THE COMPLETE GUIDE TO ASSESSING AND IMPROVING YOUR VOLUNTEER PROGRAM

Written and Adapted by
Judy Stevens

Graphics by Greg Allen

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VOLUNTEER VANCOUVER

Volunteer Vancouver is a resource centre with a mission to encourage and to promote volunteer participation and to strengthen the voluntary sector. Volunteer Vancouver continually seeks opportunities to provide better service to its members and build awareness and participation within the private, public and non-profit sectors. Services include:

- organized information and referral service for volunteers
- professional training for volunteer managers
- consultation services for volunteer programs
- BoardWALK, a leadership workshop series for Boards of Directors
- Senior's Talent Bank
- a resource library on non-profit management and voluntary organizations
- sale of a variety of publications
- Intercultural Volunteer Program

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FOREWORD

Volunteer Vancouver endorses criteria based on basic tenets which form the foundation of the Volunteer Programs of our member organizations. These tenets are:

1. **A Volunteer Program should have the full support of the agency's Board of Directors demonstrated by the commitment of both human and financial resources.**

2. **A Volunteer Program should be designed to enhance the services of the organization not to replace or supplant paid staff providing services.**

3. **An individual should be identified as responsible for the management of a Volunteer Program.**

4. **The basic elements of effective volunteer management form an integral part of the Volunteer Program.**

5. **The Volunteer Program activities reflect the mission statement of the organization and are designed to benefit both the agency and the volunteer.**

This book is meant as a guide to bring these commonly-held beliefs from theory to practical application within a Volunteer Program.

Workbook Applications

This workbook is designed to be used as an assessment and planning tool for organizations with existing volunteer programs. It is as comprehensive as possible to allow volunteer programs, from the rudimentary to the very sophisticated, to be examined.

An organization with a new volunteer program can benefit from the comprehensive aspect of this workbook by considering the growth options presented and planning where or when they may be implemented.

Well established organizations with long standing volunteer programs can use the workbook to examine their programs in light of the changing volunteer environment. Recommendations emerging from resulting discussions will help formulate adaptive strategies.

Examination and subsequent assessment of the program is not where the true worth of this workbook lies. Its worth lies in the sharing of ideas, strategies and opinions prompted by the statements in each component area and the actions that are planned as a result.

THE ASSESSMENT COMMITTEE

In order to achieve diversity of opinion, representatives from all aspects of the volunteer program should be included in the assessment team or committee. An example of such diversity would be: volunteers, volunteer management staff, program staff and representatives of the 'recipients' or 'clientele' served by the volunteer program. A senior member of the Board of Directors and the Executive Director of the organization should also sit on the committee. Including one or two individuals with other Board or committee experience not directly related to the volunteer program may avoid 'ownership' or 'turf defending' problems.

The workbook can be used in a 'workshop' environment with a facilitator framing the questions and recording the resulting discussion. Alternately, two or three constituent groups may be asked to complete the checklist questions to gain differing perspectives on a perceived problem or development area. The results are then compared to formulate recommendations.

STRUCTURE

Each chapter of the workbook represents the management and reporting structures, responsibilities and activities surrounding a basic criterion. Its construction lends itself to MODULAR adaptation. Each chapter has a "stand alone" capacity to enable a specific aspect of the volunteer program to be examined individually or as part of an overall picture.

The checklist questions within each chapter have a four-option answer format:

IN PLACE ▽   **PLANNED** ◯   **FUTURE PLANNING** ▢   **NOT APPLICABLE** ✗

This format enables the individual or group assessing the statements to establish the areas where the need for short or long term planning exists. Simple arithmetic totalling of the columns tells only part of the story and the comparison of chapter totals can indicate areas that may need immediate attention.For example the ratio between the totals of "IN PLACE" to "PLANNED" and "FUTURE PLANNING" can also indicate program strength (high percentage IN PLACE), or need for resource allocation (high percentage in FUTURE PLANNING).

Used in this way the workbook will provide invaluable information for strategic or program planning.

Any assessment tool that addresses the tremendous diversity of volunteer programs and activities in the non profit sector will include statements or situations that simply do not apply to some organizations. This workbook is no exception. An example can be found in Chapter 3 - The Manager Of The Volunteer Program. Not all volunteer programs will have this type of management. Very large programs may have several layers of management while others, such as small programs or some service groups, may employ a different management structure entirely.

When a situation is described that bears no resemblance to that experienced by the organization, the statement relating to it should be rated in the NOT APPLICABLE column. This column is not totalled and does not affect the ratio between the IN PLACE, PLANNED and FUTURE PLANNING replies.

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CHAPTER 1

BOARD RESPONSIBILITIES

No room for the volunteers to work? No place for them to sit for a break and no funding to provide coffee never mind cookies? Situations like these are faced by managers of volunteers every day. They are symptoms of a lack of planning, inadvertent or unknowing, for financial support of the volunteer program.
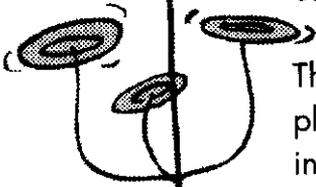
The Board of Directors bears the responsibility for long and short range planning for their organization. They approve the annual budget but rely on input from a variety of sources to compile the budgeted figures. They may never have been informed that funds were needed to supply coffee or work space for the volunteer program.

The clear communication of needs, present or planned, among the Board of Directors, management, staff and volunteers is not just an ideal, but a necessary part of management and planning in today's environment.
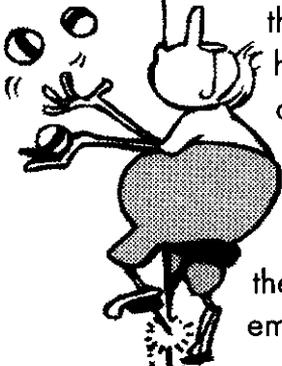
In many ways the Board of Directors of a non profit organization represent the 'ultimate' volunteers. They willingly bear legal liability, commit to long hours of board and committee meetings, weekend planning sessions, community 'socializing', and the inevitable fundraising activities.

The Board's responsibilities include human resources and risk management planning for their organization. This is expressed through the establishment of policies and procedures for the safety, physical and emotional well-being of their paid staff and volunteers.

The following four components will help to uncover some areas needing work within the ORGANIZATION AND ADMINISTRATION of your program:

> Rate each statement as it applies to your program you are assessing as:
> **IN PLACE, PLANNED, FUTURE PLANNING** or **NOT APPLICABLE**.
> Total the columns at the end of each chapter.

The volunteer program has the demonstrated support of its Board of Directors and the administration of the organization.

IN PLACE	PLANNED	FUTURE PLANNING	NOT APPLICABLE	
▽	○	☐	✗	1. There are written policies and procedures concerning the volunteer programs from the Board of Directors.
▽	○	☐	✗	2. The volunteer program has written goals and objectives.
▽	○	☐	✗	3. The program's goals and objectives reflect those of the organization.
▽	○	☐	✗	4. There is an itemized budget for the volunteer program.
▽	○	☐	✗	5. There is a staff person designated to coordinate and manage volunteers.
▽	○	☐	✗	6. Paid staff are trained and encouraged to support the volunteer program.
▽	○	☐	✗	7. Paid staff are involved in the planning of the volunteer program.
▽	○	☐	✗	8. There is a procedure for regular reporting of the volunteer program activity to the Board of Directors.
▽	○	☐	✗	9. The advisory committee (if any) of the volunteer program liaises with the Board of Directors.

Column Totals

CARRY TOTALS TO PAGE 3

2

There is a procedure for a regular, scheduled evaluation of the volunteer program.

1. The evaluation is done at least annually.

2. Participants in the evaluation include the Manager of Volunteer Services, other staff and volunteers.

3. Goals and objectives are reviewed.

4. The ability of the program to meet volunteer needs is assessed (volunteer satisfaction).

5. The ability of the program to meet client needs is assessed (client satisfaction).

6. Persons consulted in the evaluation process include:
   • volunteers
   • administration staff
   • board members
   • volunteer program advisory committee members
   • organization's program recipients
   • community representatives (program awareness).

7. Program areas considered in the evaluation include:
   • orientation
   • training
   • supervision
   • job design
   • job descriptions
   • recruitment of volunteers
   • interviewing and screening procedures
   • placement of volunteers.

Column Totals

3

- record keeping
- volunteer evaluation
- recognition of volunteer's contribution
- staff/volunteer relationships
- percentage of work-staff/volunteer 'teamed' work.

8. The evaluation results are in a written report.

9. Areas of strength and weakness are identified.

10. Corrective action or redirection is planned for.

11. Long-range planning for growth and development are considered.

A regular review and examination of the organization's insurance program is made with specific attention to risk management factors regarding volunteers.

1. Information about insurance is provided to all volunteers.

2. A written procedure is in place requiring verification that volunteers have a valid license and adequate insurance coverage when operating a vehicle or machine in behalf of the organization.

3. Provisions are made for adequate insurance for volunteers when acting on behalf of the organization and include:
   - Board of Director's liability insurance
   - worker's compensation (where possible)
   - comprehensive liability insurance

Column Totals

CARRY TOTALS TO PAGE 5

4

The board has developed policies concerning working conditions, benefits, and reimbursement for out-of-pocket expenses for volunteers.

1. There is a written policy stating what benefits and reimbursements are provided.

2. These policies are made available and explained to the volunteers and to the paid staff working with them.

3. Written explanation of benefits and reimbursements are included in a volunteer manual and given at orientation sessions.

4. Costs and compensation associated with volunteering are explained to volunteers.

5. Benefits may include:
   - letters of recommendation, reference
   - opportunities for continuing education, workshops, seminars, etc.
   - provision of insurance
   - free admission to some special events
   - other (specify) _____

6. Reimbursements may include:
   - parking
   - mileage/km driven for volunteer assignments
   - meal expenses during volunteer assignments
   - educational opportunities
   - other (specify) _____

Chapter Totals

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CHAPTER 2

THE RELATIONSHIP OF VOLUNTEERS AND STAFF

There is no relationship more crucial to the success of a volunteer program than that between paid staff and volunteers. This relationship is too often left to grow or wither on its own in the belief that the commitment to the cause will overcome any difficulty between individuals. The following examples are tragically common.

EXAMPLE A

A volunteer enters into a STAFF ONLY lunch area and is coolly received by the paid staff. The volunteer becomes aware of a boundary he or she has crossed and feels excluded or marginalized... an 'outsider'. Initial embarrassment may turn into frustration and anger. Without uttering a word or any overt action being taken by the paid staff, the volunteer may lose forever the feeling of 'belonging' and cut short his or her commitment.
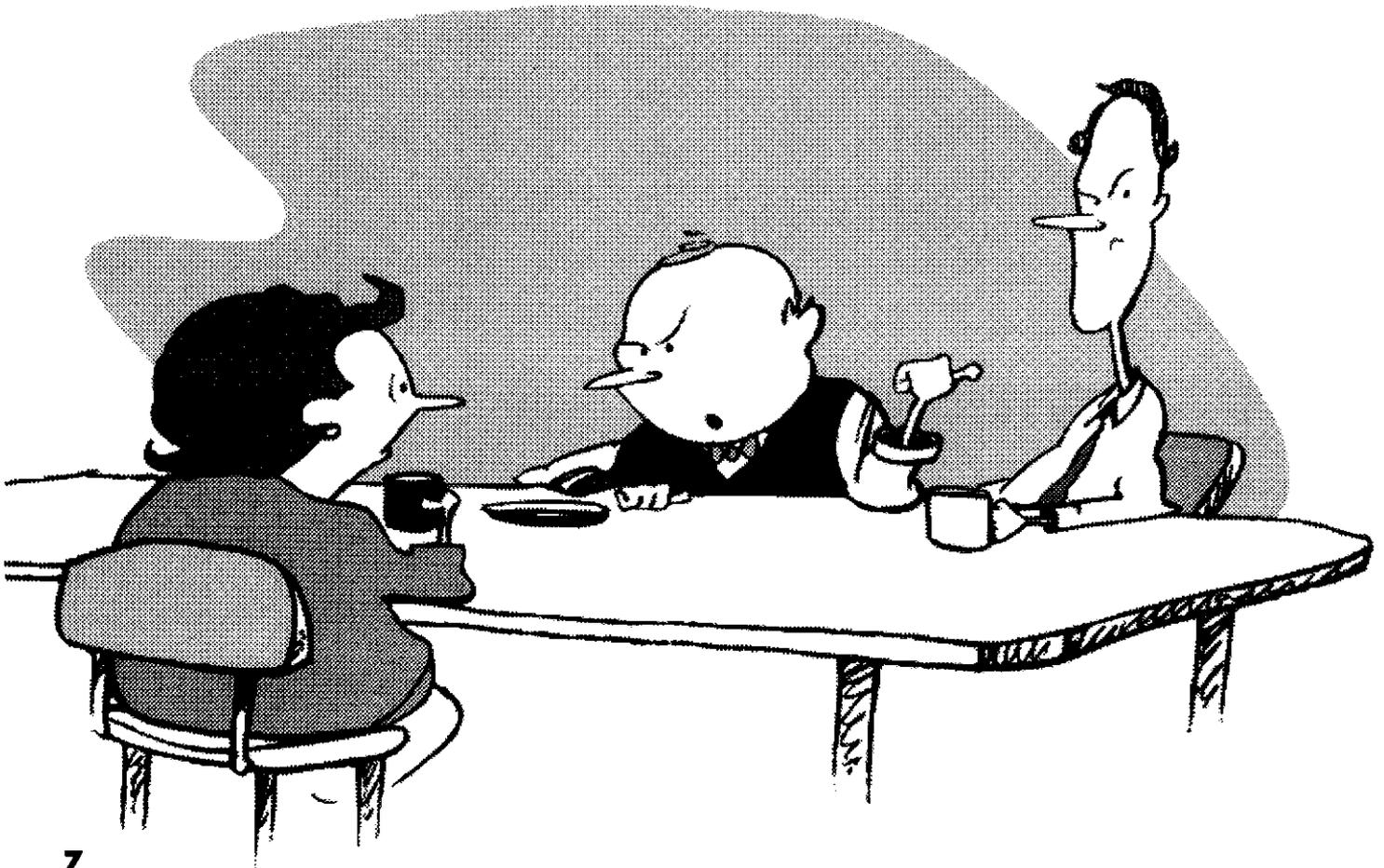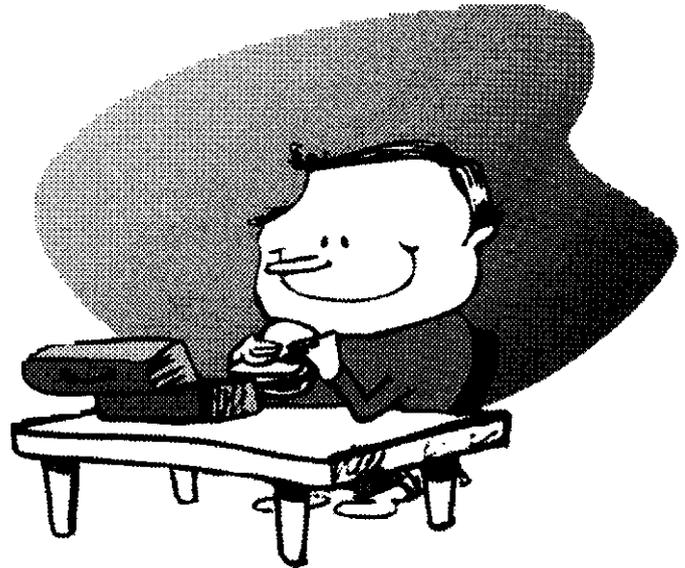
EXAMPLE B

An organization has many long-standing volunteers active on the Board and committees. Staffing is minimal. The workforce is made up primarily of volunteers. An ever-increasing workload demands more volunteer placements. The volunteer recruitment philosophy has always been directed to long term commitment. Contradicting the recruitment philosophy, today's 'typical' volunteer is interested in short term assignments. Work goes undone. The staff feel frustrated and unsupported as administration's expectations are unchanging while the volunteer 'reality' is.

Inflexibility, mistrust, marginalization, and exclusion are the enemies of successful volunteer programs. Respect, knowledge, trust, sharing, and empowerment are the essentials for success.

The following three components will identify areas that can serve to nurture and develop strong relationships between paid staff and volunteers:

IN PLACE	PLANNED	FUTURE PLANNING	NOT APPLICABLE	

Volunteers do not displace paid workers and are not placed in jobs for which funding is available. This does not preclude volunteers from applying for paid jobs or from assisting staff in carrying out the organization's goals.

IN PLACE	PLANNED	FUTURE PLANNING	NOT APPLICABLE	
▽	○	□	✗	1. Volunteers are not substituted for budgeted staff positions.
▽	○	□	✗	2. There is a written policy stating that volunteers will not be utilized in ways that displace paid personnel.
▽	○	□	✗	3. Paid staff are fully informed of this policy.
▽	○	□	✗	4. The role of the volunteer is integrated into the organization's structure emphasizing the team concept with the paid staff.
▽	○	□	✗	5. There is a written policy for volunteers regarding protocol during strike action by paid staff.

A climate of shared vision, shared mission and teamwork is encouraged between paid staff and volunteers. Paid staff share in the "ownership" of the volunteer program and are fully informed of their individual responsibilities to volunteers through orientation and training.

IN PLACE	PLANNED	FUTURE PLANNING	NOT APPLICABLE	
▽	○	□	✗	1. Paid staff have a mechanism for input in the planning of the volunteer program, its goals and objectives.
▽	○	□	✗	2. Paid staff are involved in volunteer program evaluation.
▽	○	□	✗	3. Staff of the volunteer program as well as other organization staff are provided with orientation and training regarding supervision and working with volunteers.

Column Totals

				Totals from page 9

▽	○	☐	✗	4. Volunteers are provided with orientation and training regarding working with paid staff.
▽	○	☐	✗	5. Staff responsibilities to volunteers are outlined in staff job descriptions.
▽	○	☐	✗	6. Volunteer responsibilities to staff are outlined in the volunteer job descriptions.
▽	○	☐	✗	7. Paid staff who will be working directly with a volunteer are involved in the placement and orientation of the potential volunteer.

8. All paid staff are informed about the volunteer program:

▽	○	☐	✗	• through new staff orientation
▽	○	☐	✗	• through regular 'newsletter' updates
▽	○	☐	✗	9. Volunteers are included in staff meetings relevant to their job responsibilities.
▽	○	☐	✗	10. Paid staff are included in volunteer meetings relevant to their job responsibilities.
▽	○	☐	✗	11. Paid staff and volunteers are 'teamed' together to accomplish the organization's work whenever possible.
▽	○	☐	✗	12. Paid staff recognize the contributions of volunteers through involvement in volunteer recognition.

Column Totals

CARRY TOTALS TO PAGE 11

In order to encourage staff to participate in the volunteer program and gain training, their effectiveness in working with and supervising volunteers is recognized.

1. An evaluation of the staff's effectiveness acknowledges supervising and working with volunteers as an integral part of the paid staff's performance review.

2. Paid staff are recognized for their work with volunteers by:
    *   documentation in their personnel file
    *   commendations
    *   formal ceremony
    *   in-house publicity
    *   recognition at public events
    *   certificates, pins, etc.
    *   social gathering (party, dance, etc.)

Volunteers are oriented to the special roles of the volunteers and staff:

*   Volunteers are given orientation concerning staff roles and responsibilities.
*   Volunteers recognize the support of the paid staff through involvement in staff recognition.

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CHAPTER 3

THE MANAGER OF THE VOLUNTEER PROGRAM

The diversity of volunteer talents, needs, expectations and time constraints coupled with the organization's requirements and staff support combine to form a logistical and managerial challenge indeed. It requires an individual with professional training, innate 'people skills' and management ability to answer that challenge.

The Director or Manager of Volunteer Services plays a pivotal role on the boundary linking the volunteers, the community, the paid staff and the rest of the organization.

There is an advocacy role, giving voice to the expectations and perspectives of the volunteers during planning, management meetings, and throughout the organization.

There is an informational role, keeping volunteers aware of pertinent organizational information and relaying the 'outside community' perspective reflected by the volunteers to other management staff.

There is also a community liaison role to include the organization's volunteer programs and volunteers into the larger community of nonprofit.

The Director or Manager of Volunteer Services is a supervisor of personnel and a program manager. The volunteer program impacts other departments much as Human Resources, Fundraising or Finance do. Reporting to the Executive Director, this is a middle management position and should be afforded the appropriate salary and organizational profile.

There is a person designated to manage volunteers and serve as a liaison between the community, the volunteers, and the paid staff of the organization.

1. The Manager of Volunteer Services is part of the organization's management team.

2. The agency's organizational chart includes the Volunteer Program Advisory Committee if one exists.

3. The Manager of Volunteer Services is directly responsible to the Executive Director or other senior administration personnel.

4. The Manager of Volunteer Services has received training in volunteer management and understands the role of volunteers and their participation.

5. There is a written job description for the Manager of Volunteer Services.

6. The responsibilities of the Manager of Volunteer Services include:
   - developing and maintaining the volunteer program
   - maintaining a corps of volunteers
   - developing new volunteer opportunities with paid staff as appropriate
   - providing on-going support, encouragement and communication with volunteers
   - evaluating the volunteer program

Column Totals

CARRY TOTALS TO PAGE 15

▽ ○ □ ☒   7. The Manager of Volunteer Services serves as a liaison for volunteers, staff and administration.

▽ ○ □ ☒   8. The Manager of Volunteer Services serves as a liaison with other community volunteer groups and resources.

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CHAPTER 4

COMPONENTS OF EFFECTIVE VOLUNTEER MANAGEMENT

Human resource management, volunteer or paid, has certain basic components:

- Recruitment
- Interviewing and screening
- Job design and description
- Orientation
- Supervision
- Training
- Recognition
- Record keeping

Each component area is explored in the following pages with questions designed to illustrate how basic criteria can be incorporated into the OPERATIONAL aspect of your volunteer program.

RECRUITMENT

The process of recruitment never stops. It involves creating a public awareness of the volunteer opportunities. It involves encouraging people to give their time and talents to your organization. The approaches normally used are: Scattergun (warm-body recruitment) or Targeted (skill-specific recruitment).
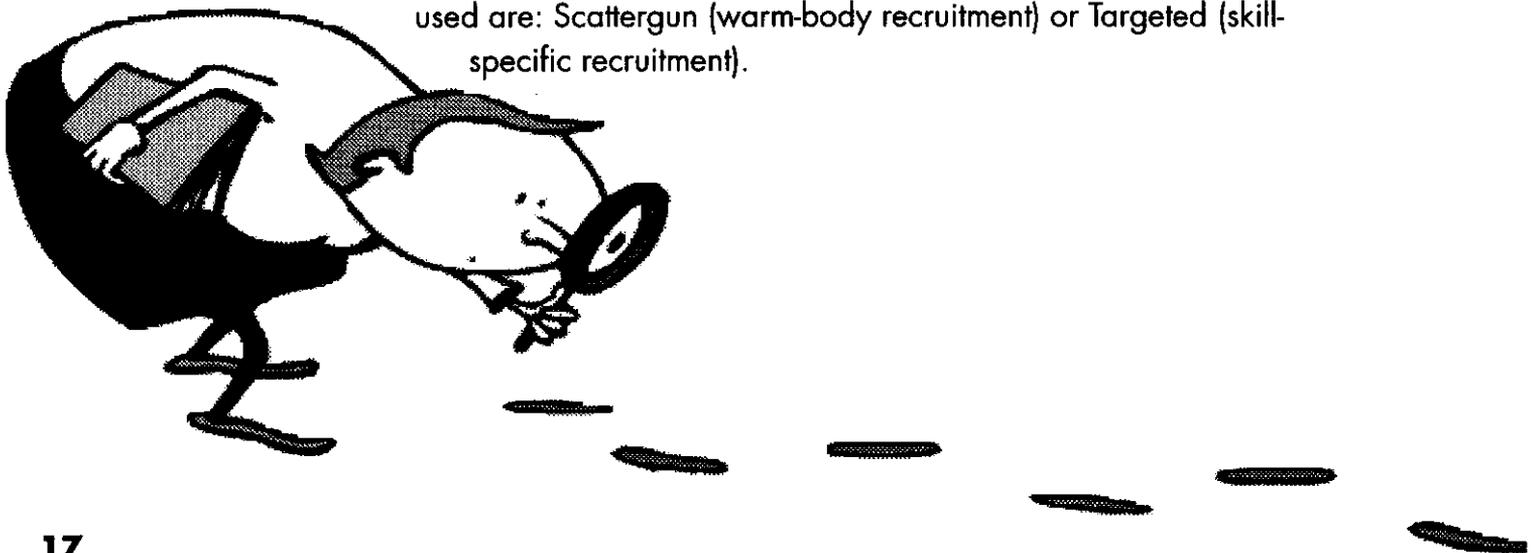
There is a nagging question for many of those involved in volunteer recruitment. Are recruits sought from the whole community? For example:

- Is there a volunteer with disabilities who has just the right abilities to fill the needs of a targeted assignment?
- Are there recent immigrants with exactly the experience needed who would like to expand their community contacts?
- Are there volunteers who have retired and are able to work during business hours?
- Are there young volunteers who have the energy to canvass.?

A volunteer recruitment plan is in place.

1. The recruitment plan employs several recruitment methods:
   - Direct (face to face)
   - Indirect (Media advertising, Public Service Announcements, posters)
   - Delegated (Schools, Social & Service Clubs).

2. A variety of recruitment material is available.(brochures, posters, flyers).

3. The recruitment material clearly describes the needs and expectations of the organization.

4. Staff and volunteers participate in recruitment.

Column Totals

CARRY TOTALS TO PAGE 19

18

The time commitment and qualifications needed for the volunteer jobs are clearly described.

1. Volunteer jobs and required qualifications are clearly described.

2. Minimum time commitment is included in the description of each volunteer opportunity (as appropriate).

The volunteer recruitment plan includes strategies to reflect the diversity of the community served by the organization.

1. Community resources have been identified

2. Liaison with diverse community groups is part of the Community Relations policy.

3. A strategy, for example a speaker's bureau, has been established to publicize the organization's programs to the community.

4. Speakers representing other non profit organizations are invited to speak at meetings and social events.

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INTERVIEWING AND SCREENING

The florist who enjoys data entry or the lawyer who wants to paint theatre sets are examples of volunteers who can easily be placed into assignments based on what they DO rather that what they WISH TO DO. It takes a very skilled interviewer to find an appropriate match.

Policies on the interviewing and/or screening of potential volunteers vary widely within the non profit sector. Organizations that serve the very young or the elderly may require police record checks on all prospective volunteers. Many other organizations rely on the interviewer's intuition and experience to determine whether or not a volunteer is desirable. Still other organizations use a two tiered screening and in-depth interview system with reference checks to establish the suitability and placement of volunteer applicants.

Whatever method is used, effective interviewing and volunteer placement procedures can prevent many problems. Linking the wishes and talents of the volunteers with the needs and opportunities of the organization will create the 'glue' that holds the best volunteer programs together no matter what the challenge.
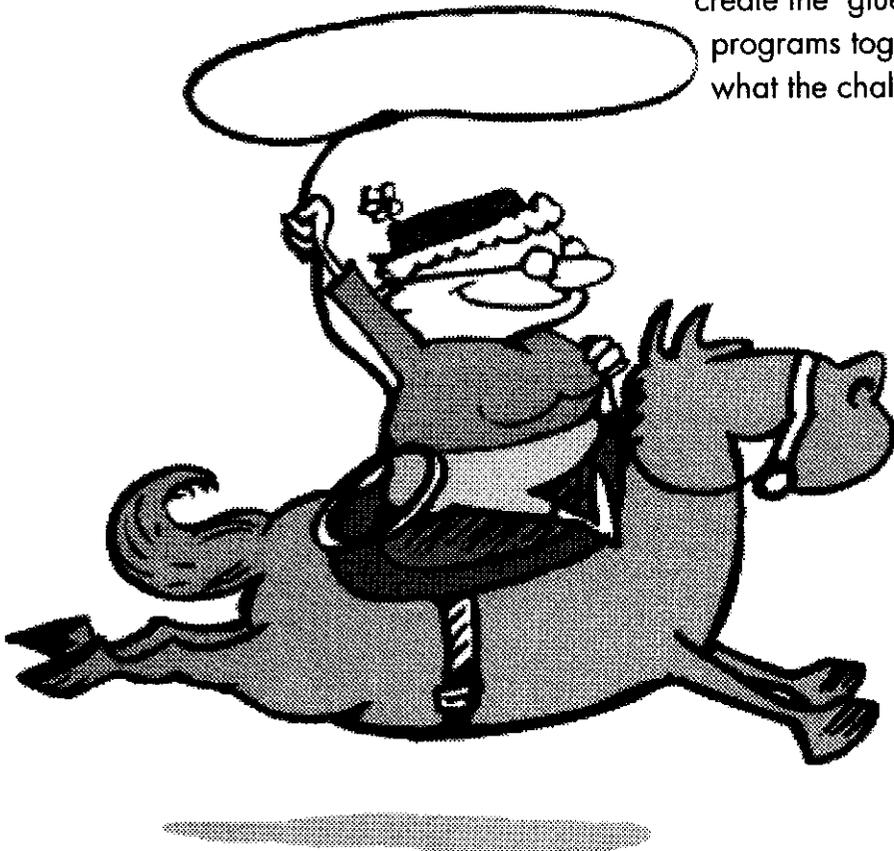
All prospective volunteers are interviewed to determine how their desires, skills and availability relate to the requirements of the organization.

1. Information is given to the prospective volunteer regarding volunteer jobs available, job responsibilities and obligations.

2. Application forms are completed by prospective volunteers.

3. The interview focuses on identifying the skills, talents and interests the prospective volunteers wish to utilize in their volunteer work.

4. If an appropriate volunteer job is not available, the prospective volunteer is referred to other community programs.

5. Reasons for selection/rejection are explained to the volunteer.

6. The organization maintains and adheres to a policy of equal opportunity.

Volunteers will undergo screening checks relevant to the job requirements.

1. References are examined and results are documented.

2. Police record checks are conducted when the job responsibilities warrant such investigation.

3. Motor vehicle licenses are reviewed when required.

4. Health assessment reports are requested when deemed appropriate.

Column Totals

Placements are made with minimal delay after the initial interview.

1. Volunteers are given an opportunity to discuss their placement preferences.

2. Volunteers are placed in jobs which best meet the needs of the volunteers and the organizations.

3. The job design is such that job duties can be adjusted to the volunteer's skills and limitations.

4. The opportunity for job mobility and increased responsibility is offered.

5. A written agreement or contract is part of the placement process.

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JOB DESIGN AND DESCRIPTION

Pity the volunteer, bundled up in warm clothing, who thinks he's going to do a door-to-door canvass. Surprise! It is a telephone canvass and the volunteer spends the next few hours sweltering in an office. It could have been worse of course, it could have been the other way around! The only way volunteer managers can be certain the task to be done is clearly understood, is to write a clear description of it.

A good job description explains the task detailing any information that may be helpful. Information such as location, tools needed, dress code, knowledge required, etc. would certainly help a new volunteer avoid embarrassing situations. It also provides the volunteer with a day-to-day guide to their responsibilities and duties. In fact the job description functions as the basis for the training, supervising and evaluating of the volunteer.

Before we describe the job though, we have to design it. The design usually begins as a list of tasks that need to be done. The next consideration is the number of hours needed to complete the tasks. The number of hours quickly leads to determining how many volunteers are required.

Job designs need to be realistic and to take into consideration the climate of the organization. If it is a store-front service delivery organization with lots of interruptions for example, the productivity requirements should reflect that.

Job designs for volunteer opportunities reflect the organizational climate and management style of the organization. Tasks are analyzed to determine their technical, motivational and responsibility levels and time requirements.

1. Technical requirements are clearly outlined.

2. Volunteer's motivation is related to tasks.

   The need for achievement:
   - Task performance directly linked to agency effectiveness.
   - Tasks utilize the skills and abilities of the volunteer.
   - Performance is regularly evaluated and feedback is given to volunteer.

   The need for power/control:
   - Working hours can be determined by the volunteer.
   - Supervision of co-workers is required.
   - Regular interaction with agency management is scheduled.

   The need for affiliation:
   - Successful task completion requires working closely with other volunteers.
   - Work schedule allows for non-task related interaction with co-workers.

3. The responsibility of the volunteer opportunity is directly related to the authority given the position.

4. Time requirements are clearly defined and regularly evaluated.

Column Totals

CARRY TOTALS TO PAGE 25

▽ ○ ☐ ☒

Written job descriptions of volunteer opportunities are available. They are updated as needed and outline the activities and responsibilities of the volunteer as well as the skills and experience required.

▽ ○ ☐ ☒

1. There are written job descriptions of volunteer opportunities.

▽ ○ ☐ ☒

2. Job descriptions are reviewed and updated on a regular basis.

3. Volunteer job descriptions include:
   ▽ ○ ☐ ☒ • name, address and department of organization
   ▽ ○ ☐ ☒ • job title
   ▽ ○ ☐ ☒ • job duties
   ▽ ○ ☐ ☒ • education and/or experience required
   ▽ ○ ☐ ☒ • special skills, aptitudes and abilities required
   ▽ ○ ☐ ☒ • health requirements (if applicable)
   ▽ ○ ☐ ☒ • supervisor's title
   ▽ ○ ☐ ☒ • supervision provided
   ▽ ○ ☐ ☒ • training provided
   ▽ ○ ☐ ☒ • minimum duration of commitment required
   ▽ ○ ☐ ☒ • minimum time required.

▽ ○ ☐ ☒

4. Organization's supervisory staff are involved in the development of volunteer job descriptions relevant to their areas of responsibility.

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ORIENTATION

How many of us have found ourselves volunteering for an organization we knew little about simply because a friend has asked us? Perhaps the organization is well known like the Red Cross or the Cancer Society. We know they do good work but are not too sure of all the work they do. That is where orientation comes in.

Orientation gives a global view of the organization to the volunteer.
It addresses the organization's role in the community, and the volunteer's role within the organization.

An orientation program should include the organization's:

history
mission
policies
goals
objectives
organizational structure/chart
programs
clientele
physical facilities
staff member listing

The orientation session can be a formal affair involving several volunteers at once. It can also be done over a cup of coffee which can be just as effective depending on the circumstances. However the process occurs, the result should be a volunteer who feels informed, welcomed and comfortable.
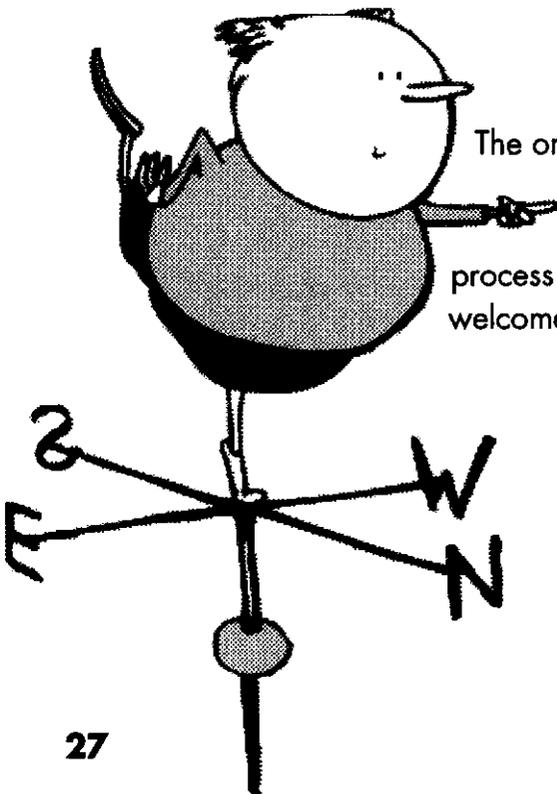
Volunteers are given an orientation which includes an overview of the organization and which prepares them to perform their role in accordance with organization policies.

1. An orientation to the organization and its volunteer program is given prior to volunteers beginning their jobs.

   Type or style of orientation:
     - formal
     - informal
     - to each volunteer individually
     - to groups of volunteers

2. The orientation is scheduled at regular intervals

3. The orientation includes:
     - organization's mission
     - organization's goals and objectives
     - description of services and programs
     - description of clients
     - organization policy regarding:
         - personnel
         - volunteer/staff conduct
         - dress code
         - confidentiality
     - organization's history
     - organizational chart
     - map of facility
     - safety procedures (eg. fire, emergency)
     - tour of facility and introduction to staff and other volunteers
     - volunteer rights and responsibilities
     - grievance process
     - roles of volunteers and staff
     - volunteer/staff relationships

Column Total

4. Orientation approaches and techniques include:
- oral presentations
- written presentations
- combination of above approaches
- group discussions - interactive workshops.
- group discussions - interactive workshops.

Section Totals

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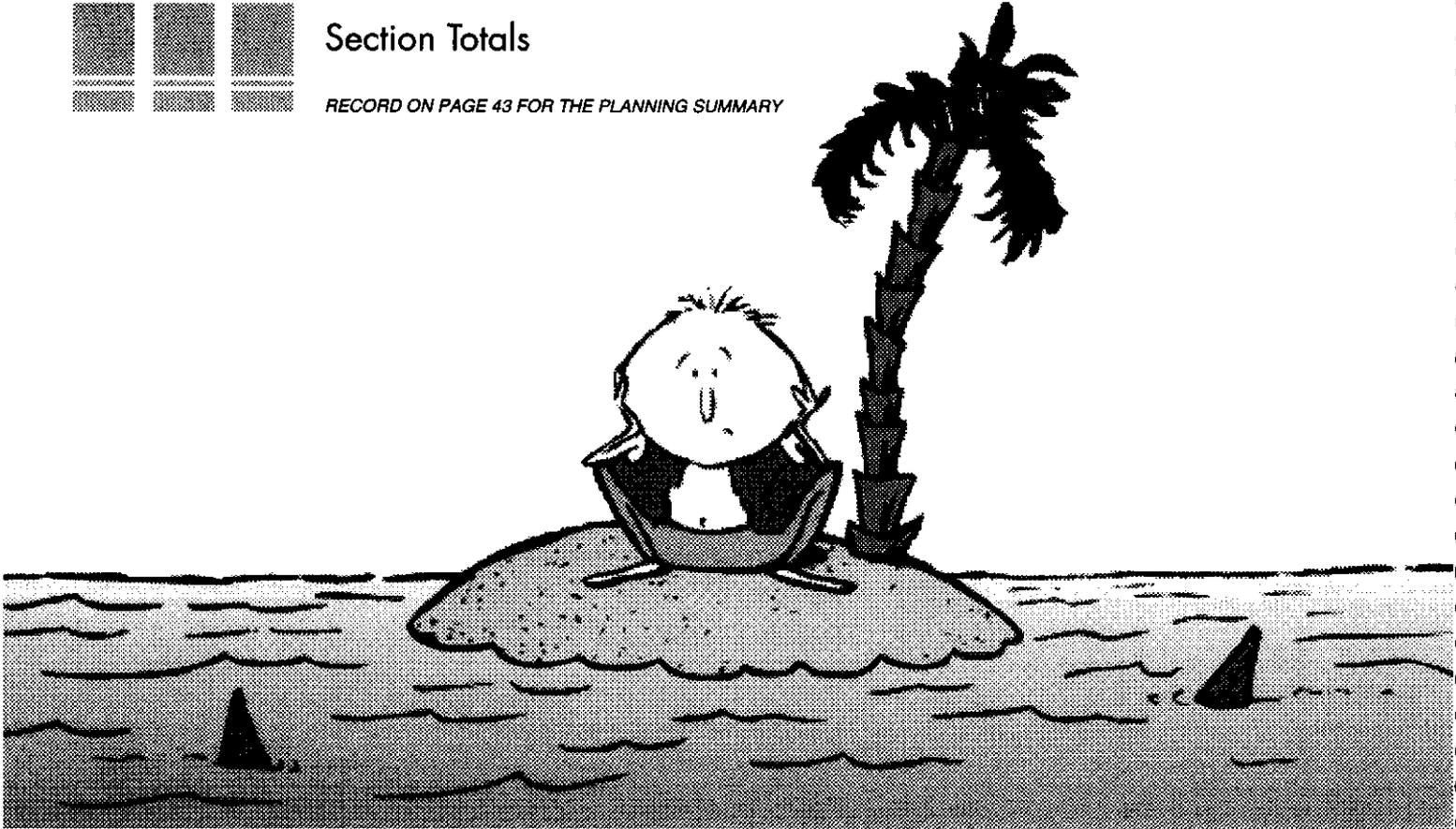
SUPERVISION

Oh that sinking feeling! You've made a mistake. You look around for the person who explained the routine to you and....they are nowhere to be found. HELP !! You have just developed the 'orphan volunteer' syndrome.

Volunteers, like paid staff, need access to someone with authority, someone with a 'global' view of work to be done. For the purposes of record keeping and evaluation, their assigned supervisor should be responsible for and available for the day-to-day management and support of the volunteer's work.

Volunteers are supervised in accordance with sound Human Resource Management practices and within the policies, regulations and guidelines of the organization.

1. Supervision of individual volunteers is provided.

2. Clearly defined lines of supervision are communicated to the volunteer by:
   - introduction to the supervisor at the time of placement
   - explanation of lines of responsibility
   - written job description.

3. Supervision is accomplished by:
   - oral comments and feedback (informal)
   - written evaluation by supervisor
   - written evaluation by Manager of Volunteer Services
   - supervision includes recognition of positive efforts and coaching to strengthen weaknesses.

4. Evaluation of volunteers includes:
   - performance and effectiveness
   - strengths and weaknesses
   - self evaluation by the volunteer.

Column Totals

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5. Formal evaluation is done:
   - short term jobs
     - mid project
     - project end
   - long term jobs
     - after first six months
     - annually thereafter
     - at conclusion

6. Supervisory staff members understand their duty and obligation to evaluate the volunteer's performance and advise the Manager of Volunteer Services.

7. There is a grievance process for volunteers.

8. There is a termination process and procedure for volunteers.

9. Volunteers receive an exit interview.

Section Totals

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TRAINING

Volunteers come fully equipped. They have experience, judgement, education and expertise. They have taken a volunteer assignment and want to be operative as quickly as possible. All they need is training in the system employed by the organization. They are adults. For a training program to be effective it must employ the basic principles of adult education:

The training of a volunteer should be individualized to the job description and background the volunteer brings to the organization.

Provision for on-going training and integrated training with staff will enhance both the volunteer commitment and the volunteer/staff relationship.

The training program recognizes volunteers':

- *experience and background*
- *eagerness to learn and their expectations to be well taught*
- *time constraints and their wish to be taught NOW*
- *desire for practical information that can be put to use immediately in their volunteer job*
- *self knowledge; they know which skills they have and which they need.*
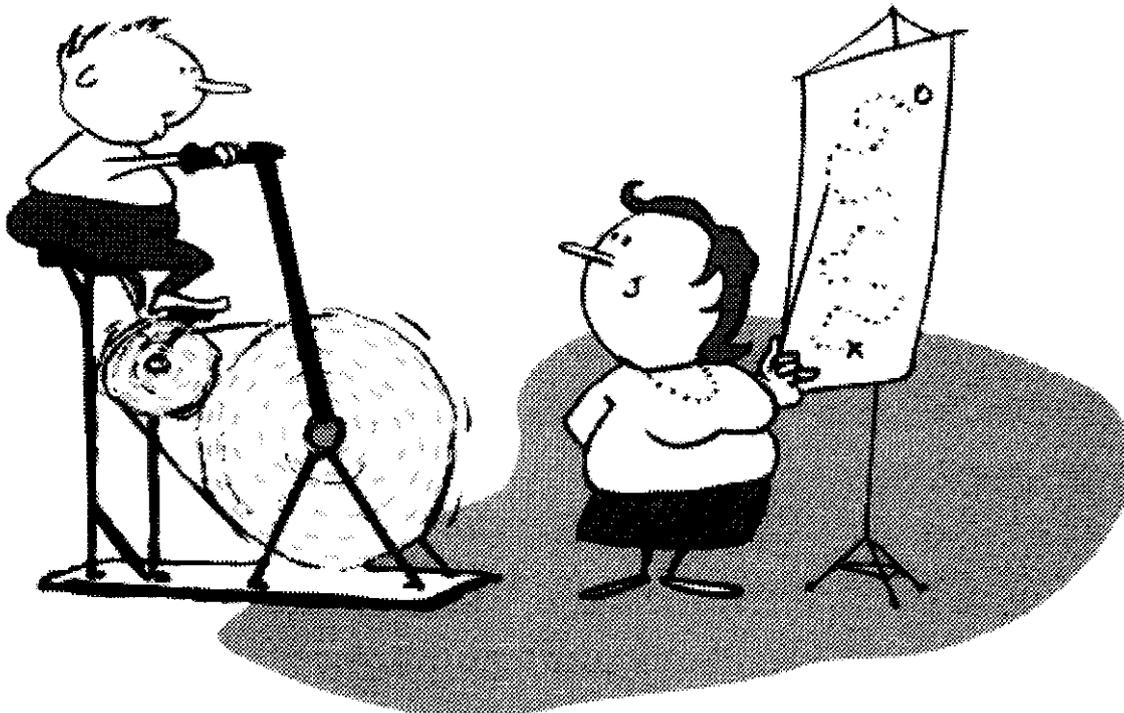
Training is provided to prepare volunteers to carry out their service role.

1. Training is provided to all volunteers appropriate to their:
   - specific job assignments
   - language requirements
   - education or background
   - previous experience.

2. Training is planned with input from the supervising staff.

3. There is a written training plan.

4. Paid staff development training is open to volunteers when it is appropriate to their job assignments.

5. Training opportunities are provided on a regular basis to strengthen the skills required for the volunteer's job.

6. Training is accomplished:
   - on the job
   - at special in-house sessions
   - workshops and conferences
   - through written materials (home study).

7. Volunteers participate in planning training sessions.

8. Volunteers participate in the evaluation of training sessions.

Section Totals

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RECOGNITION

How and when do we thank our volunteers? An informal "thank you" from the supervising staff goes a long way for some of our volunteer workers. What about the formal recognition of their value to our organizations?

A certificate received with pride and given a place of honour at the home of one volunteer may be thrown out with the newspapers at another's.
A recognition banquet is to one volunteer a welcomed occasion to widen a social circle, to another a trial to be avoided at all costs. *THE GENERIC RECOGNITION TOOL IS A FANTASY.*

To be meaningful, recognition should be personalized and tied to motivation wherever possible; a letter of recommendation for one and the opportunity of a position with greater responsibility for another.

Joint recognition can be a powerful team-building tool. The recognition of staff and volunteers 'teamed' accomplishments helps to cement that working relationship.

There is formal as well as informal recognition for volunteers and their work.

1. The volunteer program has a planned means of recognition.

2. This is accomplished by:
   - formal ceremonies
   - certificates, pens, pins, etc.
   - social gatherings (party, dance, barbecue, etc.)
   - in-house publicity
   - outside publicity
   - letter of recommendation / reference
   - letter of commendation to employer (if appropriate)
   - extended training
   - assignments offering increased responsibility
   - letter of thanks from the Executive Director
   - recommendation for outside awards eg. Volunteer of the Year Award, Honorary Degrees, Scholarships.

3. Paid staff are involved in the recognition of volunteer co-workers.

4. Volunteers are involved in the recognition of other volunteers.

A climate of informal recognition is nurtured by small gestures such as:

- Personal thanks from members of the staff
- Name plates or badges
- Parking privileges
- Coffee and 'goodies'
- Birthday celebrations
- Get well cards
- Acknowledgement of family events (births, deaths, marriages).

Section Totals

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RECORD KEEPING

Is there a doctor in the house? Can anyone here speak Urdu? How many hours were volunteered last month? Which drivers have vans and which have cars? Did he sign a waiver? It is when we have to answer questions like these that the importance of record keeping really becomes clear.

Not so long ago volunteer records were 3 x 5 inch cards in a metal file on top of the volunteer manager's desk. Today, with the proliferation of affordable computer software even small non profit societies can have the benefits of a data base management system.

The benefit of knowing how many volunteer hours it took to deliver a specific program or service is obvious when it comes to planning the future human resource allocations. The financial support budget becomes much easier to assess when figures can be analyzed and projected.

Fundraisers use the records to demonstrate community involvement to potential donor organizations. Many government grants make the recording of volunteered hours a requirement.

The organization's risk management planning is made easier by accessible current and historical volunteer activity records.

Perhaps most importantly, record keeping enables and enhances the organization's ability to protect and support its volunteers.
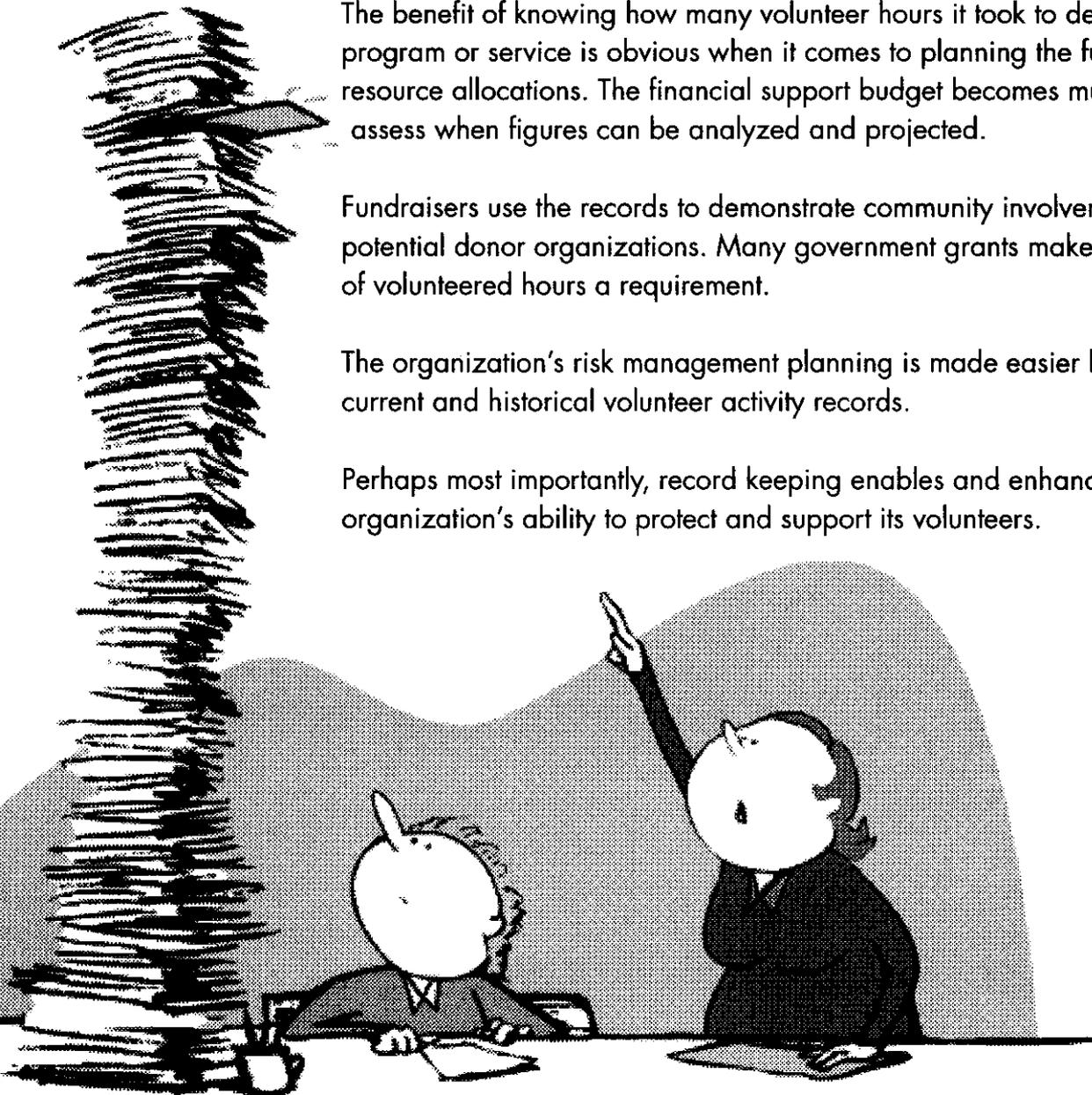
Personnel files for volunteer staff are maintained.

1. Personnel file is maintained for each volunteer.

2. The policy of confidentiality surrounding the personnel files of staff applies equally to volunteer personnel files.

Personnel files include:

1. Name and address

2. Contact telephone numbers (work/home/emergency)

3. Special skills/talents (first aid, musical ability, languages)

4. Volunteer work record:
   - jobs
   - hours
   - evaluations

5. Recognition:
   - type given
   - dates presented

6. Training:
   - in-house courses taken
   - conferences/seminars
     - expenses paid by volunteer
     - expenses partly reimbursed by organization
     - expenses fully reimbursed by organization

Column Totals

Total volunteer hours worked are recorded and maintained:

▽ ○ ▢ ☒ 1. by individual volunteer

▽ ○ ▢ ☒ 2. by department or project

▽ ○ ▢ ☒ 3. by year

Volunteer program expenses are compiled and form a budget line item in the organization's overall budget.

▽ ○ ▢ ☒ 1. All expenses pertaining to volunteers are charged to the VOLUNTEER PROGRAM not to the program or department where the volunteers are working.

▽ ○ ▢ ☒ 2. Project or departmental figures can be 'broken out' of overall volunteer program expenses.

Section Totals

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CHAPTER 5

STAYING TRUE TO THE MISSION

When you are a volunteer dealer at a casino night fundraiser or a check-point volunteer for a bike-a-thon, the mission of the organization can seem rather distant.
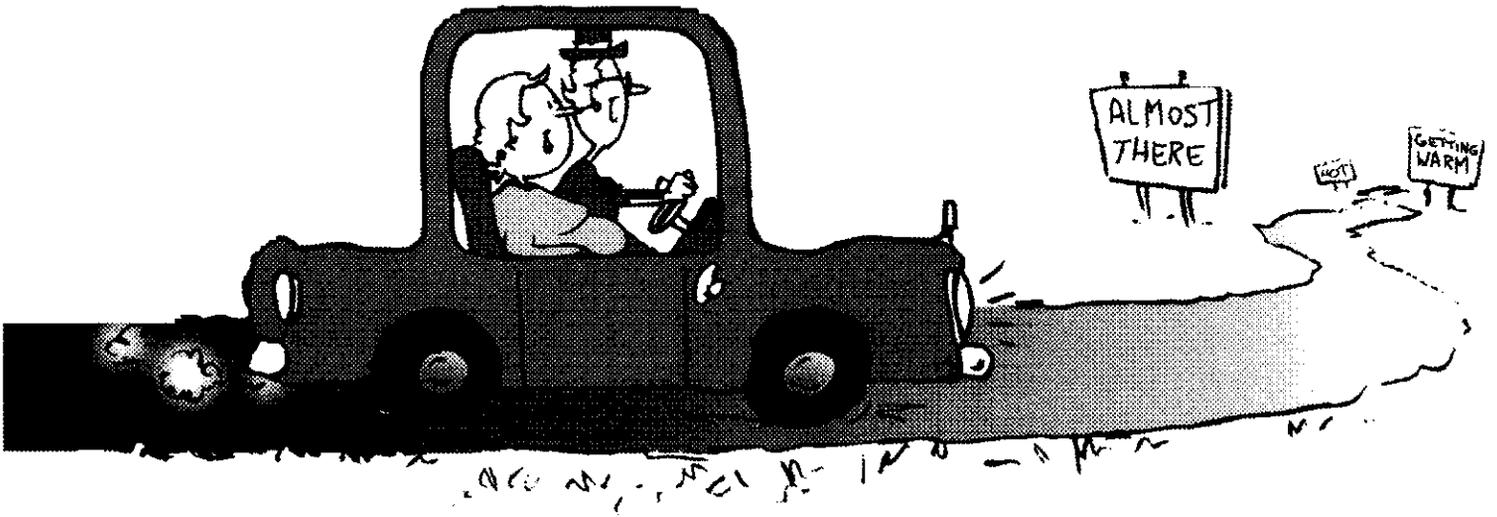
Many volunteers prefer to work on short term projects. While they may return to the project each year, they may not be around long enough at any one time to really get to know the goals and objectives of the organization.

Even the assumption that the mission is known by the office volunteer who comes in every week can be false.

Planning opportunities to share the mission, goals and objectives of the organization with staff and volunteers can help answer these age-old questions:

Alright Ethel, **why** are we here?

Including volunteers in planning and information sharing can help create the atmosphere of 'shared vision' and 'shared mission', of being part of the team. That way we *know why we are here.*

How did we **do** anyway?

Being included *after* the event can mean more to the volunteer simply because they aren't being asked to do anything more. They are just being invited to share in the results of a team effort.

When is someone going to ask **my** opinion?

Volunteer programs are about inclusion. That inclusion can take the form of a newsletter with a survey section, a telephone poll or a town-hall style meeting. Follow-up calls or mailings will add the knowledge that their viewpoint is valued.

What ever **happened** to Maude?

Sharing volunteer 'social notes' in a newsletter creates the sense of 'community' needed to sustain volunteer programs.

Are we having **fun** yet?

Is the project worthwhile? Are the volunteers getting any satisfaction out of it? Project evaluation is a key element to determining whether or not a program is working. It takes creative job design and regular monitoring to ensure the volunteer program activities are of benefit to both the volunteer and the organization.

Paid staff and volunteer staff are familiar with the mission statement, goals and objectives of the organization.

1. A written copy of the mission, goals and objectives of the organization are given to each volunteer.

2. Volunteer input is requested when the goals and objectives of the organization are reviewed.

Project results and program evaluations (where appropriate) are made available to the volunteers.

1. Project results are shared with volunteers on a timely basis.

2. Program evaluation reports (where appropriate) are made available to the volunteers

Volunteers are included in planning and 'brainstorming' sessions whenever possible.

1. A policy to include volunteers in planning and information sharing is in place.

2. A mechanism exists to survey volunteers for input into program planning and delivery.

3. Where volunteer input is identified, a mechanism for follow-up is in place.

Column Totals

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There is a vehicle for sharing volunteer information of a social nature.

1. A newsletter or designated portion of the newsletter is available for volunteer social news and recognition.

Program evaluation procedures include a method of determining and recording volunteer job satisfaction information.

1. Volunteers are surveyed regularly to determine job satisfaction levels by:
   - interviews
   - written questionnaire
   - debriefing sessions with supervisor
   - brainstorming meetings.

Column Totals

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PLANNING REVIEW

	IN PLACE ▽	PLANNED ○	FUTURE PLANNING □

Chapter 1

Board responsibilities

Chapter 2

Volunteers and Staff

Chapter 3

Manager

Chapter 4

Recruitment
Interviewing
Job Design
Orientation
Supervision
Training
Recognition
Record Keeping

Chapter 5

Staying True

ANALYZING THE RESULTS AND FORMULATING AN ACTION PLAN

The assessment committee has the responsibility to recommend a plan of action to the Board of Directors. The committee will probably need assistance to stand back from the assessment project and regain a more global perspective.

An 'outside' facilitator can help the committee to debrief and assist it to analyze the replies and formulate recommendations for an action plan. The steps to be covered in the analysis are:

Step 1   Review and prioritize FUTURE PLANNING responses paying special attention to the ratio within the component chapter and overall chapter to chapter ratio (need/urgency).

Step 2   Identify critical issues for the future (eg: new projects, social legislation changes).

Step 3   Identify strengths and resources (areas where replies were most positive, resources within the community such as the Volunteer Centre, Volunteer Management Association, United Way or resources within the organization).

Step 4   Identify weaknesses and barriers to action (eg: lack of funding/manpower, reasons why action has not been taken).

Step 5   Identify short term and long range goals as well as immediate action steps.
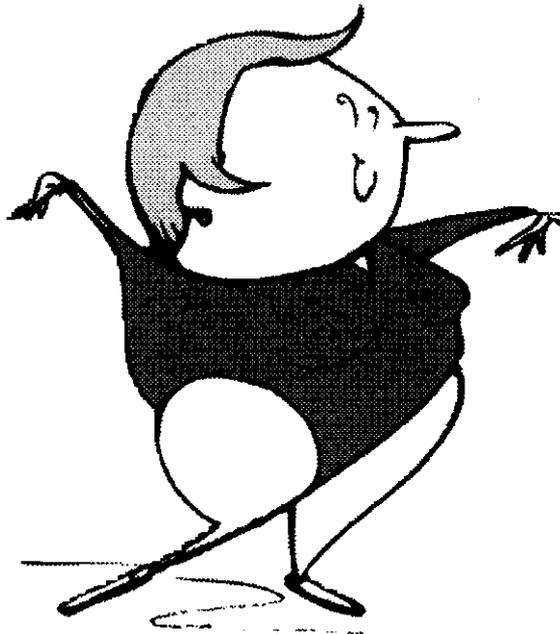
FORMULATING THE ACTION PLAN

Step 1: Two or three committee members are assigned to take notes during the debriefing and analysis session in order to combine the recommendations into a written action plan.

Step 2: A timetable for revision, consultation and submission to the Board is agreed upon.

Step 3: The organization's financial, administration and volunteer program staff are consulted to determine cost and resource feasibility.

Step 4: After final review by the assessment committee a report and action plan is presented to the Board of Directors.
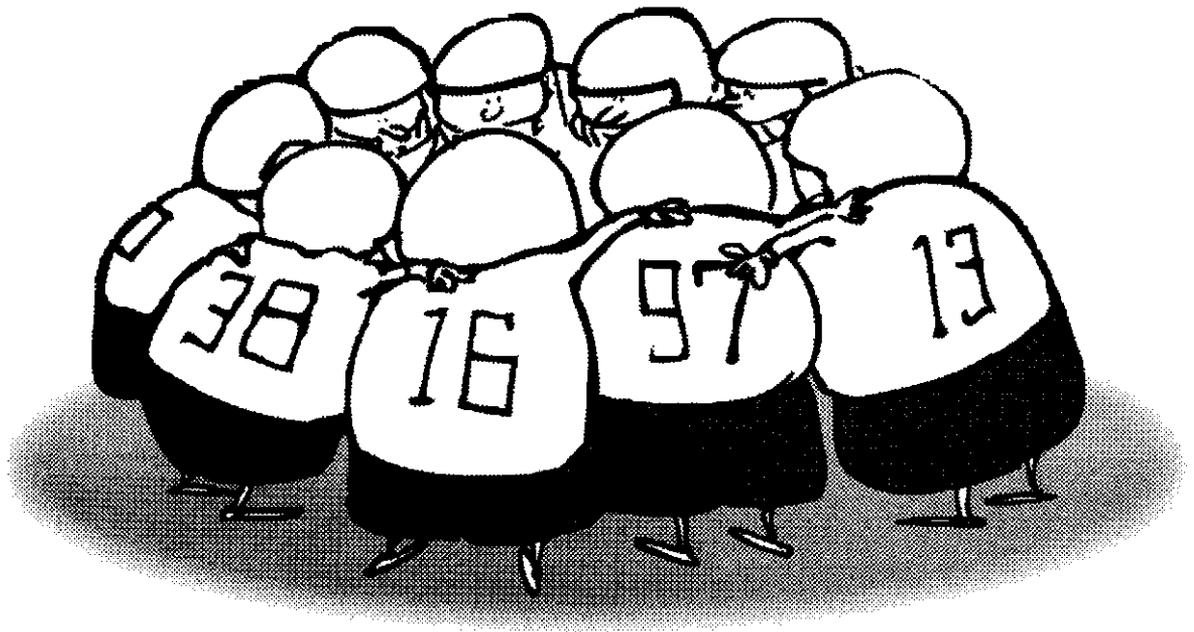
<u>READING LIST</u>

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