

Volunteer Manual Development

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INTRODUCTION

The following is the work product of myself and thirty-one participants in a volunteer manual workshop conducted at the recent AVA convention. I wish to express sincere appreciation to the participants for their very thoughtful input. In addition to serving as a workshop on volunteer manual production, I had an auxiliary goal that the workshop would also serve as a model for adult training.

I have long held the conviction that participation is central to successful training of adults. A facilitator of adult training should never allow the training to degenerate into a sharing of ignorance, but with good facilitation adult training can be a confident sharing of experience and expertise. Flip charts and handouts can certainly be a very useful tool for workshop facilitators, yet I fear they can also inhibit participation. A very carefully charted and rehearsed presentation may carry with it an implied message, "Do not participate for you will upset the structure of my presentation." Thus, I promised the participants in this workshop that they would get a handout from me, after they had generated it.

VOLUNTEER MANUAL

Many coordinators of volunteer programs, though feeling a strong need for a volunteer manual, often experience difficulty in getting started. This lack of motivation stems, I believe, primarily from three things. First, not really understanding and articulating the reasons for having a volunteer manual; second, having to

overcome very many organizational barriers to start and complete a manual; and third, coming up with a logical sequence for the development and production of a manual.

REASONS FOR A VOLUNTEER MANUAL

There are many good reasons to have volunteer manual materials. Training, information, and a ready reference are among the most easily understood. A volunteer manual imparts to volunteer staff what the organizational structure is, what organizational procedures are, and also contains important kinds of documentation. Very often it is the volunteer manual which provides unity to the whole volunteer program.

Volunteer manuals are often a very important part of recruitment. A prospective volunteer must be favorably impressed by a well written, well produced manual for it imparts a very clear message that the organization cares about volunteers. Prospective volunteers, especially if they are approaching a complex task, want to know what kind of training and support they will have. A good manual is a strong indicator that training and support needs will be met.

Volunteers will not remain in a position if they feel inadequately prepared to do the job. The good volunteer manual gives them the information they need to get started, as well as the information they need to stick with a task. Thus, the volunteer manual, in addition to being a recruitment tool, is also a tool for motivation and maintenance of volunteers.

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A volunteer manual is also a way to avoid miscommunication either among volunteers or between paid staff and volunteer staff.

A very compelling reason for volunteer training manuals is risk management. As more and more non-profit organizations deal with the issue of insurance liability, risk management is something which deserves careful attention. We not-for-profit managers have to set ourselves apart as a group and demonstrate to insurance underwriters that non-profit organizations are in fact an excellent risk.

The possibilities of legal action for not making reasonable efforts to train volunteers are multiple. There may be action taken against board members and staff by volunteer staff and/or clients. A written manual may be the first, only, and strongest defense against such actions. No action is too innocuous for liability risks. A volunteer in a small museum shop threatened a legal cause of action, slander, when she was terminated because museum staff believed she was mishandling funds. The volunteer claimed that she did not know that she was doing anything wrong. In the absence of clearly written procedures, the museum was unable to defend its position. As volunteers are dealing with sensitive issues and handling very complex tasks, an organization must be able to prove that volunteers are well indoctrinated in issues such as confidentiality and ethical procedures.

OVERCOMING THE BARRIERS

Once the reasons for having a volunteer manual are clearly understood, the obstacles to development of a manual must be attacked. The person most often in the position of having to deal with barriers is the coordinator of the organization's volunteer program. Participants in the workshop listed the following as reasons for not being able to get started on a manual:

- Lack of endorsement
- Lack of time
- Competing priorities
- Cost
- Questions of style
- Lack of skill

- Lack of focus
- Fear of failure
- Scarce resources

As a veteran of the volunteer manual battles, I was able to tell those present in the workshop that the good news was all of these things can be overcome.

The first and most important step is to obtain the blessing from organizational hierarchy. Such hierarchy may consist of a combination of board president, powerful board members, executive director, or supervisors. Attention must also be paid to the informal structure in the organization, and powerful persons within that structure must also be courted for their implied support.

The cost barrier can be overcome by getting the production of a volunteer manual into the organizational budget. It should also be kept in mind that there are special grants available for training which would cover manual cost. In-kind contributions such as paper, binders, or printing costs for manuals can also be solicited. Another organization may agree to sponsor or underwrite the cost for the organization's volunteer manuals. Of all the obstacles, cost should be the easiest to overcome.

In seeking the blessing from the hierarchy, the volunteer coordinator should pay careful attention to his or her job description. It may become necessary to negotiate a change of job description so that the production of a volunteer manual becomes a priority and the coordinator is given some guarantee of being allowed the time to pursue the task. A written job description which incorporates the responsibility of writing a volunteer manual will overcome lack of endorsement.

An important cost in the writing of a volunteer manual is clerical support. Just as a volunteer coordinator must have a very clear mandate to write a manual, clerical support staff must also be given the time to do the necessary typing.

There are many ways that questions of style and lack of skill can be overcome. A volunteer manual writer/editor can be recruited. Contents of the manual do not need to be entirely original. There is never any good reason to reinvent the wheel. Materials may be begged or bor-

rowed, but never stolen, from other organizations. I have, on numerous occasions, asked permission to use materials from other organizations for manuals that I have been editing. Imitation really is the sincerest form of flattery, and I have never been refused. Always include in your manual what all the information resources are, and give credit and acknowledgment to all sources.

In my view, one absolute necessity for the successful writing and production of a volunteer manual is a word processor. I would not even begin this task without access to a word processor because re-writing and editing is just too difficult without one. Knowing that revision can be simply handled on a word processor can overcome much of the volunteer coordinator's fear of not being sufficiently skilled to handle the task.

Looking at the "lack of focus" issue in connection with the feeling that the job is too big, I would suggest that volunteer coordinators begin to overcome this by taking a careful look at their organization's tasks and complexity. Some organizations are very simple, having only one primary activity, but the tasks involved may be very complex, dealing with many unknowns and requiring the volunteer to engage in a lot of independent decision making. Other organizations may be very complex, having many departments and volunteers doing many different tasks, simple or complex, within each of those departments. In any event a flexible approach to manual editing is needed.

If the organization is complex with many different activities, one manual does not need to be written to cover every volunteer task in that organization. A general section can be written which would contain information about the mission and the background of the organization, the budget, board members, and organizational structure. That section could also contain other kinds of general information such as address, phone numbers, parking, and other things that any volunteer in the organization would need to know. Then one section could be written for each volunteer task and given only to the volunteers doing that task. As volunteers may expand their involvement in

the organization, additional information could be given to them. For instance, a volunteer coming into an organization to work primarily on fund raising would be given a manual with a general information section plus information on such things as stuffing and sorting letters for mailing. If that volunteer wanted to move on and become a member of the organization's speakers' bureau then he or she would be given the additional information needed to carry out that assignment successfully.

Finally, the biggest inhibitor of all is probably fear of failure on the part of the volunteer coordinator. A good way to overcome this is to form a committee to help develop the manual. Standard objections to committees are that they complicate any task and we have all heard the old chestnut that a camel is simply a horse that has been designed by a committee. In response to that, I would point out that a camel is uniquely able to withstand the rigors of a very difficult environment. A volunteer coordinator who pays very close attention to developing and chairing a committee can have a very useful tool for manual development. A committee will broaden the ownership of the manual; should improve the end-product; and, if the volunteer manual fails, at least the volunteer coordinator will not fail alone.

In developing a volunteer manual committee I would suggest that four basic groups be represented on the committee: veterans and newcomers to the paid staff; and veterans and newcomers to volunteer staff. A committee with that kind of nucleus should have a clear understanding of what volunteers need to know to successfully operate in a particular organization. Also in recruiting members for this committee, the volunteer coordinator must keep in mind those persons in both the formal and informal structure who can be very powerful and very helpful. The volunteer manual committee may be an excellent way to involve a staff person or a board member who has not been a strong supporter of the volunteer efforts in your organization. Once such a person has some ownership in the volunteer program you may find that that individual

becomes one of the program's strongest supporters.

DEVELOPMENT AND PRODUCTION

After looking at the reasons for having a volunteer manual and how to overcome the typical inhibitors of writing and producing a volunteer manual, the participants in this workshop developed this list of materials and resources which would first have to be marshalled:

Research and library materials, and other organizations' manuals to use as models.

Personnel such as a typist and a writer and/or editors who perhaps could be professionals donating their time.

Word processor.

Funding for the printing and for the costs of materials.

Time.

Cooperation from volunteers in order to get input.

Demographic information.

Demographic information is important because it helps you understand who your volunteers are. Not all volunteers are well-educated members of the middle class. Literacy may be an issue. A manual may need to be developed which has more pictures, charts, and illustrations and fewer words. A volunteer manual may have to be translated into one or two other languages in order to be useful in a particular volunteer pool. In order to generate the cooperation from volunteers and the acceptance by the volunteers of a new manual, it will be important to understand the educational background of the organization's volunteers.

As with any good recipe, once the ingredients are listed they must be put together in some logical sequence so that the end-product will be palatable. Workshop participants identified many steps to getting to the final product. However, there were some very well-thought-out differences of opinions as to exact procedure. There was a final consensus that the organization, specifically the board and executive director, would have to be well

understood for the volunteer coordinator to begin to get this job done.

In the general classification of things that must be done first were:

Blessing from the hierarchy, and "significant others."

Define the purpose of the manual.

Recruit a manual committee.

Develop a plan or project proposal.

Define a target audience.

Good arguments were put forward for almost every possible sequencing of these steps. For instance, a good plan might be to first get together a committee which would then define the purpose of a manual, develop a proposal, and target the audience before going for blessings from the hierarchy. In other organizations, the hierarchy may look with disdain on a volunteer coordinator who would show so much initiative before first coming to them for a stamp of approval. Again, know your organization.

The next steps were centered around deciding on the content of a volunteer manual. Suggestions about simplifying structure were made earlier in this article. Things which should be included in the content of any manual are the background or history of the organization as well as the organizational mission. There should also be an organizational chart available to all volunteers in their manuals. Basic organizational policies and procedures should also be included. For example, an organization may have a policy on how to handle contacts from the news media. Financial information such as budgets (formats and contents) and funding sources should be included.

Sources of information, as mentioned earlier, can be manuals from other organizations. Also, an organization may have a staff manual which will have information that can be incorporated into a volunteer manual. Another source of information will, of course, be research. Volunteer and paid staff, both the newcomers and veterans, will also be a good source of information.

The writer or editor of the volunteer manual may like to use a survey for input.

Volunteer and paid staff, as well as board members, can be asked for suggestions about manual content. It is important to keep in mind that the return on surveys is seldom as good as hoped for. The manual editor should be prepared to follow up the survey with indepth interviews, especially with key paid and volunteer personnel.

Once the information has been gathered and the writing done, the manuscript should be submitted to exhaustive proof reading and meticulous correction. Each page should be read by two or three individuals who should be asked to initial each page they proof. Even after corrections are made, the proofed and initialed manuscripts should be kept on file indefinitely. The payoff to the volunteer coordinator who goes through this kind of procedure is that his or her fear of failure will be considerably reduced. Not only is the manual carefully checked, but ownership in the manual becomes very broad-based. Errors and omissions will be the responsibility of many.

When the manual manuscript is considered perfect, it should be duplicated and distributed to a test market. A few volunteers and staff members who were not involved in the original writing and revision of the manual should take it and use it. The size of the test market and the length of time for testing is something which will need to be determined by the manual committee. After testing and revision is completed, the final product can be produced.

How should the final product look? The manual should be as streamlined as possible. Scrutinize everything that is included to make sure that it is succinct. A table of contents and page numbering are absolute necessities. The first page of the manual should be one on which the volunteer can list or have listed for him or her basic important information such as work station and phone number of his or her supervisor, and how to reach a supervisor both during office hours and after hours.

A spiral bound manual is usually very compact, but its disadvantage is that it lacks flexibility. Most organizations find that a loose leaf notebook is more desir-

able as pages can be easily taken out and added. The use of tabs and different colored paper is a way to very clearly delineate various sections in a manual should that be called for. The models collected will be very helpful and an excellent source for format ideas.

Having gone through the long and arduous process of creating the perfect volunteer manual, the volunteer coordinator will want to insure its acceptance by the volunteer staff. Workshop participants came up with several clever approaches. A special training session may be devoted to introducing a new manual. A new manual might be introduced at the time of and as part of volunteer recognition. Volunteers would have to know that they count when presented with a carefully produced volunteer manual. The introduction of the volunteer manual could also be a social occasion. Everyone in the organization should know about the challenging process of creating a manual and its introduction should be accompanied by some kind of fanfare.

As the volunteer coordinator will be receiving profuse congratulations on the quality of the manual, he or she will probably also be getting some suggestions for revision. Do not be discouraged. Your manual is on a word processor and revision can be handled very easily. If something is wrong with page 19, make the changes and send the new page to all your volunteer staff and their supervisors. Don't forget: it will be helpful if you punch holes in the new page so it can easily be inserted into the manual. Also note on the new page the date of revision. You will want to keep a master manuscript of your manual, as well as a file of all pages that have been revised.

If the revisions on page 19 are extensive to the point that new pages will have to be written, don't panic. The additional pages will be number 19.1, 19.2, and so on.

In conclusion, I can make two guarantees about a carefully written and produced volunteer manual. One, it will not be easy, but it is possible. With careful planning, obstacles can be overcome. The second thing I promise is that a really good volunteer manual is worth the coordinator's time and the organization's com-

mitment to it. The benefits of a good volunteer manual to an organization are much greater than its cost. The process and the product will strengthen the volunteer program as well as the entire organization.