement with volunteers, interviewing thousands of potential volunteers, conducting training courses and consultations, extensive reading, discussions with practitioners in the field, and attendance at international and national conferences on volunteer effort.

It is hoped that the manual will help to fill a gap in the literature on volunteering within Australia, and that it will update, inform and enthuse those people who are directly or indirectly involved in volunteer effort.

HOW TO USE THIS MANUAL

- By skimming through and gaining a quick grasp of the focus of each chapter.
- Selecting material for detailed reading.
- Completing the exercises, where appropriate.
- Further reading (see section under this heading).

MANUAL CONTENT

Section I presents an overview. The extent, value and roots of volunteer activity in Australia are explored. The on-going changes in the field of volunteering and in the identity of the volunteer are noted. Some current issues which relate to volunteering are discussed. These various aspects are drawn together in order to promote a balanced picture of volunteering in Australia.

Section II addresses the role, the responsibilities, the attributes and the skills of the volunteer manager and the place the position occupies within the agency.

Section III discusses a philosophy of volunteering, the development of policies, planning and management practices, as well as review, evaluation and renewal. A number of management strategies and skills are outlined.

Section IV. This section covers the day-to-day activities of volunteer managers. The harmonious working together of volunteer and paid staff, recruiting, interviewing, deploying, orientating, training, supervising, supporting and providing opportunities for change and development of volunteers are discussed.

The conclusion lists the responses to questions put to a number of volunteer managers. Their joys, frustrations and dreams reflect the theme and challenge of the manual.

**SECTION I:
VOLUNTEERING — THE BIG PICTURE**

VOLUNTEERING — THE BIG PICTURE

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1

The Extent and Value of Volunteering

It is one of the most beautiful compensations in life that no man can sincerely try to help another without helping himself.

RALPH WALDO EMERSON

Most people see things as they are and ask why. He saw things as they might be and asked why not?

EDWARD KENNEDY

(referring to his brother, John F. Kennedy)

At a conservative estimate one in every four people in Australia regard themselves as volunteers. They work in areas ranging from the arts, youth work, sport, health, welfare, education, community development, environment and heritage, to emergency services. It is time leaders in the social, economic and political areas, and the public at large, recognised the magnitude and significance of volunteering in the life of Australia. Even the managers of organisations which utilise volunteers frequently do not adequately recognise the value of volunteers in service provision and advocacy.

Until recently volunteering has largely been an invisible and silent force with a low profile. The situation however is changing. Volunteering is now being seen as an activity which enriches the life of the volunteer, extends and enhances services, and improves the quality of community life. In order to present a potent yet balanced picture of the volunteering scene, an appreciation of its extent and value is necessary.

DEFINITION OF VOLUNTEERING

Most people, asked to define volunteering today, would agree on three main points: that it is concerned with activities which people undertake

- of their own free will
- without payment (other than out-of-pocket expenses), and
- for the benefit of the community, other than family and friends.

(from *The Politics of Volunteering*, Jos Sheard)¹

The term 'volunteer' is sometimes restricted to a person who volunteers within an organisation. However, volunteers also:

- work in self-help groups, e.g., Multiple Sclerosis Society
- promote causes, e.g. nuclear disarmament, conservation
- provide neighbourly assistance to people, e.g. transporting aged neighbour to doctor, baby-sitting, mowing a lawn.

While people's motives vary considerably, three intrinsic elements can be recognised. Firstly that volunteers *choose* to engage in an activity. Secondly, that while some volunteers may be looking for paid work, their volunteer work is clearly *not about monetary payment*. Thirdly, their involvement *adds a value to the community*.

The five broad services areas are

- social action and advocacy
- service provision
- policy and management
- self-help/mutual help
- neighbourly assistance.

TODAY'S CLIMATE

The time is ripe for a burgeoning of volunteer activity with a widely educated, longer-living, more leisured society and a world where technology facilitates our endeavours. Many people, both inside and outside organisations, are realising that volunteers are a resource with great potential. This potential can be realised when the volunteer contribution is comprehended and managed in ways which bring benefits to all concerned.

The variety of volunteer opportunities is growing as fresh options arise in new fields such as conservation. The areas for job opportunities are not limited to one's community, one's town, or even one's country. (Earth Watch offers adventurous field work for interested people in the most remote corners of the globe — what an opportunity following retirement!).

6 A feature of volunteering is its reciprocity — giving as well as receiving. 9

The value, extent and potential benefits of volunteering should be recognised clearly along with the dangers. Any human activity is subject to abuse, and volunteering is no exception. Exploitation, coercion and manipulation do occur. Such practices are unacceptable wherever practised, and must be condemned. Good volunteering practices do not put people out of paid jobs, do not exploit, do not coerce or manipulate. Volunteering empowers individuals and enriches society. It needs to be recognised that volunteering offers infinite possibilities.

THE EXTENT OF VOLUNTEERING

The extent of volunteering in Australia has been greatly underestimated by many people. Although no Australia-wide studies have yet been undertaken to investigate the total volunteer force, several significant state-wide surveys have been completed. Of these, two Australian Bureau of Statistics studies, one in Victoria in 1982 and the other in New South Wales in 1986, provide the most comprehensive and pertinent information.

The Victorian study² found that 28.2 per cent of Victorians aged 15 years and over were involved in voluntary work, as defined in this manual. Volunteers gave an average of 123.6 hours per person in the previous year — the equivalent of three weeks full-time work per person. In total, this amounts to over 100 million hours for Victorians in the survey year. Extended to the whole of Australia this represents some 400 million hours per annum (equivalent to nearly 200,000 full-time positions).

The New South Wales study³ reported a volunteering rate of 27.5 per cent, with each person volunteering an average of 226 hours per annum (over four weeks full-time per annum). Extended to the whole of Australia, this provides a picture of over three million volunteers aged 15 years and over, volunteering over 700 million hours each year. As Figure 1 indicates, many volunteers were contributing substantial amounts of time.

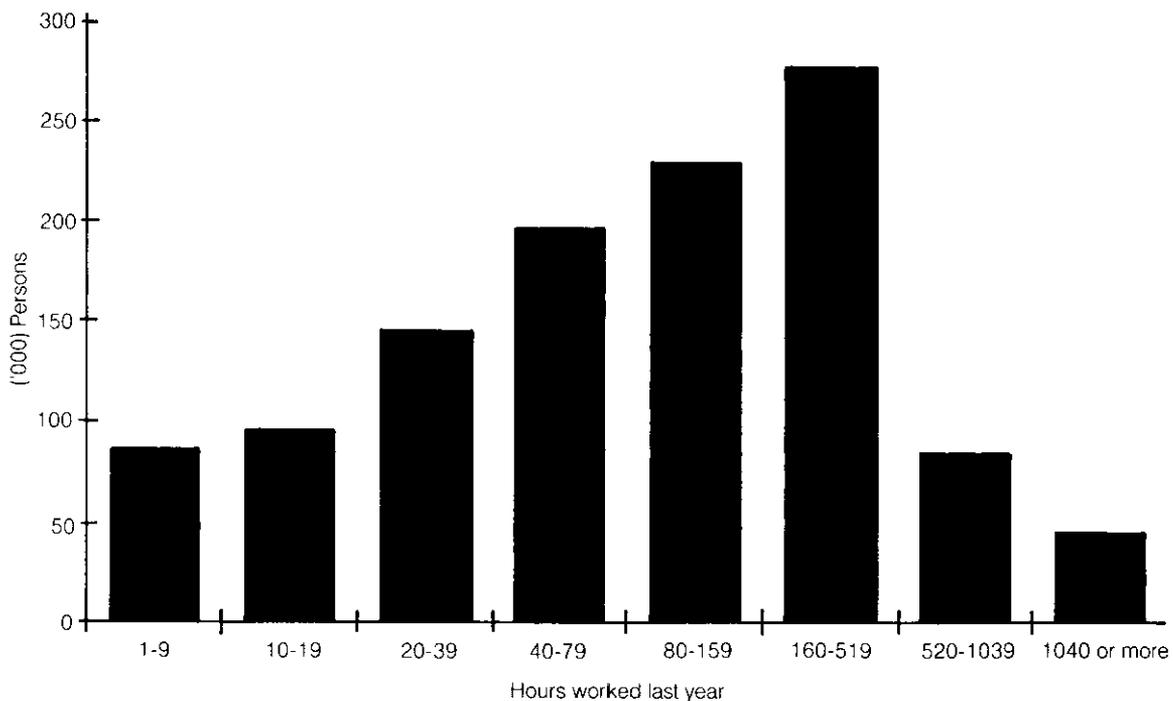


Figure 1: Volunteers — hours worked. Statistics from the 1986 Australian Bureau of Statistics survey in New South Wales.

Overseas studies have also reported high levels of volunteerism; however, varying definitions of volunteering make comparison difficult.

Graycar (1983)⁴ in a report on voluntary work in health and welfare services, made this comparison when describing the extent of volunteering:

In both Britain and Australia approximately 15 per cent of the population aged 15 and over engage in voluntary work. Australia's 1.5 million voluntary workers provide an average of four hours per week. This translates crudely into 170,000 full-time positions — equivalent to one-third of Australia's current number of unemployed. In dollar terms, the wage bill would be close to \$2 billion — as large as the cash flow of Australia's 37,000 non-government welfare organisations.

Using the most recent Australian Bureau of Statistics study (New South Wales 1986) and extrapolating to the whole of Australia, the wage bill, in dollar terms, for the volunteers of Australia would be approaching the \$6 billion mark! (Calculated on a 40-hour week, \$8 per hour basis — the rate for an adult clerk is \$8.80 per hour.)

THE VALUE OF VOLUNTEERING

Volunteering, when based on sound principles, benefits the volunteers, the organisations or groups within which they work and the communities which profit from their services. In addition, society at large benefits from the increased skills of volunteers. Not all volunteers are involved in direct service provision. Others advocate for necessary changes or new services — such advocacy is an essential element of a healthy society.

Volunteering is not limited to working within an organisation, such as Meals on Wheels. Many work in groups which promote a cause, such as Amnesty International. Others work in self-help groups, such as the Arthritis Association. A great deal of volunteering is done in all sorts of places in all sorts of ways, through assistance given to friends, neighbours and relatives.

A feature of volunteering is its reciprocity — giving as well as receiving. Volunteers Abroad, working in Third World countries, is a prime example of volunteering as a two-way process.

The following points further illustrate the value of volunteer effort, which

- provides a means of tapping the energy and time of people who have a need to be wanted, to belong and to contribute.
- provides opportunities for democratic involvement in the community. Voting every few years does not allow people sufficient scope to participate fully in their communities.
- increases awareness in areas which otherwise would be closed to people. This awareness frequently leads to a better understanding of situations and issues. A person may be working in a paid capacity as a shop assistant, but also be vitally interested in people with intellectual disabilities, or in heritage. In this case volunteering opens a door.
- improves the quality of community life as people give of their personal experience and expertise developed over a long period, for example in raising a family or through a career in the paid work force.
- develops knowledge and skills as a means for people — particularly young people — to enter the work force.
- provides mutual help within self-help groups.
- enhances, humanises and extends services provided by paid workers, particularly in areas where an additional type of input is required. Volunteers can also devote a great deal of time to one person or one piece of work, which for a paid worker might be impossible or impractical. Paid workers can then concentrate on doing what they have been trained for and do best.
- provides immediate protection and assistance in times of emergency.
- provides community development through local government, service clubs and other organisations.
- initiates new services which require an innovative approach.
- reveals injustices and inadequacies which can lead to changes and/or new services.

- provides an outside view and brings the community into an agency.
- provides a spontaneity, a drive and commitment in tackling a new area of need, which may result in the breaking of new ground.
- promotes social networking, for example befriending and helping neighbours with daily emergencies.
- provides advocacy for individuals as well as for causes, often acting as a stimulus to government.
- ensures service cover in widely dispersed areas of need and rural communities where paid personnel alone could not provide adequate cover.

The value of volunteering is manifest across a great variety of community activities as volunteers choose their own special area of interest. For example, coaching a junior basketball team, maintaining a wildlife track, befriending an isolated old man or woman, organising an art exhibition or dancing display, advocating the need for access for people with disabilities or the need for prison reform, fighting a bushfire.

SUMMARY

Many people do not realise the extent and value of volunteering within Australian society. Until recently volunteering has largely been an invisible force. However the magnitude of volunteer effort is now becoming apparent. Studies have shown that volunteers contribute an enormous amount of time to a diversity of community concerns. The value of this time commitment as it benefits individual volunteers, organisations and society at large is discussed.

2

The Roots of Volunteering in Australia

*The past and the present are our means.
The future is our goal.*

BLAISE PASCAL

Inevitably our perception of volunteers and volunteering today will be coloured by our perception of the past. Is our understanding of past events based on myth or reality, or something of both?

It is helpful to look back and consider the historical development of volunteering. The roots of volunteering in Australia largely reflect values and practices developed in the United Kingdom in the eighteenth and nineteenth centuries. It needs to be remembered however that migrants from countries other than the United Kingdom often have very different traditions in the area of volunteer effort. Further, the assistance given within Aboriginal communities sprang from a concern for the tribe and for one another — a form of mutuality. It is interesting to note that mutuality is now being recognised as an inherent feature of volunteering today.

LOOKING BACK

Early volunteers in the United Kingdom fell into two categories — social reformers and those providing services to the needy. William Wilberforce, agitating for the abolition of slavery, and Elizabeth Fry for more humane conditions in gaols, are well-known examples of forceful social reformers. Provision of food and shelter was largely characterised by Christian charity, and was seen as the responsibility of the landed gentry and the local parish. Those giving assistance to destitute people condemned to the workhouse attempted to separate the 'deserving' from the 'undeserving'.

Naomi Kroeger⁵ has observed that 'Traditionally the volunteer expressed convictions and/or feelings of social responsibility through direct help to the less fortunate. Volunteering was the role of the rich'.



DISPENSING CHARITY

Unfortunately the legacy of the matron going about her charitable work with an air of patronage and condescension still lingers in the minds of many. However, providing assistance in ways which fostered dependency was not simply the province of volunteers, but was also practised by governments. Even so, there is evidence that many of the early service providers exhibited a real concern for their fellows, and the social reformers were unceasing in their efforts against enormous odds.

In the latter part of the nineteenth and early part of this century, settlement houses, such as London's Tonybee Hall were set up in the poorer districts. These provided an opportunity for the well-off, intellectuals and students in the human services to gain first hand knowledge of the conditions under which the poor lived. Classes were conducted in literacy and crafts, discussion groups and other activities were organised and kindergartens started. Those working in the settlement houses learned how to lobby, organise and try out their ideas. Awareness was raised in such areas as the need for better sanitation, housing and organised labour as well as in women's issues. Volunteers learned through seeing and doing at first hand. A number of ideas initiated within the settlement houses were later developed as larger schemes at government level.

Australia was also well endowed with pioneers in providing services and advocating that governments should set up, or improve, basic services in the areas of health, welfare and education.

During the two World Wars women who stayed at home worked tirelessly to provide comforts to the troops. Raising money through Red Cross branches and for other organisations has largely been the province, not of those able to make large donations, but of ordinary people with a social conscience, endlessly working for trading tables and other fund-raising efforts.

6 History makes clear that volunteers have been pioneers in arousing the public conscience . . . 9

With the emergence of the concept of the Welfare State in the 1950s, efforts were made to deal with causes of social distress as well as symptoms. Huge government bureaucracies staffed by trained professionals were established, and volunteers, if tolerated at all, were largely pushed into the background, irrespective of ability.

THE SCENE CHANGES

More recently, however, professionals in health and welfare, as well as in other areas, are redefining their role. Many are realising that, despite their best endeavours, they frequently have neither the time, nor the experience in all areas to adequately tackle their growing task. Increasingly, agencies concerned with improving the lot of the individual no longer think simply of dispensing charity, but try to understand and address the causes behind the individual's problems, so as to encourage not dependency but independence. Similarly, as volunteers become involved in meeting material needs, their awareness of the reasons behind distress increases. This often leads to a desire by volunteers to become involved in advocacy — seeking changes in the circumstances of individuals.

Today, most community activities in Australia are strongly supported by volunteers. Arranging, coaching and umpiring sporting events are mainly in the hands of volunteers. A similar situation prevails in the arts, whether speaking of the visual or performing arts. Emergency services, characterised by St John Ambulance, the Surf Life Saving Association of Australia, and the Country Fire Services, present a similar picture. Overseas aid is assisted by thousands of young people.

Volunteering is continually entering new areas of concern. Women's rights, the peace movement, environmental issues and heritage concerns are four areas where volunteers are working as forceful social reformers in the tradition of Wilberforce and Fry.

Another important development is the rapid growth of self-help groups where members, in addition to helping themselves, are combining to help others, usually those suffering from a similar disability, disadvantage or condition. Their distinguishing mark is their emphasis on advocacy for legal or administrative changes, the removal of discrimination and the provision of mutual support.

DISCARDING THE STEREOTYPE

There is a tendency, as one battles with the volunteer continuing to be stereotyped as the middle-aged, well-off volunteer with too much time on her hands, to discard the word 'volunteer'. However, we need to remember that the patronising individual, dispensing largesse, was a product of the day.

Very few potential volunteers coming into the Volunteer Centre of S.A. today, when asked why they are volunteering, say 'to help others'. 'To do something worthwhile' is, however, a common phrase used by volunteers of all ages and both sexes. When further questioned it is evident that interwoven with a desire to do something worthwhile is a natural streak of self-interest. In today's society it is acceptable (and realistic) to acknowledge that in giving one inevitably receives.

History makes clear that volunteers have been pioneers in arousing the public conscience, bringing about change and ensuring necessary services are provided. Many examples can be cited of services initiated by volunteers which are now regarded as essential and funded by governments. For example Minda Inc., a South Australian

organisation for people who have intellectual disabilities, was begun in 1898 by a group of concerned business people with a budget of £100. It now employs over 600 staff and has a budget of \$15 million.

The majority of volunteers have been people with a social conscience, a real concern for others, a lively imagination and a doggedness of purpose — attributes needed in today's society.

SUMMARY

Looking back at the early pioneers, a picture is revealed of the volunteer as the patronising, but often concerned person providing charity, side by side with the dauntless advocate for radical change. With the rise of large government bureaucracies and the professional, the role of the volunteer was, for a time, eclipsed. The stereotyped 'do gooder' — which was never entirely fair in any case — is now being replaced by the modern volunteer looking to causes, involved in self-help groups and providing needed services across a whole range of community endeavour. This volunteer recognises that volunteering is of mutual benefit to others and to themselves.

EXERCISES

- What part did volunteers play in
 - the pioneering of the broad area of interest in which you are involved?
 - the early days of your agency or group?

- Many of the early pioneers were involved in innovative efforts. Are the volunteers in your area of endeavour being given opportunities to exercise imagination and innovation?

3

Volunteering and the Volunteer in Today's World

My interest is in the future, because I'm going to spend the rest of my life there.

K.F. KETTERING

Nothing is as permanent as change.

HERACLITUS IN 500 B.C.

Everyone will agree that rapid changes have taken place in the last decade and that they are gaining momentum. People may either ignore them or recognise the challenge, and benefit accordingly. The changes are reflected in the new image of volunteering and the volunteer.

INCREASED RECOGNITION

An examination of the volunteer and volunteering today reveals an interesting picture:

the *formal* recognition given to volunteers as a group dates back only a few decades, and for an even shorter period in Australia.

the recognition of volunteering as a force is having ramifications in the political arena.

appreciation of the fact that just as the paid work force needs close attention if its potential is to be realised, so does that of the volunteer work force.

The formal recognition nationally and internationally of volunteering as a force within the community is reflected in a number of developments:

- the emergence of the career of volunteer manager, volunteer administrator or director, or coordinator.
- thousands of centres and bureaux have been established across many countries during the last twenty years.

- I.A.V.E. (International Association of Volunteer Effort) was established in 1970 and now includes members from over forty countries. I.A.V.E. is a worldwide non-political non-profit organisation which encourages and promotes volunteering as a way to improve the quality of life for all people and builds bridges of understanding among caring people of all nations. Appendix 1 gives further information on I.A.V.E.
- an international conference on volunteer effort is conducted every two years.
- training institutions and publications devoted solely to the promotion of high standards of volunteering, unheard of twenty years ago, reflect the new status of volunteering.
- the first State volunteer centre was established in New South Wales in 1976. South Australia and Queensland followed in 1982, Victoria in 1986, and Western Australia in 1987. A State volunteer centre is now in the process of being established in Tasmania.
- surveys conducted since the late 1970s in the U.S.A., United Kingdom and Australia focus the spotlight on the volunteer; what motivates a person to volunteer, what are his/her characteristics, what attracts that person to an organisation, group or cause.

CHANGES IN SOCIETY

As volunteers and volunteering are examined, it is evident that both have changed markedly over the last twenty years. This is not surprising when one considers the changes which have taken place in society.

Alvin Toffler⁶ identifies changes over the last thirty years as the 'Third Wave'. New technology, new communication links, new political systems and, perhaps even more importantly, new thinking about the roles and aspirations of individuals have revolutionised our world. This Third Wave is as different from the Second Wave (the Industrial Revolution era) as the Second Wave was from the First (agrarian times). Each different wave has involved vast changes in people's lifestyles.

6 The difficulty is that the Third Wave situation has occurred so rapidly that people often respond to Third Wave situations with Second Wave responses. 9

There is a new awareness of the fact that finite resources and pollution damage mean decisions now have to take account of environmental factors. The belief that nature is waiting to be exploited has received a sharp shock. The threat of nuclear holocaust



RIDING THE THIRD WAVE

hangs over us. Technology, higher education and a reappraisal of people's aspirations have brought massive changes since the second World War, and all sorts of systems — the family, welfare, recreation, health — are under strain and undergoing change. The massive rethinking of roles has resulted in enormous changes and new structures affecting youth, women, minority groups and workers.

As Toffler points out the difficulty is that the Third Wave has occurred so rapidly that people often respond to Third Wave situations with Second Wave solutions!

CHANGES AS THEY RELATE TO VOLUNTEERS AND VOLUNTEERING

Society has changed and so have volunteers. Four areas impinging on lifestyles which have a direct relationship to volunteering are

- increased leisure time
- technology
- wider education (often leading to higher aspirations)
- demands for more flexibility and diversity.

Leisure

For the person who cannot find work, the retrenched and those forced into early retirement, increased leisure time is often unwelcome. For others, the shorter working week and early retirement is welcomed. But whether welcome or not, it is a reality. Without supporting some of the harsher aspects of the work ethic, few people would argue that work defined as 'purposeful endeavour' gives structure and meaning to a person's life. The view that volunteer work is a satisfactory alternative to paid work when paid work is what the person wants should, of course, be opposed. Likewise volunteer effort should not be trivialised by promoting it as merely an activity to fill one's spare time. Volunteering can enhance leisure time and provide new opportunities, new challenges and new situations. Many people in the paid work force volunteer with the aim of adding a further dimension to their lives.

Technology

In this age, many people fear the isolation, complexity and depersonalising effect of technology. The human touch which volunteers can provide becomes more sought after and welcomed.

Education

While people are receiving a wider education, often leading to higher aspirations, paradoxically many feel powerless in this uncertain world where everything is changing — values, structures, practices. Large bureaucracies and corporations can thwart people's opportunities for self-expression and democratic involvement. Volunteering can provide people with opportunities to become involved in areas of interest, enabling them to have their say and make their contribution in a variety of ways.

Diverse life styles

More flexibility and diversity is evident as we see people changing jobs, roles, homes, locations, spouses, from full-time to part-time paid work and back again. Many organisations are becoming decentralised and breaking up into teams of people with specific skills. People are being trained to do different jobs within the same organisation. This diversity is having its effect on both volunteers and volunteering. Many people are no longer satisfied to be involved in the one sort of endeavour for a long period of time. They want to enjoy and experience a diversity of interests.

The broad range of people seeking voluntary work presents agencies with both a challenge and an opportunity to provide flexible structures and encourage innovative approaches.

CHANGES AND THEIR IMPACT

Recent Changes

Reduction in working hours allowing people in the paid work force to volunteer

Many more people retiring early

Increase in youth unemployment

Higher education and aspirations

Increase in numbers of women in paid work

Revolutionised information systems alerting people to options

Higher retrenchment rate for older people

Increased breakdown of marriage

A better deal demanded by minority groups and individuals

The early discharge from institutional care of people with disabilities or mental illnesses

Greater involvement in community causes

The rise in self-help groups

Impact on Volunteers and Volunteering

The need to provide more after-hours volunteer opportunities

Increase in the number of retired people who want to use their skills and experience, make new friends, work in new situations, enjoy a longer useful life

More young people seeking volunteer work to gain work skills and give them added confidence

More opportunities for stimulating and challenging volunteer jobs which in some cases can lead to paid work

Less women available for volunteer work

A wide diversity of volunteer jobs is expected

The need for sensitive placement in jobs which increase self-esteem and prevent boredom

More people seeking out social contacts to fill a gap, and to enhance self-esteem

The establishment of lobbying networks to improve their position and gain recognition

Organisation of self-help groups and involvement of individuals in volunteer activity as a form of therapy, and means of integration into the community

'Cause' groups mainly organised and maintained through volunteer effort

Establishment of networks to give mutual assistance, e.g. self-help groups for people with disabilities, playgroups, work skill exchanges

EXPLODING THE MYTHS

A number of myths have evolved and persisted about volunteers, which on close inspection have no factual basis in Australian society today. The time has come to explode those myths! There are four main misconceptions people may have about volunteers, and they will be discussed in turn, using information from the most recent survey of volunteering in Australia — the Australian Bureau of Statistics survey in New South Wales in 1986. In summary, the four myths are that:

- the young don't volunteer
- nearly all volunteers are women
- volunteers are only attached to organisations
- most volunteers don't have paid jobs.

Age of volunteers

As can be seen from Figure 2, the young *do* volunteer, and in considerable numbers. 13.2 per cent of volunteers are aged between 15 and 25, and 60.7 per cent are aged under 45.

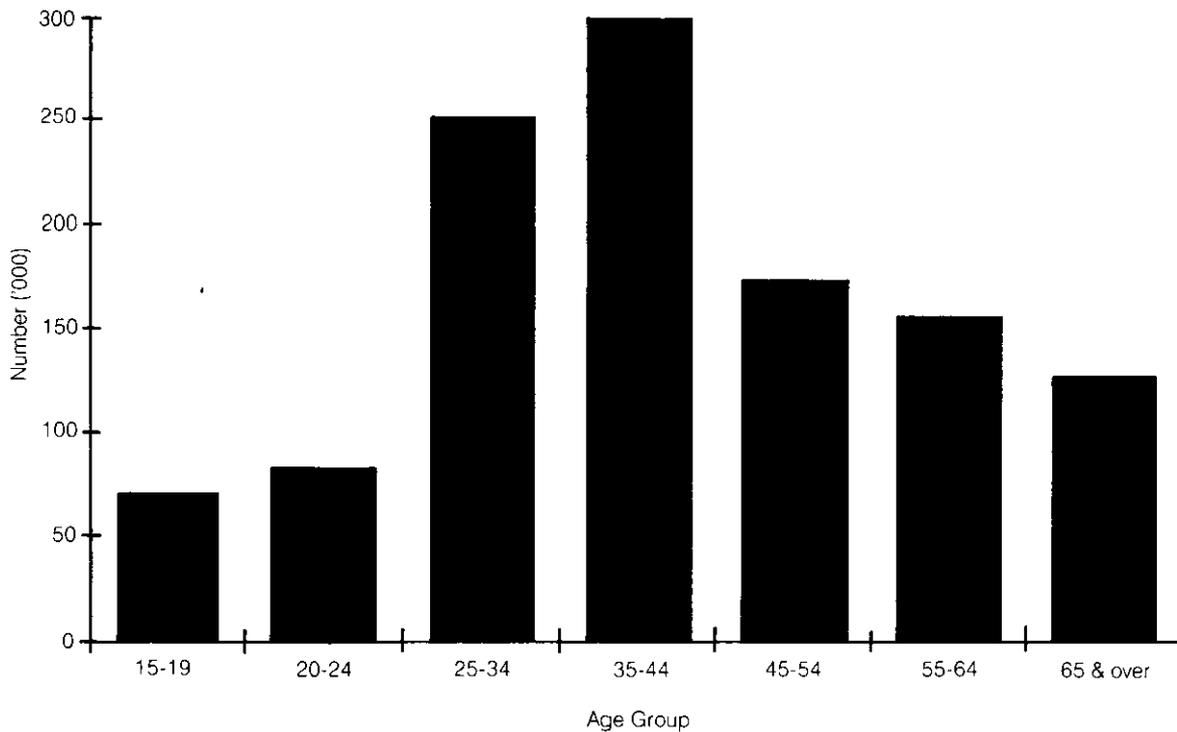


Figure 2: Ages of volunteers. Statistics from the 1986 Australian Bureau of Statistics survey in New South Wales.

Sex of volunteers

Figure 3 illustrates that only slightly more women volunteer than men. In fact, 46.1 per cent of volunteers are men and 53.9 per cent are women — hardly a substantial difference.

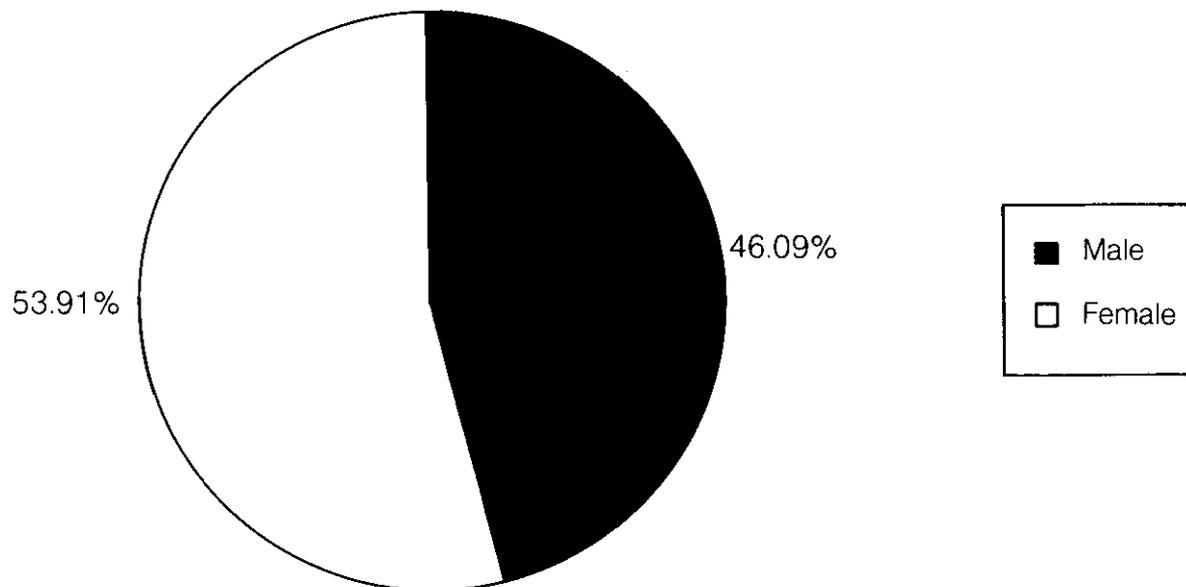


Figure 3: Sex of volunteers. Statistics from the 1986 Australian Bureau of Statistics survey in New South Wales.

Volunteers in organisations

The idea that people volunteer only through organisations is not true. As Figure 4 shows, many people volunteer outside an organisation, or as a combination of both, within and outside organisations.

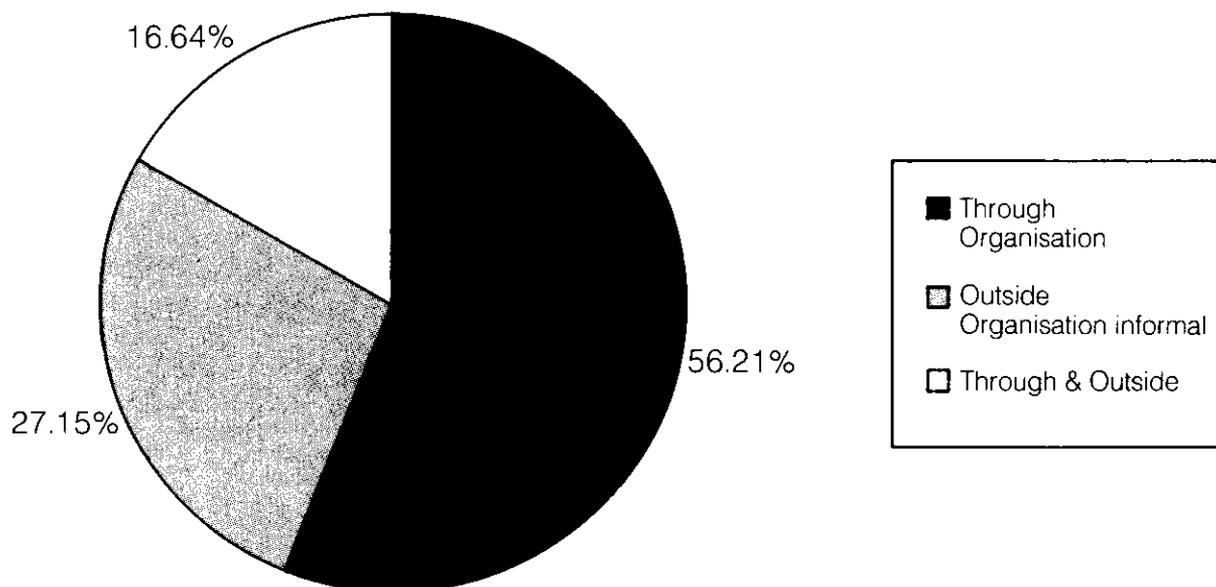


Figure 4: Volunteers in organisations. Statistics from the 1986 Australian Bureau of Statistics survey in New South Wales.

Volunteers who are also paid workers

The myth of volunteers not being in paid work is clearly exploded by the Australian Bureau of Statistics study. As can be seen from Figure 5, over 60 per cent of volunteers are in paid work (46 per cent in fact work full-time).

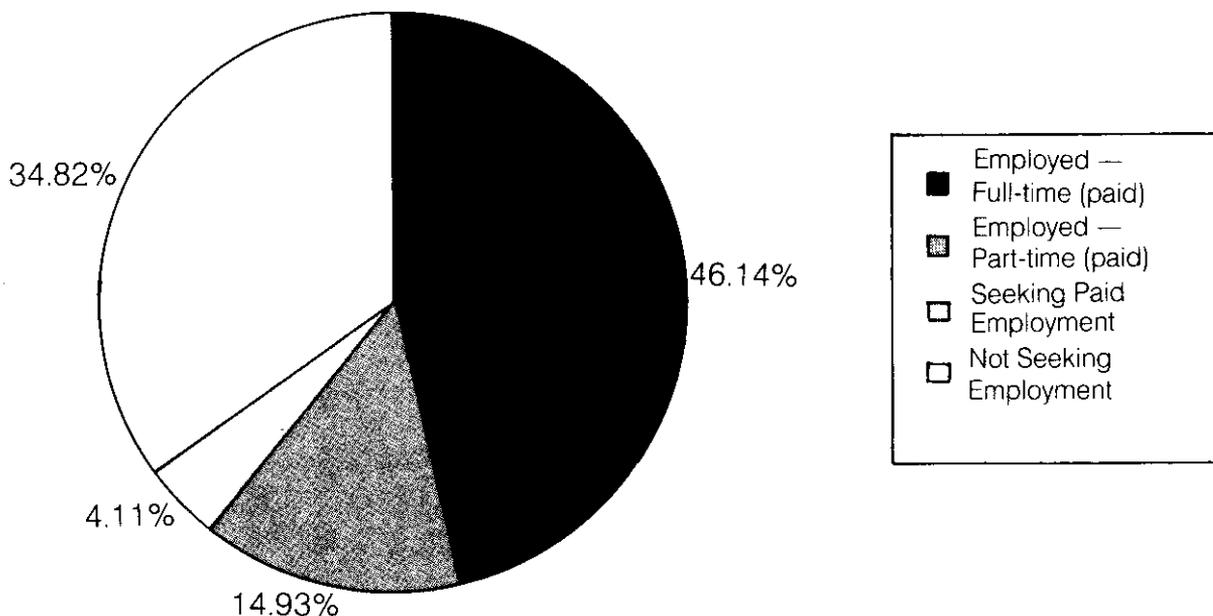


Figure 5: Volunteer participation in paid work force. Statistics from the 1986 Australian Bureau of Statistics survey in New South Wales.

CHARACTERISTICS OF VOLUNTEERS — YESTERDAY AND TODAY

The volunteer manager needs to appreciate that many volunteers today display quite different characteristics than was the case even ten years ago. It is a mistake to treat volunteers as a homogenous group. People have various motivations and will be at different stages of development.

Trends

| | | |
|--------------------|---|---------------------------|
| Female | → | Both female and male |
| Older | → | All ages |
| Upper middle-class | → | All socio-economic groups |
| Submissive | → | Questioning |
| Passive | → | Assertive |
| Ineffectual | → | Effective |
| Exploited | → | Valued |
| Unskilled | → | Skilled |
| Self-effacing | → | Self-confident |
| Stationary | → | Careerist |
| Reactionary | → | Pacesetters |

Characteristics such as 'ineffectual' and 'unskilled' are not necessarily those of the volunteer, rather it is the manner in which they are utilised that render them such.

The following account of two referrals made by the Volunteer Centre of S.A. illustrates the diversity of people volunteering today.

An ex-prisoner sought a volunteer job within an agency. His goal was rehabilitation. He was quite assertive about his skills in a number of areas — welding, landscape gardening and theatre. The coordinator of a theatre group was prepared to give him a go. Both the volunteer and the volunteer manager were very pleased with the outcome.

An army trainee waiting for call-up applied for a volunteer job. He was sent to the outskirts of the Simpson Desert to assist the park warden. Last report: 'Having a ball!'

The fact that many people in the paid work force wish to volunteer opens the door to evening and weekend work, such as befriending people who have no social networks.

Many volunteers respond to situations where people are bewildered and need information and reassurance so they can feel more in control. Volunteers who work in the courts and in hospital casualty rooms and on women's information switchboards provide such services.

People are willing to stand up and be counted on almost any public issue about which they feel strongly; it is participatory democracy in action.

SIGNIFICANCE OF CHANGES

All these changes are of great significance to volunteering, creating a new volunteer identity, necessitating new directions for volunteer programs and volunteering, and new roles for volunteers.

Recognition of the magnitude of volunteering has ramifications in the political arena. This can have positive and negative effects. Certainly it is time that the value of volunteer effort is recognised by governments. However, there is a danger that politicians and policy makers may seek to use volunteering as a cheap antidote for particular social problems. This danger is discussed further in Chapter 4.

Volunteers, and volunteering, are becoming more visible, but not as a stable predictable force. Volunteers are a diverse and dynamic group of people, constantly changing and being changed by society. Their chosen field of activities will range from giving neighbourly assistance to sitting on management committees to promoting a cause. People administering programs which involve volunteers need to be aware of this situation, and respond in a creative and flexible manner.

SUMMARY

Volunteering is now being given more formal recognition, as is demonstrated by the new career of volunteer manager, the mushrooming of volunteer centres and training institutions, as well as the world-wide movement.

The Third Wave situation in which we find ourselves is having its effect. The individual volunteer has a new identity and a new role. Raised awareness should result in appropriate responses to individual volunteers and in devising flexible structures and imaginative responses.

EXERCISES

- Are you a Second Wave or a Third Wave thinker?
Write down any fears you hold with regard to changes occurring in present day society.
Now write down some positive aspects of the changes as they relate to volunteers and volunteer programs.
- Consider the volunteers you have recruited over the last year.
Relate them to the table 'Changes and Their Impact'.
Have their needs been satisfied?
Has their potential been adequately utilised?
Are they enjoying their work?

4

Issues which Impinge on Volunteering

Democracy, like love, can survive any attack, save neglect and indifference.

PAUL SWEENEY

The magnitude of volunteering as revealed in statistical surveys is such that it has social, economic and political implications. While increased recognition of this huge reservoir of labour is welcomed, there is a danger that volunteering can be used inappropriately by politicians and policy makers in government as well as by agency managers.

Volunteer managers need to guard against inappropriate or exploitative practices, and to be in a position to discuss issues relating to volunteering both outside and within their agencies.

Four issues which have implications for volunteering have been selected for consideration:

- unemployment
- community care
- deinstitutionalisation
- gender stereotyping.

No definitive analysis has been attempted. Rather the intention is to raise awareness and encourage further discussion.

UNEMPLOYMENT AND VOLUNTEERING

Obviously a high level of unemployment is of concern to many people — the nation's policy makers, those who are unemployed, employed persons fearful of losing their jobs, and the community at large. The debilitating effects of unemployment are well-known. People who are unemployed, particularly for long periods, may lose their confidence and become disillusioned and bitter.

A number of proposals to involve people who are unemployed as volunteers have been advocated by politicians of all parties over the years, resulting in the establishment of state and nationwide programs.

Benefits to the unemployed person

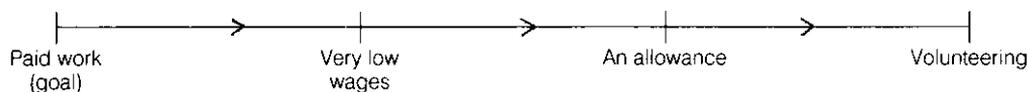
Volunteering can bring great benefits to the unemployed person

- for young people it can provide work skills, increase their confidence and assist in giving a structure to their lives.
- for older people who have been retrenched it can maintain work skills, help maintain self-esteem and prevent boredom.
- for both groups, it brings new contacts, new interests, new friends, and may lead to offers of employment.

Concerns

What are the concerns about linking volunteering and unemployment?

- In some people's minds volunteering can be held partially responsible for unemployment. Such people say that if fewer people volunteered there would be more paid jobs. However, the reason for the high unemployment rate has nothing to do with volunteer effort. In fact, in many areas over the years pioneering by volunteers has led to an acknowledgement of the need for more services, and the employment of paid staff as a consequence. There may be isolated cases where a volunteer has replaced a paid worker, but on balance volunteering has created far more jobs than have been lost.
- Another concern is when volunteer work is presented as a satisfactory alternative to paid work, when paid work is what the person wants and needs. If viewed as a continuum from the desired objective (paid work), to working for very low wages, to working for an allowance, to volunteering, the volunteer will come to regard himself or herself as being engaged in the least satisfactory form of endeavour, reserved for the least able and least adequate.



- If volunteering becomes a *pre-requisite* to eligibility for an unemployment benefit, it takes away a fundamental element of volunteering — that of undertaking service of one's own free will. Alternatively, to volunteer may not be a stated pre-requisite, but the danger is that implicit or explicit pressure may be applied.
- When there is a large imbalance between paid jobs available and those looking for paid work, people are likely to feel they have little control over their lives. To direct unwilling individuals to accept voluntary work is a contradiction in terms. The situation can become self-defeating and unrewarding for all concerned — the unemployed person, the organisation (which has the unenviable job of supervising the conscript volunteer) and the recipient of service.
- Directing a person unable to find paid work to undertake work on a voluntary basis reinforces the ethic held by some that one needs to perform some sort of work in order to be of value to his or her society. The problem is that paid employment may never again be available to all.

Implications for organisations

A few agencies which involve volunteers who are unemployed will misuse the situation, making unrealistic assumptions or exploiting the volunteer, particularly the younger volunteer. A case in point is a young volunteer who was working in a nursing home. After some time she was offered paid employment for two days a week, provided she undertook voluntary work for an equivalent period of time.

Persons who volunteer when unemployed frequently require special attention if both their needs and the needs of the organisation are to be met. This needs recognition by management, followed by appropriate measures. Appendix 2 sets out guidelines for organisations which involve young volunteers who are unemployed.

Schemes presently in place do not direct unemployed persons to volunteer. However the situation needs to be watched to ensure that the fundamental elements of volunteering are not ignored, as a compulsory scheme could have adverse effects on all concerned.

Agencies, too, must guard against exploitative practices or insensitive treatment of persons who are unemployed.

COMMUNITY CARE AND VOLUNTEERING

The current emphasis on community care as a means of allowing people who are aged and frail, or have physical or mental disabilities, to live in the community, rather than in an institutional setting, has much to commend it. Not only is independent living cheaper in money terms, it is also the desired option for most people.

In an effort to keep people in their own homes, policy makers are looking to volunteers to assist, mainly by working in day centres and by giving neighbourly assistance — visiting, providing respite, helping with shopping and transport.

Some people will be very willing to give of their time to ensure those living in their neighbourhood can remain happily in the community. But the danger arises when policy makers *presume* carers of relatives and volunteers will cooperate with them regardless of their situation, wishes or abilities. It may be that one section of the community benefits at the expense of another. In this case women may be disadvantaged as they are likely to be the target group of policy makers. Women may once again be locked out of paid jobs which they *want* and into unpaid jobs they may *not want*.



While the concept of community care is generally seen in a favourable light, planning must ensure that service by volunteers is given 'of one's own free will', otherwise schemes become exploitative. Moreover community resources must be adequate and appropriate.

For the scheme to be successful, paid workers, carers and volunteers need to work closely together. Generally paid workers are not experienced in working with volunteers, and they need time to develop these skills. Volunteers should be trained in the emotional and physical needs of people who are frail, aged, disabled and those who are isolated. The tasks allocated to volunteers should reflect their availability and skills. Some jobs will need to be undertaken by paid workers.

All those involved need to be consulted if misunderstandings and mistakes are to be avoided and the interests of all parties upheld. Volunteering should respond to the needs of the day. However, volunteers should have the freedom to choose where they work and what they will do.

DEINSTITUTIONALISATION AND VOLUNTEERING

The current policy of deinstitutionalisation which encourages the discharge of patients with physical or mental disabilities from hospitals and institutions at the earliest possible point is having an effect on the volunteer scene. Many professional workers are suggesting to ex-patients that they look for volunteer work. Using volunteering as a form of therapy or as a means of re-integration into the community is becoming widespread. This can be very beneficial to ex-patients where workers in an agency are sympathetic to their needs and can find appropriate jobs for them. However many require an enormous input of time and patience, not only by the volunteer manager but by volunteers and paid staff with whom they work. It also limits the amount of time volunteer managers can spend with other volunteers. A big strain is placed on community organisations faced with increased service demands and limited resources. There is a limit to the number of ex-patients who can be effectively supervised and supported at any time.

Policy makers and professionals need to be aware of the impact of their actions in referring unlimited numbers of ex-patients who are still in need of a great deal of support, to community organisations. Organisations may already be under strain and will need extra resources if they are to assist adequately the ex-patients.

GENDER STEREOTYPING AND VOLUNTEERING

In recruiting volunteers, are organisations perpetuating the stereotyping of jobs according to gender? The answer would seem to be 'yes'. This stereotyping, of course, reflects what has occurred in the paid work force. The raising of awareness in society is bringing about changes within the paid work force. The challenge for those working in the field of volunteering is to ensure that this new awareness is also reflected in the recruitment and deployment of both male and female volunteers.

Currently, women volunteers tend to take on jobs such as clerical work and typing, and the caring and nurturing roles, while male volunteers generally accept such jobs as sitting on management committees, organising sporting events and mending toys. A survey conducted by the Social Welfare Research Unit of the University of New South Wales in 1983⁴ showed that women volunteers comprised only 33 per cent of the management committees of all voluntary welfare agencies.

A plan of action

Volunteer managers are in a good position to look at the situation in their agency, and consider whether changes are necessary. A plan of action could include the following:

- Propose to management that they examine the make-up of their planning and management groups and if necessary consider the adoption of a policy of encouraging a better gender balance.
- In collaboration with interviewers, review interviewing and deployment practices as they relate to both women and men.
- Highlight the issue and raise awareness in training programs.
- Consider creche arrangements for those who would otherwise be excluded from participating in volunteer activities.

A great deal of stereotyping is unconscious, affecting both the interviewing staff and potential volunteers. The first step is to raise awareness of what is happening. The second is to encourage both women and men freely to choose preferred options. For example, a woman may like a carpentry job, while a man may choose to work in a creche.

If volunteering is to reflect current moves towards a more open and balanced society, we need to address issues like these.

5

Promoting the Message

Volunteers are so essential a part of the complex mechanism of our communities that without them the whole fabric of society would be placed at risk.

SIR NINIAN STEPHEN

Volunteering is the volunteer manager's area of specialisation. Apart from being personally knowledgeable, the job requires the ability to convey to an individual or public audience all aspects of volunteering. This is not easy as many issues are involved, and both the identity of volunteers and the volunteering scene are changing. The volunteer manager needs to be equipped to address any audience by having a broad overview as well as specific information, experience and ideas relating to volunteering.

It is necessary to present an enthusiastic, wide-ranging, up-to-date and balanced message.

THE TOTAL PERSPECTIVE

Conviction is a pre-requisite to a vital and dynamic message. However, basic information is also necessary. This could include

- specific information relating to volunteering in the agency or field of endeavour being promoted
- an historical perspective
- statistics on the extent of volunteering
- the myths and the reality
- information on areas of community endeavour where volunteering has been of value in advocating for changes and in providing services
- social, political and industrial issues relating to volunteering
- appreciation of the fact that in addition to an enormous range of service jobs, volunteering covers advocacy, mutual help and neighbourly assistance
- data regarding the emergence of national and international interest in volunteering.

Anecdotes which illustrate the message add interest and assist in clarification.

TARGETING THE MESSAGE

It is necessary to identify the target group as well as the message. The type of information and the way it is presented will, of course, vary according to the audience and whether it is conveyed verbally, through the printed word or the screen.

Audiences can be divided into the following categories:

The agency

Management, paid staff and current volunteers need to be kept up-to-date on volunteering today.

The community

Involving potential volunteers, recipients of service and community organisations.

Current and potential funding sources

Involving governments at all levels, industry, business interests, foundations and grant bodies.

Community leaders

Within this group are politicians, significant figures in the local and wider community, the business and media worlds, trade union leaders, teachers and academics. Such people greatly influence public opinion and some are also influential in the allocation of resources.

Different aspects of the message will appeal to different audiences.

- People responsible for funding sources would be impressed if the time given by volunteers in an agency was translated into dollar terms.
- Potential volunteers need to be informed of the great range of areas and the diverse jobs from which they can choose, as well as their rights and responsibilities.
- People concerned with questions of equity and the empowerment of individuals will be interested in ways in which good volunteering practices assist volunteers in reaching these goals.
- Volunteers may not realise that they are part of a huge force, both here and across the world. They will also be interested in the amount of time given in voluntary effort across Australia.
- Volunteers who still describe themselves as 'just a volunteer' need information on the changes which have occurred in the way their work is viewed. It can be suggested to people who have retired that instead of filling out 'retiree' on the next form they complete, they give their occupation as 'freelance volunteer'.
- Some self-help groups may not wish to use the term 'volunteer', but nevertheless will appreciate the contributions their members are making to others as well as themselves.
- The advantages of volunteering as a form of community participation will appeal to proponents of community development.
- Concerned people assisting their neighbours in a variety of ways will respond to a recognition that they are also part of volunteer effort.

SUMMARY

Volunteer managers will inevitably be involved in promoting volunteering to small or large audiences. They are working in a field of endeavour which has tremendous repercussions on the quality of life of countless Australians. The message needs to be spread abroad by every possible means. By having a broad and detailed knowledge of the volunteer scene and identifying the target groups, volunteer managers can present a vital dynamic message.

EXERCISE

You have been asked to address the staff of a women's health centre which is considering involving volunteers on their committee of management and in service provision. They have invited you, a volunteer manager, and a representative from a women's group who is opposed to volunteering, to address them.

Prepare the points for your paper.

**SECTION II:
THE VOLUNTEER MANAGER**

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6

The Volunteer Manager

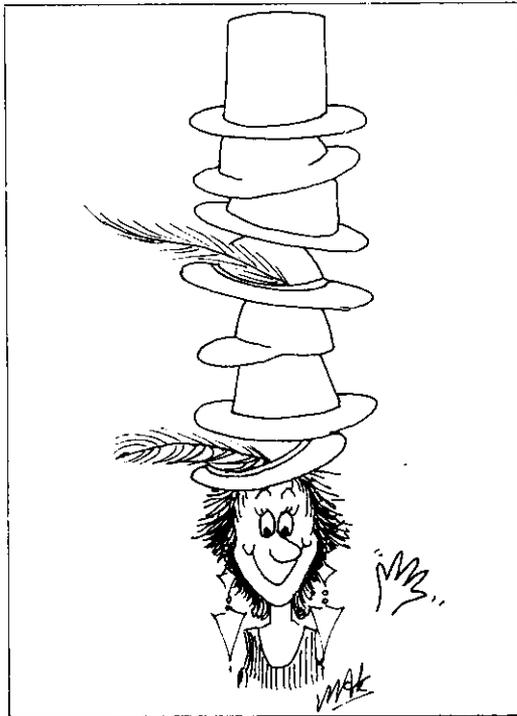
People cannot discover new oceans unless they have the courage to lose sight of the shore.

ANONYMOUS

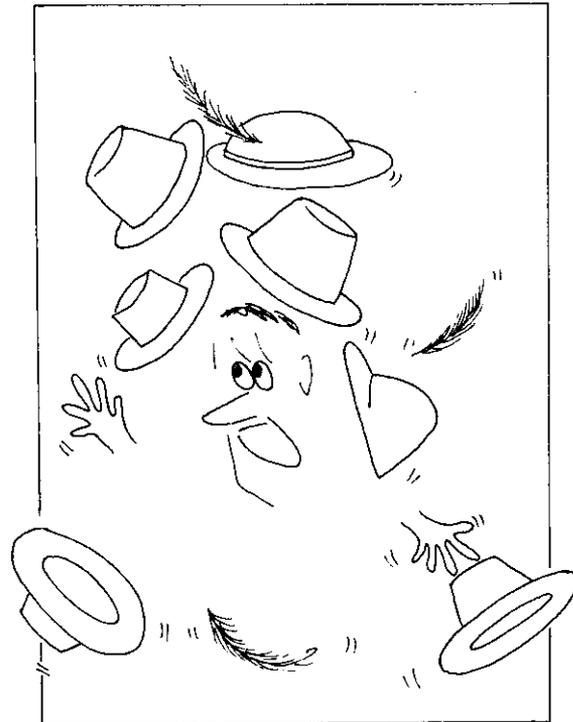
The job of volunteer manager is complex and demanding. However the rewards are great when the job is tackled thoughtfully, with enthusiasm and with commitment. Working with a great diversity of people, seeing them enjoy their volunteer activities and develop skills as they provide needed services, can bring great satisfaction. The range of abilities required for the job is considerable but provides the volunteer manager with great scope for personal development.

Volunteering is of great significance in our society. The appointment of a volunteer manager is an acknowledgement by management of the need to ensure the contribution of volunteers is recognised and utilised to the maximum. However, the importance of the position is not always reflected in its place within the organisation's structure, particularly in larger agencies. The position needs to be within the mainstream planning and management structure so that the volunteer manager can bring the insight and contribution of volunteers directly to the attention of management. As sometimes happens with a comparatively new career where the position within the structure is ambiguous, the incumbent becomes a jack-of-all-trades. The volunteer manager is often placed in the situation of having to clarify his or her own role. Sometimes the position needs to be subsequently redefined in the light of experience.

The title 'volunteer manager' rather than 'volunteer coordinator' has deliberately been used in this manual. The term volunteer coordinator is a misnomer — the job requires much more than coordination, a word which seldom rates a mention in a job description.



FIRM CONTROL



UTTER CHAOS

VOLUNTEER MANAGERS WEAR MANY HATS!

It is not unusual for a job description to include the following assignments:

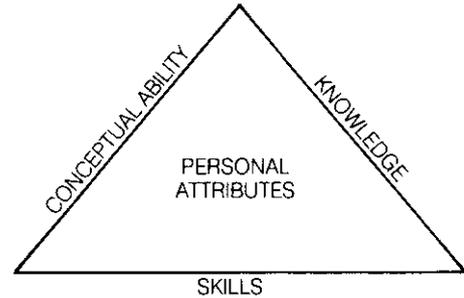
- plan, implement, manage and evaluate the volunteer program
- develop a policy on volunteering
- recruit, select and deploy volunteers
- orientate and train volunteers
- oversee the provision of services
- support, supervise and appraise volunteers
- work closely with paid staff
- organise and attend meetings
- provide and maintain good communication channels
- promote volunteering through community meetings, public speaking and media contacts
- arrange rosters, keep records and statistics
- write reports and submissions
- publish a newsletter
- budget and raise funds
- represent the agency in the area of volunteering
- liaise with other sections of the agency, other agencies and the community.

The above duties involve the skills required of a manager, personnel officer, training officer, administrator, public relations officer, fund raiser and service provider!

ATTRIBUTES AND SKILLS

The volunteer manager's job will require conceptual ability, knowledge, skills and certain personal attributes.

Conceptual ability includes an understanding of
the philosophy of volunteering
how volunteering and the community interact
management concepts
human relationships
current issues which impinge on volunteering.



Knowledge of facts, includes those relating to
the community, volunteers, agency goals, structure and paid staff
the history of volunteering
the extent of volunteering
the identity of today's volunteer.

Skills related to
interviewing
decision-making
delegating
managing conflict
knowing how to bring about change
conducting meetings
writing reports
communicating effectively
public relations
organising
enthusing others.

Personal attributes include
creativity
enthusiasm
sensitivity
flexibility
patience
ability to relate well to people
persistence
commitment
assertiveness.

STATUS OF VOLUNTEER MANAGER AND VOLUNTEERS

Too often volunteer managers are excluded from planning and management bodies in larger agencies. They are then put in a position of reacting to situations rather than being free to act creatively. When things go wrong, for example a volunteer acts inappropriately, the volunteer manager is often held responsible. However, the trouble may have its roots in earlier planning decisions in which the volunteer manager was not involved. The status of volunteer manager often reflects the low status given to volunteers.

The full implications of the decision by management to involve volunteers need to be recognised. The position of volunteer manager should be integrated into the agency structure in a functional rather than an ancillary way. Volunteer managers need to be given more opportunities to be involved in planning and decision making.

The position of volunteer manager can often be a lonely one. In larger organisations volunteer managers often have little status and are isolated from the main stream of staff support. In small agencies the volunteer manager is sometimes the only paid person working with volunteers and the management committee.

In these situations strategies need to be developed to ensure that the volunteer manager not only survives, but thrives! These could include

- not taking the isolation personally
- establishing support networks with — other volunteer managers, sympathetic colleagues, someone who has the ability to extend one's thinking and imagination, and volunteers who can give their own perspective
- developing a knowledge of local resources and information
- planning time for professional development, for example attending meetings for discussions with other volunteer managers, being involved in seminars and conferences and reading widely
- acknowledging the advantages of working with volunteers, and the infinite possibilities of working with a team of people committed to personal development, advocacy of a cause and the provision of services.

THE ROLE OF THE VOLUNTEER MANAGER

As the volunteer manager integrates conceptual ability, knowledge, skills and personal attributes within the context of the job, a picture emerges of a person managing a variety of tasks, leading towards the final goal — a team of volunteers working effectively and enthusiastically.

People working as volunteer managers do not always see themselves as managers. They come from a variety of backgrounds. Most, however, are people-orientated. Management is largely about people, so the ability to work well with people is a very useful attribute, particularly as it is bound up with beliefs and attitudes which are hard to change.

Some managers are concerned primarily with their organisation's structure and procedures. They are often popular with their supervisors but not necessarily the people they work with. The office may appear to be efficiently run, with a good output, but unless the people who provide the service remain happy, cracks will inevitably appear and output will decrease.

6 Ultimately the success of the volunteer manager will be judged not on the brilliance of his or her personal output, but on the effectiveness of the volunteer team. 9

'People' managers are primarily concerned with their team. They are often popular with the people they work with but not necessarily their supervisors.

Volunteer managers, like all good managers, need to be concerned with people, organisational structures and agency function. However their special responsibility is to ensure that not only the contribution of the volunteer is recognised and maximised, but that the volunteers' needs are nurtured and their wishes safeguarded. This does not mean over-protection of volunteers, rather, developing a climate which frees and encourages the volunteers to perform to the best of their abilities and grow in competence and confidence.

Ultimately, the success of the volunteer manager will be judged not on the brilliance of his or her personal output, but on the effectiveness of the volunteer team.

SUMMARY

We have seen that the volunteer manager has a complex, responsible and potentially rewarding job. The job description covers duties required of people of varied disciplines. The volunteer manager requires conceptual ability, knowledge, skills and specific personal attributes. These need to be integrated within the context of their job.

The position of the volunteer manager within the organisation is examined. Often the volunteer manager is expected to manage a situation without having been given sufficient say in planning and decision-making. Obviously this needs changing. The position can be a lonely one, whether working in a large or small organisation and the volunteer manager needs to develop strategies to cope with this.

The importance of management ability is stressed, with the aim of maximising the effectiveness of the volunteer team.

EXERCISE

| ATTRIBUTES AND SKILLS | Mark: A = Do well/have B = Need to develop | Suggestions/strategies for improvement |
|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|-----------------------------------------------------|-------------------------------------------|
| <ul style="list-style-type: none"> Understanding of philosophy of volunteering Interviewing ability Decision-making Delegating Managing conflict Communicating effectively Organising ability Creativity Enthusiasm Patience Sensitivity Add to list those important to your job | | |
| <p>Complete the above table, for self-appraisal. Then, with a partner try rating one another's attributes and skills. Discuss. Brainstorm strategies for improving performance. After six months, repeat both exercises.</p> | | |

**SECTION III:
POLICIES AND MANAGEMENT PRACTICES**

POLICIES AND MANAGEMENT PRACTICES

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7

Formulating a Philosophy on Volunteering

Action should have its basis in contemplation.

BERTRAND RUSSELL

Policy and practice guidelines, which are discussed later in this section, are based on philosophical considerations, as well as the situation to be addressed. Thinking through the philosophy as it impinges on volunteering is therefore a prerequisite to working out policy guidelines.

Any discussion of volunteering will reflect a particular set of experiences, values, beliefs and attitudes. Each individual and agency will need to establish their philosophical stance. This chapter suggests a possible framework as a starting point for further reflection.

Misunderstandings among colleagues (volunteers, management and paid staff) often occur because they are working from a different set of values. People are often not fully aware of the values which they hold as they have not consciously examined them. Bringing values into the open can serve to clarify why one is acting in a certain way, leading to a better understanding and more effective practice.

PHILOSOPHICAL CONSIDERATIONS

A philosophy on volunteering will reflect

- values with respect to individuals and society
- values with respect to volunteering.

VALUES WITH RESPECT TO INDIVIDUALS AND SOCIETY

A number of statements which reflect a set of values is listed below, as examples.

The individual

Each person

- has a basic need to contribute and to belong
- has a democratic right to a point of view, and the right to attempt to bring about change
- has the right to be treated with respect
- should have an equal opportunity to reach his/her potential
- should be able to choose from a number of options.

Society

- Finite resources, both human and physical, should be maximised without exploitation
- the unique contribution of every person is of worth.

The aim is a satisfying quality of life for the individual and an enriched community.

VALUES WITH RESPECT TO VOLUNTEERING

Volunteering can extend, enhance and humanise services (see Chapter 1 for discussion on the value of volunteering).

Essential elements of volunteer activity are that it is given of one's own free will, without payment, for service.

HOW PHILOSOPHY IS REFLECTED IN POLICY AND PRACTICE

Having clarified one's values, it is possible to state one's philosophy on volunteering as it relates to

- the volunteer
- the agency
- service provision.

The volunteer

- Opportunities should be provided for any person to volunteer, irrespective of age, sex, race or capacity, keeping in mind the need for matching the person to the job.
- Volunteers should be made aware of their responsibilities to the agency within which they work.
- Opportunities should be provided for training and self-development, widening of experiences, and maximising of choice to enable the volunteer confidently to carry out his or her work.
- Volunteers should not be coerced.
- Volunteers should not be exploited.
- Volunteers should not be given jobs which are the province of paid workers.

● The unique contribution of every person is of worth. ●

The agency

- The agency must clearly state why it is involving volunteers, in what areas and on what jobs.
- Good relationships between paid staff and volunteers and relationships within the volunteer team itself, should be based on mutual trust and respect, and on a recognition of the unique contribution of each individual.
- Role definition and avenues for consultation should be provided.
- Adequate support, supervision and recognition should be provided.

Service provision

- Service should be provided in such a way that recipients are able to exercise control over their lives.
- Services should be cost-effective and of high quality.
- Volunteers must not be imposed on service recipients without their knowledge and approval.

REVIEW OF PHILOSOPHY

Philosophies can change. Experiences, both personal and on-the-job, and exposure to new situations and ideas can subtly or radically change philosophical notions, calling for periodic review. A revision of policy guidelines also provides an opportunity to re-evaluate philosophy.

SUMMARY

In this chapter it is noted that the agency's philosophical stance will be reflected in policy and practice guidelines. Philosophy is based on values and attitudes, which of course may vary widely between individuals and between agencies. It is therefore important to clarify values held by an agency as a first step in formulating policy guidelines.

Examples are given of statements which reflect values with respect to individuals and society. Having clarified these values, it is then possible to state one's philosophy on volunteering as it relates to the volunteer, the agency and service provision.

EXERCISE

VALUES RELATING TO INDIVIDUALS AND SOCIETY

Individuals

Each person

has a basic need to contribute and to belong

has a democratic right to a point of view, and the right to attempt to bring about change

has the right to be treated with respect

should have an equal opportunity to reach his/her potential

should be able to choose from a number of options.

Society

Finite resources, both human and physical, should be maximised, without exploitation.

The unique contribution of every person is of worth.

Add to or amend the values listed above — or choose your own list.

Relate each value to volunteering as practised in your agency, with regard to

- (a) the volunteer
- (b) agency practice
- (c) service provision.

8

Policy and Practice Guidelines

Once turn to practice, error and truth will no longer consort together.

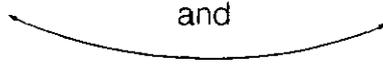
THOMAS CARLYLE

Preparation of policy and practice guidelines relating to volunteer involvement may be seen to be a daunting task. Certainly, a number of questions will need to be answered. However, it can be an interesting exercise for all concerned. The establishment of guidelines, following wide consultation, will lead to a smoother path ahead.

Philosophy and the facts surrounding the situation need to be considered.

By amalgamating

PHILOSOPHY and THE SITUATION



clear guidelines can be formed which help in day-to-day activities.

Each agency is unique, with its own set of circumstances which needs to be addressed. This means each agency will need to prepare guidelines to cater for its particular situation. The process of preparation is very important — widest possible consultation should be the goal.

During preparation questions WHY? HOW? and WHAT? will need to be asked. For example,

Why is the agency involving volunteers — to encourage community involvement, to extend and enhance services, as a cost-saving device, or some other reason?

How should the agency recruit and deploy volunteers to ensure the satisfaction of all parties?

What jobs and responsibilities, if any, should be the sole province of paid workers?

Well-prepared guidelines will assist in maximising the effectiveness of the contribution of volunteers, and at the same time will provide safeguards for all parties concerned. The guidelines will

- address issues concerned with volunteer involvement
- ensure that roles, rights and responsibilities are understood by all concerned

- set the climate for a productive working relationship between the parties involved
- facilitate the review of agency practices (as the guidelines are there for all to see).

While management may delegate tasks associated with the preparation of the guidelines to the volunteer manager, management is ultimately responsible for the guidelines, and for their periodic review.

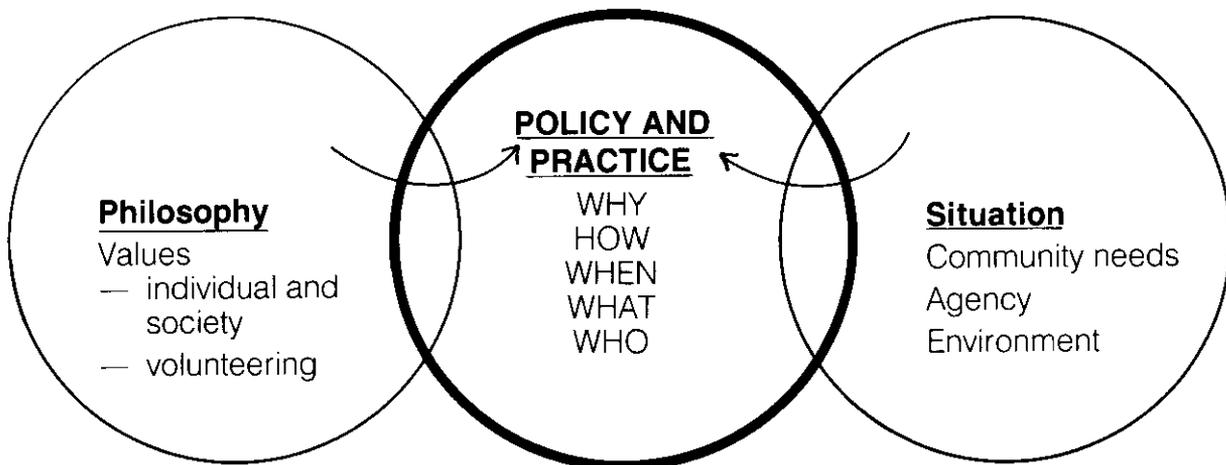
AREAS FOR CONSIDERATION

1. **Philosophy**

Values with respect to individuals and society.
 Values with respect to volunteering.

2. **Situation** (facts)

Community needs
 Agency: goal of agency, its policies and philosophy
 service provision
 staff, management
 paid staff
 volunteers
 service recipients
 physical amenities
 funds
 Environment (industrial, physical, social, cultural).



PROCEDURE FOR DEVELOPING GUIDELINES

Slowly does it!

The importance of the process cannot be over-emphasised. The process will include consideration of

- who will be involved in order to ensure plenty of ideas are gathered and to ensure commitment to the guidelines
- the time allowed for proper consideration and consultation
- the order in which the different steps in the process will be carried out.

In the case of a large complex organisation it may take months or a year before a formal written policy is agreed upon. This does not preclude having a provisional agreement, perhaps verbal, covering a number of points. For instance, it will be necessary to decide whether volunteers should be paid out-of-pocket expenses before they are recruited. Written guidelines must wait until all parties who will be involved understand the issues which need to be considered.

The sad, but true story, is told of an organisation which wanted to introduce volunteers into its operation. The scene was set with strong support from management, a clear set of policy guidelines and an interesting program of extended services to the client group. Everything was set to go . . . when suddenly, everything ground to a halt! Paid staff and unions vetoed the project, as they had never been consulted. Feelings ran so high that the volunteer program could not be resurrected for years.

People to be involved

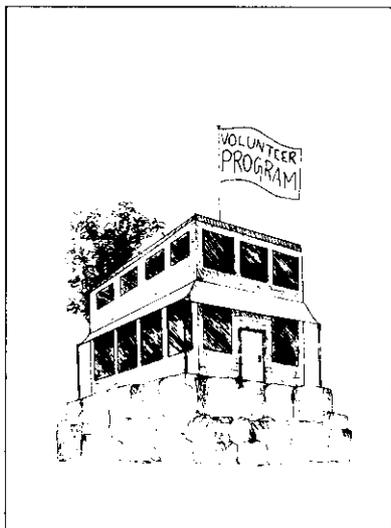
Any party directly or indirectly involved should be included, for example

- management
- volunteer manager
- volunteers
- paid staff
- representative of consumer or client groups
- trade union representatives.

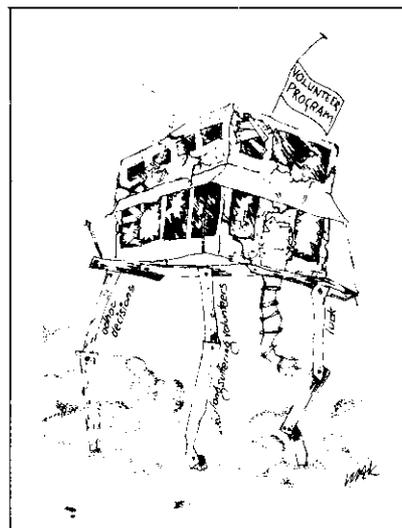
The steps and time-frame

Sufficient time should be allowed for each step to be properly completed.

1. Collection of facts (the situation) and clarification of philosophy, including the reason for volunteer involvement
2. Initial brainstorming
3. Formulation of draft
4. Wide distribution of draft
5. Review draft (keeping the requirements of step 1 clearly in mind)
6. Seek feedback — written and verbal
7. Collation of feedback
8. Agreement to guidelines by all parties concerned (including management) with date set for review
9. Distribution to all concerned.



ON THE ROCK



ON THE ROCKS

CONTENT OF GUIDELINES

What needs to be included will depend on, for example,

- the size and complexity of the agency or group
- the type of services in which volunteers will be involved
- whether the volunteers will be working in separate teams or as individuals working side by side with paid staff.

However guidelines could well involve the following:

1. Why volunteers are being involved,
e.g. to increase the effectiveness of the agency and allow for wider community participation.
2. The responsibility of paid workers,
e.g. (a) to identify ways in which their work could be extended or enhanced by involvement of volunteers, and (b) to supervise and support volunteers as appropriate.
3. What the volunteers can expect of the agency,
e.g. a clear statement of the work being offered and any necessary assistance to enable them to perform the task adequately.
4. What the agency can expect of the volunteers,
e.g. agreement to work within the agency structure and guidelines.
5. Principles of equal opportunity,
e.g. A volunteer job will not be withheld simply on the grounds of sex, race or religion.
6. Provision for orientation and adequate training,
e.g. The agency's policy on staff development and training applies equally to volunteers and paid workers.
7. Payment of out-of-pocket expenses, insurance cover and working conditions,
e.g. Volunteers will be covered by insurance and paid out-of-pocket expenses —both clearly delineated.
8. Integration of volunteers into the agency structure,
e.g. Volunteers will have the right, and will be encouraged, to participate in team meetings and in the planning and organisation of the work. Volunteers are entitled to information, consultation and participation in decision making appropriate to their job.
9. Industrial considerations,
e.g. The involvement of volunteers will be subject to mutual agreement of management and paid workers. Volunteers will not replace paid workers or facilitate a decrease in paid employment. Volunteers will not cross picket lines in a strike.
10. Record keeping,
e.g. Statistics will be kept, recording the extent of the contribution of volunteers to the agency.
11. Areas in which volunteers will and will not work,
e.g. As far as possible volunteers should not simply be given the unpopular jobs or used as another pair of hands but should be given work which they 'own'.
Volunteers will be adequately protected from dangerous situations, or situations which might lead to untenable consequences.
12. Provision for review,
e.g. Guidelines will be reviewed annually.

6 The process of preparation is very important — widest possible consultation should be the goal. 9

Some help with the examples was provided by the Volunteer Policy Document of ADVANCE (Advice and Development for Volunteering and Neighbourhood Care in London).

Appendices 3, 4 and 5 might prove helpful in guideline preparation.

INDUSTRIAL ISSUES

Using volunteers in an organisation where paid staff are already employed can result in industrial disputes involving trade unions or conflict between paid staff and volunteers. The three sectors have legitimate concerns which need to be recognised by all.

Trade unions have a mandate to protect the rights of their members, and it is important that volunteers do not prejudice working conditions, job security and employment opportunities of paid staff. However, generally trade unions recognise that

- there are people who do not wish, or are unable, to engage in paid employment, but have a desire to assist others and satisfy their personal needs for social contact and self development.
- there is some work which is generally not appropriate for paid work, e.g. befriending, fire-fighting in a country area (cost reasons)
- most current community services which now provide paid employment for many people were initiated through volunteer labour. The trade union movement itself is an example.

Paid workers also have legitimate concerns when

- they are expected by management to provide support and supervision to volunteers without due recognition of the time, skills and training they need to do the job adequately.
- they fear that volunteers will put them out of work or discourage further paid employment.
- they will be deprived of duties they enjoy.

Volunteers are concerned that they be given opportunities to

- fulfil their desire to be involved in an area of interest and contribute their experience, skills and time
- learn work skills and test possible career areas
- provide advocacy for people and causes and try to bring about what they see as necessary change
- engage in mutual help enterprises.

When agencies have clear policies, and when the contribution of all parties is appreciated, the rights of each party can be preserved.

Guidelines underlying good working relationships

- The work of volunteers should complement and extend, but in no way compete with, the work of paid staff. The work of volunteers should not
 - deprive others of a livelihood
 - constitute a threat to the security and job satisfaction of paid staff
 - be used as a substitute for paid labour when the situation requires paid labour
 - be seen to be in conflict with the paid staff members' capacity to contribute to the community for altruistic motives.
- Clear job descriptions and areas of responsibility are necessary for both paid staff and volunteers — verbal or written.
- The role and function of the agency must be clearly understood by all involved and an effective working relationship established between all parties working towards a common goal.
- Management must give due recognition to the additional time and skills required by paid staff to supervise and support volunteer involvement.
- Volunteers need to make realistic commitments, in terms of both time and area of involvement: it is legitimate for the agency within which they work to expect these commitments to be fulfilled.
- Communication and consultation channels should be clear to all concerned, and volunteers, as well as paid staff, should be included in consultation and decision-making processes, as appropriate. This is especially necessary during times of change.
- A climate of mutual respect and confidence should be engendered between paid staff and volunteers. This will be facilitated by each appreciating the unique contribution of the other.
- Management must provide adequate resources to enable volunteers to fulfil properly their allotted tasks, through orientation, support structures, and any necessary training. The employment of volunteers should not be seen merely as provision of a cheap service.
- The purpose behind any contractual agreement between trade unions and management concerning the utilisation of volunteers should be understood and accepted by all parties, after allowing for full consultation. The spirit of any agreement should be understood and followed, otherwise there is a danger that a strict adherence to the wording will be unnecessarily restrictive. The agreement should be a tool, not a weapon.
- Demarcation lines need regular review to ensure their relevance; in addition full consultation should occur between all interested parties when a shift of duties is contemplated.

Apart from preparing working guidelines which will have the effect of promoting understanding and goodwill between paid staff, volunteers and management, an agency may need to establish contingency procedures for dealing with any industrial action which might occur. In doing so, the following might be included:

- During an industrial dispute, any additional work by volunteers would normally only be undertaken with the agreement of both management and those staff and/or their representatives involved in the dispute.

- Volunteers should not be expected to cross picket lines, except by agreement with management and staff involved in both sides of an industrial dispute (on the other hand trade unions might consider alternatives to picket lines in order to minimise the chance of confrontation with volunteers).

(See Appendix 3, point 5.(4))

INSURANCE FOR VOLUNTEERS

Insurance cover can protect both the agency and the volunteer. Insurance is, however, a vexed question for many agencies. The increasing cost of insurance poses problems, particularly for small agencies and groups. A first requirement in considering insurance is to understand the various types of cover. Systems within Australian States vary. However each State will have some form of insurance covering the four situations mentioned below:

1. **Public liability** or **public risk insurance** covers the agency if it is sued by a volunteer or other person for injuries. If the organisation is liable (usually for negligence) then unless the policy has a relevant exclusions clause, the person can sue for injuries and the insurance company will pay the bill. The public liability policy must be read in full to see if there are exclusion clauses which might matter to the agency, and to make sure that any special conditions are being met. Public liability insurance will often not cover accidents to volunteers, either because the organisation was not negligent and the accident was no one's fault, or was the volunteer's fault, or because volunteers knew about and accepted the risk of accident.

Agencies which involve volunteers should **always** have a public liability insurance policy which should be read carefully to check the terms.

2. **Volunteers personal accident insurance** covers volunteers irrespective of the cause of the accident or who was at fault. Personal accident cover generally pays weekly benefits, out-of-pocket expenses like medical bills, and low capital benefits for permanent injury or death. It does not provide high pay outs like public liability insurance. Individuals can take out their own personal accident cover, but usually the agency takes out a block policy to cover all its volunteers.

There are two points of view in relation to whether or not agencies should take out volunteer personal accident insurance. One view is that it is unnecessary because most people are not covered by insurance at home or in leisure activities, so volunteers are not disadvantaged if they are not covered. The other view is that it is unfair not to cover volunteers particularly if they are working alongside paid staff who will be covered by some form of workers compensation. The risk factor must always be taken into account. It may be felt unnecessary to cover a member of the committee of management but essential to cover a person working with people who are frail and disabled, or engaged in erecting a hut.

Volunteers not covered by personal accident insurance ought to be advised so they can make an informed decision about whether they wish to bear the risk of accident during their volunteer work. Details of the specific benefits to volunteers who are covered should be clearly explained. In addition a written list of the benefits should be readily accessible.

3. **Workers compensation insurance** is compulsory in all States for paid workers, but is rarely available for volunteers — check State legislation. Some States are now reviewing their insurance with schemes being introduced like WorkCover and WorkCare. Workers compensation insurance usually provides a high pay out if the employer was negligent (as with public liability insurance), or a lower weekly pay out if the employer was not at fault (like volunteers accident insurance).
4. **Professional Indemnity Insurance** is usually taken out by self employed professionals like doctors, lawyers and architects to cover them against damages caused through their own negligence. Where professionals are acting in a voluntary professional capacity on behalf of an agency, for example a lawyer in a community legal information centre, the public liability insurance policy will normally cover the agency. However, if there is an exclusion clause in the public liability insurance policy the agency should consider taking out its own professional indemnity insurance or requiring professional volunteers to take out professional indemnity cover in order to protect themselves and the agency.

Insurance policies do not make exciting reading but understanding them (including the small print) is vital.

Agencies will wish to obtain several comparative quotes from an insurance broker or insurance agents, keeping in mind their particular situation, for example the difficulty in finding cover for volunteers over seventy years of age.

SUMMARY

If taken step by step, preparation of policy and practice guidelines is a rewarding task. It provides an opportunity to ensure that all parties concerned understand the place of volunteers within the agency. Relevant issues will have been identified and addressed and questions on policy issues will have been answered. The job of the volunteer manager will be made easier.

Industrial issues are discussed and guidelines suggested. Types of insurance cover are listed and points requiring consideration are outlined.

9

Planning and Management

Planning . . . bridges the gap between where we are now and where we want to go.

MARLENE WILSON

The temptation to jump in and get things moving without thinking carefully (if, why, what and how) can be very hard to resist, particularly for action orientated people, or where the boss is telling you to get cracking! However, utilising volunteers involves complex issues which affect the volunteers, the image and functioning of the agency and service provision. Careful planning and management is therefore essential if the creative energies of volunteers are to be encouraged not only to provide needed services, but to be the pacesetters for innovation and necessary change.

It is incumbent on management who have made the decision to involve volunteers to ensure their services are used to best advantage. This necessitates the establishment of a well paid position of volunteer manager commensurate with the responsibilities involved. Too often a position of volunteer coordinator is established with a low salary and a low status.

A prerequisite to effective planning and management is that the job of volunteer manager is clearly defined. Its function and responsibilities and place within the agency structure must be understood by all concerned (Appendix 6 provides examples of job descriptions for volunteer managers within different settings).

FACTORS WHICH HAVE AN IMPACT ON PLANNING AND MANAGEMENT

Volunteer managers may be involved in a range of programs, apart from the overall plan which relates to volunteer involvement. Their role in planning will differ greatly according to where the primary responsibility for each program or activity lies. For example the volunteer manager would be primarily responsible for the planning of volunteer involvement, but for certain elements only of a program of hospice care where a social worker could have the primary planning responsibility.

The complexity of the volunteer manager's job of planning and management will depend on a number of factors, including

- the type of services the agency provides, its size and setting
- the type of work in which volunteers are engaged
- whether volunteers are working in a separate team or alongside paid workers
- whether volunteer involvement is a tradition or is a new development.

The job is often complicated by other factors, such as

- situations where supervision of volunteer involvement is just one of the jobs expected of the volunteer manager, that is, the position is only part-time
- the difficulty of getting a job done when one is working with a variety of volunteers who report on one day a week and, in some cases, less frequently
- rapid changes taking place in the type of volunteer now offering for service, with a myriad of different motives, skills and personal needs
- the need for agency management to provide the facilities and funding required for the successful involvement of volunteers in the face of a tight budget situation
- difficulties for paid staff, who are already fully committed, to provide sufficient supervision and support
- the fact that often volunteers are deployed in many different programs and activities, necessitating the volunteer manager liaising with a number of paid staff across the agency
- the wide range of areas of work expected of the volunteer manager, requiring a variety of different skills.

PLANNING FOR VOLUNTEER INVOLVEMENT

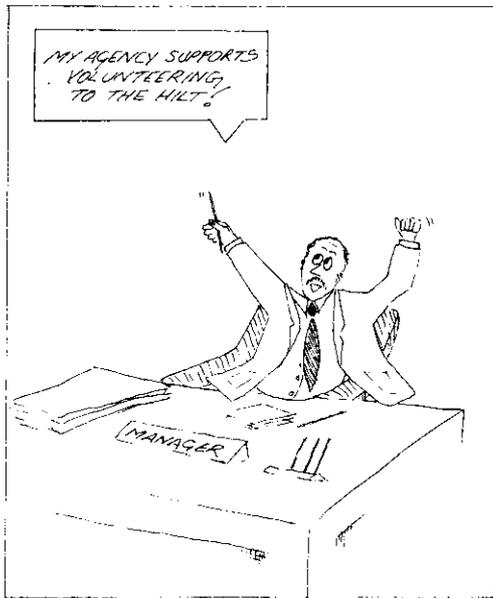
If the organisation's policy statement on volunteer involvement is already in place, some pointers are available which will assist in planning the involvement of volunteers within the agency's program. However, if a written policy statement has yet to be prepared the volunteer manager will need to receive from management some answers to questions, for example about insurance cover and out-of-pocket expenses, before volunteers are recruited. The policy guidelines need to be integrated into every phase of volunteer involvement. It is not a document to keep in the bottom drawer or lose in the filing cabinet!

● **The job of volunteer manager demands creativity — a 'blowing of one's mind'. ●**

In planning for the involvement of volunteers it is essential for the volunteer manager to seek the ideas of all concerned. This is important not only for the value of their ideas, but to ensure their commitment.

Commitment of management means they

- understand the philosophy of volunteering
- appoint a person to oversee the volunteer program — the position to be placed within the planning and decision-making structure of the agency
- are committed to volunteer involvement which benefits all parties involved
- are prepared to give adequate recognition to the contribution volunteers are making to their agency
- provide concrete support by ensuring budgeting for the program, including out-of-pocket expenses, insurance for volunteers and funding to cover training needs for volunteers and paid staff, e.g. manuals, materials, attendance at seminars and conferences.
- etc.



Commitment of volunteers means that they

- understand the reasons behind any activity, as it relates to the program aim
- agree to work within the agency structure and guidelines
- are prepared to accept ancillary jobs related to their task
- are reliable
- etc.

Commitment of paid staff means they

- understand the philosophy of volunteering
- are properly equipped for the job of providing supervision and support to volunteers
- have the time to carry out the additional work
- are given recognition by management and the opportunity for training in the skills required
- etc.

GOALS — OBJECTIVES — PROGRAMS/PROJECTS/ACTIVITIES

An agency will set its goals, objectives and programs culminating in the provision of a service to the community. The involvement of volunteers needs to be seen in relation to these goals and objectives.

Goals relate to the purpose for existence, pointing to a desired direction, aim or mission. The goal may never be wholly realised, otherwise the agency could go out of existence.

Objectives define specific ways in which the goal can be achieved, or at least move towards achievement. Writing them down guards against activity without direction

Programs. Objectives can then be translated into programs or projects which might be short-term or long-term; they must define a plan of action and be measurable.

FOR EXAMPLE, TAKE AGENCY X:

Goal or mission: To improve the quality of life of frail aged persons living in the Council area of

Objectives:

- to provide advocacy for individuals
- to provide stimulating and enjoyable leisure activities for frail aged persons
- to involve the community in service provision with maximum participation by volunteers
- etc.

Programs/projects/activities for next year.

1. arrange three river cruises, each to cater for seven persons, escorted by volunteers
2. arrange one bus trip catering for twenty persons to a near country town, escorted by volunteers.
3. . . .
4. . . .

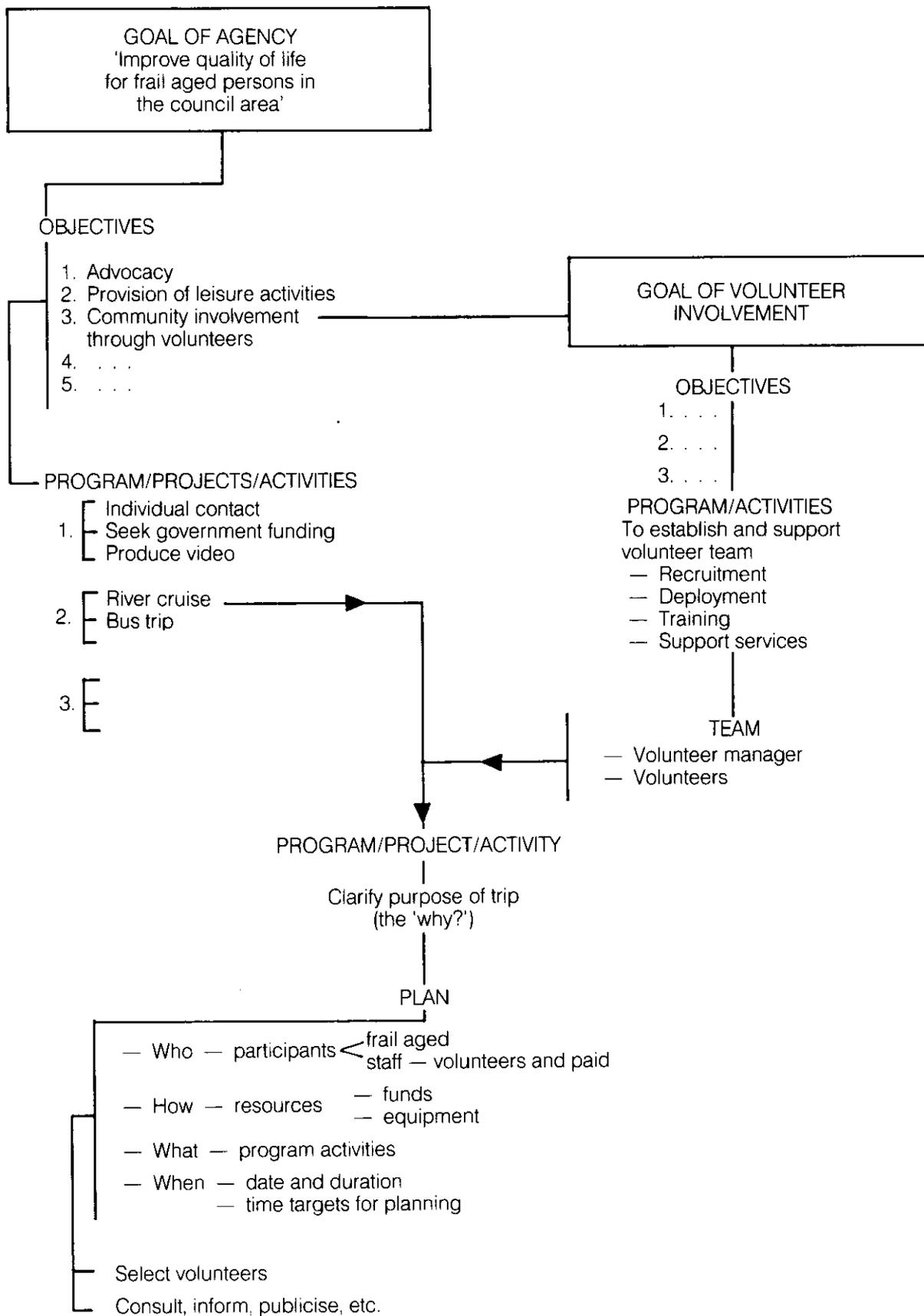
Having made the decision to involve volunteers in the cruise and bus trip, the next step for the volunteer manager (perhaps in collaboration with an activities officer) will be to decide:

- the work to be done
- who will do it
- who has overall responsibility during the trips
- who has responsibilities for certain tasks
- time target, etc.

The volunteer manager will be responsible for

- recruitment of volunteers if sufficient suitable volunteers are not available already
- selection of those who would be suitable for the responsibilities of the job, taking account of their availability
- orientation of the new volunteers, and training in the special needs of people with disabilities and requirements of the holiday programs
- establishment of a working relationship between volunteers and paid staff who will be involved
- ensuring everyone knows the lines of communication, and from where support and supervision will be available
- budgeting considerations
- evaluation of outcome.

Current volunteers and paid staff would be involved in all aspects of the planning process to ensure their commitment, understanding and ability to take on as much responsibility as is possible and appropriate.



FLOW CHART OF AGENCY 'X'

CREATIVITY IN PROGRAM DESIGN

The job of volunteer manager demands creativity — a 'blowing of one's mind' and a commitment to thinking big as well as in detail.

The development of skills by the volunteer manager in planning and management always needs to be seen in the context of encouraging an effective, creative and innovative team of volunteers.

In drawing up plans people will often slavishly follow a set pattern regardless of other options. Decisions should take account of a range of creative options which then need to be rated against

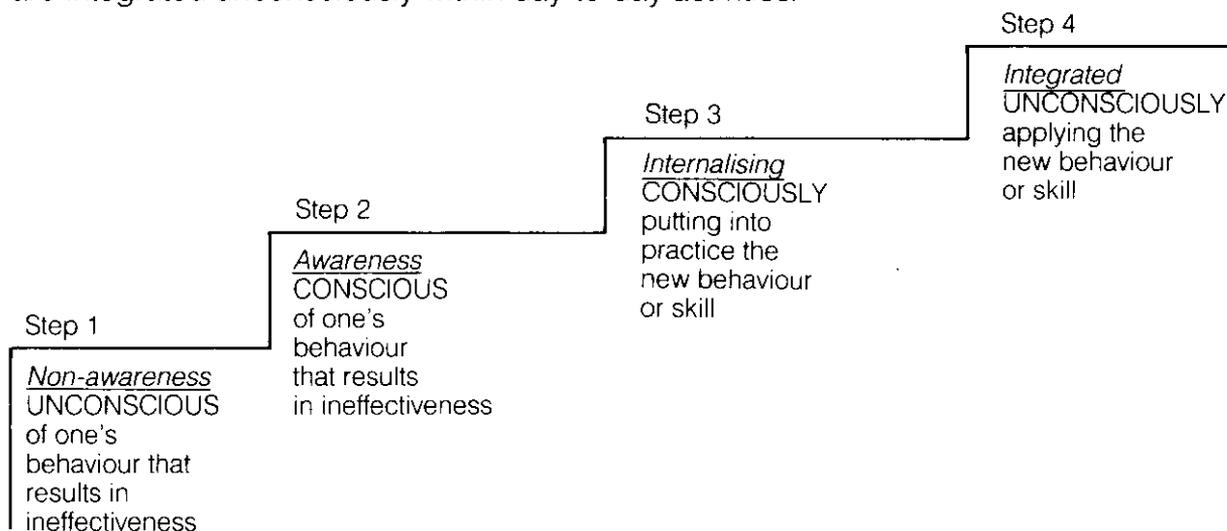
- need for service or innovations
- the reality of the situation, e.g. potential recruiting ground for volunteers, views of relevant trade unions
- whether resources (skills, funding, facilities, time) are available, or can be obtained
- constraints, e.g. conservative attitudes
- how the program accords with agency policy
- very importantly, which option works best towards achieving the goal and objective, in both the long and short term.

LEARNING TO MANAGE

Peter F. Drucker⁷ defines the characteristics of a good manager as one who

- knows where their time goes
- concentrates on results rather than on activity
- builds on strengths, not weaknesses
- concentrates on a few major areas which have potential for producing outstanding results
- makes effective rational decisions.

Madelyn Burley-Allen in her book *Listening: The forgotten skill*, graphically illustrates how managers can improve their performance. The first step is becoming aware of current behaviour and the last is the applying of new behaviours and methods so they are integrated unconsciously within day-to-day activities.



For example Joe Blow is constantly in a muddle (Step 1). In moving to Step 2 he would have realised his problem lay in a lack of organising ability. In taking Step 3 he would implement a plan of time management, delegation, etc. Step 4 represents the stage where Joe's organisational ability has improved to the extent that his performance is effortless.

SUMMARY

The first step in effective planning and management is to clarify the role of the volunteer manager and, in so doing, establish the place of volunteer involvement within the agency function and structure. Goals, objectives and programs are defined and examples given. The aim of the volunteer manager will be to plan and manage creatively (using the ideas and commitment of those involved) so that the energies of volunteers are directed into satisfying and purposeful endeavours.

EXERCISES

- Draw up a chart of your agency's structure, showing where you, as volunteer manager, fit.
Now show where the services provided by volunteers fit into the overall function of the agency.
Is the situation satisfactory?
If not, what needs to be done to improve the situation?
- You have been asked by management to present to them the goal and objectives of volunteer involvement in the agency. Set these out and add your proposed activities, being as creative as possible, for the next year.

10

Management Strategies and Skills

Not everything that is faced can be changed easily, but nothing can be changed until it is faced.

JAMES BALDWIN

When the best leader's work is done, the people say 'We did it ourselves'.

LAO-TZU

Management strategies are a means of 'working smarter not harder' as the Americans would say. As noted in previous chapters, a great range of skills is required of the volunteer manager. It would be unrealistic to expect one person to be expert in every area. A commitment to improving those areas which need development is therefore necessary. The strategies and skills discussed in this chapter all require a sensitivity to people, their needs and attitudes and ways of working.

LEADERSHIP STYLES — NOT ONE, BUT FOUR!

Some years ago managers would be described as being one of two kinds, either autocratic or democratic. One kind gave orders, down, the other believed in participatory management. Kenneth Blanchard⁸ advocates four leadership styles. His model of 'situational leadership' proposes that the type of leadership should be adapted to the abilities and the degree of confidence and commitment of the staff. The volunteer team is likely to consist of people with varying abilities and degrees of confidence and commitment. Under Blanchard's model, a volunteer manager would use all four types of leadership, possibly all in the one day.

**SITUATIONAL LEADERSHIP — LEADERSHIP STYLES APPROPRIATE
FOR THE VARIOUS DEVELOPMENT LEVELS**

| DEVELOPMENT LEVEL | APPROPRIATE LEADERSHIP STYLE |
|----------------------------------------------|----------------------------------------------------------------------------------|
| D1 Low competence High commitment | Style 1 DIRECTING Structure, control and supervise |
| D2 Some competence Low commitment | Style 2 COACHING Direct and support |
| D3 High competence Variable commitment | Style 3 SUPPORTING Praise, listen and facilitate |
| D4 High competence High commitment | Style 4 DELEGATING Turn over responsibility for day-to-day decision-making |

Directing (Style 1) is for people who lack competence but are enthusiastic and committed (D1). They need direction and supervision to get them started.

Coaching (Style 2) is for people who have some competence but lack commitment (D2). They need direction and supervision because they are still relatively inexperienced. They also need support and praise to build their self-esteem and to prepare them for involvement in decision-making.

Supporting (Style 3) is for people who have competence but lack confidence (D3). They do not need much direction because of their skills, but support is necessary to bolster their confidence.

Delegating (Style 4) is for people who have both competence and commitment (D4). They are able and willing to work on a project by themselves with little supervision or support.

'Situational leadership' provides a guide as to when delegation is appropriate.

A GOOD MANAGER IS A GOOD DELEGATOR

Al Capp, the American cartoonist, has one of his characters say, 'A manager is a person with just enough sense to get somebody else to do the work!' There is a grain of truth in this — certainly it is not sensible for a person to do everything, as he or she will inevitably fail to get everything done, try to do jobs others can do better, or be saddled with jobs he or she dislikes, yet others enjoy.

Definition of delegation

It is important to be clear on what delegation is and is not. Delegation is a conscious passing over of an identifiable section or sub-section of one's job to another person or group. The final responsibility for the job, however, rests with the delegator.

The goals of delegation are:

- to share the job with others who are capable, willing and able, so more work is accomplished

- to provide opportunities to volunteers to use their skills and experience in satisfying activity, which can also have the effect of developing their abilities further and increasing their confidence
- to increase democratic participation so people feel they are partners rather than simply participants
- to enable volunteers to take responsibility for a whole job with a beginning, middle and end, rather than a segment of a job. This provides them with further opportunities for insight, creativity and satisfaction.

The latter point is illustrated in the story of the person who was bored with his paid job and lived for his weekend golf. He dreamed he was offered a full-time job in a golfing team and was allocated the chip shot to Number 3 green. At first he was delighted, and his chip shot improved markedly. But after a while he wanted to see how his fellow players were progressing, and to try other shots. His boss told him that was not possible — everyone had their set job. Soon his performance deteriorated, and the dream became a nightmare!

Delegation is not to be confused with passing the buck, i.e. avoidance of responsibility, asking someone to do a piecemeal job, or handing over a job simply because it is unpleasant.

Delegation as a matter of policy

In planning a program of volunteer involvement it may be decided to adopt a policy of encouraging delegation to the maximum extent possible as a means of empowering volunteers and increasing output. This will mean that the principle of maximum delegation is integrated into the program.

Considerations where delegation is inappropriate

The job demands that the volunteer manager be involved, e.g. liaison with agency management.

The job demands a continuity which is not possible with volunteers working on only one day per week or per fortnight.

The volunteer manager is particularly adept at the job and no volunteer is available who can do the job as well.

A program is new and it is necessary to know what is involved in terms of skills, funding and time before delegating.

Strategies for overcoming impediments or difficulties

- Pair or form a team of volunteers to provide back up, aid continuity and help build confidence.
- Provide extra training and/or support prior to, or in the early stages of delegation until confidence and competence is established.
- Recruit a person from the community who already has the skills required.

Steps to consider in deciding what jobs to delegate, and to whom

1. Involve co-workers (volunteers and paid staff) in the planning.
2. Divide the total work load into identifiable sections, e.g. recruitment, assessment, administration, publicity, and if necessary into sub-sections, e.g. publicity could be

divided into contact with the media, public speaking, preparation of promotional material.

3. Select the sections (or sub-sections) which can appropriately be delegated.
4. Consult current volunteers regarding offers of help or suggestions on how to find suitable volunteers. Some direct approaches could be made to volunteers who are obvious candidates. (This is possible when one has a clear idea of the competence and commitment of the volunteers. See Level D4 in 'situational leadership' table). If a policy of encouraging maximum delegation is in place, volunteers will be better prepared when approached.
5. Before delegating jobs, volunteers' suitability and availability will have been assessed. The job, the goal, the reasons for delegation, length of commitment, responsibilities, reporting back mechanisms, review date, etc. will need clear definition. If a sub-section of a job is delegated, the volunteer needs to be aware of how it relates to the whole, and what the full program is trying to accomplish.
6. When delegation has been agreed on, check that the person or team clearly knows
 - the task
 - the desired outcome
 - the limits of the task in terms of activities and areas of responsibility
 - feedback mechanisms
 - available resources
 - what to expect from the volunteer manager in the way of back-up.
7. Once assured that the person or team knows what to do, and has the resources to do it, maintain support and interest without unnecessary intrusion.

Delegating, when well planned, ensures

- more work is accomplished
- volunteers develop further skills and confidence
- the volunteer manager is an enabler rather than a doer, is not drowned in an ocean of activities, and is therefore better able to plan, manage and review.

Delegating is not opting out. It is using resources to best advantage, recognising the ability and commitment of volunteers and confidently handing over to them segments of the work load. This does not however involve the handing over of final responsibility. The volunteer manager can be likened to a conductor who does not need to be a competent player of all instruments. However, by recognising the contribution of each instrument and bringing them all together, a harmony is achieved which brings satisfaction to the audience and the players.

TIME MANAGEMENT

Master time and you make the most of your life.

HERACLITUS, 500 B.C.

Time is an unrenowable resource. No-one can manage time — but self management is possible! It is important to be in control — but remain relaxed. The important principles are

- Decide what is to be achieved.
- Plan the day.

- Limit interruptions.
- Streamline the physical environment.
- Be decisive.
- Delegate.

Learn self management

This means commitment and control. The daily routine must be analysed in order to identify the time waste areas.

Some factors are *external*, for example, constant interruptions. Others are *internal* such as likes and dislikes. For example, some people are freshest in the early morning, some people prefer working alone.

Some of these factors may be beyond control, particularly in the external area. If controllable, decide what adjustments may work best, for example, tackling difficult tasks early in the day.

Keep a diary and carry it always. This is important in any case, but vital if memory is poor. Jot appointment details down at once. A diary is an important tool for feeling in control of the week and the months ahead.

Streamline the physical environment

This involves notions of time and motion. The following points are important:

- arrange furniture and equipment to minimise movement, to avoid loss of time and energy, and generally to save wear and tear
- identify a fixed place for everything from filing cabinets to pins, ensuring that all are handy.

Decide what is to be achieved

Once-clear goals often become lost in a maze of activity. The trick is to keep the goals uppermost in mind. The emphasis must be on the final results, not on the activity.

Plan the day

Some people will say, 'It is no use me planning. I always have so many interruptions. It's hopeless.' Nevertheless, a plan is important. List the jobs and prioritise. Even though at the end of the day all may not be completed, it is at least possible to see what has been achieved. Now there is a starting point for the next day.

Limit interruptions

Certain interruptions are inevitable. Uncommitted time is often short and further diminished by phone calls and personal visits. These must be allowed for, but appointments should be made wherever possible. The remaining time must be well guarded.

Trivia in phone conversations or in discussions should be minimised. Know what has to be said or heard and finish. Other people's time is precious too!

Be decisive

Everyone procrastinates at times, some all of the time. 'The biggest thief of time is indecision,' according to Charles Flory. Indecision also involves worry and this is destructive. A decision-making framework — situation, goals, options — can assist when one is indecisive. Deadlines should be set for achieving results. It sometimes helps if the least popular task is done first.

Delegate

After listing priority tasks, check to see which can be delegated. Managing does not necessarily imply doing.

Six final points

- A good filing system is vital.
- Papers should be handled once only if possible, i.e. they should be dealt with immediately.
- Lines of communication should be kept clear and open and everyone must know what those lines are. Being fully informed saves everyone's time.
- Speed reading and clear concise report writing and correspondence are valuable ways of using time more effectively.
- It is not necessary to be a perfectionist — too much time can be wasted on fine detail.
- Personal rewards for tasks completed on schedule are to be encouraged. For example, a coffee break, a beer after work, sharing achievements with a colleague.

EXERCISE

Log yesterday's activities.

List what you feel were time wasters.

Divide into (A) what can be changed and
(B) what cannot be changed.

Make decisions on (A) — how you can alter or amend the situation to prevent time wastage.

| <i>Yesterday's activities</i> | <i>Tick time wasters</i> | <i>A or B</i> | <i>Decision on A</i> |
|-------------------------------|----------------------------------|-----------------------|--------------------------|
| | | | |

DECISION MAKING — A POSITIVE APPROACH

Some people try to avoid decision making as they associate it with problems. However if careful decisions are made in planning and management, problems may be avoided.

Understanding and practising a number of guidelines on decision making will pay dividends. The alternatives — 'shooting from the hip' or procrastinating — will become a thing of the past. Decision making can be interesting, stimulating and fun!

Guidelines

- Recognise when a decision has far reaching implications, requiring very careful consideration, and when it doesn't.

It is surprising how often more time is spent on the latter, e.g. a board meeting which approves a building complex without comment, but argues for an hour on car park reservations (possibly because the reservations affect board members personally); or half the staff meeting time is taken up in discussion of the unwashed cups in the sink.

- Consider the whole scene, not only the subject matter, but how the decision will affect others, whether it fits in with the agency goals and whether any decision taken will require general or detailed approval by senior staff. It is much easier to implement an idea if you have the blessing of those in charge from the beginning. Even good ideas can be thwarted later if the decision has not been ratified.
- Consider who is in the best position to make an informed decision based on a knowledge of the whole situation.
- Who will be affected by the decision? Should their point of view be obtained?
- Watch out for tactics to thwart or delay decisions, e.g. forming a committee which is never asked to report back, arranging a complicated survey which is incapable of being analysed and acted upon.
- Consciously use a decision-making framework until the steps become automatic.

Decision-making framework

1. Appraise situation/problem, using clear factual information. Consider personal and environmental, also negative and positive factors.
2. What are the main objectives? That is (a) what needs to be achieved most of all? (b) What would simply be a bonus?
3. What are the likely causes behind the need/problem? Differentiate between what is fact and what is opinion.
4. Brainstorm. What are the options for action or no action in the short and long term?
5. Are the options possible in relation to political expediency, money, skills and other necessary resources, commitment, acceptability in terms of values? Eliminate the impossible.
6. What are the advantages and disadvantages of the remaining options?
7. What will be the consequences of the options in relationship to 2 (a)?
8. Make a decision, and take action.
9. Review progress and amend as necessary.

CHECK LIST

Check your present reactions to decision making:

| | Yes | No |
|----------------------------------------------------------------------------------------------------------------|-----|----|
| I make decisions on gut feelings | | |
| I involve anyone I can lay my hands on to help with a decision | | |
| I consider who is in the best position to know the situation and involve them in making important decisions | | |
| I pass any decision-making over to my committee | | |
| I don't like making decisions as the decision may turn out to be wrong | | |
| I don't mind making minor decisions but don't like to be involved in ones which have far-reaching consequences | | |
| I enjoy making decisions | | |

EXERCISE

Think of a decision you need to make.
Make your decision using the Framework as outlined.

CONFLICT — CONFRONT, BACK OFF OR MANAGE?

Conflict is a universal and unavoidable experience. It occurs constantly because needs and values of an individual come into opposition with those of others at home, at work and in situations outside these areas. Some conflicts are minor and may be overlooked: others are major, requiring successful management or resolution, otherwise the result will be constant tension, which may eventually be disastrous.

Managing conflict successfully is a very important skill, which can be learned and practised.

Nature of conflict

For purposes of simplification two areas of conflict may be identified. One relates to values, goals, attitudes, the other to tangibles (possession of money, goods, usage of goods, work, recreation, etc.). The causes are many: stemming from error, ignorance, prejudice, lack of planning, temperamental differences, to name a few.

Conflict solving strategies

These may be divided roughly into three types:

1. Avoidance. Response is looking the other way, repressing emotions, possibly withdrawing (job, school, or marriage). The outcome is anxiety, fear, tension or in the case of withdrawal, varying responses — from further uneasiness to satisfaction.
2. Defusion. Response is trying to cool off the situation, delaying tactics, postponing the confrontation. The outcome is in some cases satisfaction, if problem is minor or temporary in nature, but in most cases, continued stress and uneasiness.
3. Confrontation. Here the strategies are of two kinds:

USE OF POWER

The strategies may be physical (fighting) or bribery ('I promise to give you . . . if you . . .') or punishment ('I'll take away your . . . if you don't . . .'). The outcome of these strategies is apparent success, however bitterness, enmity, anxiety and further repercussions are the usual aftermath.

NEGOTIATION — THE PREFERRED OPTION

- Diagnose. First, ask where the problem lies.
 - Is it in the area of management, paid staff or volunteers, or a combination of these, e.g. a conflict between paid staff and volunteers?
 - Is it basically related to values or tangibles, or both. If related solely to values, the conflict may be difficult, if not impossible to resolve. If both tangibles and values are involved, a compromise may be reached relating to tangibles.

Example.

X, the volunteer manager, believes that volunteers should not be coerced.

Y, the agency administrator, believes that volunteers should do as they are told.

X and Y may have to be satisfied with agreeing to disagree, regarding their values. However, the problem has a tangible effect, i.e. a job will not be done so negotiation is necessary. An agreement is reached whereby X recruits new volunteers who are keen to do the job. The concentration is on the tangible effects. A compromise has been reached.

- Initiate. This is the first step in confronting the person involved. Avoid a defensive response. Start by saying, 'I am not going to force any of my volunteers to do this particular job when they are unwilling', rather than, 'I'm fed up with you because of your stupid attitude to my volunteers . . .'

- Listen. It is essential to listen *actively* and hear the other person's point of view. Avoid defending, explaining, demanding or threatening. Paraphrase the explanation given, e.g. 'I believe you are saying that . . .'. When this has been done to the other person's satisfaction restate the opposing view. 'My view is . . .'
- Resolve.
 - Jointly clarify the issues and where each party stands.
 - Generate possible solutions (brainstorm).
 - Then look at each solution in turn.
 - Decide which solution is the most favoured.
 - Plan the implementation of the solution — how, when, where, what.
- Review within a specific time.
 - Has the strategy worked?
 - If not, go through all the steps again.

EXERCISE

Think of a conflict that has arisen in your agency or in your former working experience. Work out a plan for negotiation, using the steps as outlined.

MEETINGS — ASK WHY, WHEN AND HOW?

A great deal of time is spent in meetings, for example a committee meeting, a working party meeting or a meeting between two or three people.

Meetings are useful

- to decide on action following input of a variety of viewpoints and ideas. (However if follow-up action is not taken, the meeting has been a waste of time for everyone).
- to give information which is more effectively communicated on a face-to-face basis than through a notice or letter
- to discuss a situation which requires clarification or change.

Often one meeting contains agenda items covering all three. Those present need to be clear on the objective of each item, so that they know whether they are being asked to make a decision, to receive information, or to discuss a situation.

Addressing the questions

Meetings can become habit-forming and time-consuming so it is useful to check out why, who, when and how?

Why: Why is this meeting being held? Is it really necessary?
Is a meeting the best way of achieving the desired objective?

Who: Who should be invited, listing the reason for each invitee. Participatory management does not mean expecting everyone involved in an activity to attend every meeting. There are times when a person who has no knowledge of a subject is invited because 'that way she'll feel part of the operation'. In fact the reverse can often happen; as the person is in no position to make a contribution, she feels useless. There are better ways to help people feel involved. Every person at the meeting must themselves appreciate the reason for their attendance and understand their role. Task groups or sub-committees are a useful way of targeting people who are best able to focus on a particular task without involving everyone.

When: While regular meetings have the advantage of prior notice, questions must be asked, e.g. what is the longest interval which can be allowed between meetings, while still enabling the satisfactory handling of the business. A sub-aim of regular meetings could be team building and socialising. This may be better achieved in another way.

How: Many books, articles and videos are available on chairing meetings and how to participate effectively. In view of the importance of meetings for providing information, making decisions and facilitating discussion, time spent on improving skills associated with meetings is time well spent.

The agenda

The secretary will need to prepare an agenda in consultation with the chairperson, numbering items according to importance, and distribute prior to the meeting. If two or three people only are to meet, it is still necessary to agree on what needs to be discussed.

The chairperson

It is essential to appoint a chairperson who can exercise control while keeping the meeting relaxed and productive.

An effective chairperson

- is aware of meeting procedures and the rationale behind them. However there are no God-given rules of procedure. Whether strict procedures regarding amendments to the motion are followed can be decided by participants.
- establishes, at the beginning of the meeting, whether any member needs to leave early, and schedules items accordingly.
- requests participants to indicate at the beginning of the meeting whether they have any item to include under Any Other Business.
- knows the significance of each item on the agenda and can explain it, facilitate participation by all present and summarise information on proposed action.
- avoids expressing an opinion first as this can inhibit others.
- ensures all participants are given an opportunity to put their point of view.
- attempts to achieve consensus decision making rather than insist on strict majority voting, with some members left dissatisfied. Sometimes a little more time spent on pursuing the different points of view can achieve a satisfactory result.
- discusses the proposed length of the meeting, keeps it as brief as possible and on course by observing the following:
 - starting and finishing the meeting on time, and bringing participants to an agreement if the business has not been completed
 - keeping discussion to the point by remarks such as 'I'm conscious of the time — can we move on'
 - allocating a time for various agenda items, as well as for individuals, who wish to speak on an item.
- when necessary ensures minutes of the meeting are kept to provide a record of decisions made and who is responsible for follow up. Minutes should be as brief and clear as possible to achieve their objective, e.g. 'AGREED: A letter of appreciation to be written by the secretary to X.'

In summary, the chairperson will

- keep the meeting moving
- clarify all decisions
- allow everyone to participate
- cover all agenda items.

REPORT WRITING

Writing a good report confidently and quickly is a skill which can be learned. However, the writer must be clear about the message to be conveyed and the purpose of the report and to whom it is directed. There are four types of reports in common use:

1. The routine report required to be submitted at regular intervals. It is likely to contain information on progress to date, and may contain suggestions for consideration by the reader.
2. A report providing information of value to the reader without analytical comment.
3. A report for presentation of a recommendation for action. This must contain sufficient information to convince the reader the recommendation should be supported, or at least that the report merits careful consideration. A submission for funding would come under this category.
4. A report which contains detailed material on the basis of which a review or evaluation of a program or project can be made.

Guidelines

- Be clear about the message to be conveyed. Is the purpose to provide
 - a progress report?
 - information of interest to the reader?
 - a recommendation for action?
 - review or evaluation of a program or project?
- Consider the readers and, in particular, the person/s to whom the report is primarily targeted. What do they already know and what do they need to know?
- Before starting the report, list headings under (1) introduction, (2) body of the report, (3) summary or conclusion which may contain a recommendation.
- State the purpose of the report in the heading and introductory paragraph. The reader can then relate what follows to the purpose of the report. For example if asking for resources this should be made clear at the beginning. A report is not like a novel with a surprise ending!
- Impart sufficient detail to inform or convince the reader, but no more. Additional information can be provided in appendices, if necessary.
- Use headings and sub-headings to separate different sections.
- Use simple words and short sentences.
- Differentiate between what is fact and what is opinion.
- Tell the story in a natural, step-by-step presentation.
- Use the summary to give a succinct precis of the main points already presented.
- The conclusion should reveal a sound interpretation of the data provided, to support any recommendation. If one avoids making a recommendation when action is called for, one could be disappointed with the decision.

- Recommendations should be positive, practical and capable of achievement.
- Revise the report to ensure it is clear, concise, complete and correct.
- Ensure that the report is well typed with an attractive format and is proof read.

KEEPING OF RECORDS

Keeping records, like any other activity, must justify the time and effort spent.

Ask why, what, how, when, where and who?

- Why? Establish the need for each set of records, e.g. a record of volunteers' hours contributed may be kept for the purpose of personal recognition, publication purposes and statistics relating to funding and promotion.
- What? Decide both the type and the minimum amount of information necessary to achieve your purposes, e.g. for comparison when conducting a review.
- How? Decide how the records can be collected, maintained, updated and retrieved so they will continue to be accurate and useful.
- When? Decide if constant or periodic collection is necessary to achieve the objective.
- Where? Decide where the records will be located for easy accessibility. At the same time confidentiality and security is essential in some situations.
- Who? Decide who will be involved in recording, collating and reviewing, and if any further training is necessary.

Set a review date for checking every aspect of your records.

EXERCISE

CHECK LIST OF MANAGEMENT SKILLS

| Skills | Tick — for further development | Decide how to take the first step for improvement |
|--------------------------|--------------------------------------|------------------------------------------------------|
| Program planning | | |
| Consultation | | |
| Enthusing others | | |
| Promoting an idea | | |
| Taking responsibility | | |
| Establish procedures | | |
| Delegating | | |
| Organising | | |
| Making decisions | | |
| Team building | | |
| Working in a team | | |
| Organising communication | | |
| Time management | | |
| Handling conflict | | |
| Managing stress | | |
| Writing reports | | |
| Keeping records | | |
| Chairing meetings | | |
| Contributing at meetings | | |
| Confronting others | | |
| Add..... | | |
| | | |
| | | |
| | | |
| | | |

11

Reviewing, Evaluating and Renewing

It is time to put our most passionately held assumptions under the microscope. We may find that they no longer correspond to the emerging reality.

ALVIN TOFFLER

Everything around the volunteer manager is constantly changing — the volunteer team, service demands and how the agency operates.

If the purpose and place of volunteer involvement within the agency is recognised and accepted, and the volunteer manager has well-developed planning and management skills, the operation should be working satisfactorily. However, in any field of activity new demands are made, practices become outdated, new ideas are floated, the environment alters and new action becomes necessary.

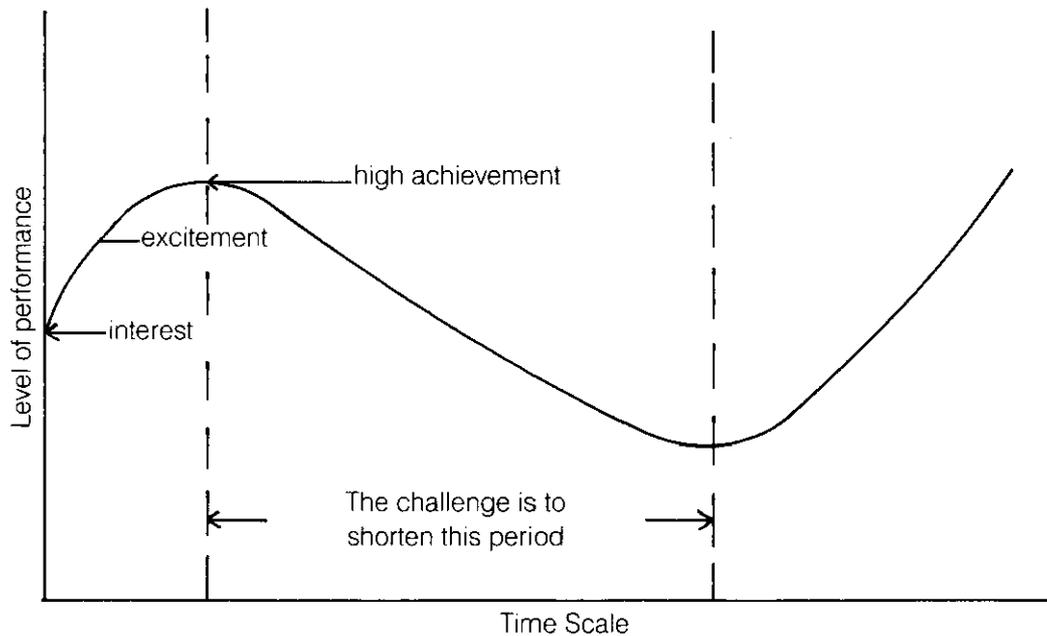
The volunteer manager will be constantly reviewing what is happening and considering what could happen. An in-depth study of operations may also be required if more radical changes are to be considered.

Questions can be posed, such as
where are we now?
where do we want to go?
how do we get there?
how long will it take?

Review and evaluation demonstrates accountability to management and gives paid staff and volunteers a chance to participate in making any necessary changes. It brings all parties up-to-date with what is happening and is likely to increase their interest and commitment towards revitalisation of the program.

PROGRAM PERFORMANCE

The level of commitment of people in agencies and groups is likely to go through stages ranging from interest to excitement, to high achievement, to a falling off in enthusiasm, followed by a gradual swing back to good performance. This falling off can be due to such things as frustration, overwork, inability to keep up a high level of enthusiasm, unsought or sudden changes and boredom.



This curve is a normal reaction. The challenge is to shorten the period between the downturn and the subsequent upturn. This can be achieved by assessing the situation, determining the reasons for any excessive falling off in performance or enthusiasm, and deciding on moves to counteract it. These would relate to the causes, for example volunteers may require different challenges, or feel they are being taken for granted by, for example, the volunteer manager or by management.

PRE-CONDITIONS FOR REVIEW AND EVALUATION

- Review and evaluation cannot be made in isolation from a desired goal.
- Records should be available on which to base performance comparisons.
- All parties should be involved in planning for the exercise.
- A clear intention to follow through with any necessary action must be demonstrated.
- An open and sensitive approach must be adopted, with the purposes and parameters clearly stated.

REVIEW

This will take the form of

1. Constantly monitoring operations, as a necessary part of the volunteer manager's day-to-day work, ensuring all areas are operating smoothly and efficiently.
2. Examination of the cause behind any hiccup which may occur, so the situation may be corrected as soon as possible. Questions such as what is the problem, why did it occur, and how can it be resolved, need to be asked. It is important to look carefully behind the problem for the underlying cause and not simply to react to the resulting disruption.

For instance, if there has been a sharp dropping off in volunteers offering their services, it might be presumed it is because of the hot weather, winter colds, etc. Volunteer interviewers may then be given other jobs, if they are complaining they have insufficient work to keep them busy. However, if the problem was in fact due to inadequate publicity or poor recruitment practices, facing up to the situation will simply be delayed.

3. A review of the program as a whole, or parts thereof, made at regular intervals by the volunteer manager, volunteer and paid staff, and possibly involving representation of management. A planning day or days may be set aside, say every six months.

Periodic review should be an expectation of all staff. Working close to the coalface, they might be in a better position to detect causes behind any areas of concern, as well as suggesting ways to bring about improvements and innovations.

EVALUATION

Evaluation is a more formal, all-embracing and in-depth study, possibly carried out by an independent evaluator. It can be time-consuming and threatening. However if carried out openly and fairly, encouraging constructive criticism, it can be a positive experience. Evaluation can be the first step in bringing about necessary change.

Forms of evaluation

M. Rein, in his book *Social Science and Social Policy*, suggests three versions of the evaluation process — all quite different.

1. A needs-resources study concentrates on whether there are sufficient resources to do the job adequately.

This type of evaluation is inherently conservative as it maintains the same form and structure.

Likely outcome — minor amendments and request for more resources.

2. Distributional research evaluates whether a redistribution of resources within the same program or a change of method would result in program improvements.

Likely outcome — a limited change in the way the program is arranged and managed.

3. Allocative research is a form of evaluation in which the present program is put aside for the moment and thought given to the overall program *goal*. A number of different options by which the goal could be achieved are considered.

Likely outcome — additional programs and/or a radically changed program.

The third type of evaluation challenges and invites innovation.

AREAS FOR REVIEW AND EVALUATION

Each agency needs to compile its own list. However, some of the areas listed below could well be considered:

- Are the goal and objectives of the program clear to all concerned, and relevant to current needs?
- Is a reassessment of needs necessary?
- Are policy and practice guidelines relating to involvement of volunteers available and understood by all concerned, as well as being relevant to the present situation?
- Recruitment. Is recruitment targeted to service needs and the interests of potential volunteers?
- Assessment. Are interviewers responsive to service requirements, as well as to the needs of volunteers and paid staff?
- Deployment. Is the work allocated appropriate to the interests, skills and availability of volunteers, with a maximum degree of delegation?
- Orientation. Is information provided on agency function and structure, details of present job and future job possibilities?
- Working conditions. Are these attractive, adequate and safe? Is provision made for insurance cover and out-of-pocket expenses?
- Communication channels. Is there a good flow of information back and forth, with opportunities for consultation and participation in decision making?
- Training. Is this adequate to ensure proper job performance?
- Support and supervision. Does this allow for the building of confidence and competence?
- Appraisal. Is the emphasis on development of skills, opportunities to transfer to other jobs and increased responsibility, as well as on job performance?
- Staff relationships, between management, paid staff and volunteers. Are these relationships indicative of a shared purpose and an understanding and appreciation of each other's unique contribution?
- Review and evaluation. Has the principle been established, and opportunities provided, for on-going review and evaluation at regular intervals?

CHANGE AND RENEWAL

This is often not easy as

- change can be threatening
- some people have vested interests in maintaining the status quo
- additional resources or a redistribution of resources may be called for, and this is difficult to achieve in time of tight budgets
- bringing about change is time consuming and takes a lot of energy.

Steps to take

1. In the planning stages, involve the people who will make the ultimate decision concerning the recommended changes.
2. Show change is necessary for the good of clients, staff or community.

3. Show you have canvassed a wide range of sources in the collection of all relevant information, and it is on the basis of this information that the new direction is being recommended.
4. Draft a proposal, involving the people who will be affected by the suggested changes. Adequate time should be given to discuss the proposal, consider the implications of changes and personal adjustments required. It takes time for people to adjust and feel comfortable with changes, in some cases, even minor changes.
5. Prepare a document which reads well, looks good and includes relevant statistics.
6. Choose either
 - a pilot program
 - a small scale version of the program, which is likely to succeed as staff who are committed to the idea will be involved
 - full implementation. This will only be possible when all circumstances associated with a successful outcome are favourable.

The difficulties involved in making radical change should not deter those concerned from taking action. Cracks will inevitably appear if the structure is outdated. Necessary repair or rebuilding action may be essential.

The result will be a revitalised program, while at the same time maintaining volunteer interest and commitment.

SUMMARY

Review and evaluation are necessary features of a healthy program to ensure that practices which are inefficient or outdated are uncovered and new ideas and necessary changes introduced, resulting in a revitalisation of programs and staff. Preconditions and various forms of review and evaluation are discussed. Possible areas which could be the subject of review or evaluation are listed.

Change often meets with opposition. Suggestions are made as to how change could be attempted and renewal achieved.

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VOLUNTEER INVOLVEMENT —
THE PRACTICE**

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12

Volunteers and Paid Staff: A Team Approach

Team development, building and maintenance are becoming critically necessary to the survival of systems whose programs and services are delivered by a combination of paid and volunteer personnel.

EVA SCHINDLER-RAINMAN

Schindler-Rainman defines the word 'team' as a 'group of persons interrelated by agreed objectives and tasks'. The team can function as a group, sub-groups or as individuals, with the supports and resources of the group available. Maximising the contribution of all staff members, paid and voluntary, requires recognition of each other's unique gifts. Unity in diversity is achieved and this new entity moves on towards the common goal.

It is recognised that in many agencies paid staff are in the minority compared with volunteer staff. The paid staff may in fact comprise one person. Nevertheless, the same principles regarding the team approach apply.

PREREQUISITES TO TEAMWORK

Commitment of management

Paid staff cannot be expected to put their full weight behind a program which involves volunteers unless they know management is committed fully to the idea. This commitment by management must be shown in practical ways, for example

- by giving credit to those paid staff who are, or will be, involved with the volunteers
- allocating time to enable paid staff to carry out the job adequately
- recognising that additional skills are involved in the supervision and support of volunteers, and that training may be necessary to develop these skills
- providing sufficient funds for out-of-pocket expenses and insurance cover for the volunteers, as well as suitable and safe working conditions and facilities
- nominating a person who will be responsible for the program and who in turn can provide support to paid staff and volunteers.

Consultation with paid staff

The understanding, approval and involvement of paid staff at all levels of planning, recruitment and implementation, is crucial to any effective teamwork. If the volunteer manager realises that this is not the case, further consultation and discussion will be necessary.

Recognition of advantages and disadvantages

It needs to be recognised there are some disadvantages of volunteer involvement. These cannot be pushed under the carpet. By airing and discussing them they can be accommodated.

The pros and cons of using volunteers include the following:

ADVANTAGES

Volunteers

- bring additional skills and experience with them
- bring community into the work place
- add a new dimension
- freely choose the job and may therefore be very committed
- are able to devote a great deal of their time to one task (often impossible for paid personnel).

DISADVANTAGES

Volunteers

- are often short-term
- seem to be more difficult to reprimand
- can take holidays and/or walk out of the job whenever they wish
- usually work for a day a week only, causing daily change-overs.

6 The greater the input and involvement of paid staff, the greater their overall commitment to the volunteer program. 9

When these aspects are clearly recognised, the disadvantages can be minimised by being dealt with in positive ways, for example

- the frequent change-over of volunteer personnel requires the setting up of good information and communication systems
- the taking of frequent holidays requires the necessity of a holiday diary for prior entries and adequate roster systems
- the difficulty of reprimanding volunteers requires assertiveness training.

TEAMWORK PRACTICES

Paid staff must be able to

- see how they, the agency or service will benefit from volunteer involvement
- feel comfortable with the notion of volunteers joining the staff, as they have the assurance of management that their jobs are secure; in addition, feel confident regarding their own job performance
- recognise the volunteers as colleagues with shared aims and commitments
- understand and recognise that their tasks and responsibilities and volunteers' tasks and responsibilities are different, but complementary

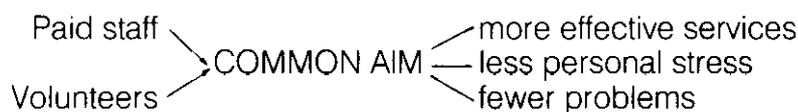
- know precisely where responsibility and accountability lie in relation to both paid staff and volunteers
- be involved (or at least represented) at all levels of orientation, training, assessment and review
- understand that, at all stages of the program, lines of communication will be open to ensure that information is disseminated and problems are aired and that the flow is in both directions
- attend regular meetings and/or planning days for feedback, review of progress towards aim, and future planning
- realise that the confidence and trust generated between paid staff and volunteer staff will be maintained through personal contact in working together and in socialising together, e.g. meal breaks, small or large get-togethers, annual celebrations.

Obviously the greater the input and involvement of paid staff, the greater their overall commitment to the volunteer program. Staff acceptance of volunteers and their work can either make or break a program.

Volunteer staff

If the word 'volunteer' is substituted for 'paid' all the above points excepting the second apply equally to the volunteer staff.

Team approach



WHEN PROBLEMS ARISE

First, try to establish the source. Does the problem relate to one or more of the following:

- management
- paid staff
- volunteer staff
- volunteer manager.

Once this has been identified, pinpoint the cause.

Examples:

1. The problem relates to paid staff work overload. Consider
 - consulting management — discover where their priorities lie
 - recruiting volunteers who are already skilled, requiring minimum support and supervision
 - allowing volunteers to work as a self-contained team, providing their own supports
 - delegating responsibility in as many areas as is possible and appropriate.

2. The problem relates to paid staff and is due to a lack of commitment to volunteer involvement. A reassessment must be made. Consider
 - separating the activities of paid staff and volunteers as much as possible
 - limiting the scale of the volunteer program until the situation can be improved
 - postponing the volunteer program until the reasons for the paid staff's lack of commitment are sought and rectified.
3. The problem relates to volunteers and their supervisor, and is due to inadequate communication. In order to clarify the situation a round table conference of both parties is called. The following story is given as an illustration.

Several volunteer interviewers became impatient with the paid staff supervisor. They felt she was putting too much responsibility on their shoulders with regard to interviewing potential volunteers who had a history of mental illness. The grievances were aired, with the following results:

- job descriptions for interviewers and supervisors were reviewed
- the interviewers received further training
- the supervisor ensured that the interviewers were reasonably experienced and confident before interviewing volunteer applicants with special needs.

The meeting and outcome was useful in that it demonstrated to all concerned how necessary it is to have clear lines of communication, clear job descriptions, and adequate support and training.

SUMMARY

The word 'team' is defined as 'a group of persons interrelated by objectives and tasks'. The need for teamwork between paid staff and volunteers is emphasised.

Good teamwork begins with the firm commitment of management to volunteer involvement (not just rhetoric, but action). Paid staff are consulted, informed and reassured regarding the team approach. They will realise that there are some disadvantages as well as advantages in the involvement of volunteers, but that strategies can be devised to minimise the disadvantages.

Through consultation, communication, forward planning and review there is a building of initial trust and confidence, and this is reinforced by personal contact and socialising together. Problems are dealt with as they arise and appropriate solutions found.

In all these activities, the common aim is stressed.

EXERCISES

Look again at the lists of advantages and disadvantages of volunteer involvement. Add others which relate to your own situation.

Choose one of the disadvantages you have listed and suggest ways in which the effects can be overcome or minimised.

| SURVEY OF THE VOLUNTEER STAFF TEAM | RATE | | |
|-------------------------------------------------------------------------------------------------------------------------------------------------------------------|------|----|-----------|
| | Yes | No | Partially |
| Management is strongly behind volunteer involvement | | | |
| Paid staff are convinced that management acknowledges that working with volunteers involves them in additional time and skills and has given them credit for this | | | |
| The majority of staff approve of volunteer involvement | | | |
| Paid staff receptivity to volunteers has been carefully surveyed, with emphasis on working with cooperative staff | | | |
| The goals relating to numbers and role of volunteers are realistic | | | |
| Volunteers feel they are valued by paid staff | | | |
| Both volunteers and paid staff see themselves working towards a common goal | | | |
| Planning, orientation and training has been a joint effort of paid staff and volunteers | | | |
| Roles and responsibilities of staff and volunteers have been clearly defined | | | |
| Channels of communication are clear and open to both paid staff and volunteers | | | |
| Add any others you think important | | | |
| Note any areas which rate 'no' and 'partially' and work out ways to improve the situation. | | | |

13

Recruitment: Creative Use of Human Resources

Every country is renewed out of the unknown ranks and not out of the ranks of those already famous and powerful and in control.

WOODROW WILSON

- Good recruitment which results in finding the best person for the job helps to ensure
- more satisfied volunteers
 - more committed volunteers
 - better service provision
 - less strain on the volunteer manager and paid staff.

The recruitment program should proceed after planning for the setting up of the volunteer program has been carried out in collaboration with volunteers and paid staff. The reason to involve volunteers will have been clearly stated, for example 'The policy of the agency is to encourage community involvement through the maximum use of volunteers'.

The reason for starting a recruitment program may be that a new program has been planned, that the present program is being expanded, or that there is a high turnover of volunteers in the present scheme. Generally programs can expect about one third turnover in a year. Reasons may include sickness, family concerns and work. Stress, frustrations and problems for all concerned are avoided if recruitment is not rushed in order to produce quick results even though enthusiasm may be high at this stage. When planning a recruitment drive it helps to ask why, what, who, when and where, remembering that the desired objective is to find the best person for the job.

THE RECRUITMENT TEAM

While the volunteer manager will be overseeing the scheme, the work load needs to be spread. Gather together a group of volunteers and paid staff with a variety of skills. Plan each step in detail and set dates for the execution of each step. Involving other people is especially necessary for part-time managers.

STEPS TO FOLLOW IN RECRUITING

1. Set the objective

Be absolutely specific, for example 'The aim of the New Year Drive is to recruit 20 volunteers in the next three months to initiate befriending jobs for the purpose of contacting 20 isolated people within the district of . . .'. This guards against recruiting an excess number of volunteers which can be quite disastrous, both for the volunteers and for the agency, as this story illustrates.

A volunteer, part of a highly trained and motivated team of volunteer guides in a public garden, decided to leave the job after a year. 'I felt thoroughly fed up,' the volunteer complained. 'The organisation just accepts any number of recruits. They really have too many guides — as a result our rostered days are too spread out. I've lost all my enthusiasm!'



OVER-ZEALOUS RECRUITMENT

2. Review job descriptions

These will already have been prepared in the earlier stages of program planning (see Appendix 7) unless additional jobs have been created. In this case new job descriptions will be needed. Specify tasks, time commitment, skills needed and note, if applicable, the most suitable volunteers. For example, people already skilled, people prepared to join a training scheme, young women for 'Big Sister' jobs.

3. Focus on target groups. Narrow down the group, or groups, in order to target the publicity. Although reasons for becoming involved may be complex, generally people fall into one of the five categories listed:

- seeking new horizons
- unemployed and wishing to gain work experience
- retired and wanting stimulation and social contacts
- in paid work and looking for a leisure-time occupation
- seeking rehabilitation (following illness or trauma).

4. Know the community

This is essential. Every locality is unique as it relates to recruiting possibilities. Some situations will vary considerably, for example country and city locations. Obviously this will need to be taken into account. Ask questions such as

Will the recruits being targeted have far to travel?

How adequate is the public transport system?

What is the socio-economic mix and the location? This could be significant in relation to the interests of the recruits, the payment of their out-of-pocket expenses, etc.

Where do people gather?

5. Work out appropriate message

A powerful message is needed, one that has strong impact and yet still conveys the basic information effectively. Consider the job to be done, consider the attributes and skills required to do the job, how to get the message across, and how to match the need to the target group. For example, 'We are looking for people with artistic ability to create a stained glass window in a new community centre'. The need may be indirect to the job, such as working in the Craft Council headquarters office as a typist. Here the team effort would be stressed and the importance of each person's contribution in supplying the need. Stress the needs, stress the benefits also. An understanding of volunteer motivation is important in this context. Some people feel they have no skills. Perhaps they say that all they have is time. Many undervalue their experience, and need encouragement to realise their capacities.

The message may be simple and direct, as in a slogan, or more detailed if conveyed by means of a publicity talk. If giving a talk, the following check list may be useful:

identification of the needs

the aims of the program — what will be achieved

job descriptions

skills and attributes which may be desirable

benefits for the volunteer

delineation of time when volunteers will be needed (day, evening or weekend)

examples, stories and anecdotes.

6. Delivering the message — the ways

Some suggestions are:

volunteer centres and resource services

radio and TV stations

newspapers and news sheets

local councils

CES offices

industry, business houses

churches

shops, laundromats

take-away food outlets

libraries

educational institutions

sporting and service clubs

community halls, clubs and pubs.

7. Delivering the message — the means

Consider the following ideas which have proved useful in various situations: slogans, posters, pamphlets, displays, videos, mailings, community announcements, speeches and talks, drinks and nibbles, open days, word-of-mouth, personal approach.

Well advertised open days or evenings provide an opportunity for delivering full information about the program. Some self-screening takes place as the potential volunteer weighs up the situation.

The most effective means of recruitment is spontaneous word-of-mouth and personal appeal to a selected individual. In the first approach, satisfied volunteers will tell others; in the second, a representative from the agency will approach someone who has been identified as being right for the job, for example someone about to retire who has the appropriate skills. In both of these approaches, information, enthusiasm and personal testimony regarding job satisfaction are conveyed, bringing good results.

6 Sound marketing techniques are fundamental — the addition of new ideas may well prove to be a winner! 9

If using the media, include a job description, desirable skills and attributes, and stress the benefits to all parties. True-life stories and volunteer profiles are appealing.

Remember that volunteers of today are often wanting short-term work only — especially if they are looking for paid work. Therefore continuous recruitment may be the only option. However, there are some voluntary jobs (for example museum guides) where special long-term training periods preclude the short-term volunteer.

Consider a variety of strategies and find out what works best in a particular situation.

8. The timing

Consider for the volunteer

- the time of the year. The start of the year is the most favourable for recruitment. The New Year represents the termination of the old and the starting of the new. Springtime is also a good time for new ventures.
- special circumstances, such as school holiday periods, festivals and showtime are best avoided.

Consider for the agency

- any times that will be difficult, for example holiday times
 - will staff be available?
- changes and rearrangements in staffing
- disruptions to normal routine.

Annual or periodic drive

Weigh up the following considerations:

- saving of time and money, greater impact of the 'big splash', greater enthusiasm. On the other hand a sudden surge of volunteers may cause problems and be less desirable than the constant trickle.
- some jobs, for example literacy tutoring, warrant periodic recruitment drives as the extended training sessions need to be conducted at regular intervals.
- in planning a drive where a large number of volunteers may be recruited, careful consideration would need to be given to the number of jobs available, orientation and training needs, paid staff availability.

9. Innovation

Brainstorming may bring some fresh and totally unexpected ideas! Try some bold recruitment schemes, especially if you are already experienced. While sound marketing techniques (for example, a clear message, well advertised and targeted) are fundamental, the addition of new ideas may well prove to be a winner! In fact, the input of new ideas and a more flexible approach may be the only way of attracting new volunteers in some situations. Most people already have their leisure time well filled. Agency structures need to cater for people who have limited time to give or who wish to vary their volunteer involvement by moving from one situation to another. The agency may be considerably enlivened by attracting to its ranks enthusiastic volunteers who are welcomed on the basis that they can stay for only three or six months.

In order to attract more volunteers the agency may decide to:

- give volunteers a key to allow for weekend work
- allow volunteers to take work home at night
- enable evening or weekend visiting at, for example, a nursing home. (Why do volunteer hours need to correspond with those of the volunteer manager?)

POST-DRIVE EVALUATION

Record the approach which worked best. Note details, including any mistakes made to ensure they are not repeated. Note the good aspects and highlight for the future.

SUMMARY

Having received the endorsement of management and paid staff the recruitment plan can be commenced, step by step, remembering that the setting of a specific and measurable objective is the vital first step. A clear message, effective targeting and timing, sound marketing techniques together with innovation and flexibility are essential elements in a successful recruitment program. A post-drive evaluation is the important final step.

EXERCISE

Your local youth group catering for 12-16 years olds will have to close unless it can attract volunteer leaders. Your parent organisation will support whatever local action you take, although it cannot provide volunteers for you.

How would you go about devising a recruitment plan using an innovative approach?

14

The Interview Process and Deployment

If I can listen to what he has to tell me; if I can understand how it seems to him, if I can see its personal meaning for him, if I can sense the emotional flavour it has for him . . . this is listening with understanding.

CARL ROGERS

If the needs of the volunteer, the client and the agency are to be satisfied, appropriate matching of the volunteer to the job is essential. In addition, a good interview allows the applicant to accept the job or reject the job, consider possible volunteer alternatives, or to realise that volunteering is not after all what he or she wants and consider other activities.

The interview is an important first step for the applicant. It may have taken a long time, and a degree of courage, to front up for the interview in the first place. The interviewer should be skilled and have a thorough knowledge of the volunteer job assignments. Good interviewing is an art which can be enhanced by good techniques. Each interview should be regarded with due seriousness. The outcome should be satisfactory deployment, or a reassessment of personal interests and goals by the applicant.

THE INTERVIEW PROCESS

Understanding Motivation

Along with training in appropriate techniques, the interviewer must have a broad understanding of the reasons for volunteering, i.e. motivation. Generally speaking, motivation falls into four broad categories:

| NEEDS | EXPECTATIONS |
|-------------------------------------------|------------------------------------------------------------------|
| The improvement of self-esteem and status | confidence competence rehabilitation social integration |

| NEEDS | EXPECTATIONS |
|----------------------------------------------------------------------------------------------------------------------------------|----------------------------------------------------------|
| The fulfilment of aspirations | altruism satisfaction creativity challenges met |
| The meeting of social needs | friendship team involvement |
| Assistance to help solve or manage a problem. This may be personal — unemployment, grief, or community — pollution, conservation | employment power to cope improving the community |

Many volunteers express several motives. Others may conceal or not recognise them. In order to place people successfully, the interviewer needs to elicit the applicant's motives or, if this is not possible, attempt to gauge them.

The motive may be to develop an interest outside the confines of paid work. The following story is an example:

The applicant for voluntary work was a mechanical engineer with a full-time paid job. His expressed need: 'to get away from machines and work with people at the weekend'. He chose a job involving disadvantaged children, assisting with day trips and weekend camps. The complete turnaround from machines to people left him feeling refreshed and with a greater sense of fulfilment.

The pinpointing of motives is a powerful aid in the successful interviewing and deployment of potential volunteers.

Preparation

Ensure that there is a clear understanding of the time and place for the interview. An appointment is desirable as

- it gives a person time to reconsider
- the applicant does not have to wait about
- the interviewer has put the time aside to give the applicant proper attention.

Make sure the environment is suitable — comfortable, relaxed, quiet, preferably private.

Have written material regarding assignments, job descriptions and forms on hand.

If inexperienced, plan a list of questions or points.

Ensure the applicant will be greeted by receptionist or interviewer.

The steps

The arrangement of the steps may be altered but they all need to be covered.

- Introduction and welcome

Remember the first impression is very important. Warmth of greeting, a smile, a quiet, easy informal manner are essential. Many applicants are nervous — they need to be quickly reassured. Clarify the purpose of the interview. Filling out the application form (see Appendix 8) may be carried out after some preliminary discussion or even as a final step. The latter especially applies if the agency is small and jobs may be limited to one or two types only.



- Discuss interests and skills, experience and time availability. Elicit further information by questioning and/or reading the completed form carefully. Use open-ended questions, for example 'What is your interest in youth work?' rather than 'Are you interested in youth work?' Give an assurance of confidentiality.
- Discover the needs and aspirations of the volunteer, for example, motivation. 'What do you expect to get out of volunteering?'
- Inform. Provide appropriate details regarding the agency and the job. A clear written job description is helpful especially as it helps applicants to self-screen. This should include the specific time required (day, weekend, evenings), desirable attributes, a 'person who would be unsuitable' clause, for example if lifting was required, a person with a back problem would be unsuitable. Information should also be provided on expectations from the point of view of the applicant and the agency, insurance cover, out-of-pocket expenses, orientation and training, support and supervision and confidentiality when appropriate.
- Assess through body language, tone of voice, communication skills, general appearance, specific traits, along with information given or withheld and interest displayed. Remember 'listen more, talk less'. The applicant may dry up if premature suggestions are made.
- Decide. A mutual decision must be reached — to proceed, to begin a trial period, or not to proceed. If the applicant shows interest in a job which is presently unavailable, putting their name on a waiting list can be suggested. Referral may be appropriate to another agency for an alternate volunteer job, a confidence building course, or a social club. On the other hand the applicant may realise that they did not really want a volunteer job at this stage.

● **A chatterbox may be suitable for a hairdressing job but is obviously undesirable in a community legal office! ●**

- Deploy. Make further arrangements, appointments as appropriate. Ensure any necessary forms are completed.
- Conclude. Summarise the situation. Give clear directions as to next step, verbal or written, as appropriate.
- Farewell. Give and express appreciation of his/her interest. This is an important final step in the interview.
- Complete records required by the agency (forms, filing etc.). Care must be exercised if personal comments are recorded. Avoid making sweeping statements and assumptions. Comment on the behaviour, not the person. Couch the language in terms that are not offensive or derogatory, for example, 'I have reservations about recommending X for this volunteer job because during the interview she talked constantly', NOT 'X would be a failure in this job because she's a hopeless listener'.
- A written contract may be considered in some situations, for example for marriage guidance counsellors where the training required is lengthy and complex, and an agreed period of commitment is important so that the needs of long-term clients can be met adequately.
- Follow-up. This will vary according to agency requirements but from the point of view of personal satisfaction for the interviewer, and statistics regarding deployment of volunteers, follow-up procedures are important. Statistics are essential for purposes such as review and evaluation.

Points to watch

- Form filling
 - Not being literate is a possibility. A sensitive approach is necessary so the volunteer will not feel uncomfortable, for example, 'Like some help? I'll do the writing, you do the talking'.
- Obvious traits
 - A 'chatterbox' may be suitable for a hairdressing job in a home for the elderly but obviously undesirable in a community legal office! Special traits may be essential for particular jobs:
 - a good listener for a counselling job
 - clear diction for a telephone receptionist.
- Appearance of applicant
 - For certain jobs, e.g. serving food in a kiosk, a satisfactory degree of cleanliness and neatness is desirable. For other jobs, e.g. gardening, appearance is of no particular importance.
- The interviewer's manner
 - warmth, friendliness and goodwill must be apparent.
 - frankness and honesty, along with sensitivity and tact, will overcome most difficulties.
 - patience is necessary. Hasty interviews lead to inappropriate placements.
- Special screening
 - Special screening may be necessary for applicants when reservations are held about their suitability for a particular job, for example caring for young children or the handling of money. Further checking, references etc. may be needed. Permission for a police clearance may need to be given in certain situations, for example if working alone with a child who is intellectually disabled. If either party is uncertain at this stage, a further appointment needs to be considered.

- Clients' needs

Where clients are involved, such as in welfare situations, their needs must be kept in mind. Otherwise the needs of the volunteer may be served at the expense of the client.
- Jumping to conclusions

Avoid making assumptions — careful observation, questioning and listening leads to a good assessment.
- Intuitive feelings

Intuition may be a guide. The vague feeling that something is wrong should not be ignored. If doubtful, one, or all, of the following may be necessary:

 - further dialogue
 - more time, to check information or obtain references
 - a second interview
 - a trial or review period set.
- Uncertainty of applicant

If the applicant seems to be uncertain, suggest a second interview or that the applicant check out two or three other job options. Some individuals feel they need more time to decide and this desire should be respected. They may be realising that they are not yet ready to begin volunteering.
- Need to confront

If an applicant is being evasive, talking incessantly and inappropriately, or making what appear to be untrue statements, this needs to be handled with frankness. The interviewer will need to state how the position appears to him/her. This can then be discussed. An explanation or clarification may be the result. If this is not forthcoming, it will be necessary to point out the reality of the situation. Voluntary work may not be appropriate. In this case, alternate options will need to be suggested.
- Coping with aggressive behaviour

Occasionally an applicant's manner or actions may be extreme, ranging from very difficult to aggressive and deranged. While the experienced interviewer will manage to handle the situation, a few suggestions may assist those less experienced.

 - do not try to ignore what is going on — deal with the situation without delay
 - a quiet manner tends to have a calming effect on aggressive behaviour
 - if working in a fairly isolated situation, work out a plan before the problem arises, i.e. who to contact for support.

Interviewers need to be aware that the situation may occur at some time and be prepared for it by having discussed possibilities and precautions.

DEPLOYMENT — SPECIAL CONSIDERATIONS

A person may have excellent interviewing skills, but the goal — satisfactory placement — is not always quick or easy to reach, for example the skills and interests of the applicant may not meet the current job requirements. Extra care and time are needed in some circumstances. However, experience does help considerably in this process.

People with disabilities

Special consideration must be given to a person who has a physical or an intellectual disability, or anyone who is recovering from a mental illness or trauma. If the applicant is in a wheelchair, access must be the first consideration; toilet access is particularly important.

In certain cases it may be wise to seek a written referral from a doctor or social worker for the information of the interviewer. (See Appendix 9 for example letter and referral form). This enables a sensitive placement to be made, ensuring the person is not placed in an untenable position, and the needs of the volunteer, the agency and the service are safeguarded.

If the applicant does not acknowledge what the interviewer perceives to be a disability which may jeopardise suitability for the job, this will have to be aired. Placement may need to be delayed allowing time for further consideration and assessment, or made with conditions attached, for example a three-week trial period.

Any person with a disability will need careful placement. However the interview should follow the usual lines with account being taken of a person's skills, experiences and particular requirements. The disability is just one aspect of the total assessment. Some jobs may be ruled out, others will be quite suitable. A person with a disability will often feel a strong motivation to succeed.

Stereotyping gender roles

The reasoning behind the need for equal opportunity applies just as much to the voluntary force as to the paid work force. Interviewers who were brought up in a climate where women and men were expected to fulfil limited roles need to be aware of the changed attitudes. Care must be taken in not *assuming* that a woman desires (or is necessarily better in) a welfare job rather than a position on a committee of management, or driving a bus.

Likewise, one should not be surprised to find men seeking such jobs as child-minding, caring for people who are disabled or befriending.

Unemployed persons seeking job experience

As this is such a common and valid reason for seeking volunteer work today, it deserves comment. Deployment will take on a somewhat different perspective. Firstly, the motivation is precise and concentrated, so in one sense it forms a focus for job options — the interviewer suggests only the jobs that will give the desired experience. The second consideration is the time commitment. This is likely to be short-term, either because the volunteer finds employment or has gained sufficient job experience to move on to further experiences. Thirdly, the supervision required may need to be more concentrated, particularly as it is likely the volunteer will be seeking a reference. See Appendix 2: Agency Guidelines Relating to Young Volunteers who are Unemployed.

SUMMARY

The interviewer must be acutely aware of the importance of motivation — why people volunteer. Needs, whether for personal fulfilment or to help others, or to solve a problem, must be satisfied if the volunteer, the agency and the service are to benefit. Prior to interview, the appointment and an appropriate environment need to be arranged. The interview must be conducted with warmth and sensitivity; listening, informing and guiding, until a mutual and satisfactory decision is reached regarding placement. Some points to consider in deployment with regard to people with disabilities, gender roles and people who are unemployed, are discussed.

EXERCISES

INTERVIEWING ABILITY

Assess your attributes/skills/awareness/knowledge against the following list. Rate A (good), B (satisfactory), C (needs further development). Underline those marked C. Consider what steps you would take to improve your performance.

| <i>Attributes/Skills/Awareness/ Knowledge</i> | <i>Rating A, B, C</i> | <i>Steps to take for improvement/development</i> |
|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|---------------------------|------------------------------------------------------|
| <ul style="list-style-type: none"> • Friendliness • Confidence • Listening — understanding what is really being said • Observing — noting mannerisms and gestures • Familiarity with all job options • Greeting • Farewelling • Remembering to pass on all relevant information (as regards support, supervision, insurance, out-of-pocket expenses, etc.) • Knowing your agency: history, structure, funding • Confronting inappropriate behaviour, e.g. aggressiveness, incessant chatter • Ability to interview people with special needs • Ability to place people with special needs | | |

- *A man aged 50 is seeking a volunteer job. He has been retrenched from his job as a shop assistant. Music is one of his interests and he enjoys singing. He is pleasant and friendly, but seems to be very restless (finger tapping and shifting constantly in chair). He would prefer work related to his former job, in the hope that he may eventually find employment.*

How would you go about the interview?

Invite a colleague to role play the potential volunteer.

15

Orientation and Training

*If you give a man a fish, he'll eat for a day,
If you teach him how to fish, he'll eat for life.*

CHINESE PROVERB

The new volunteer needs to have basic information about the job, the program and the organisation. This is orientation. It is generally the first step after commitment, but could occur during a trial period before final commitment.

Orientation is not to be taken lightly. For the volunteer, first impressions of the agency and its work are very important. The resulting image carried by the volunteer to others, if favourable, is a good form of advocacy for the agency and its work.

The degree of training that should be given to volunteers is a debatable point. Some argue that volunteers come to the job with sufficient skills, experience and interest to tackle it effectively and that training would inhibit their performance. However, most would agree that training at least must be sufficient to ensure proper performance of the assignment.

ORIENTATION

Orientation may be conducted on an individual or a group basis. If it takes place prior to the decision to volunteer, it also serves as a convenient method for self-screening thus saving time and effort. This is especially useful if a number of volunteers have been recruited together.

However, in most cases volunteers are invited to orientation after they have joined the staff.

Experienced volunteers and paid staff should be involved in orientation.

The objective

To give a general picture of the agency, the program and the job prior to commencing work.

This will include

- an understanding of the service needs, the voluntary job, the agency and its goals
- an understanding of how the volunteer fits into the picture as part of the team and in relation to the allotted task
- information on the training, supports, supervision, and appraisal that can be expected
- a discussion of the philosophy of volunteering and the volunteer's rights and responsibilities. Reliability and informing of non-availability would be stressed
- information on additional features appropriate to the particular situation, e.g. in a large hospital, identification, dress and procedures will be of special importance.

The means

A tour, an explanatory talk possibly using visual aids, and written handouts. This will cover

- the agency. Its history, aims, policies, structure, programs (their purpose and results), funding sources, and rules where applicable.
- the volunteer. Information sources, rights and responsibilities, details of supports and supervision, training (in-house, formal, short-term or ongoing), reimbursement of expenses, insurance, etc.
- the job, including particular needs of recipients where involved, paper work and records
- channels of communication — what they are and how they work
- social activities
- the relationship between management and the staff, paid and volunteer, whether minimal or extensive. Their operations may be separate, but their complementary relationship will be stressed.

The following example illustrates how necessary it is to involve all three groups.

At a community health centre, new volunteers were given excellent input by several paid staff members. However no opportunity was given to the volunteers being orientated to meet any other members of the large staff team. The orientation sessions concentrated exclusively on the immediate job expected of the volunteers. The volunteers were not given the opportunity to see themselves and their work in the context of the agency team as a whole. The result was that they were never integrated into the centre structure, but rather saw themselves as something of an appendage.

The first day at work

A welcome and introduction to staff members and supervisor. Many new volunteers feel nervous and it is important to make allowances for this. They will respond to warmth and clear directions. Show volunteer the work place and the facilities, place for bag and coat, coffee making, the agency layout, special features, for example, signing-on books and in-trays.

The supervisor will then prepare the volunteer for action by referring to the job description, the support and supervision available (identifying the person 'on call'), the information sources, and finally the day's tasks. If the volunteer has already had complete orientation on these topics, it may only be necessary to say 'Do you have any questions?'

At the end of day one, a further discussion can cover
work completed
questions arising relating to work
the volunteer's feelings
allaying any anxieties, giving encouragement.

Finally, further questions and/or information may be appropriate.

Appendices 10 and 11 are samples of an orientation check list and an orientation course outline respectively.

TRAINING

Training must be approached remembering that most participants are adult and will have life experiences behind them. They will have much to offer in the way of input and the training should be an exhilarating experience for them, and the trainer! Initial training need only provide basic skill building and the confidence to make a start.

The potential volunteers already have an interest in the work of the agency or project. An over-zealous trainer may in fact impede the natural confidence and the freshness of approach and in some cases, the outsider's commonsense way of viewing things. Some paid workers, who have been in the same job for years may have a tendency towards restricted vision. In such cases, the volunteers' perspective will be useful.

● An over-zealous trainer may in fact impede the natural confidence and the freshness of approach . . . ●

After being in the job for a short period, the volunteer may be ready for further training, and this will be more advanced as he/she will be aware of personal strengths/weaknesses, problems arising from the job. Worries can be aired and opinions expressed.

There are several kinds of training

1. Prior to the job

This would occur especially in highly responsible jobs, or in jobs requiring specialist knowledge, for example, taking people with disabilities on holiday trips, conducting tours in a maritime museum, or for jobs requiring both special skills and high degrees of responsibility, for example, crisis counselling.

2. On the job

Remember, it must not be too haphazard or informal. Gradual training and progression from step to step are desirable, not a bombardment of information and advice. It is often worthwhile to assign an experienced volunteer the task of being an on-the-job trainer to the new volunteer.

3. Ongoing (at regular intervals)

This occurs at the Volunteer Centre of S.A., where interviewers meet bi-monthly for training workshops, and at the same time a meal and friendly chat. Ongoing training maintains interest, sharpens skills and increases confidence.

Plan for training

As training will vary so much according to the agency or project in hand, general points only can be made. Training however must be well planned, and involve paid staff and clients where applicable and volunteers. When planning, ask why, what, how, who and when!

The aim

Having agreed on an aim, work out what the training will cover, keeping in mind what experience and skills the volunteers already possess.

The content

This would focus on the specific knowledge, understanding and skills training required for the job.

Training for people-servicing jobs may include acceptance, non-judgemental attitudes, the art of listening, confidentiality, attitudes towards gifts from clients and over-involvement.

The timing and the trainers

Length of training and identification of trainers will be decided. Experienced people — volunteers/paid staff/clients where applicable — should be included, especially those directly involved with the task at hand. In addition, it is desirable to invite a representative from management to attend a session.

Type of training

The formal lecture has become obsolete. Short talks, small group discussions (about five people work well together), then finally a general get-together, evaluating what has been learned and what further training is necessary, is a useful approach.

In addition, written and simulation exercises, role plays and demonstrations add variety and interest. People learn best by doing. A mixture of informal and experiential training works well, using various aids such as videos, charts, overhead projector, slides, tape recordings, and chalk boards. Hand-outs reinforce the message and can also provide additional information.

Assessment

Some form of assessment is a valuable means of evaluating training methods and content. See Appendix 12 for a sample evaluation form.

SUMMARY

The aims and means of orientation are examined, and include the introduction to the agency, the staff and the work environment, along with the basic information the volunteer will need in order to make a start. The climate should be warm, friendly and welcoming.

The kind of training, whether prior-to-the-job, on-the-job, or ongoing, are discussed. The steps in planning are outlined and include: objectives, content, timing, trainers, type of training and assessment.

EXERCISE

You are coordinating a group of volunteers to provide information (specialist and general) to visitors (national and international) for a festival of arts.

Outline a plan for training these volunteers.

Ask why, what, how, who, when and where?

- What — are the objectives?
- does this group already know?
- further do they need to know, i.e. the content?
- Why — train?
- How — go from the known to unknown?
- present the content in logical order?
- make the sessions interesting and stimulating?
- Who — will carry out the training?
- When — will it start?
- will it finish?
- Where — will the training be carried out?

16

Supervision, Support and Recognition

In the final analysis, your success in helping one volunteer to grow from strength to strength will be passed on, and on, and on . . .

PAULA J. BEUGEN

Support, supervision and recognition are closely linked and overlapping. They will be reflected in the quality of service provision. The volunteers will feel more confident when support, supervision and recognition are constant and adequate, and the agency will benefit from having a skilled team at its disposal.

SUPERVISION

The amount of supervision given must be appropriate to the nature of the job and the experience and skill of the volunteer. The word 'supervision' should not be seen as a kind of inspection from on high! Many adult volunteers are already skilled and will require periodic consultation only — when the information and enlightenment may be two way. Supervision may be carried out by a volunteer when he/she is competent regarding the task and has the necessary confidence.

Direction

Give clear and complete instructions regarding the job initially, and when necessary repeating them to make sure they are understood and carried out. This is especially necessary if the volunteer is new, or is doing the job at regular short intervals and possibly forgetting in the interim. Written instructions are sometimes helpful, for example task check lists. The supervisor must be readily available and approachable to answer questions, reinforce instructions and help when things go wrong. If working with clients, regular talks and feedback with the supervisor are essential.

Clear expectations

Clear expectations concerning the job on both sides — volunteers and supervisors — are necessary. Knowing the initial motivating factors which brought the volunteer to the job is important, and discovering whether these are being satisfied is helpful to both volunteer and supervisor. Any dissatisfaction should be able to be expressed. If the volunteer's needs are not being met, consideration should be given to changing the job. The supervisor too has the right to express dissatisfaction if the volunteer is not meeting the needs of the job. More training or a job change can then be considered. Any misunderstandings need to be cleared by frank discussion as soon as possible.

Showing appreciation

Everyone needs their work to be appreciated, whether they are being paid or not. Paid workers may have to stay in their jobs for various reasons,

but voluntary workers will soon leave the job if an appreciation of their work is wanting. This particularly applies to the new volunteer — especially if lacking in confidence. Regular volunteers, even confident ones, do not like being taken for granted. A word of sincere appreciation may make all the difference to the outlook of a volunteer and his/her approach to the job. The following story illustrates this point.

6 Volunteers — even confident ones — do not like being taken for granted. 9

A retired professional man took up a volunteer job as a research assistant in a museum. The supervisor, noticing the new volunteer's quiet, competent approach, decided to leave him to get on with the job, and to avoid appearing interfering or nosy. The volunteer, on the other hand, after long months of dedication to his job, began to feel somewhat neglected and to lose interest. He mentioned this casually to an acquaintance, who passed this on to the supervisor. The result was that the supervisor quickly realised the need for personal interest and recognition. Friendly thanks and appreciative interest were offered and received.

Nobody likes to be taken for granted!

Confronting

At some time, all volunteer managers will have to confront a volunteer with regard to behaviour or job performance.

Pointing out difficulties or modifying the assignment will be the first step. If the problem continues, other options may be suggested, e.g. switching to another job. Asking the volunteer to leave will be the last resort. None of this is easy or pleasant. Nevertheless, the relief to all concerned, and possibly even to the volunteer who may have seen it coming, if only subconsciously, will be immense. However, the volunteer's self-esteem needs to be preserved. The rule is to criticise behaviour or performance, not the person. (See Chapter 10 regarding conflict management).

The above situations will seldom arise if the following are observed:

- careful screening, orientation and training
- keeping the lines of communication open
- supervision and assessment on an ongoing basis
- offering constructive help freely
- letting the volunteer know when performance level drops; discovering the reasons for this and suggesting remedies.

SUPPORT

Support

- leads to a growth in the confidence, ability and the self-esteem of the volunteer. It is closely allied to recognition and approval, and should be received from paid staff, other volunteers and the volunteer's supervisor
- does not preclude constructive criticism. At a certain point and in some situations, constructive criticism may be the best form of support which can be given to the person
- should be ongoing in making the volunteer feel needed, and that their job is worthwhile
- may be needed in making decisions, for example that the assignment is not an appropriate one and, again, in the decision to 'let go'. The volunteer's strengths should be reinforced and positive suggestions made if a change of direction is desired
- should be quickly available in the case of accident or injury on the job. A report and follow-up steps should be expedited.
- will be needed at times on a personal basis. The supervisor needs to be alert to the volunteer who shows signs of stress, for example in the case of illness, bereavement or family problems. While being sensitive to the personal needs of the volunteer, there is a limit to the time a supervisor is able to give. Other sources of help and support may need to be suggested in some situations
- comes also from the volunteer team, and the strength and quality of this will depend partly on the way the team is organised. Group meetings for the team to air problems, discuss changes, share the rewards and laugh together, build up networks of encouragement, strength and good fellowship.

Finally, full communication (two-way), and the ready availability of the supervisor are at all times vitally important.

RECOGNITION

Must be consistent and ongoing. In the case of routine jobs (and here the long-term goals and the team approach must be stressed) the contribution is warmly acknowledged, especially as job satisfaction might be limited. Recognition may take the form of

- cards sent to sick volunteers, personal news announcements. A volunteer noticeboard for written announcements, personal messages, and postcards from absent volunteers
- coffee breaks, theatre parties, picnics, lunches, Christmas parties. These are an important part of building the friendship network among volunteers. Coffee is generally given free of cost to volunteers. An occasional free meal too is a much appreciated form of recognition
- further training, more challenge, or increased responsibility in job assignments may be offered when a volunteer has demonstrated commitment and competence.

SPREADING THE LOAD

In the case of the volunteer manager who has many other jobs and responsibilities — and can therefore devote only limited time to the support and supervision of individual volunteers — the following options may be considered:

- select volunteers who are self-sufficient and can work in teams with their own support mechanisms,
- appoint a volunteer to act as team leader,
- pair volunteers so each gives the other support,
- delegate as many jobs as possible, e.g. the roster system, the checking of records.

Options which spread the responsibility of support should be considered by all volunteer managers.

SUMMARY

'Appropriate' and 'ongoing' are key words with regard to supervision, support and recognition. Clear directions with regard to the job, consideration of the volunteer's expectations when starting, and at intervals, showing appreciation, and the possibility of having to confront at times, are factors the volunteer manager needs to be aware of constantly.

The volunteer will gain in confidence and competence with proper supervision, support and recognition.

Finally, suggestions are made as to how to spread the load.

EXERCISE

There is an alarming rate of volunteer turnover in your agency. You have recently reviewed recruitment, screening, orientation and training methods — they seem to be OK.

Using the table below:

Check out factors which may contribute to high turnover.

Rate good/satisfactory/needs improving.

Work out steps to take for 'needs improving'.

Ask an experienced volunteer to repeat the exercise.

Compare results.

| | Factors involved | Good/ Satisfactory/ Needs improving | Steps to take |
|-------------|------------------|-------------------------------------------|---------------|
| SUPERVISION | | | |
| SUPPORT | | | |
| RECOGNITION | | | |

17

Appraisal and Lane Changing

... it may be important to him or her as a human being to move up or out or on.

EVA SCHINDLER-RAINMAN

Appraisal is frequently regarded with distaste by volunteer managers, because they believe that the volunteer undergoing appraisal would regard the process to be unfair and threatening. However if the purpose is explained — that it is directed towards the possibility of lane changing, further development and confidence building — misconceptions and fears disappear.

THE CONCEPT

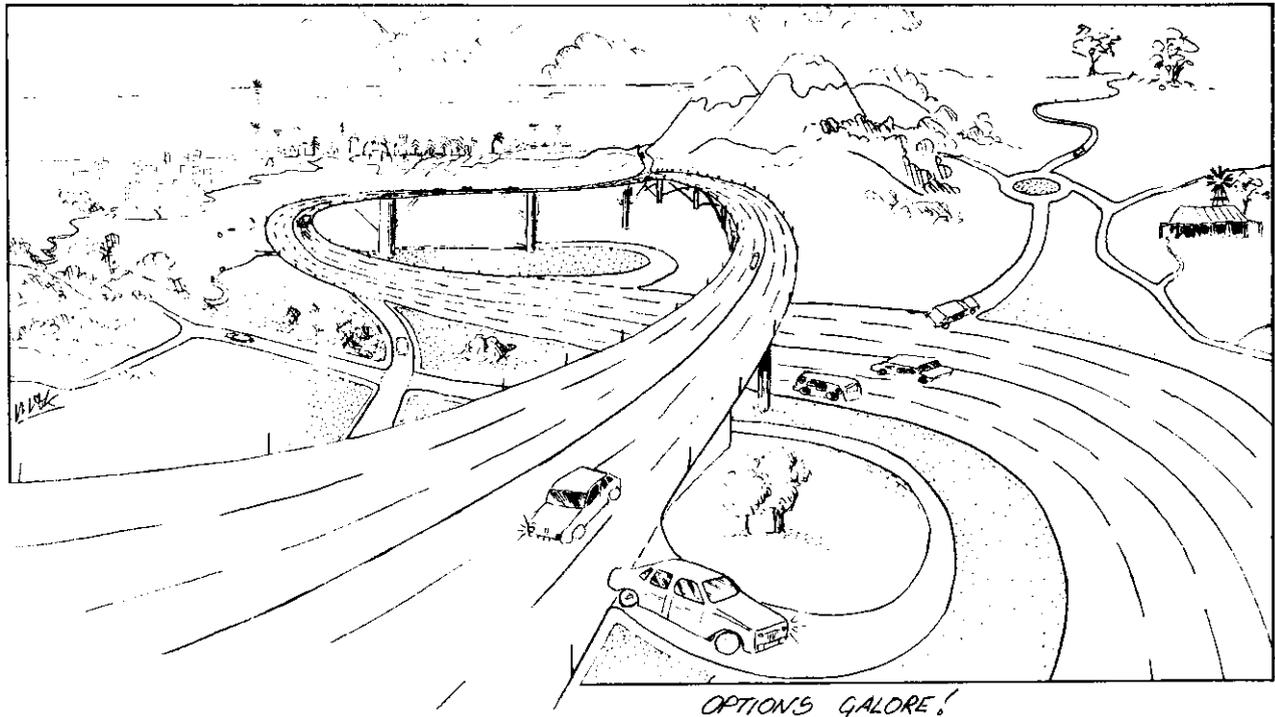
Paula Beugen⁹, an American consultant on volunteerism, speaks of the 'volunteer life cycle' which consists of three stages — exploratory, developmental and mature. Each stage has various characteristics, going from testing the water to growing and blooming to advising and leading. Many volunteers go through these stages, with some variations. It is useful and interesting for the volunteers and their supervisors to identify their own position regarding these stages.

Society is changing rapidly and individuals are undergoing constant changes in jobs, attitudes and lifestyles. 'Transitioning' as Eva Schindler-Rainman¹⁰ reminds us, is a very common phase as people change from one situation to another. Individual volunteers may wish simply to make a change in order to pursue a further interest, or to progress to another job with increased responsibility, or to retreat somewhat and take a less responsible job.

Appraisal has so often been seen as an evaluation by the boss. When volunteering is seen as a means of personal development, the function of appraisal becomes apparent.

The concept of lane changing is a familiar one to everyone. Individuals attempt to progress towards goals but constant changes are necessary, brought about by accident or design. The slow lane may be necessary for a short while or forever (for example, after a severe accident or illness). Some volunteers may choose to be in a fast lane. For example, the older woman feeling lost after the children have left home may be seeking

new horizons and choose a mentally stimulating job. Others may prefer the slow lane. For example, the paid worker with a high pressure job from Monday to Friday chooses an undemanding volunteer job.



PREPARATION

Clear job definition, adequate orientation and training are pre-conditions of appraisal. In addition, support and supervision must be positive and regular. If this is the case, the volunteer will already be aware of his/her strengths and weaknesses and know that resources are available when needed.

Preparation is necessary for the volunteer who is to be appraised. Appraisal and lane changing needs to be explained as a systematic stocktaking, where the individual addresses questions relating to themselves and their volunteer work and asks 'Where am I now? Where am I going? What are my goals?' The answers may be to move onwards, or to step sideways or to keep the status quo.

Benefits

- may help volunteers in self-development
- may be a means of advancing to further experiences and responsibilities or stepping sideways (to a job of equal demands, for a change of interest)
- useful for volunteers feeling restless in current job, for example young volunteers
- clears the air by bringing into the open problems or misunderstandings previously unrecognised.

Results

The results for the person being appraised may be lane changing, moving out of the job or the resolution of problems arising from misunderstandings in the areas of communication, support and supervision. Appraisal provides an opportunity to recognise the contribution of the volunteer.

Methods: informal and formal

It must be realised that informal appraisal is inevitable. It occurs in many different ways: both covert and overt.

Covert

A supervisor may think 'I wish Sue would cheer up a bit. I can't stand her moaning!' Sue is given no chance in this situation to express her point of view, or state the reason.

Overt

The supervisor may say 'Sue, you are sounding unhappy. Let's talk about it.'

There may also be a need for a more formal, periodic appraisal. This will be necessary when the volunteer is working away from the agency, for example visiting a terminally ill patient or, further removed, working in a remote area. In addition, the work of volunteers in situations of great responsibility, for example crisis counselling, calls for in-depth assessment at regular intervals.

FORMAL APPRAISAL

A plan will be necessary. What is the objective? What is the interval? What is the method? Who will appraise? These questions must be addressed.

The objective

To make improvements and revisions, to receive data and feedback, to reiterate personal goals and to underline the supports available to reach these goals. To advance or to step sideways.

6 The appraiser encourages personal feed-back . . . 9

The timing

May be monthly (especially in the early stages of the assignment), annually, or whatever is considered appropriate in the circumstances.

The method

A checklist of topics to be covered provides a good focus and ensures important points are not missed. The list will vary greatly according to the situation.

The climate must be one of respect and openness. Then two-way communication is possible and self-esteem is maintained.

It is essentially a discussion relating to strengths and weaknesses, capacities, potential for lane changing or acceptance of further responsibilities, needs such as further information and training, future plans. It is participatory. Gone are the days of the cold appraisal being handed down from on high to the hapless worker! The appraisal should be two-way. The appraiser *encourages* personal feedback of his/her own performance.

The appraiser(s)

Usually appraisal is carried out by the person directly supervising the volunteer in their job assignment. Alternatively a small group of two or three volunteers, along with their supervisor, may appraise each other, using a check list as a focus.

Aspects to consider

Personal aspects are considered — responsibilities, commitments, interests, fitness level, feelings, reliability, cooperation with other team members.

The job is discussed — the hours, the level of responsibility, the effectiveness, the bonuses, the problems.

The outcome

The status quo is maintained, a move sideways or forwards, or a readjustment is agreed on.

Recording

This may be useful if the volunteer is hoping to obtain paid employment and requires a reference. Otherwise it is of doubtful value. The check list, if used, may be kept by the volunteer for further comparison.

Should formal appraisal be compulsory?

Only in cases where this has been a condition of acceptance of the volunteer's job, for example in the case of counselling.

Group appraisal

This can be less threatening. It would, however, only be used in a supportive climate. In such cases it can be very effective and provide ongoing help and encouragement to all group members.

SUMMARY

Appraisal as a type of individual stocktaking is examined: why it is conducted — for self-assessment and lane changing, and how it is conducted — in a warm relaxed climate. Results will then be both positive and satisfying. Various types of appraisal are outlined. The setting of objectives, the method and the outcome are discussed.

EXERCISES

Draw up a table listing the advantages and disadvantages of

(1) One-to-one Appraisal

(2) Group Appraisal

Which form of appraisal is your desired option?

Using the suggested guidelines draw up a plan for appraisal within your agency.

Your youth group utilises adults as its volunteer leaders. One of the requirements of commitment to leadership is that direct leadership will cease at the age of 55 years. Other roles within the organisation are available.

Formulate a plan to prepare a person of 54 years for cessation of the leadership role.

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Conclusion

THE VOLUNTEER MANAGER SPEAKS

Seven volunteer managers from large and small agencies in the city and country were invited to take part in a telephone interview. Spontaneous answers to questions posed were sought and given. Their replies are quoted verbatim.

What provides the greatest stimulus in your job?

- 'Seeing that volunteers are happy and things are working well.'
- 'When someone grows through being a volunteer and moves on.'
- 'The great variety of people I meet.'
- 'Seeing volunteers grow — fantastic.'
- 'When volunteers stay for a long term and become committed.'
- 'Interacting and socialising with people.'
- 'Seeing the amount of time volunteers are willing to contribute.'

What is your greatest hassle?

- 'Volunteers who think that they know what's best — from years ago.'
- 'Having volunteers with so many problems that they are not ready to be part of a team.'
- 'Time constraints.'
- 'Paid staff's non-acceptance of volunteers — treating them as inferior.'
- 'Time constraints and so many different jobs to do.'
- 'Bureaucracy, red tape.'
- 'Non-acceptance of volunteers by paid staff.'

If you had a magic wand what would be the first two things you would want to change?

First wish

- 'To be able to give more time to volunteers.'
- 'More equity in resources in relation to what is being achieved.'
- 'More space to work in.'
- 'For volunteers and the community to run this place, in terms of empowerment.'
- 'More time with the volunteers.'
- 'Dependable funding.'
- 'A better understanding of volunteers by paid staff.'

Second wish

- 'A room that volunteers could call their own.'
- 'Half representation of women on management committee.'
- 'A higher public profile for volunteers.'
- 'Reach more people — those who say they have nothing to give.'
- 'More regular volunteers.'
- 'No red tape.'
- 'That volunteers would stop putting themselves down.'

Where does your greatest support come from?

- 'Volunteer team and my supervisor.'
- 'From volunteers themselves, who are so rich in their life experience, enthusiasm and energy.'
- 'Volunteers themselves.'
- 'From the volunteers.'
- 'Management committee, who are themselves volunteers, and from two old faithfuls in particular.'
- 'Volunteers who pass on their energy and keep motivation high.'
- 'Meetings with other volunteer managers.'

What attributes do volunteers bring to your agency?

- 'Variety, interests and skills and an outside view.'
- 'A matching of human skill to the job requirement.'
- 'Their time and their willingness.'
- 'A 'down to earth' ability — commonsense.'
- 'Personal, real life experience.'
- 'Wide ranging experience.'
- 'Extension and enrichment of the work of the paid staff.'

What attributes do volunteers bring to society?

- 'Happiness, love and a wish to help others.'
- 'Idealism.'
- 'A feeling for humanity.'
- 'Encouragement to other people to get involved and be motivated.'
- 'First hand experience of the problems of the client group.'
- 'A healthier society through better sharing and integration.'
- 'Integration of people into society.'

What do you see as being most important to the job of volunteer manager in terms of

(1) personal characteristics

- 'An ability to understand people, put yourself in their shoes.'
- 'Being outgoing.'
- 'A liking for people.'
- 'A sense of humour, rapport with a wide range of people.'
- 'A caring relationship with people.'
- 'Sincerity.'
- 'Honesty.'

(2) **skill/ability?**

'Communication skills.'

'Leading and delegating.'

'Administration skills.'

'Being a good organiser and facilitator.'

'Being a good organiser.'

'Communication and listening skills.'

'Being clear on your goals, and able to match people with jobs to be done.'

An acquaintance is about to accept a job as volunteer manager.

What advice would you give her or him?

'You need to like people, be able to work with them. Be sure you can organise.'

'Wouldn't give advice — just welcome them. Everyone has own thing to bring.'

'Make sure you find out the attitude of your employer towards volunteers, and do a time management course.'

'Don't take on all responsibilities — let your volunteers learn and then back off.'

'Make sure you look after your volunteers and that they know they are wanted and needed.'

'Get to know your community and target groups.'

'The job is very demanding so you need to get clear directions on what is expected of you — think twice!'

What better summary could have been provided of the joys, frustrations, needs and hopes of volunteer managers? It is obvious that those contacted are people managers. They value volunteering as a means of empowering people and creating a more caring, integrated society. They revel in the contribution volunteers can bring, but this confidence is not always reflected in the attitude of paid staff and management. Too many jobs are expected of them, limiting the support time available for volunteers. Facilities are not always adequate. Organising ability is seen to be essential as well as a liking for a wide range of people.

What does this mean for the future?

The challenge is to ensure that the contribution which volunteers are offering is used to the maximum. Where paid staff are involved, both can find common ground through working for the same cause. Management will need to provide adequate resources for the volunteers, as for the paid staff. Recognition of the volunteer contribution will be reflected in the status and remuneration given to the volunteer manager. The position will be integrated into the organisation's structure rather than simply as an appendage.

THE FINAL WORD

The magnitude of volunteer effort is there for all to see. It has social, political and economic implications. It offers great opportunities. For the volunteer it offers opportunities to do something worthwhile, to have one's say and to benefit from personal development. For the agency or group, volunteers ensure a direct link with the community, and extend and enhance services. For the community, it provides a largely unseen but vital reservoir of energy, commitment and experience, assisting in all sorts of ways and places, as well as when crises strike.

Volunteers come from all walks of life and all socio-economic and ethnic groups, are of all ages and both sexes.

Volunteer managers, appointed to oversee volunteer involvement within their agencies, take on a responsible but rewarding and exciting career. Through the development of relevant and effective volunteer policies and practices they have a key role to play in enabling volunteers to be assertive rather than passive, to be the pacesetters rather than to be reactive, thus contributing to a dynamic and integrated society.

No-one can help others without also helping themselves. This is the truth about volunteering. The opportunity provided to all involved, and in particular to volunteer managers, to support and nourish this source of energy is the inspiration for this manual.

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Appendix 1a.

International Association for Volunteer Effort

I.A.V.E. was created in 1970 as a worldwide nonpolitical, nonprofit organisation to encourage and promote volunteering as a way to improve the quality of life for all people and to build bridges of understanding among caring people of all nations.

Members now represent over 40 countries in every part of the world. They come together every two years in conference — to explore issues of mutual concern, exchange information and experiences, establish valuable contacts and linkages, learn new techniques and renew their commitment to effective volunteering in their own nations and around the world. Conferences have been held in the Philippines, Turkey, Colombia, Switzerland, England, the United States, and Australia.

I.A.V.E. is governed by an international board of directors composed of officers, regional representatives and at-large members elected by the Council of Representatives at the biennial conference.

For individuals and organisations, I.A.V.E. provides the opportunity to:

- Be part of our international network of people and organisations involved in volunteering.
- Learn creative new ways of dealing with daily situations volunteers face.
- Contribute your own enthusiasm as a volunteer to others, building bridges and opening boundaries among nations.
- Attend, at favourable rates, a biennial conference and receive the I.A.V.E. newsletter and member directory.

In addition, I.A.V.E. provides:

- Program ideas on how to support volunteering.
- Staff exchange and mutual enrichment.
- Sharing of thoughts and solutions about the environment in which volunteers act.
- Discovery about ways of dealing with government, the business sector and other partners.
- Insights into appropriate organisational objectives and structures.
- Link-ups on publications, information and data collection.

I.A.V.E. exists to link its members together. To achieve this, all members receive:

- Preferred registration fees at the biennial conference.
- A regular newsletter.
- A directory of members, their volunteer interests and resources.
- The opportunity to participate in selection of national and regional representatives to I.A.V.E.

Membership is open to all individuals and organisations that share I.A.V.E.'s belief in the importance of volunteering as a way for people to address human, economic and environmental problems. Dues for individuals are 52 Swiss francs (U.S. \$30) for one year; 100 Sfr. (U.S. \$50) for two years. For organisations, 104 Sfr. (U.S. \$60) for one year, 200 Sfr. (U.S. \$100) for two years.

Appendix 1b

INTERNATIONAL ASSOCIATION FOR VOLUNTEER EFFORT

MEMBERSHIP APPLICATION

PLEASE TYPE OR PRINT IN BLOCK LETTERS:

FAMILY NAME
(or) ORGANISATION NAME:

GIVEN NAME
(or) ATTENTION OF:

EXACT MAILING ADDRESS:

COUNTRY:

TELEPHONE: (Include Code):

INFORMATION FOR MEMBERSHIP DIRECTORY (In 50 to 100 words, please describe your volunteer activities and special volunteer interests)

| | | | | | |
|-------|----------------------------------------------|-----------|---------------------|--------------|-----------------------------------------|
| DUES: | <input type="checkbox"/> INDIVIDUAL | One Year | 52 Swiss Francs or | \$30.00 USA | <input type="checkbox"/> New |
| | | Two Years | 100 Swiss Francs or | \$50.00 USA | <input type="checkbox"/> Renewal |
| | <input type="checkbox"/> ORGANISATION | One Year | 104 Swiss Francs or | \$60.00 USA | Amount Enclosed: _____ |
| | | Two Years | 200 Swiss Francs or | \$100.00 USA | |

MAKE PAYABLE TO: INTERNATIONAL ASSOCIATION FOR VOLUNTEER EFFORT
MAIL TO: USA (TAX DEDUCTIBLE) TO:

MIRAM LEU, TREASURER
I.A.V.E.
TAVELWEG 20
CH-3006 BERNE, SWITZERLAND

RUTH MARCH
V.P. MEMBERSHIP
P.O. BOX 27095
LOS ANGELES, CALIFORNIA 90027-0095
U.S.A.

LIVE CONFERENCE ASSISTANCE FUND:

TAX DEDUCTIBLE DONATION: _____
(USA \$)

MAIL TO: JEAN TRUEBLOOD
1089 MORAGA DRIVE,
LOS ANGELES,
CALIFORNIA 90049

Appendix 2

Agency Guidelines Relating to Young Volunteers who are Unemployed

Prepared by the Volunteer Centre of S.A. Inc. and the Youth Affairs Council of South Australia (1986)

YOUNG UNEMPLOYED PEOPLE AS VOLUNTEERS

Unemployed young people are a new volunteer force with distinct motivation. Some of the reasons why they volunteer are:

1. To meet people.
2. To try out a vocation.
3. Employer expectations that potential employees will have had experience, even if they have not been previously employed (this is especially strong in human services areas where formal qualifications are not the only entry point).
4. To avoid boredom.
5. Social pressure or personal guilt — the need to 'do' something to legitimise receiving Unemployment Benefits.

The primary motivation of many young unemployed volunteers is getting paid employment. This motivation may lead to a variety of different outcomes:

1. They may be less 'committed' or 'reliable' in the traditional sense (e.g. they may not come in at regular times and their period of volunteer work may be more transitory).
2. They are likely to need more training, supervision, support and development opportunities. Considerable staff time needs to be expended providing this.
3. There is a greater need for acknowledgement of the volunteer effort through reference, certificate of service etc.
4. The agency needs a policy covering what expectations the volunteer should/shouldn't have about getting the next available paid job in the agency. There must be a clear structure for understanding and negotiating these expectations.
5. The agency should arrange adequate insurance cover (e.g. public liability, personal accident, vehicle).
6. Out-of-pocket expenses should be covered. The agency must also examine its overt, and subtle (e.g. social outings), expectations of volunteers' financial contribution.
7. Agencies involving young unemployed people must be prepared to allow time off for job interviews; encourage the volunteer to gain a range of experiences within the agency and be willing to 'let go' so that the volunteer can gain different experiences elsewhere.

STATEMENT OF PRINCIPLES: POLICY ISSUES

1. Young people have the right to decide whether or not they will volunteer their services, and if so, to whom.
2. Unemployment benefit is a right in contemporary Australian society. It is a right in part because the current structure of the economy is such that there are not enough jobs for all those who want to work. Young people should not therefore be expected to volunteer as a prerequisite to receiving unemployment benefits.
3. Unemployed people must not be expected to undertake volunteer work simply because they are unemployed.
4. The use of volunteers in an agency must not:
 - deprive others of a livelihood. Volunteers are not to be substituted for paid workers in an agency, either by the agency or by withdrawal of Government funding.
 - constitute a threat to the security and job satisfaction of paid staff.
 - imply that paid staff work only for financial reward.
5. It is legitimate for agencies to extend, through the use of volunteers, the range of services they offer, provided that such volunteer-based services are:
 - of constant quality and availability
 - adequately supervised and coordinated
 - adequately resourced.

STATEMENT OF PRINCIPLES: PRACTICAL ISSUES

1. A primary objective of agencies which involve young people as volunteers must be to protect the rights of those volunteers and ensure that their experience of volunteerism is positive.
2. Agreement should be reached between young volunteers and the organisations to whom they volunteer, clearly specifying the rights, responsibilities, and expectations of both parties.
3. The expectations, interests and skills of the volunteer must be matched to the task to be performed. This involves a competent assessment of the volunteer and a detailed description of the task. Such matching is necessary whatever the task.
4. Clear job descriptions are necessary for both volunteers and paid staff members.
5. In defining areas of work and responsibilities for both staff and volunteers, all interested parties should be actively involved. It is in the interests of management to secure understanding and endorsement of decisions in these areas, although the ultimate right of management to make such decisions independently is recognised. Harmonious relationships should exist between paid staff and the volunteer coordinator.
6. Communication and consultation channels should be clear to all concerned, and volunteers should be included in consultation and decision making processes as appropriate.
7. Areas of responsibility need regular review to ensure their relevance, and full consultation should occur between all interested parties when a change of duties is contemplated.

8. Any agreements should be made known to and understood by all those involved before changes occur.
9. In the event of an industrial dispute:
 - any change in work normally undertaken by volunteers should only take place with the agreement of management and those staff and/or their representatives involved in the dispute.
 - volunteers should not be expected to cross picket lines, except by agreement with management and staff involved in either side of an industrial dispute.
10. Volunteers need to make realistic commitments, in terms of both time and areas of involvement.
11. Agencies should consider and make allowance for the costs of utilising volunteers in terms of out-of-pocket expenses, time allowed for recruitment, orientation, support, supervision and where necessary training, and accommodation and facilities.
12. A staff person with special responsibilities for overseeing the volunteer program should be identified. All staff involved with volunteers should be allowed sufficient time by the agency and given proper recognition to enable them to adequately carry out their responsibilities.
13. The host agency should arrange adequate insurance to cover the various functions of volunteers. Details of insurance cover must be communicated to volunteers.
14. Young unemployed people who undertake voluntary work have the right to appropriate training within the agency, to 'time-off' for job interviews and to encouragement and practical support (e.g. references, certificate of service) in their efforts to find paid employment.

Appendix 3

Policy Guidelines Reflecting Current Thinking on Volunteering

S.A. Council of Social Service and the Volunteer Centre of S.A. Inc., August 1984

1. PHILOSOPHY AND BENEFITS

Volunteering contributes to the preservation of the spirit of democratic involvement of people in all facets of society. In wishing to live their lives to the full, many people have the desire, and all have the right, voluntarily to give of their time in some form of socially acceptable and satisfying activity of their own choosing.

From the perspective of host agencies, volunteering enables committees of management and paid staff to tap the reserve of community goodwill to extend or maintain their existing services, or to develop new ones. To this end, agencies have a right to insist upon volunteers' acceptance of suitable programs of training and supervision which they provide, but have a responsibility to ensure that such programs are appropriately resourced.

In the context of the guidelines which follow, a volunteer is defined as a person who provides a service of his or her own free will, and without pay. The harnessing of people's time, interests and skills provides benefits not only to the volunteers, but to the persons or projects assisted, the organisation within which they may work, and to the community at large.

Some specific benefits to those concerned are:

To the volunteer

- meeting the need for personal development and expression, and broadening life experience
- meeting psychological needs (e.g. to be needed, occupied and relate to other people)
- involving people in their community
- widening and maintaining personal skills, either for their own sake, or with future paid employment in mind
- providing an opportunity for volunteers to assist an agency in return for past services received.

To persons or projects assisted

- meeting of needs in a spontaneous and generous manner appropriate to the particular situation, and in some cases, needs which would not otherwise be addressed.

To the agency

- bringing to the agency the energy, creativity and new perspectives of the volunteer who moves freely between the community and the agency
- providing opportunities for paid staff to extend their effectiveness by concentrating on work in areas to which their training particularly equips them, and by using volunteers in other areas
- enabling the mounting of pilot programs which need to demonstrate their usefulness and viability before seeking acceptance as a funded project
- providing a sounding board for paid staff about the community's perception of the agency and its services.

To the community

- improving the quality of community life as more people with ideas, skills and commitment make their contribution
- increasing the public's awareness of, and sensitivity to community needs, and its knowledge of the range of programs and services that are available to meet them
- increasing involvement in decision making across a wide spectrum of society
- providing service cover in widely dispersed areas of need and rural communities which could never be fully funded and staffed solely by paid staff
- providing opportunities for the initiation of innovative schemes which need community acceptance before being funded.

2. SCOPE AND DIVERSITY OF VOLUNTEER ACTIVITY

Volunteers are an integral part of many of society's institutions. It is well established that a large percentage of the population is involved in some form of voluntary activity. Such activity takes many forms and is undertaken in a variety of settings.

- It can range from individual therapy for volunteers, to participation in decision making at various levels, and in various fields of community life. A single agency may encourage voluntary work which relates to both ends of this spectrum, as well as intermediate points, such as working in partnership with paid staff
- many areas of work cover a wide range of activities such as welfare, education, arts, heritage, sport, to mention a few
- practical functions of volunteers can include counselling, befriending, group work, administration, office or committee work, and public relations. The allocation of tasks will depend on individual volunteers' skills, aptitudes, extent of training, available time, and personal aspirations, as well as on the requirements of the host agency
- types of organisations which recruit volunteers include statutory and voluntary organisations offering social, educational, recreational, or cultural services; trade unions; service clubs; schools; churches and sports clubs
- the structure of host organisations also varies. Some are predominantly staffed by paid workers, while others are predominantly or wholly staffed by volunteers.

The type of involvement in voluntary effort also ranges widely:

- *firstly* there are self-referred volunteers who are matched by an agency to a service or function relevant to their skills and interests
- self-help groups are a *second* category. People with similar problems or aims provide mutual support and assistance, and the helper-helped roles can be interchanged

- the *third* category includes neighbourhood or resident groups operating within a community to provide locally-orientated support or projects
- *fourthly*, there are the informal and reciprocal support structures or networks within a community. Such networks can relate to locality, employment or a common interest.

3. SAFEGUARDING INTERESTS

While the attention of management will naturally focus primarily on the task to be performed and on ensuring a sustained quality of service, the interests of both paid workers and volunteers must be safeguarded. Safeguards need particular attention in times of high unemployment and increasing leisure. However, sound volunteer management will mean that growth in paid employment opportunities and in voluntary service are not incompatible goals.

4. PRACTICE — GENERAL PRINCIPLES

As situations where volunteers are used, and the manner of their use, differ widely, it is impossible to make a definitive detailed statement which would suit every agency. It is imperative, therefore, for each agency to formulate its own policy and management guidelines in accordance with its own particular situation.

There are, however, some basic principles which need to be kept in mind:

- the expectations, interests and skills of the volunteer must be matched to the task to be performed. This involves a competent assessment of the volunteer and a detailed description of the task. Such matching is necessary whatever the task
- clear job descriptions are necessary for both volunteers and paid staff members
- the role and function of the agency must be clearly spelt out and understood by all involved, and an effective working relationship established between all parties
- volunteers need to make realistic commitments, in terms of both time and areas of involvement, and it is legitimate for the host agency to expect that these commitments will be consistently fulfilled
- the agency must make an appropriate commitment to understanding and meeting the legitimate expectations of the volunteers
- communication and consultation channels should be clear to all concerned, and volunteers should be included in consultation and decision-making processes as appropriate. This is especially necessary during times of change
- a climate of mutual respect and confidence should be engendered between paid staff and volunteers. This will be aided by a carefully considered and implemented volunteer policy, which provides for the participation of volunteers at an appropriate level in agency management
- the agency needs to consider the cost of utilising volunteers in terms of out-of-pocket expenses, time allowed for recruitment, orientation, support, supervision and where necessary training, and accommodation and facilities
- a staff person with special responsibilities for overseeing the volunteer program should be identified. All staff involved with volunteers should be allowed sufficient time by the agency and given proper recognition to enable them to adequately carry out their responsibilities

- volunteers have a right to expect that the host agency will arrange appropriate insurance to cover their various functions.

5. PRACTICE — SPECIFIC ISSUES

(1) Volunteer — agency issues

The agency need to clearly define tasks relevant to the volunteer's skills and interests and provide appropriate feedback, lines of communication, and where necessary, training. Reliability and appropriate communication should be expected of the volunteer.

Volunteer interests need to be considered when management decisions are being made. Direct representation of volunteer interests in the agency's management structure aids in promoting harmonious relationships.

(2) User — volunteer

Issues which need defining include the right of the user to an effective service and confidentiality, and realistic expectations of each other by the user and the volunteer.

(3) Volunteer — staff issues

- role definitions and communication procedures need to be clearly defined and agreed on. There is a clear distinction between a contract made by a paid worker and a volunteer. Clarification of these differences should avoid tension or misunderstanding between staff and volunteers. A clear understanding in these areas enables both paid staff and volunteers to see the relevance and importance of their respective contributions, and to avoid feeling threatened
- it is legitimate for agencies to extend, through the use of volunteers, the range of services they offer, provided that such volunteer-based services are:
 - of consistent quality and availability
 - adequately supervised and coordinated
 - adequately resourced
 - not in deliberate or unwitting competition with similar services, paid or unpaid, in the community covered by the agency
- while the use of volunteers aims to extend the arm of the paid worker, staff who are already fully committed cannot be expected to refer work to a volunteer if supervision and support of that volunteer will then fall on their shoulders. Strategies need to be developed by management for such supervision and support to be given in an alternate way. Often resources can be found within the volunteer group itself. Time needed for supervision depends largely on recruitment practices and how well the volunteer's work and life experiences are matched to the task. The SACOSS Handbook on Volunteer Management suggests some tried procedures in this area.
- paid staff should not be replaced by volunteers simply as a means of saving money. On the other hand, volunteers should not be replaced by paid staff simply as a means of providing paid employment. The paid worker has a right to paid work and the volunteer has a right to volunteer without pay.

An area in which volunteer/staff issues needs special attention is where a committee of management consists of volunteers, who are therefore in a position of authority over staff. Because of the potential for tension, well considered policies in the area of role definition, matching of skills to the task, and communication are essential. Adequate formal representation of paid staff should be guaranteed on such committees of management.

(4) Industrial issues

Policy and practice guidelines need to be formulated by each agency, appropriate to their unique situation.

Underlying principles would include:

- the use of volunteers in an agency should not
 - deprive others of a livelihood
 - constitute a threat to the security and job satisfaction of paid staff
 - be seen to be in conflict with the paid staff members' capacity to contribute to the community out of altruistic motives
- in defining areas of work and responsibilities for both staff and volunteers, all interested parties should be actively involved; it is in the interests of management to secure their understanding and endorsement of decisions in these areas, although the ultimate right of management to make such decisions independently is recognised: harmonious relationships should exist between paid staff and the volunteer coordinator
- demarcation lines need regular review to ensure their relevance, and full consultation should occur between all interested parties when a shift of duties is contemplated
- any agreements should be made known to and understood by all those involved before changes occur.

Apart from preparing working guidelines which will have the effect of promoting understanding and goodwill between paid staff, volunteers and management, an agency should also establish contingency procedures for dealing with any industrial action which might occur. In doing so, the following should be included:

- (i) during an industrial dispute, any departure from work normally undertaken by volunteers should only take place with the agreement of management and those staff and/or their representatives involved in the dispute
- (ii) volunteers should not be expected to cross picket lines, except by agreement with management and staff involved in either side of an industrial dispute.

(5) Financial issues

Funding provision must be made for the recruitment, orientation, any necessary training and supervision of volunteers, as well as for the reimbursement of their out-of-pocket expenses and insurance cover. A system of reimbursement for out-of-pocket expenses should allow for claims to be readily made without discrimination or difficulty for either those claiming or those preferring not to claim.

Volunteers should be advised of agency practice regarding payment of out-of-pocket expenses at the initial interview.

(6) Public relations and lobbying

In any situation where an individual volunteer is authorised to speak publicly on behalf of a host organisation, the extent and nature of that involvement must be clearly defined and understood.

6. CONCLUSION

While these guidelines set out general principles, the need for each agency to formulate its own policy and practice guidelines cannot be over-emphasised. It is not sufficient for the management of any agency to endorse the use of volunteers in principle, without making specific provisions for their contribution to the agency's work. Management must be prepared to establish procedures and provide resources which will bring benefits to all sectors involved — persons being assisted, volunteers, paid staff and the agency itself.

Appendix 4

Mission Statement of the Volunteer Centre of New South Wales

Volunteering is about people being enabled and empowered to exercise freedom of choice in the way they spend their time. It is about making it possible for each person in the community to know and value the choice to volunteer. The Volunteer Centre of New South Wales is committed to raising the profile and esteem of volunteering as a vital force in this country. It is also committed to the highest professional standards of volunteer involvement, ensuring that the work of the volunteer supplements, humanises and enhances, but in no way competes with, the work of paid people.

Appendix 5

Public Participation

SOUTH AUSTRALIAN NATIONAL PARKS AND WILDLIFE SERVICE POLICIES DOCUMENT (3rd Edition) MAY 1986

The Service is aware that it must have community support for many of the objectives it has to achieve. This is particularly so as public resources are diminishing and the Service is being assisted in many areas. Following such voluntary work, especially where young people are involved, there is a chance that the people participating will maintain an interest in nature conservation.

1. The Service will seek appropriate public participation in the planning and management of reserves and in the development and implementation of wildlife conservation programs.

In particular, ongoing liaison with amateur groups interested in conservation and the natural sciences is seen as being important.

2. Appropriate opportunities will be developed by the Service to encourage dialogue between the community and Service staff, both through formal avenues, such as Consultative Committees, and informal arrangements

Consultative Committees will be appointed by the Minister for consultation on a regional basis, or in some circumstances, on a particular issue or problem.

3. Community groups will be encouraged to contribute on a voluntary basis to the management, development and interpretation of reserves.

Such involvement will foster community participation in nature conservation work and will not be designed as an alternative to the current employee structure of the Service. Projects should be complementary to other programs of work in a reserve and in accordance with a management plan. They should be discussed with union representatives, regional and park staff beforehand.

Community groups may become organised into 'Friends' of a particular park with the approval and assistance of the Regional Manager and the Ranger-in-Charge.

Appendix 6

Samples of job descriptions for volunteer managers within different settings

JOB DESCRIPTION 1

| | |
|--------------------------|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| JOB TITLE | DIRECTOR OF VOLUNTEER SERVICES |
| RESPONSIBLE TO | Executive Director |
| ESSENTIAL QUALIFICATIONS | Tertiary qualifications in the behavioural sciences. Proven management experience at a senior level. Experience in planning and implementing new services and programs. Experience in working with volunteers is necessary. A knowledge of advocacy processes is also desirable. |
| SUMMARY OF DUTIES | Direct the agency's volunteer services, investigate community needs and plan, implement and develop new volunteer services to meet needs not provided for within the community. |

DUTY STATEMENT

1. Be responsible for the day-to-day direction, development and management of all the agency's services provided by volunteers.
2. Develop policies, structure and management procedures to ensure volunteers are carefully selected, adequately trained and supported.
3. Be responsible for the selection, training and supervision of coordinators of volunteers, both paid and unpaid, in other sections.
4. Be responsible for the development of service evaluation processes to ensure quality and relevance.
5. Develop policies and processes for providing advocate support for individuals where appropriate.
6. Provide advice and assistance to other sections of the agency's services to enable them to effectively involve volunteers where appropriate.
7. Provide regular data and advice to the Executive Director on client needs and relevant services with which volunteers are involved. Make recommendations on appropriate changes.
8. Be a member of the Executive Committee and assist in the process of policy decision making. Implement management procedures in line with these decisions.
9. Liaise with relevant government departments and other voluntary care agencies on objectives and operations of volunteer services.
10. Undertake other duties as directed by the Executive Director.
11. Provide the Executive Director annually with details of the year's program and suggested budget. Operate services within the budget allocated.

JOB DESCRIPTION 2

POSITION TITLE Volunteer Manager

RESIDENCE

RESPONSIBLE TO Director

BROADER DUTIES

1. To coordinate volunteers and activities to enhance the quality of life for residents.
2. To develop and maintain a volunteer service that promotes the integration of members of the community on a one-to-one relationship with residents.
3. Establish liaison with community resources.

SPECIFIC RESPONSIBILITIES

1. Develop programs that will achieve the above goals in liaison with senior staff.
2. Assist in development of Volunteer Policy within the agency.
3. Recruit, interview, select, deploy and train volunteers to implement required services.
4. Provide supervision and support for volunteers and encourage the maximum use of their skills and abilities.
5. Promote advocacy contacts for residents.
6. Maintain records of services provided and hours given by volunteers.
7. Develop rosters for volunteers.
8. Review volunteer staff activities and procedures at regular intervals.
9. Provide the Director of Volunteer Services with a monthly report of activities, developments, suggestions and other relevant information.
10. Address public forums regarding the contribution of volunteers to the program.
11. Other duties as required.

JOB DESCRIPTION 3

TITLE Volunteer Manager
COMMUNITY CENTRE
RESPONSIBLE TO Community Centre Committee of Management
QUALIFICATIONS Tertiary qualifications in human services area desirable.
Experience in community work necessary. Driver's licence.

OVERALL RESPONSIBILITY

To work towards the main objectives of Community Centre
as attached.

DUTIES INVOLVED INCLUDE

1. Supervision of day-to-day activities within the Centre including
 - group usage on a cooperative basis
 - assisting self-help groups
 - administration of facility including private hirings
 - administration of Centre office's accounts and records, operating within budget limits
 - supervision of administrative assistance staff.
2. Responsibility for current activities, which include
 - community information services
 - History Project with volunteer assistance
 - planning, implementation and administration of the Health Project, including supervision and training of a part-time administrative assistant and a team of volunteers in liaison with local health authorities.
3. Liaison and consultation with local groups, community agencies and local resources to promote the Centre as a hub of local community development activity.
4. Monitoring of community needs and liaising with relevant authorities concerning programs which will be of advantage to the local community.
5. Development and implementation of new programs and projects in conjunction with the Community Centre Management Committee.
6. Providing regular reports to the Management Committee regarding Centre activities, as well as an annual review.

Appendix 7

Sample of Volunteer Job Description

The Box Factory Community Centre Inc., South Australia

JOB TITLE: Creche Assistant

THE JOB

Major responsibility is to assist the Coordinator in our occasional care creche which operates for four sessions per week. Each session is of three hours duration and attendance currently ranges between five and twenty children per session.

Some SPECIFIC DUTIES may be:

Assisting Coordinator in —

- Setting up of toys and activities
- Playing with and caring for children
- Changing nappies
- Preparation of fruit and drinks etc.
- Cleaning and maintenance of general area in use
- Packing up of equipment at end of session
- Assisting with the children's activities and learning experiences.

THE PERSON

We are looking for people with these qualities —

- Outgoing friendly personality
- Ability to relate to people from all walks of life
- Caring and loving attitude
- Previous experience in childcare or nursing or related fields a great bonus but not essential
- Ability to work within a team environment
- Creative, musical or dramatic skills also a great bonus.

THE BENEFITS

- Out-of-pocket travel expenses reimbursed
- Friendly supportive environment
- Opportunity to gain childcare skills and experience
- Opportunity to improve self-esteem and confidence
- Opportunity to meet some fantastic children and to have fun.

ATTENDANCE TIMES (Optional)

- | | |
|----------|--------------|
| Monday | 9.30 — 12.30 |
| Tuesday | 9.00 — 12.00 |
| Thursday | 9.30 — 12.30 |
| Friday | 9.00 — 12.00 |

Appendix 8

Sample of Volunteer Application Form

Volunteer Centre of S.A. Inc.

APPLICATION TO BECOME A VOLUNTEER

CONFIDENTIAL

SURNAME GIVEN NAMES

ADDRESS

TELEPHONE: Home Work Contact No.....

AGE GROUP (please circle) Up to 18, 19-25, 26-35, 36-50, 51-65, 66+M/F

TIMES AVAILABLE (please circle) DAY EVENING WEEKEND

LOCALITY PREFERRED, IF ANY.....

WHAT ARE YOUR INTERESTS, SKILLS, PREVIOUS EXPERIENCE (PAID AND/OR UNPAID)?

.....
.....
.....

ARE YOU CURRENTLY (please circle):

STUDENT/HOME DUTIES/EMPLOYED/UNEMPLOYED/RETIRED/OTHER (please state)

DRIVERS LICENCE: YES/NO USE OF CAR: YES/NO ON BUS ROUTE: YES/NO

COUNTRY OF BIRTH OTHER LANGUAGES.....

HOW DID YOU HEAR OF THE VOLUNTEER CENTRE? (please circle) BROCHURE NEWSLETTER

WORD OF MOUTH NEWSPAPER/RADIO TV OTHER AGENCY OTHER (please state)

WERE YOU REFERRED TO THE VOLUNTEER CENTRE? YES/NO

IF YES, BY WHOM?.....

HAVE YOU ANY DISABILITIES WHICH MAY AFFECT THE TYPE OF WORK YOU DO AS A VOLUNTEER?

ARE YOU ON COMPENSATION: YES/NO ARE YOU ON SICK LEAVE: YES/NO

IS THERE ANY REASON WHY YOU WOULD BE UNSUITED TO SOME AREAS OF VOLUNTARY WORK?

.....
.....

DATE..... SIGNATURE.....

INTERVIEWER

Appendix 9(a)

Sample of Letter to Medical/Para-medical Person Seeking Further Information on a Volunteer Applicant

Dear *Dr. Jones*,

Carolyn Smith has contacted this agency to discuss volunteer jobs available in the community.

Carolyn tells us ~~he~~/she is under your care. Obviously we are most anxious that any volunteer jobs we suggest will aid and not aggravate ~~his~~/her present state of health.

To this end would you kindly complete the enclosed form and return it to us as soon as possible.

Carolyn has given us ~~his~~/her permission to contact you.

Yours sincerely,

Ruth Brown

Appendix 9(b)

Sample of Referral Form

NAME OF PERSON *Carolyn Smith*
ADDRESS *Fifth Street*
Adelaide 5000 Phone No. *123678*

1. Please give details of any factors relating to *Carolyn's* health or well-being which could be aggravated/enhanced by volunteer work.
2. Please provide any information on medication which you believe is relevant.
3. What general type of volunteer work would be suitable/not suitable, keeping in mind the needs of *Carolyn* and people with whom he/she would come in contact.
4. Any other comments.

SIGNATURE.....

TITLE.....

DATE.....

Appendix 10

Sample of Orientation Check List

Prepared by Volunteer Centre of S.A. Inc.

ORIENTATION CHECK LIST

- Received orientation handbook.
- Guided tour of the Centre.
- Orientation and tour of the entire first floor of the building.
- General introduction to Centre, its history, aims, services.
- Outline of structure of Centre and how decisions are made.
- Access to the Centre's information system — e.g. notice boards, day baskets, filing cabinets.
- Allocated own file in staff drawer of filing system.
- Filled in staff medical record form.
- Added name to staff roster on notice board.
- Name, address and phone number added to staff list at receptionist desk.
- Out-of-pocket expenses (time book) explained.
- Cleaning of the Centre explained.
- Time off and holidays explained.
- Phone system.
- Photocopier.
- Typewriters.
- Stationery — knowing what we have and where it is.
- Name tag allocated if wish to use it.
- Knowledge of resource section.
- Understanding of referral service.
- Understanding of training service.
- Understanding of the publicity program.
- The Centre's links nationally and internationally.

In this list, the boxes are ticked when each item has been satisfactorily explained/understood.

Appendix 11

Sample of Volunteer Orientation Course Outline

Prepared by Pat Hunt of the Department for Community Welfare, South Australia.

VOLUNTEER ORIENTATION COURSE OUTLINE

(You will need to fill in topics and columns according to the requirements of your agency).

| TOPIC | PURPOSE FOR PARTICIPANTS | CONTENT | RESOURCES |
|--------------------|---------------------------------------------------------------------------------------------------------------------------------------------------------------|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|--------------------------|
| YOU AND THE COURSE | To understand what the course involves and to clarify any issues | Introduce the trainers. Overview of the program. Questions. Attendance. If absent Participation in an adult learning experience. Homework. Evaluation of course. Assessment of volunteers at completion of course. Certificates | (Fill in as appropriate) |
| Approx. time: | | | |
| YOU AND THE GROUP | To feel more comfortable with each other. To remember each other's names. To enable us to work together as a group | Introductory exercise Group ground rules | |
| Approx. time: | | | |
| YOU AND THE AGENCY | To understand the philosophy of the agency and the services that it offers. To know staff names and their role in the agency. To know the agency layout | The philosophy and purpose of the agency. Historical perspective. The services of the agency and where the volunteer service fits in. Introductions to manager and key staff. Tour of the agency | |
| Approx. time: | | | |

| TOPIC | PURPOSE FOR PARTICIPANTS | CONTENT | RESOURCES |
|-----------------------------|----------------------------------------------------------------------------------------------------------------------------------------------------------|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|--------------------------|
| YOU AND THE TASK | To understand the role of the volunteer and to hear first hand from current volunteers of their tasks and experiences | Details on the range of tasks offered. Where task fits into aims of the agency, purpose of task. Talk and discussion from current volunteers. Process of introduction to clients, contracts and termination | (Fill in as appropriate) |
| Approx. time: | | | |
| YOU AND THE CLIENT | To understand the needs of clients and why they require the service | Who uses the service? Why they require the service? Information on client's needs. Volunteers attitudes to clients. | |
| Approx. time: | | | |
| YOU AND YOUR SKILLS | To improve the skills required to do the task | Appropriate skills development depending on the task | |
| Approx. time: | | | |
| YOU AND THE STAFF TEAM | To understand the specific roles of each member of the staff team | Job descriptions of staff. Information on abbreviations used at the agency. Discussion on rights and responsibilities. Ideas on cooperating together | |
| Approx. time: | | | |
| YOU AS A VOLUNTEER | To understand the motivation of volunteering and the payoffs and problems of volunteer work. To understand the rights and responsibilities of volunteers | Discussion on motivation for volunteering, the advantages and disadvantages. Discussion on rights and responsibilities | |
| Approx. time: | | | |
| YOU AND THE VOLUNTEER GROUP | To be aware of how work is allocated. To know what support and supervision is provided, and what part the volunteer can have in future planning | Information on volunteer support groups, work allocation, supervision etc. | |
| Approx. time: | | | |
| YOU AND THE SYSTEM | To understand the agency provisions for volunteers and the systems | Information on insurance, claiming expenses for mileage, telephone. References for volunteer work. Availability/unavailability of volunteers. Using resources of agency. Messages. Phone calls | |
| Approx. time: | | | |

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Involve, Volunteer Centre, U.K., 29 Lower Kings Road, Berkhamsted, Herts HP4 2AB, U.K.

The Australian Volunteer, Australian Association of Volunteer Resource Centres, c/o. Volunteer Centre of S.A. Inc., First floor, 155 Pirie Street, Adelaide 5000

This is an essential manual for anyone involved in volunteering, and in particular for managers of volunteer programs. It will also be of great interest to community leaders, policy makers, academics and students, giving them an insight into all aspects of volunteering.

Here, at last, is a book which brings together volunteer theory and practice. The comprehensive contents include such diverse topics as the extent and value of volunteering, policy making, time management, recruitment and orientation. The practical day-to-day matters of volunteer management are dealt with clearly and concisely.

The role of the volunteer manager is brought into the spotlight. The urgent need for an upgrading of status, the diversity of tasks and responsibilities, the attributes and skills required, are stressed. The frustrations of the job are not glossed over — positive suggestions for dealing with these are outlined.

This manual is a down-to-earth handbook, and at the same time will be a source of stimulation and inspiration. It will provide enlightenment and food for thought on the whole spectrum of volunteering.