Valuing
Volunteers

**A Volunteer
Recruitment & Management
Tool Kit**

**For
CAPC & CPNP
Projects**

Rural Response for
Healthy Children

Our Children, Our Future
Nos enfants, notre avenir

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THE NATIONAL PROJECTS FUND

The purpose of the National Projects Fund is to strengthen Community Action Program for Children (CAPC) and Canada Prenatal Nutrition Program (CPNP) projects across Canada. It does so by addressing common concerns and supporting information sharing through training, resource development and dissemination.

One theme for the National Projects Fund for 2000/2001 was strengthening program management – Human Resource, Volunteer and Board Management.

Volunteer Recruitment and Management was identified as a priority based on surveys of CAPC/CPNP projects, feedback from Health Canada Program Consultants and learnings from the CAPC/CPNP renewal process.

A COLLABORATIVE PROCESS

"Volunteering is the most fundamental act of citizenship and philanthropy in our society. It is an extension of being a good neighbour, transforming a collection of houses into a community."
VOLUNTEER ONTARIO, 1996

In the Fall of 2000, Health Canada issued a call for letters of interest from CAPC/CPNP projects to sit on a National Advisory Committee regarding Volunteer Recruitment and Management.

On November 20 and 21, 2000, a National Advisory Committee, comprised of representatives of CAPC/CPNP projects from across Canada met to discuss the issue of volunteer management within our projects.

The committee was formed at the beginning of the process so that members could work together and thoroughly discuss the issues, needs, priorities and strategies that could or should be addressed by a project proposal to the National Projects Fund.

The meeting was intended to ensure that the proposal development process (and ultimately the product) accurately reflected and responded to the needs of CAPC/CPNP projects in all regions of the country.

PREFACE

THE NATIONAL ADVISORY COMMITTEE

The preliminary advisory committee was comprised of:

Jenn Cody
Merritt Moms(CPNP)
British Columbia

Charleen Gorbet
Health Canada
Ontario Region

Chris Harris
Calgary Inter-Faith Food Bank (CPNP)
Alberta

Dale Howatt
Rural Response for Healthy Children (CAPC)
Ontario

Marjolaine Isabelle
Programme Les Marraines (CPNP)
Quebec

Lyzette Johnston
Health Canada
National Office

Carmen Robillard
Our Children, Our Future/Nos enfants, notre avenir (CAPC/CPNP)
Ontario

Sharon Taylor
Wolseley Family Place (CAPC)
Manitoba

It was agreed that Rural Response for Healthy Children, in partnership with Our Children, Our Future / Nos enfants, notre avenir, would take the lead role in developing the tool kit. Members of the committee agreed to provide information and to take on a liaison role between the lead organizations and projects in their region.

Valuing Volunteers: A Volunteer Recruitment & Management Tool Kit for CAPC/CPNP Projects

PREFACE

THE VISION

The National Advisory Committee envisioned a process that would be *consultative* and *responsive* to needs identified by CAPC/CPNP projects. The resulting product would draw upon *lessons learned* and *best practices* developed to share with our colleagues across the country.

We envisioned the development of a *comprehensive, accessible* volunteer management tool kit that would be *tailored* to the needs of CAPC/CPNP projects across the country. It would build upon existing strengths of projects by identifying basic *ethical, legal and managerial issues* and by offering tools and templates for volunteer management tasks and challenges.

The tool kit would be available:
- in *both official languages*
- as a *hard copy*
- and *electronically*

to allow projects to access resources and adapt templates.

Throughout the course of the project, we bid farewell to Marjolaine, Charleen, and Lyzette (the only constant in CAPC/CPNP is change!). However, we were pleased to welcome:

Josée Arseneau
Centre de Ressources Familiales de la Péninsule Acadienne Inc. (CAPC)
Atlantic Region

Lucie Guillemette
Centre de Bénévolat de la Rive Sud(CPNP)
Quebec

Marybeth Zeeman
Health Canada
National Office

We invited Cheryl Faber and Anne Landry to our working team. They drafted working documents for the Advisory Committee ranging from the survey to the first and second and third drafts of the tool kit. They distributed the survey, followed up with colleagues across the country, conducted focus groups, consulted with volunteer organizations, gathered and collated everything we could find about volunteer recruitment and management.

The entire process was bilingual – from committee meetings (the 'talkers' in the group learned patience!) to consultation to the collection of tools, templates and great ideas!

PREFACE

TESTING THE VISION

The Advisory Committee wanted to be sure that our vision was what our CAPC/CPNP colleagues really wanted and needed, that it was what they had envisioned when they identified Volunteer Recruitment and Management as a priority. So we asked.

In the Summer of 2001, we circulated a survey to every CAPC and CPNP project across the country, asking if projects currently involved volunteers and how and if not, why not.

We asked projects to tell us about how they support volunteers, the types of tools they use or would like to have, and the issues they face related to volunteers.

We asked for recommendations about existing tools and content and format of the tool kit – and for volunteers to review the drafts as we developed them!

*A copy of the questionnaire is included in the appendices.

BRIGHT IDEA

CAPC/CPNP Principles & Values
+
Volunteerism
=
Valuing Volunteers:
A Volunteer Recruitment and Management Tool Kit for CAPC/CPNP Projects

AND THE SURVEY SAID…

In total 813 surveys were distributed across the country (some projects received both English and French surveys). 21% were returned, representing CAPC and CPNP projects in all regions of the country.

Our colleagues told us that *local realities* such as geography, language and project size influence volunteerism in projects, however there were also constant themes in the responses.

The *roles and relationships* between **volunteers** and *employees* vary greatly, but the concerns were similar. The philosophical debate about not replacing employees with volunteers versus the benefits of maximizing service provision permeated many responses.

Several respondents told us that honorariums and expense reimbursements further complicate this debate. They have become increasingly complex issues since they may be interpreted by social services or employment standards as 'income', further blurring the lines between volunteer and employee.

PREFACE

"We really value the contribution of volunteers and they value their contribution to our community work – however, we do not have the resources to further develop the program."
CAPC/CPNP RESPONDENT
VOLUNTEER SURVEY 2001

The roles and relationships between *volunteers and program participants* varied greatly. Some projects told us that their participants do not volunteer at all to avoid any real or perceived conflict of interest. Others required participants to become involved in the project in one way or another. Still others talked about 'progressive volunteerism' wherein the individual moves from participant to volunteer at the service delivery level to volunteer at the management level to employee.

The *practical issues* identified by CAPC and CPNP projects related to volunteer management were consistent across the country. They included:

·   **high turnover** and the need for continuous **orientation & training**

·   *lack of time and money* to recruit, screen, orient, train, supervise and recognize volunteers. Projects told us time and time again that volunteerism, while offering many benefits, comes with a myriad of associated costs – costs to both the organization and the individual volunteers.

·   lack of *support* from management and funders

·   lack of *policies*

·   concerns about *consistency, quality service, confidentiality and liability* – especially with volunteers involved with direct service

These common themes and other specific requests for concrete tools provided the framework for this tool kit.

PREFACE

GATHERING THE TOOLS…

Many projects offered great ideas and tools that have been included in this tool kit. A special thanks to …

Association Carrefour Famille Montcalm
St-Lin-Laurentides,Québec

Brighter Futures Coalition of St. John's
Newfoundland

Brighter Futures Society of High Level Alberta
Alberta

Bruce Grey Children's Services
Ontario

Calgary Interfaith Food Bank
Alberta

Carrefour des Pitchou
Montréal-Est,Québec

Centre d'Action Bénévole St-Siméon/Port-Daniel
Paspébiac Ouest, Québec

Centre de Resources pour parents du Restigouche
Campbellton, New Brunswick

Centre de Bénévolat de la Rive-Sud
Candiac, Québec

Children's Aid Society
for the Districts of Nipissing and Parry Sound
Ontario

CLSC NDG/MTL – O
Montréal, Québec

Entre Parents
Montréal-Nord, Québec

Kids West Inc.
Prince Edward Island

Maison de la famille Drummond
Drummondville, Québec

Maison de la famille Vallée-de-la-Lièvre
Buckingham, Québec

North Peace Community Resources Society
Fort St. John, British Columbia

Our Children, Our Pride/Fier de nos enfants
Embrun Family Centre
Ontario

Parenting for the Future
Stony Plain, Alberta

Waterloo Region CAPC
Ontario

…who generously contributed their forms, tools, policies and great ideas that form the bulk of the 'tools' section of the kit.

The Human Resources Tool Kit, **People and Planning**, was distributed to CAPC/CPNP projects in the fall of 2002.

For more information contact The Pas Family Resource Centre at www.tpfrc.com.

STILL MORE COLLABORATION…

In many ways, effective Volunteer Recruitment and Management parallels effective Human Resource Management, but it can also differ significantly.

Since the National Projects Fund had also funded the development of a Human Resources Resource (try saying that several times in a row!), we (the National Advisory Committee for Volunteer Recruitment and Management, the National Advisory Committee for Human Resources Management and the National Projects Fund team) agreed that any processes undertaken or resources developed should be complementary.

To that end, we've shared survey design, dissemination and results, met to consult about basic framework and content, and edited both tool kits so that they would be complementary.

PREFACE

ONGOING CONNECTIONS AND SUPPORTS

This tool kit has been made available to CAPC/CPNP projects in hard copy (for ease of use) with the accompanying tools available in electronic format so that they can be tailored to meet organizational needs.

The text is available in .pdf format to download from:

the Health Canada Web Site
www.hc-sc.gc.ca/hppb/childhood-youth/cbp/npfproject/index.htm

and the websites of the lead organizations

Rural Response for Healthy Children
http://www.rrhc.on.ca

and

Our Children, Our Future / Nos enfants, notre avenir
http://www.ourchildren-ourfuture.net

The templates are available in Rich Text Format (rtf) on the CD Rom and from the latter two websites so they can be downloaded and readily adapted.

The names of contributors were current at the time of publication – but if you'd like to contact a particular project or individual, a current listing of all CAPC/CPNP projects can be found at:

http://www.ssjs.hc-sc.gc.ca/capc/
(for CAPC projects)

and

http://www.hc-sc.gc.ca/hppb/childhood-youth/cbp/cpnp/index.html
(for CPNP projects).

In addition, Volunteer Canada is always ready and available to assist organizations with volunteer program development. Their services are available in both official languages. For more information, visit their website

http://www.volunteercanada.ca

PREFACE

THANK YOU, THANK YOU, THANK YOU…

We simply can't say it enough – to all of the projects and individuals who have dedicated time, energy and expertise to the development of this tool kit: a very sincere and heartfelt thank you.

National Advisory Committee Members

Focus Group Participants

Projects that completed the survey

Projects that shared tools and resources

Volunteers who helped assemble the kits

The Pas Family Resource Centre and the Human Resource Tool Kit contributors

Project Employees

Health Canada

Together we can make a difference in the lives of children and families (and volunteers) in our communities!

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Recruitment & Screening

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INTRODUCTION

THE STARTING POINT

Community Action Program for Children (CAPC) and Canada Prenatal Nutrition Program (CPNP) projects across the country have been involving volunteers in their programs in a variety of capacities over the years. Philosophy and practice regarding volunteerism are as varied as the projects themselves.

Many CAPC/CPNP projects identify participation of volunteers in project activities as a key element of the success of their projects. In 2001, CAPC/CPNP projects reported that *volunteers* contributed more than *924,091 hours* of service!

Like many not-for-profit and voluntary organizations, projects that involve volunteers have built upon the strengths and best practices in local communities. We have sought out appropriate resources, models and templates. We have learned important lessons about volunteerism, community development, skill development and about how inextricably intertwined the preceding are in effectively managed volunteer programs.

We know that volunteers come to our programs with a range of skills and abilities, hopes and expectations. We have learned to tailor our volunteer opportunities to meet their needs, optimizing the experience for both the individual and the organization.

Effective and ethical volunteer recruitment and management has been identified as an important issue for CAPC/CPNP projects across the country. Effectiveness and ethics therefore form the foundation of the questions we ask throughout the tool kit.

It is our hope that this tool kit will help in the *ongoing critical analysis* of the roles of volunteers in our organizations; that we will continue to ask the questions about why and how we incorporate volunteers into the work we do with children and families.

"We have struggled with the word volunteer as it refers to "doing for". Community development suggests participant involvement and everybody with a vested interest pitching in. How do you then separate participant and volunteer?"

CAPC/CPNP RESPONDENT
VOLUNTEER SURVEY 2001

There are a myriad of volunteer management resources available both nationally and locally. It is not our intent to duplicate what is readily available elsewhere but to compile lessons learned, best practices, helpful tools and great ideas from our colleagues. They have been tried and tested by organizations committed to CAPC/CPNP principles. They are offered as tools for program start up or review - as a starting point.

INTRODUCTION

A UNIQUE PERSPECTIVE: CAPC/CPNP

CAPC and CPNP have blurred the lines around traditional volunteerism. Many projects have used a **participatory approach** from the outset, encouraging program participants to volunteer their time in a variety of capacities and asking for their input on program development, implementation and evaluation.

Is this volunteerism? You bet it is! Does it fit the traditional volunteer model that recruits and trains people to 'help others'? Not quite so clearly.

Projects that work in a **community development** model recognize that some of the volunteers who come to them are more vulnerable than families they serve, but that this is the easiest door for them to open. They encourage them to volunteer, offer information and skills through orientation and training, and place them appropriately so that they can learn and grow and contribute to program development.

Is this volunteerism? Absolutely! Does it fit the traditional volunteer model that recruits and trains people to 'help others'? Not exactly.

Many CAPC and CPNP projects also focus on **community capacity building**. In this framework, volunteer recruitment and training can be seen as public education, leadership training and skill development. When volunteer training is seen as an end in itself, high attrition rates are a good thing because volunteers leave training to share what they have learned in their communities.

Is this volunteerism? Of course! Does it fit the traditional volunteer model that tracks hours and years of service? Not quite so clearly.

INTRODUCTION

POPULATION HEALTH

DETERMINANTS OF HEALTH

Income & social status
Social support networks
Education
Employment & working conditions
Social environments
Physical environments
Biology and genetic endowment
Personal health practices
& coping skills
Healthy Child Development
Health Services
Gender
Culture

The introduction of *population health* concepts in recent years has added yet another model that affirms the CAPC/CPNP approach with participants and volunteers alike.

According to Taking Action on Population Health, "the population health approach recognizes that health is a capacity or resource rather than a state, a definition which corresponds more to the notion of being able to pursue one's goals, to acquire skills and education and to grow."[1]

Population Health is also about social support, employment and working conditions, and social environments – factors that organizations must consider when recruiting and retaining a strong volunteer base.

The Population Health approach encourages projects to look at the outcomes for everyone related to the projects – volunteers included.

It will become clear in the pages that follow, that volunteering with CAPC/CPNP can be about pursuing one's goals, acquiring skills and education and growing.

Projects told us loud and clear that they wanted practical tools, so we've included them. Many of the tools, strategies and suggestions we offer are common to Volunteer Management no matter what the setting. The underlying premise of this tool kit, however, is that:

- volunteers are of *integral value* to our organizations and communities,

- volunteers bring *skills, abilities, knowledge and influence* to the organizations they serve,

- volunteers *contribute in meaningful and concrete ways* to our organizations and communities,

- volunteers can *benefit and grow* through their experience with our organizations.

There is no such thing as just a volunteer!

INTRODUCTION

HOW TO USE THIS TOOL KIT…

We hope that this tool kit is user-friendly. It can be used as a primer for those considering the use of volunteers or a refresher for the seasoned veteran. It can provide a framework for developing new volunteer programs or great ideas for rejuvenating existing ones.

Valuing Volunteers: A Volunteer Recruitment & Management Tool Kit for CAPC & CPNP Projects includes an easy to read overview of volunteer recruitment and management strategies and a collection of tools, templates and resources in an easy to carry *file box*. It can stand alone or the files can be removed and integrated into existing filing systems.

The *binder* provides the background questions and great ideas that we've collected from colleagues across the country. We hope that it will generate questions, discussions and critical examination of the roles of volunteers in our organizations and of the ethics of volunteerism in general.

The first few chapters are dedicated to program planning.   The latter chapters address program implementation – the nuts and bolts of ongoing volunteer coordination.

Throughout the binder, there are sidebars:

Red flags highlight areas of particular concern that might require further action at the local level.

Bright ideas are just that – ideas that have worked for colleagues or internet sites that we've found particularly helpful. They offer a range of resources from background information to online tools and tutorials. We know that time is a valuable commodity at the project level – adding these links to your favourites may provide you with a series of shortcuts when you're looking for specific, updated information and tools in the future!

Dynamic Downloads are tools that are currently available on the internet to *complete the kit*. We've added an "insert here" page in the 'Terrific Tools' section of the kit to indicate where the downloads fit.

These downloads form an integral part of the kit – including them in this manner has allowed us to offer much more information than we would otherwise have been able to do and at the same time, provide you with valuable links for future reference.

INTRODUCTION

BRIGHT IDEA

Every effort has been made to ensure that all weblinks are current and active at the time of publication.

If you have difficulty accessing a given link, try shortening the link to get to the organization's home page and going from there.

If you encounter difficulties downloading, please contact Rural Response for Healthy Children or Our Children, Our Future / Nos enfants, notre avenir and we will send you a hard copy if possible.

We've also added questions to think about, quotes from colleagues and interesting facts in the sidebars for quick reference.

The accompanying files contain the *Terrific Tools & Relevant Resources* – extra reading, forms, and templates. All forms and templates may be copied or adapted for local use (see conditions below). We've colour coded the paper and file folders for ease of use – templates created for this tool kit are on *yellow* paper, *green* folders contain *tools* and *templates*, *blue* folders additional *reading* and *resources*.

The *electronic version* of the manual is available in .pdf format on the enclosed CD Rom and to download from the following websites. Tools and templates are also available on the CD Rom and to download from the latter two websites. They are provided in rich text format (.rtf) – for ease of adaptation.

Health Canada website
http://www.hc-sc.gc.ca/hppb/childhood-youth/cbp/npfproject/index.htm

Rural Response for Healthy Children website
http://www.rrhc.on.ca

Our Children, Our Future / Nos enfants, notre avenir website
http://www.ourchildren-ourfuture.net

Documents, tools and templates may be downloaded or printed for project use only. They may be edited and adapted for local usage, but credit must be given to the originator of the document.

The documents, tools and templates that form this tool kit may not be sold nor any profit made from reproducing them. Do not copy, extract, summarize or distribute downloaded documents, tools or templates outside of your own organization in a manner which competes with or substitutes for the distribution by the originators.

INTRODUCTION

WHAT THIS TOOL KIT IS NOT

This tool kit is not a comprehensive 'how to' manual. Collectively, we have years of experience involving volunteers in CAPC/CPNP projects. We hope that the questions asked and tools offered are representative of the views and responsive to the needs of our colleagues across the country. It is a starting point.

This tool kit is not a legal reference. It is not intended to set standards that cannot be met or to replace investigation and thoughtful consideration about the role of volunteers in relation to organizational policies or legislative constraints. Organizations are encouraged to consult with the appropriate experts in their communities.

This tool kit is not intended to encourage the belief that volunteerism is inexpensive or easy – just the opposite in fact. While there are many benefits of an effective volunteer program, cost-savings is not necessarily one of them (see chapter one – costs).

This tool kit is not intended to convince CAPC/CPNP projects that have philosophical concerns or practical constraints to institute a volunteer program – just the opposite, in fact. Volunteerism works best in organizations that value volunteer contribution and can offer appropriate supports to volunteers.

RED FLAG

For a more thorough consideration of the factors involved in staff-volunteer roles, see chapter two.

This tool kit is not intended to encourage projects to replace employees with volunteers. What one organization may deem an appropriate role for employees, another may consider a volunteer role – we simply encourage the critical examination of the questions and the clear delineation of roles and responsibilities.

INTRODUCTION

A NOTE ABOUT BOARDS OF DIRECTORS

CAPC and CPNP projects strongly encourage participant and partner involvement at every level of decision-making, up to and including Boards of Directors.

Family Resource Programs Canada has developed Responsibility and Accountability-Based Programs Need to Know.

It was distributed to all CAPC/CPNP projects in the fall of 2002.

While all projects are funded through a not-for-profit organization that must have a Board of Directors, the relationship to that Board varies greatly, ranging from direct participation to no contact.

Directors are charged with roles and legal responsibilities that are beyond the scope of this Tool Kit. We will address some of those responsibilities in Chapter Four, however we encourage organizations to seek other resources to augment what we are able to provide.

DYNAMIC DOWNLOADS

A-Z Guide for Board Governance from www.volunteerbc.bc.ca/tool/governance.html

Directors Liability: A Discussion Paper on Legal Liability, Risk Management and the Role of Directors in Non-Profit Organizations from http://www.volunteer.ca/volunteer/screening_room7.htm

We will say this, however. *Directors are volunteers.* Sometimes they are the only volunteers involved with the organization. They need to be considered in volunteer recruitment, screening, orientation, training and recognition. Organizations must determine which volunteer policies and procedures apply to Board members and implement those decisions fairly and consistently.

In general, the relationship of Boards with employees charged with Volunteer Recruitment and Management is distant. The nurturing, encouraging role that a Volunteer Coordinator might play with most volunteers is undertaken by the senior management of the organization or the Board itself, depending on the structure.

Given that Boards of Directors, are charged with the overall strategic direction of organizations, it is critical that they are aware and supportive of volunteerism.   They must ensure that there are appropriate policies, structures and resources in place for an effective volunteer program.

INTRODUCTION

A NOTE ABOUT LANGUAGE…

While all CAPC and CPNP projects share common principles, we vary greatly in terms of organizational structure, program provision and the words we use to express what we do.

For the purposes of this tool kit, we offer the following definitions:

Project: CAPC/CPNP funded initiative (it may be a stand-alone project, a venture of a multi-partner collaborative, a program of a single sponsor, or any combination of the preceding).

Program: A service provision component of the project (for example, home visiting program, parent education program, volunteer program).

Organization: The larger body of which CAPC/CPNP may be a part (for example the sponsor organization).

RED FLAG

Roles and Responsibilities of volunteers and employees must be clearly defined to ensure an effective volunteer program.

In the CAPC/CPNP context, roles and responsibilities of participants as volunteers may also have to be clarified.

Participants: The individuals who access programs and services from the organization.

Volunteers: Individuals who do not receive a salary or wage (excluding expense reimbursement and honouraria) for their services to the organization.

Employees: Individuals who receive a salary or wage for their services.

Personnel: All individuals and groups serving the organization.

Volunteer Coordinator(s): Individual(s) in the organization charged with any aspect of volunteer management.

Stakeholders: Individuals and groups who have a vested interest in the organization.

A complete ***glossary of terms*** is included in the appendices.

CHAPTER 1: MAKING AN INFORMED CHOICE

Needs Assessment

PROGRAM DEVELOPMENT

Program Design
- Goals, Objectives & Activities
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- Risk Management
- Budget/Resource Development
- Policies & Procedures

Evaluation

Recognition

Record Keeping

COORDINATION

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- Orientation &Training
- Supervision

Recruitment & Screening

Implementation

In this chapter...

CHAPTER 1: MAKING AN INFORMED CHOICE

WHAT DOES 'VOLUNTEER' MEAN?

Organizations and communities use volunteers in a myriad of capacities. What exactly do we mean when we use the word 'volunteer'?

For the purposes of this Tool Kit, we use a definition adapted from Safe Steps[2] and Volunteer BC[3]:

Volunteers are individuals:

- Who ***choose*** to undertake a service or an activity – who are not coerced or compelled to do so,

- Who do this activity ***in service*** to an individual or an organization, or to assist the community-at-large,

- Who do so ***without compensation*** or expectation of compensation except for the reimbursement of expenses.

There are a variety of ***unpaid roles*** in any organization – that may or may not be considered voluntary. Some organizations might include individuals doing:

- Internships
- Field placements
- Co-op placements
- Community service or mandatory community work[*]

These groups may be considered 'special case volunteers'. Their motivations vary from 'volunteers' as we've defined them, and there are often planning, supervision and reporting requirements of the organization that would not be required of 'volunteers'. Tools and templates offered in this tool kit may be useful for addressing some of these requirements.

CAPC/CPNP program participants are often asked to become involved in the projects. Is this volunteerism? Or is it a requirement of participation? Some projects ask participants to contribute their time as a condition of participating in the program (not volunteering) and track these contributions separately from volunteer time.

We hope that the questions asked and the strategies offered throughout this tool kit will be helpful as projects strive to include participants in a meaningful way at every level of their organizations.

BRIGHT IDEA

Defining who is a volunteer clarifies roles, responsibilities, relationships –and who needs to adhere to which policies.

RED FLAG

[*]The use of mandatory community workers has both practical (screening, supervision, reporting) and philosophical (Do we want to participate in 'mandatory' placements?) implications.

The weight organizations place on the non-compulsion element of the definition of volunteer versus the benefits to be had by the individual or organization will vary.

Be sure to separate this discussion from that of including volunteers in general!

CHAPTER 1: MAKING AN INFORMED CHOICE

WHAT ARE THE BENEFITS OF VOLUNTEERISM?

Volunteerism benefits individual volunteers, the organization and the community.

1. Benefits for the Volunteers

Volunteers offer their time, talents and energy for a variety of reasons. Organizations that recognize this diversity and ensure that they offer opportunities that benefit volunteers will recruit and retain volunteers with greater ease. Recruitment, screening, orientation, training, supervision and recognition activities can then be tailored accordingly.

Benefits can include the opportunity to:

- share their talents
- learn new skills
- challenge themselves
- explore career options
- try something different
- meet new people
- develop new friendships and supports
- be recognized
- increase their self-confidence and self-esteem
- contribute to the community
- feel like they are making a difference in the lives of children and families
- provide leadership
- relieve stress levels
- find a balance

Volunteer work can often offer flexibility – volunteers can work at home, in the office, days, evenings, weekends, daily, weekly, monthly, or as appropriate.

"Participants appreciate that volunteers are there because they want to be…that they believe in what they're doing."

CAPC/CPNP RESPONDENT VOLUNTEER SURVEY 2001

RED FLAG

When we ask participants to volunteer, we change the roles, responsibilities and relationships of all involved.

What policies and procedures does the organization have in place to address these changes?

2. Benefits for the organization

Volunteerism benefits the organization by contributing to:

a. Organizational Capacity/Revitalization
Participants and employees both benefit from enhanced organizational capacity. Volunteers can:

- enhance programming and services by providing time, skills and knowledge,
- increase service provision,
- offer expertise,
- provide objective input that can affect future planning,
- add diversity to the organization,
- increase the reach, profile and credibility of the organization in the community,
- bring energy, enthusiasm and creativity to the organization,
- enhance supports to individual participants,
- concentrate on specific projects,
- add a more personal and informal 'touch' to programming.

It is important to identify and, if possible, quantify the outcomes of volunteer programs (for the volunteers and the organization). Doing so enables the inclusion of volunteer programs in logic models and funding proposals to ensure that adequate financial resources are dedicated.

b. Participant Involvement
When program participants come to group early to set up coffee, join a focus group or sit on a board or advisory committee, they are contributing their time, talents and energy. Whether this involvement is labelled volunteerism or not, appropriate supports are necessary.

Strategies for recruitment, screening, orientation, training, supervision and recognition of volunteers can be readily adapted for effectively involving participants.

c. Access
Volunteerism can also serve as an entry point to program participation. A parent of young children who is reluctant to attend programs might feel more comfortable becoming involved with the organization as a volunteer.

3. Benefits for the community

Volunteerism benefits the community by providing a framework for:

a. Community Development
Volunteerism can provide the framework for developing supportive relationships – between volunteers, volunteers and employees, volunteers and program participants. Relationship-building is the foundation of community development!

Volunteerism also provides the opportunity for citizen involvement in developing ongoing programs and services to enhance and sustain 'community'.

b. Capacity Building
Volunteer orientation and training (whether or not the volunteers choose to continue with a particular organization) increase the knowledge and skills of citizens in the community – thereby enhancing capacity in innumerable ways.

c. Public Awareness and Education
Some organizations view volunteer training primarily as an opportunity for public awareness and education. As with capacity-building, whether or not individual volunteers choose to continue with the organization, they have had the opportunity to learn about the issues the organization addresses and the services it offers. They, in turn, may share this information with family, friends, neighbours…(of course, the better job we do with training, the more likely the ripple effect is to happen!)…who may choose to volunteer with the organization, use the information themselves or share it with others.

CHAPTER 1: MAKING AN INFORMED CHOICE

WHAT ARE THE COSTS OF VOLUNTEERISM?

"We don't have the time or money to dedicate to volunteers."

CAPC/CPNP RESPONDENT
VOLUNTEER SURVEY 2001

While there are a myriad of benefits associated with volunteerism, they do not come without associated costs.

Our CAPC/CPNP colleagues told us repeatedly that they do not have sufficient resources to make their volunteer programs what they know they could be. They identified costs to the organization and to individual volunteers.

1. Cost to the organization

An effective volunteer program requires **dedicated resources**. Recruitment, screening, orientation, training, supervision and recognition all require coordination and resources. At the very least they require employee time and expertise, volunteer expense reimbursements, office supplies and equipment, photocopying, computer access.

In addition, ensuring that there is **adequate work space** for volunteers may require freeing up space that is used for something else. Our colleagues tell us that they offer the very best work space to their volunteers.

The costs associated with **recognition activities** will vary greatly depending on the resources available. Attitude costs nothing; creativity and thoughtfulness can go a long way - but do require dedicated time.

The **reputation of the organization** must also be considered. Volunteerism increases the number of individuals representing the organization in the community through either program provision or promotion. A well-trained and committed volunteer can prove an invaluable ambassador for the organization but a frustrated, inadequately trained volunteer or unsatisfactory volunteer experience can reflect poorly on the organization as a whole.

2. Cost to the volunteers

There are also **costs to the volunteers**. Potential expenses must be identified and the reimbursement of those expenses considered.

CHAPTER 1: MAKING AN INFORMED CHOICE

EXPENSE REIMBURSEMENT

It should not cost people money to volunteer their time, efforts and expertise – but it does. It costs money to travel to and from the volunteer workplace; it may cost individual volunteers childcare expenses or extra food costs related to being away from home. Some volunteer responsibilities may require special equipment or clothing. Additional phone or postage costs are often incurred by volunteers who 'work from home'.

Reimbursement of expenses is one way of ensuring that volunteering is **accessible** to everyone. When developing policies concerning expense reimbursement, organizations must consider a variety of factors, including (but not limited to):

- Organizational philosophy
- Existing policies (especially regarding expense reimbursement)
- Encouraging participants to volunteer
- Local regulations
- Governing legislation

BRIGHT IDEA

The Canadian Automobile Association provides up-to-date per kilometre reimbursement rates that reflect the actual cost of operating a personal vehicle for work or volunteering. See www.caa.ca for the office nearest you.

JUST THE BEGINNING

Identifying the possible benefits and recognizing the potential costs are critical to making an informed choice about volunteerism.

Other more specific questions about organizational readiness will also need to be considered in determining if, how, when and where volunteers 'fit' with the organization.

IN THE TOOLS SECTION…

1. Volunteers: The Heart of Community Organizations
2. Working with Volunteers

Needs Assessment

Evaluation

Recognition

Record Keeping

PROGRAM DEVELOPMENT

Program Design
- Goals, Objectives & Activities
- Responsibility
- Risk Management
- Budget/Resource Development
- Policies & Procedures

COORDINATION

Retention
- Placement
- Orientation &Training
- Supervision

Implementation

Recruitment & Screening

In this chapter…
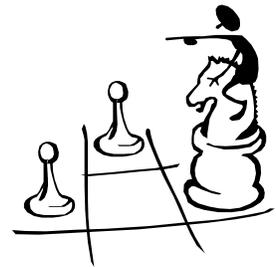
CHAPTER 2: LAYING THE GROUNDWORK

ARE WE READY FOR VOLUNTEERS?

Laying the groundwork is essential to effective volunteer management. Volunteers make a commitment to the organization with which they volunteer. They need to know that they are needed, respected and appreciated.

It's important for organizations to ask critical questions before recruiting volunteers – questions about organizational philosophy and capacity:

> Does the organization have well defined values, vision, mission and goals?

> Is volunteerism consistent with the organizational philosophy and culture?

> Does the organization have the capacity to involve volunteers?

> How will involving volunteers address the values, vision, mission and goals of the organization?

BRIGHT IDEA

Review

The **Canadian Code for Volunteer Involvement** included in the Relevant Resources!

and

The Universal Declaration on Volunteering at www.iave.org

"It doesn't matter how skilled our volunteers become – systemic racism limits their employability."
CAPC/CPNP RESPONDENT VOLUNTEER SURVEY 2001

"We struggle with which tasks we can ask volunteers to do without affecting paid employment."
CAPC/CPNP RESPONDENT VOLUNTEER SURVEY 2001

ORGANIZATIONAL PHILOSOPHY

Does volunteerism fit with the overall organizational philosophy? CAPC/CPNP projects have many different sponsor and partner relationships – and need to be sensitive to their particular context. It's important to ask questions about volunteerism in relation to other values held by the organization and its partners.

Consider, for example, the concept of *equity and accessibility.* CAPC and CPNP projects maintain that children, regardless of culture and socio-economic status, are entitled to opportunities to develop to their full potential.

Is this extended to volunteerism, viewing it as an opportunity for growth and development?

Where is the balance between equity and accessibility for volunteers and appropriate screening measures to protect children and vulnerable adults?

CHAPTER 2: LAYING THE GROUNDWORK

What about **empowerment**? Surely the opportunities and skill development offered to volunteers are empowering…or are they?   The objective may be to empower participants or volunteers with skill development. If volunteer opportunities encourage unrealistic expectations about employability however, the end result may be disappointing.

Think about **employment principles**. Are organizations maximizing resources or replacing employees with volunteers? It is critical that employees do not feel threatened or insecure by the presence of volunteers.

Some have argued that volunteerism reinforces a culture that continues to undervalue the work and contribution of **women** to society. How might an organization that held such a belief develop a volunteer program that is not contradictory to its foundational values?

None of these examples precludes the possibility of developing an incredible, positive and productive volunteer program. We hope, however, that they illustrate the kinds of questions that organizations need to address with all program development.

BRIGHT IDEA

Review

Rights and Responsibilities included in the Terrific Tools and Templates Section!

and

Volunteer Bill of Rights at www.ubalt.edu/alumni/BOGHBKsec3.htm

ORGANIZATIONAL CAPACITY

Does the organization have the capacity to involve volunteers? The Canadian Code for Volunteer Involvement suggests that:

> "Voluntary organizations recognize that volunteers are a vital human resource and will commit to the appropriate infrastructure to support volunteers."[4]

Appropriate infrastructure includes (but is not limited to):

1. Employee/Management Support
Do we have the support of the **Board of Directors**?
- Do they acknowledge the vital role of volunteers in the organization?

Do we have the support of **management**?
- Are resources dedicated to volunteerism?

RED FLAG

Getting employee buy-in is essential for effective volunteer management – watch out for subtleties that may indicate underlying resistance!

Do we have the support of **employees**?
- Are employees willing and able to work with volunteers?
- Do they have the necessary skills? Are they willing to learn?
- Have we clearly defined the roles and responsibilities of volunteers in relation to employees?
- Are there concerns about job security?

Do we have **policies** about…
- Volunteer recruitment, screening, orientation, training, supervision and recognition?
- Asking employees to volunteer their time?

2. Resources

Effective volunteer management requires dedicated resources.
- Is there a **volunteer centre/bureau** in the community?
- Do community **partners** have expertise in volunteerism or volunteers to share?
- Are there adequate **financial resources** allocated to volunteer management?

Are we willing to dedicate financial resources to volunteer management for:
- employee time for volunteer coordination?
- employee training, if necessary?
- reimbursement of volunteer expenses?
- volunteer recruitment, screening, orientation and training costs?
- volunteer recognition activities?

3. Legal Considerations

The full range of potential liabilities related to volunteerism is explored in Chapter 4. At this point, we highlight the following:
- Are there organizational **policies or procedures** that need to be considered?
- Is there a **collective agreement** that needs to be considered?
- Have we considered **liabilities**?
  - Do we have adequate and appropriate insurance coverage?
  - Can we reduce or transfer the risks?

4. Accessibility

Are we accessible to volunteers? Consider:
- Is our **location** physically accessible?

Is it geographically accessible?
- Are we prepared to address transportation issues?

Is the *environment* inviting? formal or informal?
- How can we make it comfortable?

Can we accommodate multiple *languages*?
- Can we provide interpretation?
- Can we minimize the use jargon?

5. Expectations

Are our expectations regarding volunteer roles and responsibilities realistic?

Can we recruit and train the people we need?

What is our back up plan?

Can we meet volunteer expectations?

ORGANIZATIONAL CULTURE

Does the organization value volunteers? The answer to this question can manifest itself in a variety of ways – from the subtle to the overt. Consider asking:

- Do we use phrases like "just a volunteer"?

- Do we treat volunteers as colleagues?

- Do we ask volunteers to be as committed as employees? What contingency plans will be put in place if not?

- Do we use different language with co-workers than we do with volunteers?

- Do we recruit program participants as volunteers?

- Are we expecting something for nothing?

- Will we invest adequate time, energy and financial resources into the volunteer program?

- Are there clear expectations, supports and reporting structures in place?

- Are we willing and able to include volunteers in our decision-making processes?

- Can we offer adequate workspace and tools to do the job?

DYNAMIC DOWNLOADS

Be sure to download:

What Volunteers can expect from Healthy Organizations
from:
http://www.volunteerbc.ca/tools/fornotforprofits.html#what

What Organizations can expect from Healthy Volunteers
from
http://www.volunteerbc.bc.ca/tools/forvolunteers.html#what

CHAPTER 2: LAYING THE GROUNDWORK

IN THE TOOLS SECTION…

Terrific Tools & Templates

1. Sample Codes of Ethics from:
   - Bruce Grey
   - Calgary Inter-Faith Food Bank
   - Children's Aid Society for the Districts of Nipissing & Parry Sound

2. Sample Rights and Responsibilities from
   - Kids West
   - Maison de la famille, Drummond
   - North Peace Community Resources Society

Relevant Resources

1. Canadian Code for Volunteer Involvement
2. Canadian Code for Volunteer Involvement Overview

Needs Assessment

Evaluation

Recognition

Record Keeping

Retention
- Placement
- Orientation &Training
- Supervision

COORDINATION

Recruitment & Screening

PROGRAM DEVELOPMENT

Implementation

Program Design
- Goals, Objectives & Activities
- Responsibility
- Risk Management
- Budget/Resource Development
- Policies & Procedures

In this chapter...

CHAPTER 3: GETTING STARTED

"The best volunteer program management serves to enable volunteer achievement, not limit it."
FROM THE TOP DOWN
www.volunteering.org.uk/workwith/fromtopdown.htm

WHAT IS A VOLUNTEER PROGRAM?

A *Volunteer Program* is an activity of the organization to coordinate and measure the contributions of volunteers. It channels and directs the multiple skill sets and motivations of volunteers to meet needs of both the volunteers and the organization.

PROGRAM DEVELOPMENT 101

Planning is essential to ensure that the first experience volunteers have with the organization is a positive one. Research with volunteers consistently shows that disorganized management[5] (especially when it wastes volunteers' time) is the greatest cause of volunteer dissatisfaction.

Volunteer management includes both program development and ongoing coordination.

Some stages of program development involve the entire organization, others may include only specific program teams.

The entire *cycle* of volunteer program development and coordination, however, must be covered to ensure program effectiveness. Program development sets the stage for ongoing coordination which, in turn, informs future program development:

RED FLAG

VOLUNTEER TURN OFFS
- Disorganized management
- Lack of Board support
- Paid employee indifference
- Limited orientation & training
- Lack of contact/support
- Wrong assignment
- Perks that are withdrawn
- Insufficient funding
VOLUNTEER CENTRE
OTTAWA-CARLETON

Needs Assessment

Program planning
♦ Goals, Objectives & Activities
♦ Responsibility
♦ Budget/Resource Development
♦ Risk Management
♦ Policies & Procedures

Evaluation

Recognition

Record Keeping

PROGRAM DEVELOPMENT

COORDINATION

Retention
♦ Placement
♦ Orientation &Training
♦ Supervision

Implementation

Recruitment Screening
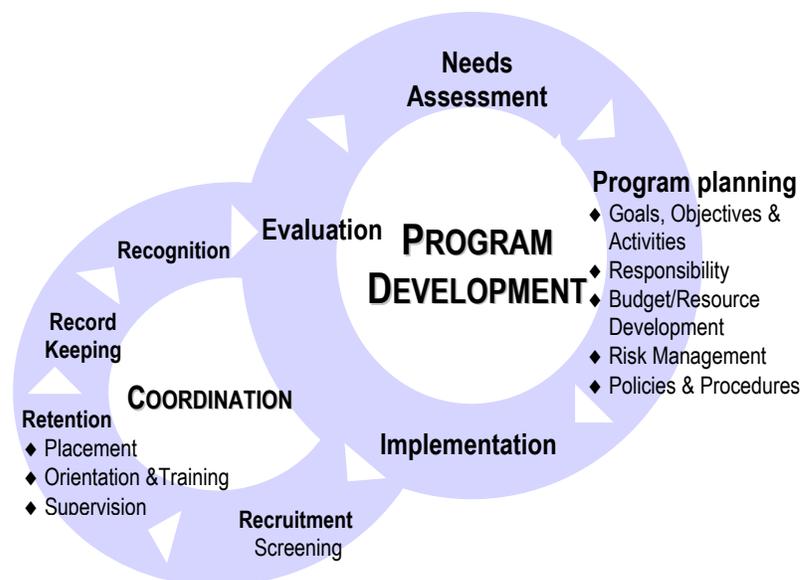
CHAPTER 3: GETTING STARTED

NEEDS ASSESSMENT FOR VOLUNTEER PROGRAMS

Needs assessments for volunteer programs are not unlike the needs assessments for all program development. They involve asking critical questions of key stakeholders and assessing the organizational capacity to meet those needs. (See Chapter 2)

To develop useful and meaningful volunteer programs, seek input of some or all of the following individuals:

- Program participants
- Volunteers
- Employees, especially those requesting volunteer assistance
- Program managers
- Directors

Facilitate a discussion about:

Goals & Objectives for the Volunteer Program
- What outcomes are expected?
- How will success be evaluated?
- What do volunteers currently contribute?
- What are the strengths of existing programs?
- Weaknesses?
- Gaps?
- Can gaps be addressed with volunteers?
- What could volunteers offer?

Qualifications/Skills required
- Who volunteers now?
- What kinds of volunteers are needed?
- Where can they be found?

Time and Location of work

Resources required
- employee, material & other

Responsibility
- recruiting, screening, orientating, training, supervising & recognizing volunteers

Foreseeable **problems** and potential **solutions** (see Chapter 4)

The information gathered will be used to design the program.

CHAPTER 3: GETTING STARTED

PROGRAM PLANNING

Program planning includes the development of activities, timelines and responsibilities related to the goals and objectives. It is often reflected in a *program logic model* and associated *work plan* (see "Terrific Tools and Templates" section for samples).

1. Goals, Objectives and Activities

The outcomes of the needs assessment formulate the goals and objectives of the volunteer program.

- *Goals* identify "what" will be done. What are the anticipated results (long term outcomes) of the volunteer program? Goals might include increased service provision or increased community capacity.

- *Objectives* identify "how" the goals will be reached. They tend to be more measurable. Objectives for a volunteer program might include increased number of volunteers involved in direct service or increased training opportunities for volunteers.

- *Activities* are the specific actions required to achieve the goals and objectives. They might include recruitment, screening, orientation, training, supervision and recognition activities.

Objectives are SMART
Specific
Measurable
Attainable
Relevant
Timely

2. Assigning responsibility

The responsibilities for Program Volunteer Coordination might be assigned to a single "Volunteer Coordinator" (paid or unpaid) or shared among several individuals.

Volunteer Coordination connects the work of the volunteers to the organization's mission and mandate in a clear and meaningful way. It makes the work of the organization and the integral part that volunteers play come alive. It provides the invisible background supports and structures that ensure satisfied volunteers and enhanced programs.

Volunteer coordination requires dedicated human resources. Whether this will be a single individual or a shared responsibility, a paid or unpaid position, will be determined by a variety of factors including but not limited to:

- budget
- geography/transportation
- language
- current employee structure & skills

CHAPTER 3: GETTING STARTED

RED FLAG

BRIGHT IDEA

Having a single individual dedicated to volunteer coordination can help ensure consistent messaging and a constant point of contact for the volunteers throughout their experience with the organization. It can also help focus organizational planning related to the volunteer program and clarify responsibilities.

Our colleagues tell us, however, that having a single individual responsible for volunteer coordination is not the norm for CAPC and CPNP projects across the country. While close to 80% of the respondents to our survey indicated that they currently use volunteers, less than 25% have a 'volunteer coordinator'.

Shared responsibility for volunteer coordination can bring a richness and variety of perspectives to the process and help develop closer relationships between the volunteers and employees.

Ensuring that there is clear delineation of responsibilities and lines of communication is essential in this model. Volunteers need to know to whom they are accountable.

Whatever the structure, it is critical to assign responsibility to individuals who value volunteerism are readily available and have the requisite skills and abilities to ensure effective implementation. (Sample job description in the Tools Section)

3. Budget
The projectizing worksheet included in the Terrific Tools & Templates section can be particularly helpful in assigning resources (human and financial) to the activities that need to be accomplished.

4. Risk Management
(see Chapter 4)

5. Policies and Procedures
(see Chapter 5)

SHARING THE PROGRAM PLANS

Everyone in the organization needs to be aware of the volunteer program, its relationship to and impact on their own roles and responsibilities. Sharing the plans, formally or informally ensures that awareness, offers the opportunity to invite further input and serves as a checkpoint that the program plan is consistent with the overall organizational plan.

IMPLEMENTATION

Implementation includes all of the steps, strategies and processes addressed in chapters six through eleven.
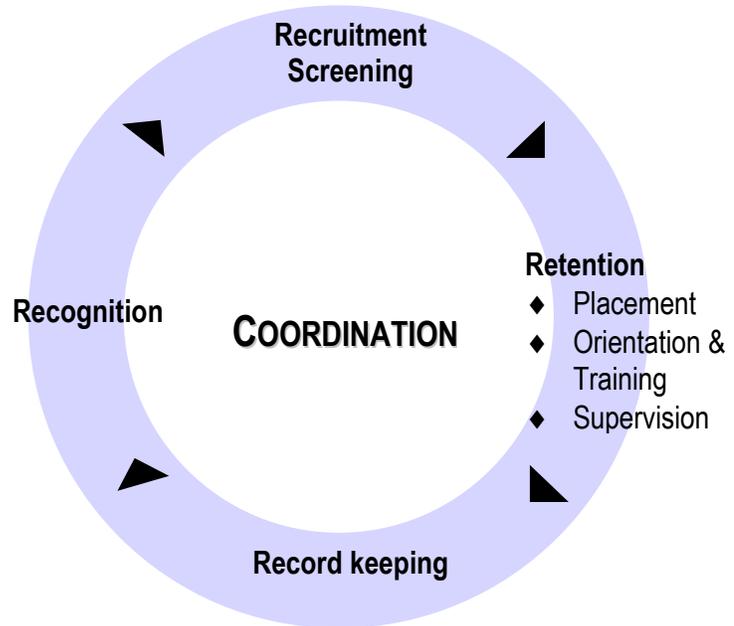
a. Recruitment

Effective recruitment requires an understanding or of what the organization needs, who volunteers, why, and where to find them. See Chapter 6.

b. Screening

Once we've got volunteers in the door, it is essential to determine their suitability. We've dedicated Chapter 7 to this subject.

c. Orientation and training

It is important to provide all volunteers with appropriate orientation to the organization and training for the roles they will be assuming and tasks they'll be undertaking. See Chapter 8 for more details.

d. Supervision and Recognition

After investing time, effort and resources into recruiting, selecting, screening, orienting and training volunteers, it's important to put as much in place as possible to ensure that they stay! Chapter 9 addresses volunteer supervision. Chapter 11 has lots of great ideas for recognition!

e. Record Keeping

Record keeping is an essential and integral part of an effective volunteer program. It provides information for program evaluation and planning, public relations and volunteer recruitment, orientation, training, supervision and recognition. See Chapter 10.

CHAPTER 3: GETTING STARTED

EVALUATING THE PLANNING PROCESS

Evaluation is an ongoing process – and an invaluable tool for ensuring quality programming, measurable program outcomes and satisfied, effective volunteers.

Evaluation can also justify the program to decision-makers (both internal and external) and assist to secure funding for the program.

Evaluation is informed by and informs all of the steps identified throughout this tool kit. It needs to answer the questions:

- Have we done what we set out to do? Have we:

    · sought input from program participants, experienced volunteers, employees and program management?

    · identified the benefits and challenges related to volunteerism?

    · identified goals, objectives, activities?

    · assigned responsibility?
        · for volunteer coordination
        · for the development and review of policies and procedures

    · allocated resources?

- Why or why not?

- What could we do differently?

- What are the next steps?

The answers lay the foundation for future program planning.

IN THE TOOLS SECTION…

Terrific Tools

1. Volunteer Coordinator Job Description Template
2. Program Logic Model Template
3. Workplan Template
4. Projectizing Worksheet from:
   - Our Children, Our Future / Nos enfants, notre avenir
5. Sample Job Descriptions from:
   - Calgary Inter-Faith Food Bank
6. Sample overview of shared responsibilities from:
   - Bruce Grey Children's Services

Relevant Resources

1. Organizations Assessing their Needs
2. Program Planning for Organizations
3. Strategic Planning

CHAPTER 4: "IT WILL NEVER HAPPEN TO US"

Needs Assessment

Program Design
- Goals, Objectives & Activities
- Responsibility
- **Risk Management**
- Budget/Resource Development
- Policies & Procedures

Evaluation

Recognition

PROGRAM DEVELOPMENT

Record Keeping

COORDINATION

Implementation

Retention
- Placement
- Orientation &Training
- Supervision

Recruitment & Screening

In this chapter...

CHAPTER 4: "IT WILL NEVER HAPPEN TO US"

WHAT IS RISK MANAGEMENT?

Risks are everywhere, in everything we do. Volunteer organizations are natural risk takers. We assess each risk and adapt our behaviour to minimize the risk, transfer it, eliminate it completely, or face it.

Risk is the chance of injury, damage or loss[6].

Liability is the legal responsibility for a particular act or event and the related consequences[7].

Risk Management is the process of recognizing and reducing risks to protect and safeguard the organization's resources.

Risk management enables organizations to develop appropriate operating policies, procedures, screening, orientation, training and supervision practices to protect volunteers, employees, participants and the organization.

The information, forms and templates offered in this toolkit are guidelines only. Organizations should consult with local legal, employment and insurance experts about their specific needs.

RISK MANAGEMENT 101

Risk Management is an ongoing process, occurring both at the beginning of any project or program and at regular intervals thereafter. Changing circumstances may also merit reviewing existing risk management strategies and processes.

We can't eliminate (or even anticipate) all risks, but we can:

RED FLAG

There are significant provincial variations in legislation – every organization is responsible for keeping informed regarding changes in the law.

This tool kit provides general information and guidelines only and should not substitute for legal advice. It is NOT the FINAL WORD.

Specific situations may warrant legal or other professional counsel.

Identify
the potential dangers and hazards

Assess
Or measure the risks against knowledge, skills and abilities

RISK MANAGEMENT

Evaluate & Revise

Implement
decision

Decide
To proceed, postpone, modify or cancel

CHAPTER 4: "IT WILL NEVER HAPPEN TO US"

IDENTIFYING THE RISKS

It is important to identify **potential risks** to the organization, to the volunteers, employees or program participants. Consider the risks to:

- *People*
  - participants
  - volunteers
  - board members
  - employee
  - general public

- *Property*
  - buildings
  - equipment
  - bank accounts

- *Revenue*
  - sales
  - grants
  - contributions
  - donations

- *Goodwill*
  - individual and organizational reputation

Equally important is identifying the **possible consequences** to people, property, revenue and goodwill should the risk be accepted.

EXAMPLES OF POTENTIAL RISKS

Risks related to volunteerism can be associated with:

1. Directors and Officers
Directors and officers are volunteers with the organization – and bear specific responsibilities related to risk management.

2. Personnel Issues
(especially if it's perceived that paid positions are being replaced with volunteers!) Consider the implications of volunteerism for policies related to:
- harassment
- discrimination
- alcohol or drug usage
- volunteer-employee or volunteer-participant relationships

BRIGHT IDEA

You are not alone!

Ask people who have recently done whatever you are considering doing.

Read books, visit websites.

3. **Vulnerable volunteers and program participants**
   - Have we screened and trained appropriately?
   - Are employees adequately trained?

4. **Health and Safety**
   (injuries from hazards, working conditions, communicable diseases, accidents)
   - Volunteers may or may not be covered by worker's compensation legislation – be sure to check the law in your area!
   - Many not for profit organizations are covered by their general liability insurance rather that worker's compensation.

5. **Automobile Usage**
   (if volunteers are passengers or drivers – with or without passengers)
   - organization-owned vehicles
   - volunteer-owned vehicles

6. **Professional and malpractice liability**
   (especially if volunteers are offering direct service)
   - Have they been adequately trained?
   - Are they members of professional associations?
   - Are they employees of other organizations offering in kind services?
   - Have license, Driving record, Certificate of insurance been verified?

7. **Property**
   - Accounts receivable
   - Buildings, contents
   - Extra expenses
   - Valuable papers
   - Fiduciary liability

ASSESSING THE RISKS

Once the risks have been identified, its important to weigh them against organization's knowledge, skills and abilities. Ask:

1. **How likely are they**?(i.e. the risks)?
   - risks increase when volunteers are involved in direct service
   - risks decrease when volunteers are never left unsupervised with participants

2. **What are the consequences?**
   - who could be harmed?
   - how?

BRIGHT IDEA

Try the online tutorials at www.nonprofitrisk.org .

Talk to experts –there are free 'dial a lawyer' services in every province that will offer a free initial consultation.

BRIGHT IDEA

Have you thought about asking program partners for certificates of insurance (especially if sharing space, employees or volunteers!)?

CHAPTER 4: "IT WILL NEVER HAPPEN TO US"

3. What is currently being done to reduce or manage the risks?
- policies and procedures
- insurance

4. What can we do to reduce the risks?
- adapt policies, procedures or activities?
- transfer the risks (insurance, partnership agreements, waivers)?

ASSESSING THE ORGANIZATION'S ABILITIES

Risks can be managed at their source, in the process and at the destination. Here are some strategies to consider:

1. ***Staying informed.*** Be aware of:
    - ***Organizational and individual rights and responsibilities***
      The law outlines our legal obligation to one another and protects and compensates us when those obligations are not met. Find out more about:
        - Criminal Code of Canada
        - Provincial Child Welfare Legislation
        - Canadian & Provincial Human Rights Law and Charters
        - Employment Standards Legislation

    - ***Legal duties of organizations***
      In some situations organizations may be liable for the actions of volunteers. It is important for organizations to understand the legal status, duties and liability of volunteers.

    - ***Legal duties of volunteers***
      Volunteers must have a basic understanding of their legal duties. Understanding some basic duties, such as the duty to take reasonable care, is crucial for every volunteer.

2. Ensuring **Volunteer Job Descriptions** are in place.
    - see Chapter 5

3. Ensuring **Policies** limit liability are in place.
    - see Chapter 5

4. Ensuring volunteers ***are screened, trained and supervised***.
    - see Chapters 6 – 9

5. ***Anticipating and preventing*** accidents before they occur.
    - This involves ongoing risk assessment, reduction and management strategies for all programs.

6. Ensuring the legal duties of **Boards of Directors** are implemented and respected.

7. Checking that ***insurance coverage*** is adequate.
    - For volunteers
    - For organizations
    - For Board Directors and Officers

DYNAMIC DOWNLOADS

Be sure to download:

Volunteers and the Law
from
www.publiclegaled.bc.ca.

It provides up-to-date Canadian information about legal interpretation of a variety of not-for profit and voluntary activities in very easy to read language.

Responsibility and Accountability: What Community-Based Programs Need to Know
from
www.hc-sc.gc.ca/hppb/childhood-youth/cbp/npfproject/index.htm

Federal Law & Social Policy
from
www.volunteer.ca/volunteer/screening_background.htm#Law

STAYING INFORMED: VOLUNTEERS AND THE LAW

We would like to acknowledge and thank The People's Law School for their permission to reproduce, use and adapt their publication Volunteers and the Law, (revised March 2001) produced by the School and Volunteer Vancouver. We have abridged and adapted it for inclusion in the Terrific Tools and Templates section.

The law outlines our legal obligations to one another, and protects and compensates us when those obligations are not met. There is not, however, a defined area of law known as Volunteer Law, nor is there a particular Canadian statute that outlines the roles and responsibilities of volunteers.

In general, the **law** provides rules of conduct that apply to all people. Violation of these rules could lead to government action (like a fine or imprisonment) or private action (being sued by another party).

Human rights is an area of law that deals with people's right to equal treatment without discrimination and the accommodation of differences. Depending on the circumstances involved, these laws may apply to volunteers, participants, employees and board members of voluntary organizations. There are three statutes that work together to protect the human rights of people in Canada.

1. Canada's Constitution has a **Charter of Rights and Freedoms**. Its list of protected grounds of discrimination is open-ended, so judges can add to it without governments having to change the Charter. It applies to all actions of government, but has been interpreted to affect organizations outside of government. As it is the supreme law of the land, all laws in Canada must comply with it.

CHAPTER 4: "IT WILL NEVER HAPPEN TO US"

2. The **Canadian Human Rights Act** is very similar. It applies on a federal level, such as government policy, a national employer, or a national volunteer organization.

3. The **Provincial Human Rights Codes** cover areas like employment, wages, housing and services. They protect against discrimination based on a variety of factors which may include race, colour, ancestry, place of origin, political belief, religion, marital status, family status, physical or mental disability, sex, sexual orientation, age, or unrelated convictions or offences. Not all provincial codes are equal.

LEGAL DUTIES

Every organization and every volunteer has legal responsibilities and duties. Organizations and volunteers who fail to meet these duties may be liable for injuries or damages that result. Organizations also have specific legal duties, such as:

- Duty to take reasonable care
- Duty to those injured by volunteers
- Duty to volunteer
- Duty to provide safe premises
- Duty to note discriminate
  (Organizations also have a legal obligation, called reasonable accommodation, to change activities and policies that are discriminatory.)
- Duty of confidentiality
- Duty to not assault

By far, the greatest legal concerns of volunteers and organizations surround the **care and supervision of children**.

When caring for children, the level of care required is not that of the average, reasonable person, but that of a careful parent or guardian. This is a high degree of care, since the volunteer must stand in the place of a parent who would take great care to protect a child against any foreseeable risks. Duties include:

- Duty to supervise
- Duty to not abandon
- Duty to not use excess force
- Duty to report child abuse
- Duty to rescue

These duties are explored in greater detail in both the full and abridged versions of Volunteers and the Law.

Applying the law to other volunteer activities is also important. Consider the potential risks when volunteers:

- Give advice
- Drive
- Produce materials, reports and newsletters
- Coordinate special events and fundraisers
- Act as Directors and Officers for the organization

Although Directors are generally volunteers, the subject of liability of Boards Directors is beyond the scope of this tool kit. There are many helpful resources that examine the responsibilities and liabilities of Boards of Directors in greater detail. (Dynamic Downloads on p. 4-5)

LIMITING LIABILITY

Preventative measures or the unique circumstances of the occurrence can limit the liability of both organizations and volunteers. These might include:

- Consents
- Waivers
- Standard practices or customs
- Disclaimers
- Policies that prevent liability
- Insurance

Everyone connected to a voluntary organization will need to consider how to pay for any claims that might arise, including the cost of paying for a legal defence.

Plans typically include preventing and minimizing liability, determining whether claims can be paid out of assets, and purchasing insurance.

Insurance is only one form of risk management. While it can go a long way in protecting volunteers, organizations and board members, there are limits to what insurance policies can and will cover. It is important that volunteers and organizations avoid a false sense of security simply because they are insured. Insurance companies may refuse to pay for claims, or sue to recover losses, from those that demonstrate disregard for avoiding risk.

RED FLAGS

Anyone who creates a situation that is appealing and inviting to children may be responsible for injuries that result if the child is drawn into this situation and hurt.

For example, a volunteer clown handing out balloons on the sidewalk of a busy street may be found liable for a child who dashes across the street to get a balloon. The volunteer should have anticipated the child's reaction and set up in a less hazardous spot.

Organizations may need to consider whether the law permits certain people to volunteer. For example, visitors or newcomers to Canada may not be able to work as volunteers unless they have a work visa. These individuals would not be considered under the umbrella of reasonable accommodation.

Programs like Employment Insurance and Social Assistance may also limit the volunteer activities of recipients.

CHAPTER 4: "IT WILL NEVER HAPPEN TO US"

RED FLAGS

Before granting or renewing a policy, insurers may also investigate an organization's claims history and ensure it has a risk management strategy in place (See Risk Management 101). For example, comprehensive or general insurance policies protect against theft, but insurance should be only one part of an anti-theft plan that includes strategies like proper

lighting, securely locked doors and windows, engraving computer equipment or regularly conducting security checks.

Be sure to explore the following insurance coverage options:

Insurance Options for Volunteers:
- **homeowner** or **contents** insurance
- **comprehensive** insurance may cover a number of potential risks, or particular coverage cab be added to policy
- **automobile** insurance coverage offers full protection for volunteer activities

Insurance Options for Organizations:
Insurance options for organizations will vary according to the types of activities in which the organization is engaged. There are five general types of insurance:

- Comprehensive general liability insurance
- Auto insurance
- Professional liability or malpractice insurance
- Insurance for those injured on the job
- Insurance Options for Boards and Directors:
  - Directors Indemnification
  - Directors and Officers Liability Insurance

DECISIONS, DECISIONS…

Once the information is at hand, a decision has to be made: Do we accept the risks and proceed, do we modify the activity, can we transfer the risks (contract or insurance), or do we decline, cancel or postpone the activity?

A decision to decline or cancel does not have to be permanent. Increased knowledge, skills and abilities might make it possible to proceed at a later date.

CHAPTER 4: "IT WILL NEVER HAPPEN TO US"

IF AN INCIDENT OCCURS

If an incident does occur, it is important to:

1. Make safety the immediate concern – both for the injured and others present.

2. Record details of the incident as soon as possible, including, where appropriate:
    - date and time of the incident
    - who was present and witnessed the incident
    - weather conditions
    - emergency procedures or equipment used, and
    - a description of the area where the incident took place

3. If necessary, ask other individuals (employees, volunteers, participants) to write their own accounts of the incident.

4. Provide a copy of the incident report to the organization and the volunteer.

EVALUATING RISK MANAGEMENT

It is important to review programs, policies, procedures and risk management strategies for all activities regularly. Review the checklists included in the tool kit.

General questions remain unchanged. The specifics are related to the contents of this chapter:

- Have we done what we set out to do? Have we:
    - identified potential risks?
    - assessed the risks?
    - reduced or limited the risks?

- Why or why not?

- What could we do differently?

- What are the next steps?

Don't be afraid to ask questions and call in experts to protect participants, employees, volunteers and the organization.

BRIGHT IDEA

Consider striking a Risk Management Committee and including an insurance broker as part of your 'team' of experts!

CHAPTER 4: "IT WILL NEVER HAPPEN TO US"

IN THE TOOLS SECTION…

Terrific Tools & Templates

1. Sample Risk Assessment Tool from:
   - Calgary Inter-Faith Food Bank
2. Risk Assessment Checklist Templates – adapted from Volunteers and the Law

Relevant Resources

1. Legal Liability and Risk Management
2. Volunteers and the Law – Abridged Edition

CHAPTER 5: POLICIES, PROCEDURES & GUIDELINES

Needs Assessment

PROGRAM DEVELOPMENT

Evaluation

Recognition

Record Keeping

COORDINATION

Retention
- Placement
- Orientation &Training
- Supervision

Recruitment & Screening

Implementation

Program Design
- Goals, Objectives & Activities
- Responsibility
- Risk Management
- Budget/Resource Development
- **Policies & Procedures**

In this chapter...

WHAT ARE POLICIES, PROCEDURES & GUIDELINES?

Policies, procedures and guidelines are an essential element of risk management and program development. They help define the role of volunteers in the organization and how they can expect to be treated.

Policies establish parameters and guide decision-making. They reflect the philosophy and culture, goals and objectives of the organization and create the foundation for volunteer involvement.

There are three levels of policy:

- *Organizational Policy*
  - generally approved by the Board of Directors
- *General Program Policy*
  - generally approved by senior management
- *Volunteer Program Policy*
  - generally recommended by program employees with senior management approval.

Procedures outline the steps involved in implementing policy. They can also be the traditional or established ways of doing things[8].

Guidelines provide outlines of policy or expected conduct[9]. They are often adapted into easy to use 'handbooks'.

RED FLAG

We understand that in some regions of the country, expense reimbursement or honoraria may be interpreted as income by social welfare and affect the recipient's income.

Be sure to check this when developing related policies!

Policies, procedures and guidelines provide the framework for making fair and consistent decisions and avoiding unnecessary 'judgment calls'. They can increase safety, decrease risk and offer:

- Interpretation of the values and beliefs of the organization
- Clear and defined expectations for volunteers and employees
- Standards, limitations and instructions
- Guidelines for acceptable behaviour
- Accountability – for the organization and the individual
- Mechanisms for quality control

Policies, procedures and guidelines are intended to be preventative in nature. They tend to be most effective when they are:

- Clear
- Concise
- Concrete
- Shared with everyone they affect

CHAPTER 5: POLICIES, PROCEDURES & GUIDELINES

POLICY DEVELOPMENT 101

CAPC/CPNP PRINCIPLES

Pregnant Women & Children First

Strengthening & Supporting Families

Equity & Accessibility

Partnerships & Collaboration

Community-based

Flexibility

DYNAMIC DOWNLOADS

Sample wording for volunteer policies
is available from:

http://www.volunteerbc.bc.ca/riskmanagement/index.html

and

www.volunteercalgary.ab.ca/ResourceCentre/policies

The simplest, most straightforward method of developing fair and comprehensive *volunteer policies*, *procedures* and *guidelines* is to review the organization's human resource policies and procedures, then *insert* 'and volunteers' where applicable or adapt as necessary.

Whether volunteer policies are integrated into existing Human Resource Policies and Procedures or parallel policies are developed, new program-specific policies will undoubtedly be required. In addition, all policies need to be reviewed regularly to ensure relevancy.

Policy development and review involves several steps that are often part of a larger organizational review and planning process:

1. Review the *values, vision, mission, goals and objectives* of the organization (see Chapter 2).

2. Review *CAPC and CPNP principles.*

3. Identify *potential risks* (see chapter 4).

4. Review *existing policies, procedures and guidelines.*

5. Consult with *program partners, stakeholders* and *local experts* (for example, many volunteer centres can offer assistance with policy development).

6. Review *relevant resources*, including internet sites.

7. *Edit existing or develop* new policies as required (the flexibility inherent in volunteerism might mean more frequent changes than with other policies).

8. Ensure policies are *shared* with all stakeholders.

Valuing Volunteers: A Volunteer Recruitment & Management Tool Kit for CAPC/CPNP Projects

CHAPTER 5: POLICIES, PROCEDURES & GUIDELINES

It's important to have policies that address all areas of volunteer activity. For example, CAPC/CPNP colleagues have developed policies to address the following:

1. **Planning/Risk Management**
   - Purpose of the Volunteer Program/Philosophy
   - Definition of a Volunteer
   - Wellness/Workplace Safety
   - Harassment
   - Insurance

2. **Recruitment**
   - Marketing
   - Special Case Volunteers
     - Participants as Volunteers
     - Employees as Volunteers
     - Employees' Family Members as Volunteers (especially if supervision by the employee is required)
     - Internal Candidates
     - Loaned Volunteers
     - Minors
   - Screening
     - Interviews
     - Record Checks
     - References
   - Acceptance/Volunteer Contract
   - Term of Office
   - Saying No
   - Employee Request for Volunteers

3. **Conduct/Program**
   - Absenteeism/Leaves of Absence/Substitution/Punctuality
   - Access to Participant Information
   - Accountability
   - Code of Conduct
     - Confidentiality
     - Conflict of Interest
     - Representation in the Media/Public
     - Use of Organizational Affiliation
     - Alcohol/Drug Usage
     - Smoking
     - Dress Code
     - Identification

BRIGHT IDEA

Have you considered involving participants in volunteer policy development?

TERRIFIC TOOLS & TEMPLATES

A policy manual template is included in the tools section! Simply replace CAPC/CPNP Project XYZ with the organization's name – and it's ready to go.

4. *Orientation and Training*
   - Required Orientation
   - Specialized Training
   - Continuing Education

5. *Supervision*
   - Probation
   - Record Keeping
     - Activities
     - Hours
     - Personnel File
   - Performance Appraisals
   - Recognition
   - Discipline
   - Immediate Dismissal
   - Grievance/Complaint Procedure
   - Reporting Obligations
   - Employee-Volunteer relations

6. *Evaluation*
   - Program Evaluation

7. **Miscellaneous**
   - Strikes
   - Expense Reimbursement

Sample policies and a volunteer policy checklist are included in the tools section.

DYNAMIC DOWNLOAD

Be sure to download:

A Matter Design: Design Theory and Application to the Voluntary Sector from http://www.volunteer.ca/volunteer/canada_mgmt_kiosk_resources.htm

WHAT ARE VOLUNTEER JOB DESCRIPTIONS?

Policies outline the need for job descriptions. *Volunteer job descriptions* themselves provide another kind of framework – defining the roles, responsibilities and expectations of volunteers in particular positions.

Some organizations find it helpful to have several, very specific job descriptions; others have told us that creating job categories enables the organization to place volunteers in a variety of roles that require similar training and skills.

Components of a good job description include:

- a **title** that clearly reflects the role the volunteer will play

- a list of **qualifications** the volunteer must have or maintain

- **screening measures**

- volunteer's **functions and duties**

- **limits** to the volunteer's authority

- a clear statement of the **time commitment** required of the volunteer
  - term of office
  - hours per week or month

- a summary of the **training and supervision** the volunteer can expect

- the names and positions of immediate **supervisors**

- **benefits** and supports available.

All new or revised volunteer job descriptions must be approved per organizational procedures before being implemented.

Finalized job descriptions should be archived for future reference (even if they are later adapted, it is helpful to have a record of the original agreement with the volunteer).

BENEFITS OF VOLUNTEER JOB DESCRIPTIONS

Clear, complete and current job descriptions benefit both the individual volunteer and the organization. They:

- inform recruitment strategies
- are an extra layer of protection in establishing legal responsibility for actions of both volunteers and employees
- assist in clear communication between employees and volunteers
- provide volunteers with a description of their duties and responsibilities
- outline the supports available
- provide the basis for assessing the suitability (for both placement and later performance reviews)
- determine the need for extraordinary screening measures

BRIGHT IDEA

Provide a copy of the current job description (s) to volunteers or potential volunteers (as a recruitment tool!).

TERRIFIC TOOLS & TEMPLATES

Sample Job Descriptions used by CAPC/CPNP colleagues are included in the Terrific Tools and Templates section!

CHAPTER 5: POLICIES, PROCEDURES & GUIDELINES

SAMPLE JOB TITLES

CAPC/CPNP colleagues tell us that they use volunteers in a multitude of roles. The list includes:

- Administrative Support Volunteer
  - · data entry
  - · filing
  - · photocopying
  - · reception/telephone
  - · desktop publishing
  - · computer support
- Advocate
- Board Members
- Breakfast Program Volunteer
- Breastfeeding Support Volunteer
- Building Maintenance Volunteer
- Child Abuse Education Assistant
- Childcare Provider/ Babysitter/Children's Program Volunteer/Playgroup Assistant
- Cleaners
- Clothing Exchange Assistant
- Coach
- Committee/Coalition Member (chair, secretary, treasurer)
- Community Garden Volunteer
- Community Kitchen Volunteer/Cooking Program Assistant
- Counsellor
- Demonstrator (crafts, gardening, cooking…)
- Director
- Driver
  - · to deliver meals, food boxes, clothing…
  - · to offer transportation to program participants
- Elder
- Event Planner
- Facilitator
- Field Trip Volunteer
- Food Bank Volunteer
- Friendly Visitor
- Fundraiser
- Greeter
- Grocery Buddy
- Home Support Services Volunteer/Home Visitor
- Knitter (toys and clothes)
- Life Skills Peer
- Mentor/Peer Role Model

BRIGHT IDEA

Do you have volunteer job descriptions that might be of use to our CAPC/CPNP colleagues?

Why not email it to us at mail@rrhc.on.ca or mail@ourchildren-ourfuture.net and we'll post them with the electronic copy of the tool kit!

RED FLAG

Volunteer and employee roles, titles and job descriptions are determined locally. Titles are included here because they have been used by our CAPC/CPNP colleagues – not to suggest that these roles SHOULD or SHOULD NOT be performed by volunteers!

- Newsletter Writer/Editor
- Peer Nutrition Worker
- Photographer (especially babies)
- Planning Team Member
- Proposal Writer
- Public Relations/Promotions Assistant
- Resource or Toy Library Assistant
- Social Convenor
- Special Event Volunteer
- Special Friend
- Supportive Employment Volunteer
- Translator/Interpretor
- Tutor
- Youth Mentor

Complete job descriptions for many of these titles are included in the Terrific Tools and Templates section.

VOLUNTEER COMMITTEES

Many volunteers in the CAPC/CPNP context volunteer on **committees** – advisory committees, steering committees, boards of directors. Sample job descriptions for individual volunteers serving on committees are included in the tools section.

Terms of reference describe the function and responsibility of the committees as a whole rather than the duties of particular members. A sample terms of reference submitted by a CAPC/CPNP project is included in the tools section.

CHAPTER 5: POLICIES, PROCEDURES & GUIDELINES

EVALUATING POLICIES, PROCEDURES & GUIDELINES

General questions remain unchanged. The specifics are related to the contents of this chapter:

- Have we done what we set out to do?
    - Do we have policies, procedures and guidelines in place?
    - Do we review them regularly?
    - Are they communicated with all employees, volunteers and other stakeholders?
    - Are they followed consistently and equitably?

    - Are they consistent with National and Provincial Human Rights Legislation (see chapter 4)?
    - Do all volunteer assignments have job descriptions?
    - Do we review them regularly?

- Why or why not?

- What could we do differently?

- What are the next steps?

IN THE TOOLS SECTION…

Terrific Tools & Templates

Sample Job Descriptions from:
1. Brighter Futures Society "Parenting for Future"
    - Classroom Elder
    - Garden Leader
    - Child Assistant
    - Garden Assistant
    - Guest Speaker

2. Our Children, Our Pride / Fiers de nos enfants
    - Playgroup Leader
    - Blank Template
    - President
    - Secretary
    - Committee Chair
    - Funding Committee Member
    - Support Group Leader

3. Maison de la Famille Vallée de la Lièvres
   - Animatrice Programme Tic Tac Toc
   - Comité des fêtes
   - Animatrice halte garderie

4. Bruce Grey Children's Services
   - Cradlelink Home Visitor

5. Our Children, Our Future / Nos enfants, notre avenir
   - Volunteer Driver

6. Calgary Inter-Faith Food Bank
   - Phone Room Interviewer
   - Best Beginning Shopper
   - Baby Hamper Shopper
   - Care Connect- Hamper preparation
   - Maintenance Volunteer

7. Rural Response for Healthy Children
   - Public Relations Assistant
   - Parent Education Facilitator
   - Child Abuse Prevention Assistant (2)
   - Child Care Providers
   - Translators and Tutors

Sample Policies from:

1. Calgary Inter-Faith Food Bank
   - Screening
2. Our Children, Our Future / Nos enfants, notre avenir
   - Transportation Policy
3. North Peace Community Resources Society
   - General Policy

Policy Wording Template
(Policy Manual Template is available on the CD Rom)

CHAPTER 6: RECRUITMENT

Needs Assessment

PROGRAM DEVELOPMENT

Program Design
- Goals, Objectives & Activities
- Responsibility
- Risk Management
- Budget/Resource Development
- Policies & Procedures

Evaluation

Recognition

Record Keeping

COORDINATION

Implementation

Retention
- Placement
- Orientation &Training
- Supervision

Recruitment & Screening

In this chapter...

WHAT IS VOLUNTEER RECRUITMENT?

Volunteer Recruitment is the process of attracting individuals to volunteer for the organization.

Effective volunteer recruitment has been defined by The Ontario Ministry of Agriculture, Food and Rural Affairs as: "Getting the right person in the right job, with the right skills at the right time."[10]

Effective volunteer recruitment strategies vary, but share common elements:

- They are *consistent* with the organization's overall public image.

- They *identify specific groups* of potential volunteers (i.e. volunteers whose interests and skills match those of the organization).

- They *tailor strategies* to identified groups.

- They are for a *specific purpose* (i.e. the jobs are well defined and clearly communicated to prospective volunteers).

RED FLAG

Ensure you recruit as many volunteers as you need but don't recruit more than you can handle.

If there is not enough work for volunteers to do, they may lose interest and leave, which, in turn may affect the reputation of the organization and the ability to recruit in future!

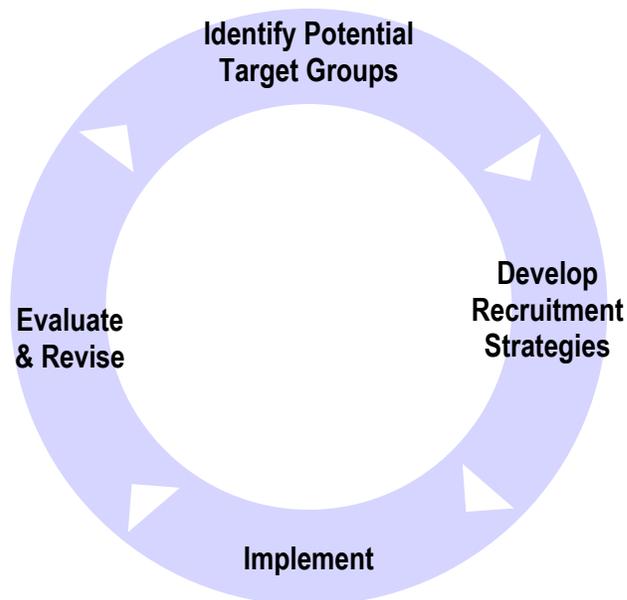## WHAT ARE THE BENEFITS OF VOLUNTEER RECRUITMENT?

Attracting volunteers to the organization offers the obvious benefit of having volunteers for the program. Effective volunteer recruitment increases the chances of:

- finding the right person for the position

- creating a win-win situation for both the organization and the volunteers

- saving time in the long run if the recruited volunteers are satisfied in their positions and provide a longer period of service for the organization

CHAPTER 6: RECRUITMENT

VOLUNTEER RECRUITMENT 101

Strategic volunteer recruitment requires planning. It is important to:

Identify Potential Target Groups → **Develop Recruitment Strategies** → **Implement** → **Evaluate & Revise** (cycle)

The 2000 National Survey of Giving, Volunteering, and Participating indicates that volunteers agreed that their motivations included[11]:

- *Believing in the cause* of the organization (95%)
- *Using skills* and experience (81%)
- Being *personally affected* by the cause of the organization (69%)
- *Exploring* one's own strengths (57%)
- Volunteering with *friends* (30%)
- Fulfilling *religious obligations* or *beliefs* (26%)
- Improving their *job opportunities* (23%) by:
  - refreshing skills
  - networking with potential employers
  - adding recent work-related experience to their resume
  - fulfilling a course requirement or prerequisite

Others volunteer because they want to:

- *contribute*/make a difference in their community
- *give back* to those who helped them or assist others
- meet *new people*
- feel *needed*
- *challenge* themselves

"Although it was not recognized as a motivation for getting involved in the first place, the opportunity to accomplish something was what kept them coming back to volunteer tasks that were sometimes stressful, depressing or otherwise difficult."

VOLUNTEER CENTRE
OTTAWA CARLTON

Valuing Volunteers: A Volunteer Recruitment & Management Tool Kit for CAPC/CPNP Projects

CHAPTER 6: RECRUITMENT

IDENTIFYING POTENTIAL TARGET GROUPS

To recruit the right people with the right skills for the right position at the right time, it is important to define the job (see chapter 5) and consider why potential volunteers might want to volunteer.

Consider reviewing the following questions:

- "Who currently volunteers with us?"

- "What kind of volunteers do we want?

- "What skill sets would complement our employees?"

- "Who isn't volunteering with us?"

- "Why?"

When developing recruitment strategies it is often helpful to narrow our focus and target our efforts to specific groups with shared characteristics or interests. When seeking volunteers, CAPC/CPNP colleagues across the country suggest considering the following groups:

Program Participants
CAPC and CPNP projects are somewhat unique in the degree to which program participants are actively encouraged to volunteer in the programs.

Volunteering provides an excellent opportunity for program participants to contribute to the project and develop new skills in a safe environment. When individuals move back and forth between participating and volunteering, clear expectations need to be in place to ensure smooth transition.

Members of the Organization
Not-for-profit or charitable corporations often have members – who already have a vested interest in the purpose of the organization. It's important not to overlook them when recruiting.
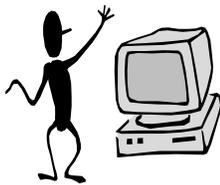
Youth
An energetic group – youth represent 29% of all Canadian volunteers, averaging 130 hours of volunteer time each in 2000[12]. Recruiting this group does have implications for risk management and all aspects of volunteer coordination. It is important to review the organization's policies, liability insurance, screening, orientation, training and supervision practices.

SUCCESS STORY

One CAPC/CPNP Project told us:

"We have been lucky to graduate participants to assist with our cooking program. Now one of the participant volunteers facilitates the Community Kitchens Program with minimal input from the staff nutritionist. The volunteer suggested renaming CK to the Meal Makers Club – and there appears to be even more interest and participation."

CHAPTER 6: RECRUITMENT

Specific policies and procedures, such as parental permission or adapted screening (police records checks completed on persons under 18 will not reveal any information) and supervision processes (always having an employee or adult volunteer present) may need to be developed. Adaptations may be a simple as ensuring that youth volunteers are paired with adults at all times.

Youth volunteer programs are most effective when youth are involved from the outset – planning, promotion, etc. Don't overlook this key detail!

University and College Students
University and college students are often highly motivated to volunteer in their field of study – which means that they bring additional knowledge and skill to the program. Few, however, are parents – something to be considered when developing job descriptions and assigning responsibilities.

Families
Who better to volunteer with programs that put families first than families themselves? Family friendly volunteering is addressed in the next section.

Older Adults/Early Retirees
46% of all Canadian volunteers were over the age of 55 in 2000[13]. Volunteers over the age of 65 contributed the highest average number of volunteer hours (269/year) of every demographic group.[14] The largest increase in number of volunteer hours contributed between 1997 and 2000 was for volunteers over the age of 55.[15]

Early retirees have many skills and newly found time on their hands! It's usually wise, however, to wait until they've been retired for about six months or so – so they've had time to develop new routines and think about how they'd like to dedicate their time, skills and energy.

Ethnocultural Volunteers
Ethnocultural volunteers volunteer for the same reasons as everyone else – but may face many more barriers to volunteering.

Groups and Service Clubs
Existing groups and service clubs often share an interest or skill that can benefit the organization. They can often offer an already developed team of experts, especially for events or one time 'work bees'. One CAPC/CPNP Project has recruited the local Quilting Guild and Busy Bees Quilting Club to make baby quilts to give to program participants. A local seniors' group also knits, crochets and sews baby items for the program.

RED FLAG
When developing job descriptions for students, be aware that flexibility is needed around exam time, reading week and summer vacations!

DYNAMIC DOWNLOADS
Be sure to download:

Stronger Together: Recruiting & Working with Ethnocultural Volunteers
from
http://www.nald.ca/fulltext/heritage/ComPartnE/Strongr1.htm

Volunteer Connections: New strategies for involving Older Adults
from
http://www.iyvcanada.org/getinvolved/building/php

DYNAMIC

DOWNLOADS

Be sure to download:

Volunteer Connections: The Benefits of Employer-Supported Volunteerism from www.iyvcanada.org/getinvolved/building.php

The Canadian Employee Volunteer Programs Survey from www.volunteer.ca/volunteer/canadn_corporate_surveu.htm

Other Service Provider Organizations

When briefing community colleagues about services offered by CAPC/CPNP, don't forget to mention the volunteer opportunities available.

Corporations

Many corporations offer flexible work arrangements to encourage volunteerism or 'loan' volunteers (employer-sponsored volunteerism) to community organizations. With employer-sponsored volunteerism, the onus of responsibility for the actions of the volunteers (and associated liabilities) usually remains with the corporation.

Some corporations choose to foster team building within their own organization by volunteering, so they may be interested in a one time multiple volunteer opportunity.

Corporations can also be useful contacts for accessing related professional associations – consider asking them to publish a request for volunteers in communications with these groups.

Professional Associations

CAPC/CPNP projects across the country avail themselves of volunteered professional services ranging from legal or financial counsel on Boards of Directors to 'in kind' plumbing repairs. Professional Associations can be an excellent contact point for recruitment.

Chambers of Commerce

Chambers of Commerce have regular contact with a variety of corporations and small businesses who may be able to consider employer-sponsored volunteerism or act as a conduit of information to employees and associates. Consider asking to speak at their next meeting or have an article about the organization profiled in an upcoming newsletter!

Loaned Volunteers

A variety of different relationships can be developed to 'share' volunteers. Some CAPC/CPNP projects, for example, have entered into purchase of service or partnership agreements with community partners who already have volunteer drivers. The community partner recruits, selects, screens, trains, supervises and recognizes the volunteers. The CAPC/CPNP projects are able to access these volunteers for their programs. Others have created an 'intergenerational program' with seniors who volunteer for partner organizations providing program supports to CAPC/CPNP projects (e.g. such Collective Kitchen co-facilitators or rocking babies).

CHAPTER 6: RECRUITMENT

BRIGHT IDEAS

Organizations such as McDonald Youth Services access volunteers from around the world. See http://www.mys.mb.ca/volunter/index.html for more information.

Additional great ideas for virtual volunteers can be found at Virtual Volunteering Project – http://www.pch.gc.ca/cp-pc/ComPartnE/pub_list.htm

DYNAMIC DOWNLOADS

Be sure to download:

**Family Volunteering:
A Discussion Paper**
from
www.volunteer.ca/volunteer/canada_family.htm

**Family Volunteering:
The Ties that Bind**
from
www.canadianheritage.gc.ca/progs/pc-cp/pubs/e/Family.htm

Virtual Volunteers

Consider recruiting volunteers via the internet. Over 500 organizations across Canada are participating in virtual volunteering – where volunteers connect electronically to the organization.

Some organizations also recruit e-volunteers – volunteers from around the world who create databases or websites or other technological applications!

PROMOTING FAMILY FRIENDLY VOLUNTEERING

Many CAPC/CPNP participants also volunteer with projects. CAPC/CPNP program participants, by definition, are parents (or soon to be parents) of young children.

Family-friendly volunteering offers volunteer opportunities that honour the importance of family by encouraging families to spend quality time together, doing something meaningful and important to them. It can promote civic responsibility and enhance a family's sense of community.

There are many simple and effective ways to make volunteer workplaces family-friendly.

Our CAPC / CPNP Colleagues suggest:

- Offering reimbursement for childcare expenses

- Providing childcare on site

- Being flexible if volunteers cannot fulfill a volunteer task due to family commitments

- Providing tasks volunteers can do from home

- Encouraging participants and their children to continue as volunteers once they graduate from the program.

CHAPTER 6: RECRUITMENT

DEVELOPING A RECRUITMENT STRATEGY

When planning a volunteer recruitment strategy, consider that the 2000 National Survey of Giving, Volunteering, and Participating[16] reported that Canadian volunteers aged 15 and older became involved in volunteer work because they:

- Were **asked** by someone in the organization (30%)

- Were **approached** the organization themselves (16%)

- Were **members** of the organization (15%)

- Had a **child** or **spouse involved** (12%)

- Were asked by a **friend** or **relative** outside the organization (9%)

- Were **nominated**, appointed or elected (<5%)

- Were **asked** by a boss or employer (<5%)

- **Responded** to a public appeal (<5%)

These results challenge us to ask the questions such as:

- Who can we personally ask to volunteer?

- Who do our volunteers know that they can ask to volunteer?

- Who has been affected by the services we offer? And is now in a position to volunteer?

The tendency for CAPC/CPNP projects to ask participants to volunteer might just explain our staggering success in this arena.

During 2001, **CAPC/CPNP** projects reported an incredible **924,091 hours of volunteer services**!

CHAPTER 6: RECRUITMENT

PROMOTIONAL MATERIALS 101

Recruitment activities and materials influence the public perception of the organization. They need to be consistent with other promotional activities.

To appeal to potential volunteers, consider:

- Highlighting the *value* of the services the organization provides. Remember, 95% of volunteers volunteer with an organization whose cause they believe in!

- Including *testimonials* from current or past volunteers

- Answering the question, *"What's in it for you?":*
  - Satisfying and enjoyable volunteer experience
  - Training
  - Flexible time commitment
  - Reimbursement for expenses

- Providing *basic information:*

  - *What* they will be doing
  - *Where* they will be doing it
  - *When* they will be doing it
  - *Why* it is important
  - *Qualifications* required and/or *training* offered
  - *Screening* information
  - *Time commitment*
  - Current *contact information*

It is important to remember that recruitment information will be seen by program participants, partners and potential donors as well as potential volunteers.

BRIGHT IDEA

When designing recruitment materials,
USE POSITIVE IMAGES and **keep messages**:
SIMPLE
CONSISTENT
REALISTIC

Remember, people will only notice and recall the key points!

RED FLAG

Remember accessibility! Black or dark blue on a light colour is much easier to read than white on red, for example!

CHAPTER 6: RECRUITMENT

GETTING THE MESSAGE OUT THERE

RED FLAG

If you ask volunteers to make public presentations, ensure that they have appropriate training (and highlight the need for confidentiality when recounting personal experiences!)

BRIGHT IDEAS

Volunteer Canada has links to Volunteer Centres across Canada at http://www.volunteer.ca/volunteer/vol_centres.htm

Ideally there should be a link to the volunteer opportunities page from the organization's home page, employment opportunities and donor's pages.

Volunteer Recruitment is an ongoing process, integrally intertwined with all the public relations functions of the organization and as such, the responsibility of all who represent the organization.

Volunteer opportunities should be part and parcel of every public presentation about the services of the organization. When the presentation is focused primarily on volunteers, it will have much more impact if offered by current volunteers who can talk about their own experiences!

There are a variety of lower cost options to consider to 'get the message out there'. CAPC/CPNP colleagues tell us that they've experienced success by:

1. Contacting Community Volunteer Centres
In communities where they exist, Volunteer Centres can be invaluable resources. They may already have a list of eager and willing volunteers, perfectly suited to the organization or task. In some cases, they may have already completed preliminary screening activities.

Volunteer Centres need to know about the organization, its programs and volunteer needs as well as the unique opportunities or benefits offered in order to refer potential volunteers appropriately. They may also provide alternatives for volunteers who may not be suited to the organization.

2. Including recruitment information in all communications
The value the organization places on volunteerism, the need for volunteers and the opportunities available should be reflected in all organizational materials.

Consider newsletters, websites, flyers, bulletin boards, windows or mailouts.

3. Informing current volunteers
The best volunteer recruiters are happy volunteers! Make sure that current volunteers are aware of the value they bring to the organization, the variety of opportunities offered and the fact that new volunteers are always needed and appreciated.

People like to volunteer with their friends. Encourage current volunteers to share recruitment information with the people they know. Make it even easier for them to do so by sponsoring a "Bring a Friend" Introductory Luncheon.

4. Contacting Community Partners

Most organizations have a variety of ways of communicating with stakeholders. They may have bulletin boards or windows where they'd be willing to post recruitment materials. They may need filler for newsletters or be persuaded to include recruitment materials in a mailout (especially if volunteers could stuff envelopes!).

Remember, most volunteers come to organizations through personal experiences or referrals so if someone within the partner organization is willing to write a testimonial or personal recommendation, all the better!

5. Contacting local media

Local media often have community announcement segments available for non-profit organizations free of charge or at a reduced rate. Be sure to ask about "Public Service Announcements" (PSAs) – sometimes you can even persuade them to help you draft a more effective message!

Consider asking to be interviewed or to have an article written – especially about a particular event, an increased need or profiling a remarkable volunteer accomplishment. When doing so, be prepared for a request to interview a volunteer – and have someone available (and suitably prepared).

Local papers are sometimes more open to publishing an article if a draft is prepared and sent to them – it's less work for them.

Press releases can also be helpful – if well-drafted and used sparingly. Press releases should be dated, brief, factual and related to a specific need, event or accomplishment. The most important information should be available to the reader in the first sentence. Samples are available in "Promoting Volunteerism".

It's always helpful to understand the local news cycle. If, for example, a community publishes a weekly paper and it always goes to press on Mondays, Friday afternoon might be a good time to send a draft article – just in case it's been a slow news week and they're looking for local filler! If a community has a daily paper, take note of which days of the week the news tends to be slower – they could be the days when the paper is more open to local community input.

6. Writing letters to the editor

Letters to the Editor is one of the most read sections of local papers. Keep an eye on local events or recent articles and look for a reason to write to the editor. Like radio interviews or newspaper articles, this strategy is most effective if linked to a particular need or event.

BRIGHT IDEAS

Many local cable stations will run advertisements for free. Some will also run videos about local programming and opportunities!

Think about having the media department of the local high school or community college develop a video about your organization – its services and volunteer opportunities – then ask the local cable company to play it at regular intervals!

Don't forget to adapt recruitment flyers into audio-visual presentations that are prepared for the organization!

7. Contacting Marketing and Communication Programs

Local community colleges, universities, and even high schools have marketing and communication programs. They might be persuaded to develop a comprehensive recruitment campaign or specific promotional tools for the organization as part of their course of studies. The students volunteer to recruit volunteers: a win-win!

8. Hosting Volunteer Fairs and Open Houses

This strategy can be particularly effective when done in partnership with other community organizations that work with volunteers.

9. Strategically Placing Organizational Displays & Information

Many organizations have display boards that remain in their carry cases between presentations. One CAPC project told us that they leave the display and associated materials at a local mall between presentations. A volunteer checks weekly to replenish the information! Another ensures that their display is at as many fall fairs as possible.

Don't forget about "Welcome Wagon" – ensure that information about the organization and its volunteer opportunities is included in the package they offer newcomers to the area!

10. Posting recruitment flyers

Think about places people congregate in the community, places people go regularly – or places where people have to sit and wait!
Where are there windows, walls or bulletin boards where information could be posted? Consider:

- libraries
- arenas
- community centres
- high schools
- post offices – especially where people pick up their mail
- churches
- doctors' offices (including examining rooms)
- dentists' offices
- local businesses
  - hairdressers/barber shops/beauty salons
  - laundromats
  - coffee shops
  - supermarkets

It's important to ensure that these postings are kept current, looking new, interesting and appealing. This means keeping track of where information has been posted and returning regularly – an excellent job for the right volunteer.

CHAPTER 6: RECRUITMENT

11. Using e-recruiting
In addition to posting volunteer opportunities front and centre on the organization's web site, consider using an online database for recruiting.

12. *Translating* recruitment materials
Consider translating recruitment materials into languages spoken by new immigrants to the area.

13. Remembering Church Bulletins.
Many churches encourage members to be active in their community and are more than willing to include information in their bulletins. Call churches well in advance to find out their deadlines – or make it even easier by creating a one page insert that will fit in the bulletin.

14. Approaching Corporations.
Most major corporations have identified a charitable interest. Tailoring the approach to ensure that volunteer opportunities reflect the identified interest can be helpful. When approaching corporations, it is important to *be prepared*. Review their mission statement, values, beliefs and charitable interests (usually available in annual reports or other public documents).

Identify the right *contact person* – this may take some time and effort, but will be well worth it in the long run. The right person is usually someone who has a personal connection with the values and purpose of the organization.

Human resource departments can be very helpful – since they may well be aware of the learning goals of present employees or the interests of early retirees – consider asking to speak at a pre-retirement seminar.

As a first step, consider providing the corporation with:
· an *information package* about the organization
· a list of *specific tasks* (noting the skills required – particularly if there is a match between the company's expertise and the organization's need)
· a *schedule* or time frames for potential volunteers

Keep it *brief* – limiting the pitch to a single page is helpful. Clearly identify the *benefits* to the corporation. Public recognition for the corporation will encourage continued support.

CHAPTER 6: RECRUITMENT

RECRUITMENT CYCLES

Volunteer recruitment tends to be cyclical. Certain times of the year tend to be key times for recruitment – because they are the times when people make decisions about their lives or firm up their schedules for the coming months.

January can be a peak month for recruitment – and allows time for the volunteer to become actively involved with the program before summer slow-down (if the organization experiences slow downs!).

Spring can be a critical time for recruiting summer volunteers – either students or 'snowbirds'.

Late summer is the time when most families with school age children and many people who've enjoyed a quieter summer, begin to consider commitments for fall or school year.

INFORMATION PACKAGES

Volunteers will respond to recruitment activities with a myriad of questions. Being well-prepared for those questions will go a long way in making a good first impression.

Many CAPC/CPNP projects have developed information packages that they provide to interested individuals. They can include:

- cover letter thanking potential volunteer and outlining application process
- brochure
- description of volunteer opportunities
- examples of press coverage
- application
- information about screening process

Providing information packages may offer the organization the opportunity to follow up at a later date – asking if the volunteers have received the information, if they have any questions and if they are is still interested in volunteering with the organization.

CHAPTER 6: RECRUITMENT

FOLLOWING UP

It is critical to follow up on preliminary inquiries promptly. This may be done via information packages, tours of the facilities or a simple phone call inviting the individual to complete an application or attend an introductory orientation session.

TOURS OF THE FACILITY

Tours of the facility can be a wonderful opportunity to provide general information to potential volunteers. They also offer volunteers the opportunity to get a flavour of the organization and the roles they might play. Depending on the nature of the programming, confidentiality of participants may limit some tours.

CHAPTER 6: RECRUITMENT

EVALUATING RECRUITMENT

One of the most effective ways of evaluating recruitment strategies is to ask new recruits how they heard about the volunteer opportunities or why they decided to volunteer with the organization.

Consider tracking this information through the application process, then reviewing regularly to discover which recruitment strategies were most effective for recruiting dedicated and long-standing volunteers!

General questions remain unchanged. The specifics are related to the contents of this chapter:

- Have we done what we set out to do?
  - Who volunteers with us now?
  - Why do volunteers choose our organization?
  - What do our current volunteers contribute?
  - Who would we like to volunteer?
  - Do we recruit from our target populations?
  - Are our recruitment messages clear and realistic?
  - Do we use a variety of recruitment techniques?
  - Are we able to respond appropriately to volunteer inquiries?
  - Do we have positions suitable for those who volunteer?
  - Do we need to develop additional job descriptions?

- Why or why not?

- What could we do differently?

- What are the next steps?

IN THE TOOLS SECTION…

Relevant Resources

1. Social Marketing for Organizations
2. Recruiting Volunteers
3. Clear Writing
4. Promoting Your Organization's Activities
5. I Volunteer

CHAPTER 7: VOLUNTEER SCREENING

Needs Assessment

Evaluation

Recognition

Record Keeping

Retention
- **Placement**
- Orientation &Training
- Supervision

COORDINATION

Recruitment & Screening

PROGRAM DEVELOPMENT

Program Design
- Goals, Objectives & Activities
- Responsibility
- Risk Management
- Budget/Resource Development
- Policies & Procedures

Implementation
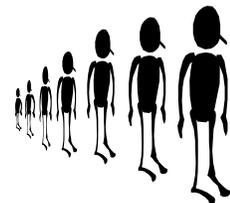
In this chapter...

WHAT IS SCREENING?

Screening has been defined by Volunteer Canada as "an on-going process designed to identify any person (volunteer or employee) who may harm children or vulnerable adults".
VOLUNTEER CANADA

When volunteers have been recruited, it's time to determine suitability. Screening and placement are the next steps in ensuring that we have the right person for the right job at the right time.

Screening is the process of determining if potential volunteers are well-suited to the volunteer roles in the organization or if the opportunities offered by the organization match the volunteer's needs.

Volunteer screening is a critical element of the organization's responsibility to create and maintain a safe environment for its program participants, volunteers and employees.

The level of screening should be related to the level of responsibility given to each volunteer.

Depending on the requirements of the position, screening can include:

- application
- interview
- reference checks
- police/criminal record check
- child abuse registry check or record check with local child welfare organizations
- medical exam
- verification of driver's licence and/or insurance

RED FLAG

Police Checks are an important element of volunteer screening, however, they are limited:

- to convictions, not allegations,
- to the date when the check is completed, and
- by jurisdiction.

Placement is the process of matching prospective volunteers with the position best suited for them. It is informed by the screening processes (and therefore included here). It may occur at this point, following orientation and training, or when the volunteer expresses a desire for change.

When a volunteer changes positions with the organization, the screening requirements may also change.

CHAPTER 7: VOLUNTEER SCREENING

BENEFITS OF SCREENING

There are many benefits of a thorough screening process for both the volunteer and the organization.

Volunteers can:

- inquire about the volunteer position and the organization

- explore all the volunteer possibilities

- clearly identify their goals and needs

- learn about the organization

- improve their interviewing skills

The Organization can:

- get to know potential volunteers

- determine suitability

- match volunteers with specific programs or roles

- outline the organization's expectation of volunteers

- decline volunteers

A thorough screening process demonstrates the importance that the organization places on the role of volunteers.

It is also the first step in building a personal relationship with each volunteer. If volunteers later encounter difficulties, the person with whom they first had personal contact could be who they turn to. If a warm and positive first contact has been made, the possibility of dissatisfied volunteers simply disappearing decreases.

CHAPTER 7: VOLUNTEER SCREENING

RED FLAG

Certain questions cannot be asked of potential volunteers –either on the application form or in the interview. Be sure to check the governing legislation in your area!

www.cdp-hrc.uottawa.ca/links/sitecan_e.html offers links to most Canadian and Provincial Human Rights Legislation web sites!

DYNAMIC DOWNLOADS

Be sure to download:

the screening checklist tool from www.volunteerbc.bc.ca/riskmanagement/pdf/screenassess.pdf

SCREENING 101

Volunteer Canada has produced the Safe Steps Screening Program[17], which identifies the ten steps of screening outlined below. For more information, see www.volunteer.ca .

The steps are outlined below:

1. Determining the *risk* (Chapter 4)
    Risks are everywhere and in everything we do. Organizations can limit the risks in their programs as outlined in chapter 4.

2. Writing clear *job descriptions* (Chapter 5)
    Screening requirements should be clearly outlined in job descriptions and may change as volunteers move from one position to another.

3. Establishing a *formal recruitment process* (Chapter 6)
    However the organization chooses to recruit, it is important to indicate that screening is part of the application process.

4. Using an *application form* (Chapter 7)
    Application forms provide standardized information that the organization requires.

5. Conducting *interviews* (Chapter 7)
    Interviews provide an opportunity to explore the suitability of the potential volunteers.

6. Following up on *references* (Chapter 7)
    Asking specific questions regarding the applicant's background, skills, abilities and suitability related to a specific position may yield important information.

7. Requesting a *Police/Criminal Records Check* (Chapter 7)
    Police Records Checks are just one step in a comprehensive screening process. They are important – but not sufficient to determine suitability.

8. Conducting *orientation and training* sessions (Chapter 8)
    Orientation and training sessions offer an opportunity to get to know volunteers in a different setting and prepare volunteers for the responsibilities they will be assuming. Probation periods give both the organization and the volunteer time to learn more about each other.

9. ***Supervising*** and ***evaluating*** (Chapter 9)
    The identified level of risk associated with a volunteer position will determine the necessary degree of supervision and evaluation. If the risk is great, it follows that the volunteer will be under close supervision.

10. Following up with ***program participants***
    Regular contact with participants can act as a deterrent to someone who might otherwise do harm. Volunteers should be made aware that follow-up activities will occur.

Screening doesn't necessarily end when the preliminary paperwork is complete. Concerns about volunteer suitability may arise at any time – even if they've been with the organization for years.

WHO SHOULD BE SCREENED?

The short answer is EVERYBODY!!! We recommend that all potential volunteers be screened prior to being placed with the organization.

The elements of the screening process used and the relative weight that the organization places on those may vary from position to position.

"Our challenge is screening for do-gooder judgementalism to ensure the integrity of our program."
CAPC/CPNP RESPONDENT VOLUNTEER SURVEY 2001

Volunteers working directly with children would be subject to a more thorough screening process than office volunteers.

For group activities (such as an event or a work bee) a comprehensive screening process may not be practical or necessary, but we suggest that Chapter Four be reviewed to ensure that risks are considered and minimized!

Screening requirements should be clearly outlined in each job description and consistently applied with no exceptions and reviewed whenever volunteers change positions and levels of responsibility.

DESIGNING VOLUNTEER APPLICATION FORMS

Volunteer application forms serve a two-fold purpose: they help with the screening process (particularly preparing for interviews) and they collect information that the organization requires.

There is a very delicate balance between asking for information that might be useful to the organization and intimidating or offending potential volunteers with the length or detail of the forms.

Sensitivity to literacy levels is critical. Consider the language used and the layout (font size, 'officialness' etc.) when designing the application form. Review the clear language suggestions in the tools section for help.

Volunteer Canada suggests asking the following questions when designing application forms:

- Why are we asking for this information?
- Is this information necessary to establish the applicant's qualifications?
- What effect will asking these questions have on the individual's prospects of being engaged?
- Will they unduly or unlawfully prejudice his or her chances?
- Will this question elicit information that falls within the prohibited grounds of discrimination? [18]

As a rule, volunteer applications should not include any demographic information that would not be permitted by Human Rights Legislation (i.e. might be considered grounds for discrimination if the organization declines the volunteer).

It is not sufficient to mark the question as 'optional'. If the demographic information is needed, it is advisable to provide a separate form AFTER the volunteer has been accepted and explain why the information is required.

Some organizations use a brief application to gather essential information and 'fast-track' the volunteer into the program, followed by a more detailed form at a later date.

The following is a sample menu of possibilities used by CAPC/CPNP colleagues across the country. Use as many or few as the program requires.

CHAPTER 7: VOLUNTEER SCREENING

Date of Application
This helps when tracking program statistics such as length of service or volunteer attrition rates.

Address and Contact Information
Volunteers often have many points of contact. Creating fields for phone, fax, email and work numbers offers the volunteer the option of providing a variety of contact points.

This advantage needs to be weighed against the possibility that volunteers without all those contact numbers may feel intimidated or that they can't complete the form.

While it's important to be able to contact the volunteer when necessary, it's equally important to respect volunteers' privacy and boundaries. A field dedicated to **"best times or ways to contact you"** can be helpful in doing so.

Mailing information and home addresses are helpful for mailing out newsletters, invitations and other information, and for knowing which volunteers are available in which geographic areas.

Program Sites
Depending on the nature of the community, this could be a critical factor in effectively matching volunteers to positions. Including this list on the application form not only gives volunteers the opportunity to indicate preferences but also offers them the opportunity to explore options they may not have previously considered.

Emergency Contact
This information is important to respond appropriately in case of emergency.

Recruitment Tracking
Knowing how volunteers hear about the program provide valuable information about which recruitment strategies are working.

Reason(s) for Volunteering
Determining trends in the reasons volunteers apply helps to target recruitment efforts more effectively.

Educational Background
Qualifications, courses, workshops, certificates – advance knowledge of this information helps tailor placement, orientation and training. Consider asking about relevant training or experience rather than formal education.

Related Experience

Volunteers come to organizations with a wealth of life experience. Asking about related experience in an open-ended format may yield very interesting (and useful) information.

Imagine, for example, a grandmother who has raised a child with special needs. She may not choose to share this information (which is her right, of course), however, if she simply doesn't think to volunteer it, we're missing a whole range of valuable knowledge, life skills and community connections she could bring to the organization!

Interests, Skills or Hobbies

Unless specifically asked, many volunteers will not think to offer this kind of information – especially if they are unaware of the potential benefits to the organization of a particular skill or ability.

It is always wise to ask (rather than assume) if volunteers are interested in using particular skills for their volunteer work – some are seeking a change from what they do elsewhere.

BRIGHT IDEA

If you've asked a question on the application form, be sure to review the answers before the interview.

This will save time and potential frustration – and allow you to spend valuable interview time exploring new information!

Volunteer Opportunities

Providing a list of job options gives volunteers the opportunity to consider and express their preliminary interests. It also helps prepare for the

interview and orientation processes. Consider combining this checklist with the work sites to make the form less intimidating.

Availability

This information helps determine suitability for particular positions. It can also be helpful to determine availability for backup, last minute needs or special tasks.

Consider asking:
- How many hours would you like to volunteer a week? Month?
- When would you like to volunteer? Weekdays? Evenings? Specific days? Weekends?
- Are you available on short notice?
- Would you like to be called about new or last minute opportunities?

Languages

Don't assume that because volunteers have a facility for English or French, they can't communicate in other languages – that skill could be invaluable at a later date!

Health Information
Organizations must be sensitive to privacy rights when asking these questions, however, they also have a responsibility to ensure that they are not placing volunteers inappropriately.

This information may also be critical in the case of emergency; having it readily available could literally mean the difference between life and death.

Police Records Check Consent
The requirement for a police record check must be made clear to volunteers from the very beginning of the recruitment process. Including consent as part of the application ensures that it is not overlooked.

References
Be sure to ask not only for name and contact information, but also the nature of the relationship between the potential volunteer and the referee. It's a good idea to include written consent to contact said referees.

Drivers Information
It's important to ask for drivers' license verification, vehicle information and insurance coverage for potential volunteer drivers.

Transportation Requirements
Asking if volunteers need transportation to and from the site is particularly important when program participants are asked to volunteer. When we ask the question, however, we need to be prepared to address needs identified.

Office Use Only
It's often helpful to include a section for office use to track the date the application is received, and the dates of follow-up activities.

The tools section of this kit includes a variety of different styles of application forms. We've also created templates for adaptation.

INTERVIEWS 101

The importance of interviews cannot be overemphasized. They are often the first 'real' contact potential volunteers have with the organization. Interviews provide not only an opportunity to talk to potential volunteers about their backgrounds, skills, interests and availabilities, but also to explore any doubts about the suitability of the candidates.

A comfortable, inviting atmosphere and friendly, welcoming attitude will not only make a good impression with volunteers, but also help put everyone at ease.

It is important to share information about the organization, programs, volunteer roles and opportunities in a clear, concise and organized manner and to be attentive to potential volunteers.

Reviewing applications ahead of time demonstrates both preparedness and interest in volunteers. The interviews are opportunities to clarify any questions that may have arisen from applications.

Questions should always be based on specific job descriptions. What works well with one volunteer or position may not work well with another. It is generally helpful, however, to focus on the skills and abilities required to do the job, job-related issues or tasks and supports available to volunteers.

Asking questions in two or three different ways may yield inconsistencies that need to be addressed. It is important to trust your instincts.

Using scripted questions can help avoid slipping onto dangerous human rights ground. Sample questions are included in the tools section.

It is important to keep records of interviews. All records should be objective and avoid subjective comments about behaviour. For example, "Applicant did not answer question 6." is acceptable. "Applicant was evasive." is not.

CHAPTER 7: VOLUNTEER SCREENING

REFERENCE CHECKS

References provide an invaluable checkpoint in the screening process. They can provide verification of factual information (for example, dates of employment), and offer insight into personal suitability. They also provide the opportunity to address any concerns the organization may have.

The best indication of future behaviour is past behaviour. Asking referees specific open-ended questions about the applicants' background, skills, abilities and behaviours as they relate to the job description can help determine suitability.

It is good practice to request permission to check references in writing and to check at least two references. Organizations may wish to ask for business, education or previous volunteer references as well as personal references.

Listen for pauses or hesitations that might indicate cause for concern and – once again – trust your instincts.

Remember, human rights legislation applies to reference checks as it does to application forms and interview questions – so prepare questions ahead of time to ensure that prohibited questions are not asked.

Consider adapting the interview questions to questions for referees. This will save time and ensure that position-specific concerns are addressed with the referee.

Records of reference checks (objective and factual as noted for interviews) should be kept in the volunteers' personnel files.

RECORD CHECKS

Record checks serve two purposes:
- They signal in a very public way that the organization is serious about the safety and well being of its participants, volunteers and employees.
- They help minimize risks.

They do not, however, ensure that individual volunteers are suitable to be placed in a position of trust with children or vulnerable adults. They are an important step in the process, but not sufficient in and of themselves.

BRIGHT IDEAS

Records checks need to be repeated regularly – especially for volunteers working with the most vulnerable in our society.

Some CAPC/CPNP projects complete initial records checks and then have volunteers sign annual waiver indicating that no offences have occurred in the interim.

Establishing criteria for volunteer suitability is the responsibility of the organization. Depending on the position, record checks might include:

- police/criminal record checks
- child abuse registry checks or record checks with local child welfare organizations
- medical exams
- verification of driver's licence, driving record and insurance

Generally, *criminal record checks* screen for offences that indicate potential harm to program participants, volunteers or employees – particularly violent or sexual offences. Driving offences would be of concern for volunteer drivers; fraud, embezzlement or theft convictions of concern for volunteers handling money.

It is important to note that criminal record checks include convictions only – not allegations that may have been made. They are limited to specific jurisdictions.

The availability of *child abuse registries* varies from region to region. In some areas, registry information is included in criminal record checks. In other areas, registries don't yet exist. Where registries don't exist, some child welfare organizations will complete a check of their records for organizations that work with children.

Medical examinations may be appropriate, depending on the nature of the program or the requirements of the position.

Verification of driver's license, driving record and insurance is particularly important for volunteer drivers. It may also be important if the volunteers are travelling for their positions. Check the requirements of the organization's insurance policies.

Costs related to completing criminal record checks or medical exams vary from region to region. It is important that organizations are aware of the related costs and have a clear policy regarding reimbursement of expenses in place before requesting that volunteers provide this information.

The existence of a criminal record in and of itself may not be a barrier to volunteering. The date and nature of the offence as well as the responsibilities of the volunteer position must all be considered.

Documentation of all records checks should form part of volunteers' personnel files.

CHAPTER 7: VOLUNTEER SCREENING

FOLLOWING UP

It's important to follow up with potential volunteers as soon as possible. In some cases, it may be possible to welcome volunteers at the end of interviews. In other cases, it might be more appropriate to do so by telephone or letter. In either case, let volunteers know when and how they can expect to hear from the organization.

Welcomes should be accompanied by next steps – including dates, times and locations for orientation and training.

Probation Periods
Some organizations parallel their human resource policies by implementing a probationary period for all volunteers.

It is important not to place volunteers in unsupervised positions until the record checks and references have been completed. If there will be a delay, consider placing volunteers in training programs or volunteer positions with fewer screening requirements until the checks can be completed.

In either case, be sure volunteers are aware that acceptance is contingent upon satisfactory completion of screening.

Contracts or Agreements
Volunteer contracts or agreements clarify expectations and delineate the organization's legal relationship with the volunteers, although they are consensual rather than contractual (see Chapter 4).

Samples from CAPC/CPNP colleagues across the country are included in the tools section.

It is a good idea to link volunteer agreements to policies of the organization (including confidentiality) and job descriptions.

Personnel Files
The screening process has provided the basics of volunteers' personnel files with application forms, interview notes and record check verifications. It is important that this information be treated confidentially.

More information about personnel files is available in Chapter 10.

Saying no…

There is no guarantee that all applicants will be accepted and placed.

Volunteers may be turned down for any number of reasons. It can be helpful to use the organization's employment standards as a guide.

When turning volunteers down, ensure that communication includes clear rationale for the decision and suggestions about other volunteer opportunities.

Include all documentation in the volunteers' personnel file – and consider notifying appropriate staff and flagging the files in case the volunteers reapply at a later date.

EVALUATING SCREENING

As with every step of volunteer coordination, it is important to evaluate regularly. The general questions remain unchanged. The specifics are related to the contents of this chapter:

- Have we done what we set out to do?
  - Have we developed a comprehensive and ongoing screening process?
  - Do we have policies that reflect that process?
  - Do we review regularly?
  - Are screening requirements included in all job descriptions?
  - Are screening requirements related to the level of risk associated with the job descriptions?
  - Are screening requirements applied consistently and without exception?
  - Are employees aware of the screening process?

- Why or why not?

- What could we do differently?

- What are the next steps?

CHAPTER 7: VOLUNTEER SCREENING

IN THE TOOLS SECTION

Terrific Tools & Templates

1. Sample Welcomes & Introductions from:
   - Calgary Interfaith Food Bank
   - Entre Parents
   - Our Children, Our Future / Nos enfant, notre avenir
   - Rural Response for Healthy Children

2. Sample Applications, Interviews & Parental Consents from:
   - Brighter Futures Coalition of St. John's
   - Bruce Grey Children's Services
   - Calgary Interfaith Food Bank
   - Our Children, Our Future / Nos enfants, notre avenir
   - Our Children, Our Pride / Fiers de nos enfants
   - Rural Response for Healthy Children

3. Sample Record Checks from:
   - Brighter Futures Coalition of St. John's
   - Brighter Futures Society
   - Bruce Grey Children's Services
   - Waterloo Region CAPC

4. Sample Volunteer Agreements from:
   - Brighter Futures Coalition of St. John's
   - Brighter Futures Society
   - Bruce Grey Children's Services
   - Waterloo Region CAPC

5. Interview Questions Template

Relevant resources

1. Take the First Step

Needs Assessment

Program Design
- Goals, Objectives & Activities
- Responsibility
- Risk Management
- Budget/Resource Development
- Policies & Procedures

PROGRAM DEVELOPMENT

Evaluation

Recognition

Record Keeping

COORDINATION

Retention
- Placement
- Orientation & Training
- Supervision

Implementation

Recruitment & Screening

In this chapter...

CHAPTER 8: ORIENTATION & TRAINING

WHAT ARE ORIENTATION & TRAINING?

For the purposes of this tool kit, we offer the following working definitions:

Orientation is the provision of *general* information necessary for all individuals related to the organization to know in order to ensure consistent and quality service provision.

It is usually offered when volunteers begin or when they take on a new role within the organization. It offers background information about the organization and its expectations of volunteers. Our CAPC/CPNP colleagues include:

- welcome
- mission, vision, values, culture
- overview of services, future plans
- community partners and relationships
- introduction to organizational policies, procedures and guidelines
  - hours of work
  - dress code
  - benefits
  - expense reimbursement
  - contact names and numbers
- goals and objectives of the volunteer program
- completion of forms
- introduction to employees and current volunteers
- roles and responsibilities
- provision of program-related information (for example, CPNP projects may provide a basic primer on pregnancy and nutrition, CAPC projects on healthy child development)

Training is the process of preparing volunteers for their *specific* roles and responsibilities. It tends to be more task-specific and may need to be tailored to individual volunteers, depending on the position in which they are being placed.

Training can be offered prior to job-start, as on-the-job-training or on an ongoing basis, depending on the nature of the position. It may include:
- Reviewing job descriptions and assigned responsibilities
- Providing specific information and "how to's"
- Reviewing organizational policies, procedures and guidelines related to specific programs or activities
- Attending programs as observers
- Shadowing employees or other volunteers
- Engaging in skill building exercises (role playing, problem solving)
- Participating in workshops, seminars, in-service opportunities

CHAPTER 8: ORIENTATION & TRAINING

WHAT ARE THE BENEFITS OF ORIENTATION & TRAINING?

By providing volunteers with a thorough **orientation**, they will:
- understand the mission, vision and values of the organization
- recognize the value the organization places on volunteers
- acquire insight into organizational culture
- understand the services of the organization
- understand what is expected of them
- get to know team members
- know where to direct their questions

By providing volunteers with effective **training** they will:
- develop the skills required to perform the tasks assigned
- feel prepared for their roles, responsibilities and tasks
- feel supported in their work
- feel confident
- get to know team members they will be working with
- get to know program participants

Investing time and effort into orientation and training benefits the organization as well: the opportunity for further screening, more effective service provision and decreased attrition rates.

Volunteers who begin with the organization feeling well prepared are more likely to enjoy their experience.

BRIGHT IDEA

Think about Volunteer Orientation & Training as Public Education or Community Capacity Building

PLANNING ORIENTATION & TRAINING

Orientation and training are most effective when tailored to individual needs, skills and abilities. The following questions may prove helpful to the planning process:

Are the volunteer positions short term, long term or ongoing?
Volunteers who offer to do face painting for a children's fair would require relatively little orientation or training compared to volunteer home visitors or childcare providers.

Do all volunteers have similar roles, responsibilities and tasks?
The answer to this question will determine the degree to which orientation and training can be combined for groups of volunteers.

Do volunteers have related work experience or specific areas of expertise or interest?
This information will be available from the screening process. Individual experiences, abilities and qualifications can affect decisions about providing group or individualized training and the degree to which the facilitator must prepare content.

Nothing will undermine a volunteer program more than underestimating the existing skills and abilities of volunteers and 'boring them with the basics'. For example, an experienced ESL teacher will not require the basics of adult education; a banker will not require extensive training regarding the details of filling out a deposit slip for fundraised revenues.

Will volunteers be working with vulnerable populations, the general public, with employees or alone?
The answers to these questions will affect training content – and the amount of 'prior-to-job-start' or 'on-the-job' training required.

Where will orientation or training occur?
If volunteer opportunities are at various locations it may be helpful to offer orientation and training at each location. This can make it easier for volunteers to attend (easier access to transportation, childcare) and offers volunteers the opportunity to become familiar with the environment.

Conversely, it may be preferable to gather volunteers in one central location for orientation, then offer site specific training for volunteers who will be assigned to a particular site.

ORIENTATION & TRAINING 101

Orientation and training can be offered in a variety of ways, depending on the needs of the organization and the volunteers. Group training has typically been used in organizations that use large numbers of volunteers. One of the greatest causes of volunteer attrition, however, is keeping volunteers on a waiting list until a group is feasible.

CAPC/CPNP colleagues tell us that they have adapted orientation and training plans to respond to individual requests more frequently.

Group orientation and training is useful if there is more than one volunteer scheduled to start volunteering at the same time. Many organizations schedule regular orientation/training times throughout the year and will only orient/train at those times.

The benefits of doing so include:

- *Predictability:* Group orientations scheduled at the same times every year help volunteers anticipate their involvement and help organizations respond to queries in a clear and consistent manner

- *Development of relationships:* Volunteers have an opportunity to meet with and hopefully connect with other volunteers (remember, many volunteers volunteer where their friends do – if they haven't started with friends in the organization, chances are they'll stay much longer if they develop friendly relationships).

- *Team building*: In addition to developing one on one relationships, orientation and training can offer the opportunity to develop a team approach to work and problem solving.

- *Consistency:* All volunteers receive the same information and opportunities.

- *Diversity and variety:* One volunteer may present a viewpoint or ask a question that others hadn't thought of or were reluctant to ask.

- *Cost effectiveness:* Employee time is scheduled and used to orient and train all volunteers at the same time; guest speakers are more readily booked for groups than for individual volunteers.

One on one orientation and training may be the only practical alternative for small organizations or rural areas. Several CAPC/CPNP colleagues told us that they simply don't have the numbers to merit planning group training – or that individual training needs varied so much that group training was impractical.

One on one orientation and training can include many of the benefits noted above and offer:

- *Flexibility:* One on one orientation and training can happen anytime volunteers begin with the program.

- *Individuality:* One on one orientation and training allows more flexibility in adapting to individual experiences, needs and concerns

- *Comfort:* Some volunteers may feel more comfortable asking questions in a one on one situation.

- *Confidentiality:* some programs or roles may require the sharing of sensitive or confidential information with the volunteers involved.

Peer led orientation and training can be conducted in a group setting or one on one. Organizations may ask volunteers to co-facilitate orientation sessions or lead them on their own, depending on the culture of the organization and the skills, abilities and interests of the volunteers involved.

Peer led orientation and training offers several benefits, including:

- *Experiential knowledge:* As a volunteer, the orientation and training facilitator can answer questions regarding volunteering based on personal experiences.

- *Comfort:* New volunteers may be more comfortable requesting additional information from a peer.

- *Value of volunteers:* By conducting peer led orientation and training, the organization sends a clear message to new volunteers that volunteerism is highly valued.

- *Opportunity for advancement:* Having volunteers facilitate orientation and training sessions also demonstrates to new volunteers that there are a variety of roles available within the organization.

- *Potential for mentoring relationships:* Having experienced volunteers involved in orientation and training can be a helpful first step in developing mentor relationships among volunteers.

- *Board involvement:* Consider inviting Board members to participate in orientation and training. This demonstrates yet another role that volunteers can fill. It also offers Board members first hand insight into the value of volunteerism at every level of the organization and some of the resources required to support the volunteer program.

Specialized training may be required for specific positions. This may take the form of one on one coaching/mentoring, job shadowing, or paying for volunteers to attend related courses.

On-the-job training is included in most training plans. It also involves mentoring/coaching or job shadowing. On-the-job training may be as simple as walking through how to open or close the facility to something as complex as facilitating a parenting support group.

CHAPTER 8: ORIENTATION & TRAINING

PRINCIPLES OF ADULT EDUCATION

Adults bring a **wealth of life experience** to the learning process. They tend to learn best when they see the purpose of what they are learning, when they feel valued, able to contribute to the process and when they use what they know. Participatory and interactive training tends to be more effective and appreciated than 'lecture style' training.

People learn in different ways. There are three learning styles:

1. **Visual learners** learn best by **seeing**; they benefit from handouts, overheads, flip-charts or videos.

2. **Auditory learners** learn best by **listening**; dynamic speakers and personal testimonials work well.

3. **Kinesthetic or experiential learners** learn best by **doing**; they are hands on learners.

An effective training program incorporates opportunities for all learning styles to ensure optimal retention.

There are many excellent resources related to adult education and training styles available at public libraries, over the internet or through courses and workshops.

ORIENTATION & TRAINING THEMES

Information and skills can be taught – attitude can not. Orientation and training offers the opportunities to present ideas that may influence attitude and the time to evaluate the 'fit' of volunteers' attitudes with organizational needs.

CAPC/CPNP colleagues across the country identify the following themes:

- Abuse Reporting/Duty to Report
- Budgeting
- Capacity Building
- CAPC/CPNP Principles
- Car Seat Safety
- Communication / Active Listening / Appropriate Questions
- Community Development
- Community Resources
- Confidentiality
- CPR
- First Aid
- Giving Advice
- Healthy Child Development
  - Early brain development
  - Speech and language
  - Developmental milestones
  - Importance of play
  - Child abuse prevention
- Healthy Pregnancy
- Non-Judgemental Service Provision
- Nutrition
- Parenting Principles/Family Styles
- Partnerships
- Personal Safety
- Relationships with Program Participants
- Roles and Boundaries
- Sensitivity Training – attitude, values, cultures
- Strength Based Approaches
- Volunteer Experiences
- Working with Vulnerable Populations

Increasingly we understand the public education and community capacity building elements of volunteerism. Some organizations value these elements of volunteer orientation and training to the extent that they have open orientation sessions prior to screening and placement.

Volunteers may not be able to make the time commitment that organizations require, or they may decide the organization is not a good fit – but have still benefited from the orientation or training they've received – and return to their communities to share and use what they have learned.

CHAPTER 8: ORIENTATION & TRAINING

TRAINING DOESN'T STOP ONCE THE WORK BEGINS…

Organizations that are dedicated to continuous learning understand the value of offering frequent and ongoing training for their team, including volunteers.

BRIGHT IDEA

There is a comprehensive orientation checklist included **People and Planning** that could readily be adapted for volunteers!

Volunteers are an invaluable human resource to organizations. Training policies and practices need to reflect that whenever possible. Often this can be done with relatively small costs to the organization. For example:

- it costs little extra to include volunteers in **employee training**

- organizations may be able to **reimburse** the expense of First-Aid and/or CPR certification, if this is a requirement of the position – or have volunteers included in community – based training at lower costs

- **volunteer centres, schools or placement agencies** may be able to pay for relevant training for volunteers they have placed with the organization

- employees may provide **in-service training** to volunteers

- **community organizations** often offer low cost training that would be helpful (for example, many health organizations offer safe food handler courses; child welfare organizations offer seminars on reporting and intervention; mental health organizations offer workshops on depression, etc.)

- **internet training** presents reasonable alternatives for some volunteers (see the Web link earlier in this chapter)

Cross training volunteers for a variety of positions offers volunteers variety and the organization flexibility!

EVALUATING ORIENTATION & TRAINING PROCESSES

General questions remain unchanged. The specifics are related to the contents of this chapter:

- Have we done what we set out to do?
  - · Do we provide orientation and training to all new volunteers?
  - · Do we provide training to volunteers beginning new positions?
  - · Do volunteers begin their positions with the required knowledge and skills?
  - · Do volunteers have a clear understanding of confidentiality? Other policies and procedures?
  - · Do volunteers receive adequate training to minimize risks?
  - · Are orientation and training sensitive to populations that are culturally diverse and cross-generational?
  - · Are ongoing training opportunities provided for volunteers?

- Why or why not?

- What could be done differently?

- What are the next steps?

IN THE TOOLS SECTION…

Terrific Tools & Templates

1. Orientation Checklist

Relevant Resources

1. Tips for Workshop Leaders
2. Fact Sheet for Facilitators

CHAPTER 9: SUPERVISION

Needs Assessment

Program Design
- Goals, Objectives & Activities
- Responsibility
- Risk Management
- Budget/Resource Development
- Policies & Procedures

PROGRAM DEVELOPMENT

Evaluation

Recognition

Record Keeping

COORDINATION

Retention
- Placement
- Orientation &Training
- Supervision

Implementation

Recruitment Screening

In this chapter...

CHAPTER 9: SUPERVISION

WHAT IS SUPERVISION?

Volunteer management, coordination, supervision and leadership are often used interchangeably, however there are distinctions.

Chapter 3 suggested that management includes both planning and coordination. Supervision is one of the functions of effective volunteer coordination.

Management is the application of available resources (including human resources) to get a task done most effectively.

Coordination is the process of ensuring the smooth functioning of many parts for effective results.

Supervision is the process of directing the activities of others towards the achievement of a task.

Leadership is the ability to influence and motivate others – often to get the job done!

Volunteer coordination is a little like juggling, trying to balance the needs and interests of a wide variety of volunteers with those of the organization. It involves taking time to nurture and appreciate individuals, while ensuring that programs run smoothly and data is tracked.

The focus of this chapter is supervision, recognizing that it is integrally intertwined with the other functions of volunteer coordination (especially recognition!).
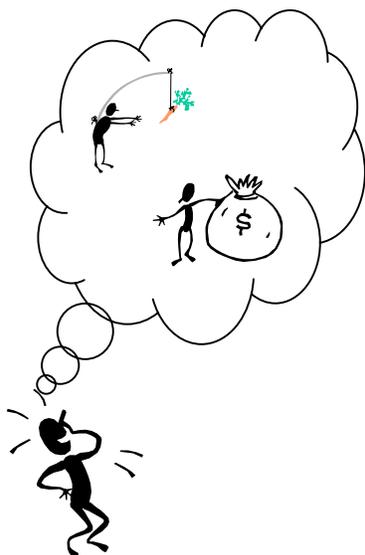
DOES SUPERVISING VOLUNTEERS DIFFER FROM SUPERVISING EMPLOYEES?

Good question! Volunteers are an invaluable but specialized human resource for organizations, so the quick answer is both "It depends!" and "You bet it does!"

The processes for volunteer management closely parallel those of human resource management in general. Volunteers are recruited, selected, screened and placed – so are employees. Volunteers require orientation and training – so do employees. Volunteers require ongoing support, supervision and recognition – so do employees.

CHAPTER 9: SUPERVISION

The difference rests in the *degree and tone* of how these functions are performed. Employees receive financial recompense for their efforts – and may keep coming to work despite supervisory shortcomings.

Volunteers come to work for different reasons – and may choose to leave at any time. It is critical that volunteers feel that both they as individuals and their efforts are important and valued.

BENEFITS OF EFFECTIVE VOLUNTEER SUPERVISION

Effective volunteer supervision benefits the organization, its employees, volunteers and participants. It can:

- Promote *teamwork* amongst volunteers and employees - ensuring that everyone is working towards a common goal or vision

- Create a positive *working environment*

- Ensure volunteer *expectations* are being met

- Promote successful *delegation*

- Develop *skill building opportunities* for volunteers

- Provide *tools and supports* for volunteers

- Increase *productivity*

- Decrease *risks*

- Ensure *quality* service

- Provide *recognition*

Volunteers who feel supported in their work are more likely to stay – and invite others to join them!

SUPERVISION 101

Supervisory Styles

Volunteer supervisors may wear many different hats in a single day – the challenge is choosing the right hat at the right time. The more common hats include:

1. Communicator

Effective supervision requires effective communication. It includes sharing information necessary to get the job done – and *listening* to volunteers' and employees' feedback, concerns, and questions.

2. Coach, Supporter, Advisor, Mentor

Supervisors can gently guide volunteer development by:
- Assessing skills
- Setting goals
- Developing training plans
- Breaking large jobs into smaller steps
- Listening
- Motivating
- Encouraging
- Offering ideas and resources
- Demonstrating, modeling, working alongside volunteers
- Matching volunteers with mentors
- Monitoring performance
- Providing positive feedback
- Recognizing and acknowledging accomplishments
- Inviting feedback and input from volunteers

3. Scheduler

Scheduling involves:
- Breaking tasks into specific times, shifts and duties
- Matching volunteers' availability and skills with the needs of the organization
- Producing and disseminating schedules well in advance (anticipating and planning for last minute changes, of course!)
- Maintaining a current list of flexible, last minute call-in volunteers
- Being flexible

4. Leader

Effective volunteer supervisors know that
- guiding
- encouraging
- inspiring

volunteers will ensure optimal and innovative results!

5. Delegator

Delegating leads to volunteer skill development and more effective time management.

Effective delegation requires:

- Choosing the right person for the right job
- Trusting volunteers to get the job done
- Outlining expectations clearly
- Offering supports
- Ensuring that assigned tasks have a beginning and an end, with clearly defined checkpoints along the way
- Maintaining open lines of communication
- Detaching from the task once it's assigned
- Evaluating and recognizing performance

RED FLAG

When delegating a task, set clear goals, expectations and deadlines, but refrain from taking the job back or 'nitpicking' the finished result – doing so is an absolute guarantee of a 'no' to future requests!

6. Record Keeper

See Chapter 10.

7. Master Juggler…

Volunteer supervisors may also play the following roles:

- Recruiter
- Interviewer
- Trainer
- Facilitator
- Evaluator
- Organizer
- Problem-Solver
- Team Leader
- Team Player
- Planner
- Decision-Maker
- Budgeter

No one supervisory style will be effective with all volunteers, but all volunteers must receive some type of supervision.

Level of supervision depends on the complexity of assignments the associated risks and the individual abilities.

All volunteers require additional supervision when assigned new responsibility.

CHAPTER 9: SUPERVISION

Whatever role the volunteer supervisor is playing, it's important to:

- Learn names – nametags can be helpful[19]
- Remember individual reasons for volunteering
- Emphasize the importance of volunteers to the organization
- Treat volunteers as valuable members of the team, and encourage all employees to do likewise
- Clearly identify and respect diversity of goals, values and needs
- Encourage clear and ongoing communication
- Listen
- Ensure regular contact
- Provide adequate and appropriate information and training
- Assign volunteers jobs that best suit their needs and talents
- Provide volunteers with job descriptions (see Chapter 5)
- Notice what volunteers do and don't do (Tasks not completed or no shows may be the volunteers' way of saying they are not enjoying the job and would like a change.)
- Offer constructive feedback
- Be fair
- Help when needed
- Consult with volunteers about decisions that affect their work
- Have realistic expectations about volunteers' time and abilities
- Have clear conflict resolutions policies, procedures and guidelines (see Chapter 5)
- Identify and interpret applicable policies
- Document concerns and accomplishments

BRIGHT IDEAS

To remember names:
1. Repeat the name back when introduced.
2. Rehearse the name in your mind.
3. Use the name several times during the first conversation.
4. Write it down.
5. Use nametags.
6. Associate the name with a personal characteristic of the individual.
7. Ask again.
8. Wait until someone else mentions the name – then begin at step 1 again!

TERRIFIC TOOLS & TEMPLATES

Be sure to check the tools and templates sections for forms developed and used by CAPC/CPNP colleagues across the country!

COMMUNICATION 101

Effective communication is essential to all supervisory styles.

While each program is unique, CAPC/CPNP colleagues have found the following communication strategies helpful in supervising volunteers:

1. Checking in
See chapter 10 for lots of good ideas for checking in!

2. Observation
Observing volunteers in action (being neither invisible nor intrusive) can be a helpful supervisory tool. It may be predictable and planned or occasional and unexpected. It is important to provide immediate feedback and recognition related to observed behaviours.

CHAPTER 9: SUPERVISION

RED FLAG

Be sure to ask permission before using volunteer reports, stories and or testimonials in promotional materials!

BRIGHT IDEA

Taking the time to set up distribution lists on email is well-worth the effort – bulletins can then be sent to all volunteers or only those working with a specific program – all at the touch of a button!

3. Feedback

Feedback is critical to effective volunteer supervision.   It should:
- Be positive, constructive, and supportive
- Be offered in a timely manner
- Be specific to task or behaviour
- Encourage continuous learning and improvement.

4. Volunteer Reports

Reports can be written or verbal, structured or unstructured.   They can provide considerable information for program planning and wonderful anecdotes for organizational reports and promotional materials.

Some volunteers will offer more information in written format, others via a quick telephone conversation or in person contact. Consider literacy levels when asking volunteers to complete written reports.
Ask about:
- joys and accomplishments
- challenges
- supports needed
- recommendations

5. Meetings

Team meetings with all volunteers or certain program volunteers may or may not be possible given the nature of the program or volunteers' time commitments, but can be an effective medium for:
- developing teams
- introducing new strategies
- sharing information
- asking for volunteers' input
- problem solving
- making decisions

Meetings can be formal or informal, structured or unstructured, scheduled or as needed.

6. Newsletters and Email Bulletins

Volunteers need to know what's happening in the organization. Newsletters and email bulletins are available to volunteers at their convenience!

PERFORMANCE REVIEWS

Performance reviews are an integral component of effective volunteer supervision. Organizations invest time, effort and energy to recruit, screen, select, place, orient, train and recognize exceptional volunteers. It's important to offer formal opportunities to reflect on individual performance!

Performance reviews do not replace ongoing feedback. There should be no surprises at formal review time.

Performance reviews offer the opportunity to:

- Identify **successes** and **challenges**
- Identify **strategies** to address challenges
- Measure volunteer **satisfaction.**   Consider asking:
  - How satisfied are you with your current job?
  - What has been your most rewarding experience to date?
  - How can this volunteer experience be more meaningful?
- Offer **feedback**, noting
  - individual milestones and accomplishments
  - contributions 'above and beyond' the requirements of the job
- Invite volunteers to **share ideas**, express feelings or concerns, asking:
  - What do you see as the role of the organization? The employees? The volunteers?
  - How could we keep our current volunteers longer?
  - If you have a question or concern, who do you go to and why?
- Review the **volunteer's role**
  - What do you enjoy the most about your role?
  - What is the most challenging part of your role?
  - What part of your role would you like to see changed?
- Review and set **goals**
  - What goals have you met to date?
  - What new areas would you like to work on?
- Review **job descriptions**
  - Are they current? Realistic?
  - What's missing?
- Explore **other opportunities** within the organization
- Identify **training needs** and **opportunities**

CHAPTER 9: SUPERVISION

VOLUNTEER FATIGUE

Volunteers are human beings (talk about stating the obvious) with complex lives, needs and wants. Fatigue may be related to volunteer experiences or other stressors in their lives.

Fatigue may display itself in a variety of ways. Volunteers may experience a change in attitude or energy level. The eager and enthusiastic attitude they came in with may be replaced with apparent disinterest, exhaustion or negativity. Volunteering doesn't appear to be 'fun' anymore.

Fatigue can happen for a number of reasons including (but not limited to):

- Not having a clear understanding of the role volunteers play in the fulfillment of the mission
- Setting unrealistic goals (individual or organizational)
- Taking on too much
- Feeling that accomplishments are not acknowledged or appreciated
- Lacking appropriate skills, training or guidance
- Inadequate supervision or support
- Insufficient resources to do the job

Volunteers can also get bored with their particular duties and tasks. They might feel that they are not currently challenged or would like to do something else.

HOW CAN WE TELL?

There are physical, emotional and behavioural indicators of fatigue. Volunteers experiencing fatigue may appear:

- Overwhelmed
- Tired
- Easily angered
- Stressed
- Frustrated

- Quiet
- Exhausted
- Withdrawn
- Pessimistic
- Drained

They may say that they feel incapable of doing anything, demonstrate a change in behaviour or comment on recent changes in eating and sleeping patterns.

CHAPTER 9: SUPERVISION

AN OUNCE OF PREVENTION…

Effective supervision means being proactive. Consider:

- Talking to volunteers about their expectations
- Setting realistic expectations with volunteers and employees
- Meeting with volunteers on a regular basis
- Talking about fatigue, self-care and stress-management
- Providing feedback to volunteers
- Helping volunteers prioritize their work
- Encouraging volunteers say "no" if they need to
- Providing new opportunities for volunteers
- Talking with volunteers about the changes in their behaviour
- Reminding employees about the roles and needs of volunteers

These strategies help set the stage for productive and positive volunteer experiences, however, there are always unforeseen challenges. A good understanding of conflict and conflict resolution strategies is helpful in all areas of human services.

WHAT IS CONFLICT?

Where there are human beings, there is conflict. Even the most well-planned, well-run, effective volunteer programs will experience conflict.

Conflict involves the struggle between two or more parties (individuals or groups) or ideas which can be real or assumed. Conflict can be constructive or destructive, often depending on how it is handled and its' resolution.

Constructive Conflict:
- allows expression and valuing of diversity
- challenges people to think outside the box
- encourages creativity in problem solving
- allows for resolution of problems
- leads to change and growth

Destructive Conflict:
- creates communication barriers
- discourages individuals and groups
- destroys trust
- affects motivation
- decreases productivity

CHAPTER 9: SUPERVISION

CONFLICT MANAGEMENT 101

Many organizations have formal conflict resolution policies and procedures, which, of course, take precedence over any of the great ideas or strategies suggested here. After consulting internal policies, consider if any of the following may be useful:

- Accept conflict as a natural occurrence in any group.
- Ensure there's a grievance policy in place that defines final resolution.
- Address the situation as soon as possible.
- Address the situation privately.
- Listen to all perspectives
  - It may be necessary to establish 'no interrupting' ground rules.
  - Ask for feedback about perceptions.
- Define the situation
  - Who is involved?
  - Did something in particular trigger the conflict?
  - What is the underlying cause of the conflict?
- Encourage people to look beyond the symptoms and identify the actual reason for the conflict.
- Focus on behaviour rather than personalities.
  - Ask why the behaviour(s) occurred.
- Identify positives.
- Agree that it is everyone's responsibility to resolve the conflict.
- Remain neutral.
- Remain calm, rational and realistic.
- Encourage all parties to brainstorm strategies to resolve the conflict.
- Explore the implications of each solution.
- Select the most appropriate solution and implement it together.
- Monitor the solution and evaluate.
- Document concerns and resolutions.

WHEN PREVENTION ISN'T ENOUGH, RESOLUTION NOT POSSIBLE…

Every now and then, despite our best efforts, volunteers fatigue past the point of no return, conflicts cannot be resolved or we encounter a 'difficult' volunteer.

Often 'difficult' volunteers are simply in the wrong job. This can be identified by reviewing volunteers' performance and satisfaction. Offering alternate placement may well resolve the situation.

Good program management involves weighing the needs of the organization as a whole, the program in particular and the needs of participants, employees and other volunteers against the needs of a single volunteer or group of volunteers.

In some cases, it may be time to say goodbye. When volunteer's performance or behaviour

- interferes with program or organizational goals,
- threatens the safety of participants, the volunteer, other volunteers or employees,
- affects the working environment for volunteers, employees or both,
- negatively impacts on participants,
- affects the public perception of the organization, or,
- puts the organization or individuals at personal or legal risk,

the behaviour must be addressed immediately and directly.

Volunteers can be dismissed. Volunteers are recruited, screened, selected, placed, oriented, trained, supervised and recognized - all to ensure volunteer satisfaction and optimum service provision. These strategies cannot control for every eventuality. It therefore is important to implement organizational policies regarding discipline and document all actions and communications with the volunteers, participants or employees leading up to the decision to dismiss.

If a volunteer needs to be asked to leave, meet with the volunteer in private. If there are concerns about reactions or personal safety, ensure that a second person is present.

During the meeting, clearly outline the concerns and the need to leave, but do not apologize. The volunteer's inappropriate behaviour (appropriately documented) is what led to the decision.

RED FLAG

Something to think about: difficult volunteers are really very, very rare…if you're encountering more than one or two it might be time for self-examination…individual or organizational"

CHAPTER 9: SUPERVISION

Document the dismissal in the volunteer's file, alert employees, and flag the file so that the volunteer is not unwittingly rehired.

Follow the dismissal with a short, objective letter confirming the dismissal. Contact all concerned parties and advise them of the dismissal, but respect the volunteer's privacy. These steps clearly delineate the organization's current relationship with the volunteer.

EXIT INTERVIEWS

Exit interviews can be conducted whether volunteers leave voluntarily or involuntarily, although the weight given to the content may vary depending on the circumstance.

An exit interview is a formal opportunity for organizations to:

- understand why volunteers leave

- give volunteers an opportunity to provide feedback

- receive suggestions and recommendations for improvement

- show appreciation for services to date

- ensure that volunteers leave the organization on 'good terms'.

Ensure that this process is confidential. Some organizations have exit interviews conducted by a neutral third party.

Format can vary, depending on the individual and circumstance. Exit interviews can be completed through a questionnaire, by phone, in person, over a farewell coffee. The questions can be similar to those suggested for performance reviews.

EVALUATING SUPERVISION

Evaluation of supervision will vary greatly depending on the program structure. It might include:

- self evaluation by the supervisor

- feedback from the volunteers (written and verbal)

General questions remain unchanged. The specifics are related to the contents of this chapter:

- Have we done what we set out to do?
    - Do volunteers feel supported? Receive feedback?
    - Do volunteers know who to contact when they have questions or concerns?
    - Is volunteer supervision incorporated into policies? Job descriptions of supervisors? Performance reviews of supervisors?
    - Are conflict resolution policies in place? Reviewed regularly?
    - Are volunteers asked for feedback?
    - Is volunteer performance reviewed?
    - Are exit interviews conducted?

- Why or why not?

- What could be done differently?

- What are the next steps?

CHAPTER 9: SUPERVISION

IN THE TOOLS SECTION…

Terrific Tools & Templates

1. Performance Reviews & Exit Interviews
   - Calgary Interfaith Food Bank
   - Rural Response for Healthy Children
2. Volunteer Feedback

Relevant Resources

1. Newsletters
2. How you can be an effective leader
3. Motivation & Leadership
4. Problem Solving
5. Strategies to Control Stress
6. Resolving Conflict
7. Coping with Problem Behaviour

CHAPTER 10: RECORDS & REPORTS

In this chapter...

WHY KEEP RECORDS AND STATISTICS?

Record keeping is an essential component of an effective volunteer program. It contributes to:

1. Volunteer Program Planning & Evaluation (see Chapter 3 and the end of each chapter)

- Documenting outcomes
- Identifying gaps in service
- Identifying training needs (volunteers and employees)
- Increasing accountability

2. Risk Management (see Chapters 4 and 5)

- Ensuring policies, procedures and job descriptions are implemented
- Documenting screening, training and supervision
- Recording volunteer activities
- Reviewing insurance covering regularly

3. Volunteer Recruitment and Training (see Chapters 6-8)

- Identifying recruitment needs and effective recruitment strategies
- Identifying training needs and effective training strategies

4. Volunteer Placement and Scheduling

- Matching skills and volunteers' abilities to program needs
- Tracking hours and activities
- Recording volunteers' goals, length of service, availability
- Generating a list of 'emergency' volunteers

5. Volunteer Supervision & Performance Reviews (see Chapter 9)

- Tracking performance reviews
- Documenting changes in volunteer activities
- Documenting accomplishments, concerns and actions taken
- Providing accurate responses to requests for letters of reference

6. Volunteer Recognition (see Chapter 11)

- Ensuring that recognition activities are related to accomplishments (hours, years of service) and tailored to personal preferences as appropriate.

RED FLAG

Don't forget that policies and procedures are part of record-keeping. They need to be reviewed regularly and review/revision dates recorded!

CHAPTER 10: RECORDS AND REPORTS

7. Funding and Sustainability

- Developing a program history
- Making a case for financial support of the program or organization
- Demonstrating impact and unanticipated outcomes
- Demonstrating community support for the program or organization
- Leveraging volunteer hours as "in kind' contributions for funding proposals

WHAT TO TRACK?

The decision about which data to track will vary from organization to organization and even from program to program within a single organization. Our CAPC/CPNP colleagues report tracking:

- Requests for volunteers
- Recruitment activities
- Reasons for volunteering
- Orientation and training activities
- Volunteer profiles
- Number of hours volunteered
- Duties performed
- Communication
- Feedback from volunteers, participants, employees, stakeholders
- Movement of volunteers between programs
- Recognition activities
- Retention and attrition rates
- Reasons for leaving
- History of volunteer program

It is also important to track process indicators and outcome measures to evaluate the volunteer program effectively.

The outcome measures will be related to the proposed outcomes indicated in the program logic model (developed in Chapter 3).

BRIGHT IDEAS

Record:
- Favourite books or magazines
- Hobbies
- Sports
- Names of family members
- Interests

in volunteers' personnel files. This makes matching recognition activities to volunteers' interests, easier.

Another good reason for projects to record volunteer statistics…is that annual reports to Health Canada require them.

PERSONNEL FILES

The content of volunteer personnel files will be affected by organizational policy or governing legislation – be sure to check there first, and then consider including the following:

BRIGHT IDEAS

Seem like a lot? Consider copying the checklist in the tools section and stapling it to the inside of each personnel file!

One CAPC/CPNP project told us that they do each annual update on a different colour of paper. If 2002 is green then a quick glance at the file is all it takes to know that this year's update is complete!

- · *Contact Information*
  - · name and address
  - · phone and fax numbers, email addresses
  - · best times to contact

- · *Emergency Contacts*

- · *Medical or Health Information*

- · *Special Needs*

- · *Application or Resume*
  - · application form
  - · references
  - · record checks
  - · start date
  - · orientation completion date
  - · qualifications and certifications
  - · special skills

- · *Driving Information* (if a volunteer driver)
  - · verification of license and insurance
  - · driver's abstract
  - · make and model of vehicle

- · *Training*
  - · mandatory and optional training

- · *Assignments*
  - · relevant job descriptions

- · *Availability*

- · *Attendance*

- · *Leaves of Absence*

- *Performance Records*
  - Annual reviews
  - Accomplishments & concerns
  - Action taken

- *Annual Updates*
  - police record checks or associated waivers
  - driving record checks or associated waivers
  - insurance updates

- **Awards**
  - accomplishments
  - recognition activity and date

- *Correspondence*

- *Incident or Accident Reports*

- *End Date*

- *Exit Interview*
  - Reason for leaving
  - Program feedback

Ensure that volunteer personnel files are stored in a secure location and retained as long as employment records.

HOW TO TRACK ALL THIS STUFF…

CAPC/CPNP projects across the country have developed a variety of forms and systems to help track this information. Below we've noted just a few…

1. Requisition Forms

Requisition forms can be great tools for tracking ideas! Have employees complete a requisition form for each task they'd like a volunteer to perform.

The resulting list will be a very practical idea bank for new volunteers or volunteers requesting a change. A sample requisition form is included in the tools section.

2. Time Logs
- Volunteer hours (daily, weekly, monthly, annually, to date)
- Number of hours contributed in each program
- Attendance details

Tracking hours is critical for volunteer recognition activities.

It may also be necessary if concerns arise about attendance.

It is also helpful for putting a dollar value to volunteerism – which is helpful with public relations, recruitment activities and seeking new funding sources.

3. Activity Logs
- Duties assigned
- Activities completed

Activity logs can provide ready references for verifying who is doing what and when and for updating job descriptions.

4. Communication Books
Communication books offer volunteers and employees a common location to record information that:
- everyone needs to know
- may be of interest to others.

5. Volunteer Reports
Volunteer reports may incorporate any of the information noted above. They offer the opportunity for volunteers to share successes and challenges, to note what has worked well and changes that might prove helpful.

Developing a volunteer report need not be an onerous task – consider using the monthly report format that employees use!

CHAPTER 10: RECORDS AND REPORTS

AREN'T THERE SOFTWARE PACKAGES TO DO THIS?

There are software packages specifically designed for volunteer coordination activities.

Websites that offer supports and resources to non-profit, charitable or voluntary organizations often review software packages. At the time of publication, the following websites offered extensive lists:

Charity Village
www.charityvillage.com/marketplace/software/csvolmt.html

Volunteer Management/Service Leadership Online Resources
www.serviceleader.org

Software programs can sort volunteers by name, category, job, interests, skills, etc. They can generate letters, nametags, birthday lists, hours summaries, schedules, job descriptions, labels and more. They can track individual or group activities, training and recognition events. Some include options for planning events or keeping in touch with volunteers.

If the organization is already operating one or more databases to track program information, it may be more practical to adapt existing systems by adding fields rather than adding yet another program to the mix! Community partners may also have developed volunteer management databases that can be readily adapted.

INTERPRETING THE NUMBERS

Traditional volunteer coordination tracks activities and outputs – numbers of recruitment activities, numbers of volunteers recruited, trained, placed, numbers of volunteer hours dedicated to the organization, etc. These numbers are helpful in promoting the organization, recognizing volunteers, evaluating activities and calculating 'in kind' contributions for funding proposals.

The data collected can also yield other information, depending on the questions asked. Take attrition, for example. Attrition is the rate at which an organization 'loses' its volunteers after recruiting and training them. Traditional volunteer coordination interprets high attrition rates as a negative, requiring more recruitment, screening, orientation, placement, training, supervision…and that can be true.

BRIGHT IDEA

Tracking volunteer interests may reveal a volunteer who is ready, willing and able to custom-design a database.

BRIGHT IDEA

We think attrition may be a good thing…an indicator of increased self esteem or skill development…leading the volunteer to employment or other community involvement.

If so… it may be time to revisit exit interviews and make sure we're asking **WHY** volunteers are leaving!

If, however, volunteers are leaving because they developed skills and confidence to re-enter the workforce, go back to school or become involved in another community endeavour, then attrition rates can indicate success.

Retention rates indicate how long volunteers stay with organizations. Retention rates can be given more weight if they're used in connection with volunteers' original intentions particularly if they stayed longer than they originally intended. This can only be measured if volunteers are asked at the outset how long they intend to stay with the organization.

Outcome measurements are important to report the impact of volunteerism related to skill development, public education and community capacity building.

ASSIGNING DOLLAR VALUES TO VOLUNTEERISM

There is no doubt that volunteers add value to organizations and communities – immeasurable value.

The 2000 National Survey on Giving, Volunteering and Participating reported that 6.5 million Canadians volunteered an average of 162 hours during the one year period preceding the survey.[20] The survey equates those numbers to 549,000 full time jobs.[21]

Assigning an economic value to volunteerism has implications for how we define volunteerism, public policy development and accountability – implications which are beyond the scope of this tool kit. From a practical perspective, however, it can be helpful to interpret the information we already have to make a case for CAPC/CPNP projects.

Projects that receive funding from a variety of sources already know that funders like volunteerism. They view it as an indicator of organizational capacity and community support for the organization.

Some funders allow the calculation of volunteer hours as part of the organization's 'in kind' contribution to matched funding formulas. The Government of Ontario, through its Early Years Challenge Fund assigned a value of $12 per hour for volunteer time. This may actually underestimate the value of volunteer contributions. The roles that volunteers play in CAPC/CPNP projects often have higher market values.

CHAPTER 10: RECORDS AND REPORTS

WRITING PROPOSALS

Sustaining an effective volunteer program requires resources (see chapter 2), which may or may not require projects to seek funding from alternate sources.

Proposals vary according to the requirements of the funder. There are commonalities, however. Our CAPC/CPNP colleagues offer the following tips:

- Understand the **requirements of the funders**. Read the materials provided by the funder to find out what they will and will not fund, what the priority areas are, and any conditions that may apply. Call a representative of the funder prior to writing the proposal to explore the 'fit' between the proposed project and the funder's guidelines in more detail. The representative can often provide helpful hints about how to present the project.

- Build on **organizational strengths**. Offer background information that lends credibility to the proposal.

- Identify the **goals, objectives, activities** and **evaluation plan** for the project (see logic model in Chapter 2). Describe the project succinctly. When possible use the funder's language in the body of the proposal.

- Develop a **budget** that is realistic.

- **Follow up.** Call the contact person shortly after submission to ensure receipt of the proposal and inquire if any further information is required.

  Subsequent follow-up, thanking the funders for their support (if funded) or consideration (if not funded) is equally important.

BRIGHT IDEAS

Use **clear language.** Describe the project succinctly. When possible use the funder's language in the body of the proposal.

Volunteer BC offers tips for writing proposals and sample proposals at www.volunteerbc.bc.ca/tools/revenuedevelopment.html

CHAPTER 10: RECORDS AND REPORTS

EVALUATING RECORD KEEPING

Evaluating record keeping can be as simple as asking the questions:
- Is the program data readily available?
- What's missing?

General questions remain unchanged. The specifics are related to the contents of this chapter:

- Have we done what we set out to do?
  - Are volunteer numbers and hours tracked?
  - Are records for each volunteer kept in a secure location?
  - Are policies and job descriptions up to date?
  - Are we asking the right questions to generate the data we need?

- Why or why not?

- What could we do differently?
  - How can we improve our tracking systems to generate the data we require?

- What are the next steps?

IN THE TOOLS SECTION…

Terrific Tools & Templates

1. Forms & Checklists from:
   - Calgary Interfaith Food Bank
   - Our Children, Our Future/Nos enfants, notre avenir
   - Rural Response for Healthy Children
   - Waterloo Region CAPC

Needs Assessment

PROGRAM DEVELOPMENT

Program Design
- Goals, Objectives & Activities
- Responsibility
- Risk Management
- Budget/Resource Development
- Policies & Procedures

Evaluation

Recognition

Record Keeping

COORDINATION

Retention
- Placement
- Orientation &Training
- Supervision

Implementation

Recruitment
Screening

In this chapter...

CHAPTER 11: RECOGNITION

DATES TO REMEMBER

National Volunteer Week
(usually the 3rd week of April)

International Volunteer Day
December 5th

Holding recognition events on these dates can make the event even more meaningful for volunteers.

WHAT IS RECOGNITION?

Everyone works better when they feel appreciated and acknowledged for their efforts. This is especially true for volunteers who receive no financial compensation for their energy, time and talents.

The terms volunteer appreciation, recognition and support are often used interchangeably. We offer the following definitions:

Recognition: special notice or attention[22] given, in this case, to volunteers.

Appreciation: expression of admiration, approval, or gratitude[23]. It may or may not be tied to a special activity or event.

Support: assistance or encouragement to get the job done.

For the purposes of this tool kit *recognition* includes formal, informal and indirect recognition, appreciation and support.

Formal or informal, serious or lighthearted, recognition activities should be:
- sincere
- timely
- specific to the task and the volunteer
- tailored to the volunteer & the organization

BENEFITS OF VOLUNTEER RECOGNITION

Recognizing volunteers can:

- demonstrate appreciation
- motivate
- encourage
- rejuvenate and energize
- celebrate successes
- provide social and networking opportunities
- build team spirit

Formal recognition, in particular, can also provide the opportunity to promote the organization and its volunteer opportunities.

CHAPTER 11: RECOGNITION

FORMAL RECOGNITION

BRIGHT IDEA

Members of Parliament have volunteer appreciation certificates which can be personalized – free of charge – when a list of names is provided to their office!

SUCCESS STORY

One CAPC/CPNP Project created a

CHAMPION FOR CHILDREN AWARD

The community nominates individuals and corporations as champions.. Media attention to the event is incredible – generating even more interest in the organization, the importance of children's programming, family supports and volunteering!

Formal recognition involves public or written acknowledgement of volunteer accomplishments. It is often used with volunteers who have made measurable contributions to the organization.

Our CAPC/CPNP colleagues suggest…
- Hosting special recognition *events* (dinners, brunches, picnics, banquets, theme meals, entertainment)
- Hosting seasonal *parties* or *open houses*
- Highlighting *achievements* and *milestones*
- Creating a *Most Outstanding Volunteer* award
- Profiling a *Volunteer of the Month*
- Nominating volunteers for *existing awards* (see the list in the tools section)
- Establishing *group awards*
- Presenting awards to student volunteers at *school* assemblies
- Presenting *plaques* or *pins*
- Presenting *gifts* with the organization's logo
- Providing volunteers with *gift certificates*
- Encouraging local businesses to provide *discounts* to volunteers
- Celebrating *anniversaries* and *birthdays*
- Writing *articles* profiling an individual or group for the newspaper, the organization's newsletter, annual report or website (be sure to ask permission first – some volunteers may not appreciate public acknowledgement)
- *Posting* volunteer names in places that are visible in the community (again, be sure to ask permission first)
- Creating new and *special assignments*
- Offering ongoing *training* opportunities
- Producing a *video* of volunteers' contributions

Make the Most of It…
Formal recognition events are wonderful opportunities to promote the organization, its services and volunteer opportunities. Be sure to include media invitations and press releases in planning!

INFORMAL RECOGNITION

Informal recognition involves tailoring the recognition to the volunteer's personal goals and objectives.

Imagine, for example, a volunteer who has identified a desire to overcome

shyness about speaking in public and agrees to co-facilitate a parenting group. Praising her immediately after the first group and pointing out the personal growth involved, may be incredibly meaningful.

Informal recognition can be very spontaneous. It involves providing volunteers with immediate, day-to-day and personal acknowledgement. It requires keeping in touch and knowing volunteer preferences.

Our CAPC/CPNP colleagues suggest:

- Greeting volunteers with a *smile*
- Offering a warm *"thank-you"*
- Making thank you *phone calls*
- Keeping a selection of *cards* on hand
  - · get well
  - · sympathy
  - · birthday, anniversary
  - · post cards
  - · thank you notes
- Creating a volunteer *scrapbook*
- Offering *tickets* to special events
- Offering free *training* workshops
- Assisting with *job searches*
- Inviting volunteers to sit on *advisory committees*
- Taking volunteers out for *coffee* or *lunch*
- Providing volunteers with organizational *nametags*
- Offering complimentary *coffee* or *refreshments* while volunteering
- Dedicating a *bulletin board* for volunteers

BRIGHT IDEAS

Fun Ways to Say Thanks…

- Flashlight
  (you are a shining example)
- Gas coupon
  (thanks for going that extra mile)
- Glue
  (thanks for sticking with it)
- Light bulb
  (thanks for the great ideas)
- Movie pass
  (to a real star)
- Rubber band
  (you stretch yourself beyond our limits)
- Mint
  (you are worth a mint)

CHAPTER 11: RECOGNITION

INDIRECT RECOGNITION

Indirect recognition occurs when volunteers are acknowledged in ways that do not involve formal or informal 'thank yous' but say 'the work you do is important – and we appreciate it'.

Our CAPC / CPNP colleagues suggest…

Highlighting the work of the organization in general
The work of volunteers is acknowledged when activities of the organization are highlighted in local media or at public events.

Broadcasting a local TV or radio show from the program site or contributing feature articles to local newspapers can also draw attention to the contribution of volunteers.

Encouraging Participation in Program Development
Encouraging volunteer input and feedback into programming says "we value your contribution". It can be done formally or informally. Ongoing feedback might be complemented by occasional focus groups or inviting volunteers to attend strategic planning meetings. Some volunteers may feel more comfortable conveying their feedback through a suggestion box.

Encouraging volunteer-directed initiatives is also helpful and can be as simple as saying "That's a great idea – would you like to take the lead on developing it? We can offer the following supports..."

Creating comfortable and accessible environments
Ensuring that the workplace is comfortable and inviting is another way to say "the work you do is important". Offering food or refreshments, ensuring there is enough space for everyone to work comfortably and offering flexible work schedules are all concrete ways of recognizing volunteer contributions.

Every effort should be made to have volunteering accessible for volunteers with special needs.

Offering social opportunities
We know that many volunteers offer their time and expertise where their friends volunteer or to make new connections in the community. Offering social opportunities can be beneficial to individual volunteers and also provide an informal opportunity for team building.

DYNAMIC DOWNLOADS
Be sure to download

Volunteer Connections: Creating an Accessible and Inclusive Environment
from
www.iyvcanada.org/getinvolved/building.php

Bridges to the Future: Supported Programs for Volunteers with Special Needs
from
www.canadianheritage.gc.ca/progs/pc-cp/pubs/e/bridges1.htm

CHAPTER 11: RECOGNITION

RECOGNIZING GROUPS AND CORPORATIONS

It is important not to overlook recognition when groups or corporations volunteer with the organization.   Do not hesitate to ask for preferences regarding recognition.

Tailoring recognition to the group is as important and effective with groups as it is with individuals.

SAYING GOODBYE

Farewells to valued volunteers offer a unique opportunity for recognition and ensuring continued goodwill and ambassadorship in the community.

Consider celebrating with a farewell party, highlighting accomplishments or comings and goings in newsletters. At a minimum, ensure that a thoughtful and sincere thank you is conveyed.

EVALUATING RECOGNITION ACTIVITIES

General questions remain unchanged. The specifics are related to the contents of this chapter:

- Have we done what we set out to do?
    - Are volunteers recognized in a variety of ways:
    - Formal
    - Informal
    - Indirect
    - Are recognition activities tailored to individual styles, preferences and accomplishments?
    - Are volunteers mentioned in annual reports? Newsletters? Websites?
    - Are volunteer achievements publicized on a regular basis?

- Why or why not?

- What could be done differently?

- What are the next steps?

CHAPTER 11: RECOGNITION

IN THE TOOLS SECTION

Terrific Tools & Templates

1. Awards & Inspiration
   - List of Awards
   - Catalogue of ideas

APPENDICES

PROGRAM DEVELOPMENT

Needs Assessment

Program Design
- Goals, Objectives & Activities
- Responsibility
- Risk Management
- Budget/Resource Development
- Policies & Procedures

Recognition

Evaluation

Record Keeping

COORDINATION

Retention
- Placement
- Orientation &Training
- Supervision

Implementation

Recruitment & Screening

In this section...

APPENDIX A: REFERENCES & RESOURCES

RECOMMENDED READING

Beyond Banquets, Plaques and Pins: Creative Ways to Recognize Volunteers and Staff, by Sue Vineyard. Downers Grove, Illinois, Heritage Arts Publishing, 1989.

Bridges to the Future: Supported Programs for Volunteers with Special Needs, by Janet Lautenschlager. Voluntary Action Directorate of the Department of Multiculturalism and Citizenship, 1992. Available to download from: www.canadianheritage.gc.ca/progs/pc-cp/pubs/e/bridges1.htm

By Definition: Policies for Volunteer Programs: A Manual for Executive Directors, Board Members, and Managers of Volunteers. 2nd ed., by Linda L. Graff, Dundas, Ontario, Graff and Associates, 1997.

The Canadian Code for Volunteer Involvement, by Liz Weaver. Volunteer Canada. Included in the tools section.

The Canadian Employee Volunteer Programs Survey. Volunteer Canada, 2001. Available to download from: www.volunteer.ca/volunteer/canada_corporate_survey.htm

Creating Bridges: A Practical Planning Guide and Checklist for the Development of a Cross-Cultural Volunteer Program, by Rebecca Levant and Keith Seel. Volunteer Calgary, 1995.

Family Volunteering: A Discussion Paper, by Paddy Bowen and A.J. McKenzie. Volunteer Canada, 2002. Available to download from: www.volunteer.ca/volunteer/pdf/FamilyEng.pdf

Family Volunteering: The Ties that Bind – an Introduction to Preparing your Agency for Family Volunteers, by Kristen Porritt. Volunteer Action Centre of Kitchener-Waterloo & Voluntary Action Program, 1995. Available to download from: www.canadianheritage.gc.ca/progs/pc-cp/pubs/e/Family.htm

Federal Law & Social Policy. Volunteer Canada, 2001. Available to download from: www.volunteer.ca/volunteer/screening_background.htm#Law

From the Top Down: The Executive Role in Volunteer Program Success, revised edition, by Susan J Ellis. Philadelphia: Energize, Inc, 1996.

The (Help!) I-Don't-Have-Enough-Time Guide to Volunteer Management, by Katherine Noyes Campbell and Susan J, Ellis. Philadelphia, Pennsylvania, Energize Inc. 1995.

Liability of Boards of Directors. Volunteer Canada, 2002. Available to download from: http://www.volunteer.ca/volunteer/screening_room7.htm

A Matter of Design: Design Theory and Application to the Voluntary Sector, Volunteer Canada, 2001. Available to download from: http://www.volunteer.ca/volunteer/canada_mgmt_kiosk_resources.htm

Measuring the Difference Volunteers Make: A Guide to Outcome Evaluation for Volunteer Program Managers, edited by Melissa Eystad. St. Paul, Minnesota, Minnesota Department of Human Services, 1997.

Measuring Up: Assessment Tools for Volunteer Programs, by Steve McCurley and Sue Vineyard. Downers Grove, Illinois, Heritage Arts Publishing, 1997.

Primer for Directors of Not-For-Profit Corporations: Rights, Duties and Practices. Broder, Peter, ed. Industry Canada, 2002. Available to download from:
http://strategis.ic.gc.ca/epic/internet/incilp-pdci.nsf/vwGeneratedInterE/h_cl00688e.html

No Surprises: Controlling Risks in Volunteer Programs. Non-profit Risk Management Center. Available to order from: http://www.epa.gov/volunteer

Promoting Volunteerism, by Janet Lautenschlager. Voluntary Action Directorate, 1991. Available to download from:
http://www.canadianheritage.gc.ca/progs/pc-cp/pubs/index_e.cfm#promotion

Responsibility and Accountability: What Community-Based Programs Need to **Know**. FRP Canada, 2002. Available to download from: www.hc-sc.gc.ca/hppb/childhood-youth/cbp/npfproject/index.htm

The Screening Handbook: Protecting Clients, Staff and the Community, by Lorraine Street. Ottawa, Ontario, Volunteer Canada. 1996.

A Springboard to Tomorrow: Creating Youth Volunteer Programs that Encourage the Development of Skills, by Janet Lautenschlager. Voluntary Action Directorate of the Department of Multiculturalism and Citizenship, 1994.

Stronger Together: Recruiting and Working with Ethno-cultural Volunteers. Voluntary Action Directorate, Multiculturalism and Citizenship Canada. 1990. Available to download from: www.canadianheritage.gc.ca/progs/pc-cp/pubs/e/pdfdocs/strongr.pdf

Valuing the Rural Volunteer.   The Ontario Rural Council, 2003. Available to download from: www.torc.on.ca

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Volunteer Connections: The Benefits of Employer-Supported Volunteerism, Volunteer Canada, 2001. Available to download from: www.iyvcanada.org/getinvolved/building.php

Volunteering for the Future: Developing School Based Volunteer Programs, by Sandra Murphy. St. John's, Newfoundland, Community Services Council Newfoundland and Labrador, 1995.

Volunteering Works! Give a Little…Get a Lot. Volunteer Canada, 2000. Available to download from: www.volunteer.ca/volworks/index.htm

Volunteers and the Law: A Guide for Volunteers, Organizations and Boards. Volunteer Vancouver. Vancouver, British Columbia, The People's Law School, 2000. Available to download from: www.publiclegaled.bc.ca

Yes You Can! Discipline and Dismissal of Volunteers, by Linda Graff. (An Audio Workshop).

NEWSLETTERS

E-Volunteerism: The Electronic Journal of the Volunteer Community: www.e-volunteerism.com/subscribe.html

VolunteerMatch Newsletter: www.volunteermatch.org

Association for Volunteer Administration: www.avaintl.org

WEBSITES

The Association for Research on Nonprofit Organizations and Voluntary Action (ARNOVA): www.arnova.org

Canadian Administrators of Volunteer Resources: www.cavr.org

Canadian Centre for Philanthropy: www.ccp.ca

Canadian Heritage / Patrimoine canadien: www.pch.gc.ca/cp-pc/ComPartnE/pub_list.htm

CASANet: www.casanet.org/program-management/volunteer-manage/index.htm

Charity Village: www.charityvillage.com

The Coalition of National Voluntary Organizations: www.nvo-onb.ca

Community Literacy of Ontario Volunteer Manual: www.nald.ca/volman.htm

Community Works: http://home.connection.com/~regan/volunteer.html

Cyber VPM: www.cybervpm.com

Energize, Inc: www.energizeinc.com

Giving and Volunteering: www.givingandvolunteering.ca

International Association of Volunteer Efforts: www.iave.org

International Year of the Volunteer 2001: www.iyvcanada.org

Macdonald Youth Services: www.mys.mb.ca/volunteer/

Management Assistance Program for Non-Profits:
www.mapnp.org/library/staffing/outsrcng/volnteer/volnteer.htm

Nonprofitscan.org: http://www.nonprofitscan.org

Nonprofit Risk Management Centre: www.nonprofitrisk.org

Nonprofit Volunteer Resource Center: www.mapnp.org

Points of Light Foundation: www.pointsoflight.org

Risk Management Library: www.rmlibrary.com/cgi-bin/suid/~rmlib/sites2.cgi?human:humvolun

Scouts Canada : www.scouts.ca

Service Leader: www.serviceleader.org

Virtual Volunteering Project: www.serviceleader.org/vv/support

Volunteer BC: www.volunteerbc.bc.ca

Volunteer Canada: www.volunteer.ca

Volunteer Centre Winnipeg: www.volunteerwinnipeg.mb.ca

Volunteer Match: www.volunteermatch.org

Volunteer Ottawa: www.volunteerottawa.ca

Volunteer Sector Initiative: www.vsi.isbc.ca

Volunteer Today: www.volunteertoday.com

The Volunteer Value Added Website : http://home.oise.utoronto.ca/~volunteer/

Volunteers Online : www.volunteersonline.ca

ONLINE TUTORIALS

Nonprofit Risk Management Centre: www.nonprofitrisk.org/training/train.htm

APPENDIX B: GLOSSARY

We offer the following not as formal definitions but as our perspective about the words we use.

Accessible –open, without barriers (physical, geographical, cultural, linguistic or other)

Attrition – decrease in the number of volunteers with a program or organization over time

Best Practices – program delivery approaches, tried and true, preferably evidence-based

Board of Directors – group of volunteers charged with the oversight of a not-for-profit or charitable organization

Bright Ideas – ideas that have worked for CAPC/CPNP colleagues, great websites or resources

Burn Out – we prefer fatigue; we think it more accurately describes the experience and more appropriately suggests that a rest or a change may ameliorate the condition

Capacity Building – increasing or enhancing the abilities of individuals, organizations and/or communities

CAPC – Community Action Programs for Children

Collaboration – working together towards a common goal or shared vision

Community Development – developing relationships and capacities among individuals and groups

Consultation – inviting input into idea development

Coordination - the process of ensuring the smooth functioning of many parts for effective results

CPNP- Canada Prenatal Nutrition Program

Delegation – the art and science of finding the right person for the right job, providing direction and support – and trusting that person to get the job done

Determinants of Health – factors that affect the health (i.e. wellbeing, not just absence of disease) of individuals and societies

Due Diligence – exercising reasonable and appropriate duties of care (see Volunteers & the Law in the tools section)

Duty of Care – the responsibility of individuals (paid or volunteer) to exercise the care, diligence and skill of a reasonable person in the discharge of their duties

Dynamic Downloads – tools that are available on the internet at the time of publication of this tool kit; download them to complete this kit!

Employees - Individuals who receive a salary or wage for their services.

Empowerment – the act of encouraging and enabling others

Evaluation – the art and science of measuring and learning from what we do

Family Friendly – welcoming, encouraging and accessible to families; in the CAPC/CPNP context, particularly families with young children and expecting women

Goals – statements identifying "what" will be done and the anticipated results

Inclusive – welcoming and accessible to all regardless of race, creed, culture, family status, language, ability, etc.

Leadership – the ability to influence, motivate and inspire others

Liability - the legal responsibility for a particular act or event and the related consequences

Loaned Volunteers – volunteers from other groups and organizations that offer service to CAPC/CPNP projects

Logic Model – a graphic illustration of program goals, objectives, outcomes and impacts

Management - the application of available resources (including human resources) to get a task done most effectively

Mentor – trusted guide, tutor or coach

National Projects Fund – a fund that supports and directly benefits CAPC/CPNP projects across Canada

Needs Assessment – identifying capacities and gaps

Non-profit/Not-for-profit – organizations that serve the public, do not operate for profit, and depend on volunteers for governance

Objectives – statements identifying how goals will be reached

Orientation - offering general information volunteers need to know to do their job

Organization - the larger body of which CAPC/CPNP may be a part (for example the sponsor organization).

Participants - the individuals who access programs and services from the organization.

Participatory – involving all stakeholders in all aspects of program activities

Performance Reviews - formal opportunities to reflect on individual accomplishments and challenges

Personnel - all individuals and groups serving the organization.

Policies – written framework for decision-making

Population Health – a conceptual framework identifying and acting upon the broad range of factors and conditions that have a strong influence on our health

Procedures – steps involved in implementing policy

Program - a service provision component of the project (for example, home visiting program, parent education program, volunteer program).

Project - CAPC/CPNP funded initiative (it may be a stand-alone project, a venture of a multi-partner collaborative, a program of a single sponsor, or any combination of the preceding).

Recognition – the art and science of acknowledging volunteer contribution

Record Checks – one step to manage risk in a volunteer program (eg. Driver's abstract, criminal reference check, personal references, child welfare records checks)

Recruitment - the process of attracting suitable individuals to volunteer for the organization.

Red Flags - areas of particular concern that might require further action at the local level.

References – individuals with knowledge about an applicant's suitability for a position or task

Reimbursement – repayment of expenses incurred when volunteering

Retention – keeping the volunteers we have!

Risk Management - process of recognizing and reducing risks to protect and safeguard the organization's resources

Screening – the act of determining suitability of a volunteer for a specific job

Service Clubs – associations or philanthropic groups dedicated to the local community

Skill Development – increasing knowledge and abilities

Stakeholders - individuals and groups who have a vested interest in the organization.

Supervision - the process of directing the activities of others towards the achievement of a task

Tool Kit – a collection of resources and templates

Training - the process of preparing volunteers for their **specific** roles and responsibilities

Virtual Volunteering – individuals offering services without remuneration via the internet

Volunteer Coordinator(s) - individual(s) in the organization charged with any aspect of volunteer management.

Volunteer Fatigue - a change in attitude or energy level affecting volunteer performance or commitment

Volunteers - individuals who do not receive a salary or wage (excluding expense reimbursement and honouraria) for their services to the organization.

Vulnerable – living in conditions of risk or "at risk"

Workplan – a chart outlining activities, responsibilities and timelines for project management

APPENDIX C: CAPC/CPNP VOLUNTEER SURVEY, 2001

THE NATIONAL PROJECTS FUND
VOLUNTEER RECRUITMENT AND MANAGEMENT PROJECT

Project Name and Address:	Telephone #:
	Fax #:
	Email Address:
	Website:
Name of person completing this form:	Position:

1. Is your project: (please check one) ☐ CAPC ☐ CPNP ☐ CAPC/CPNP

2. Are volunteers currently involved in your project? ☐ Yes ☐ No

2. a) If checked yes, please check off in what capacity?			2. b) If no, please complete below and then go to question #6.
Childcare providers	☐ Yes	☐ No	**Have they ever been involved in the past?** ☐ Yes ☐ No
Playgroup assistants	☐ Yes	☐ No	If yes, in what capacity? (use list to the left for ideas)
Volunteer drivers	☐ Yes	☐ No	
Craft program assistants	☐ Yes	☐ No	
Cleaning / Janitorial	☐ Yes	☐ No	
Parent education facilitators	☐ Yes	☐ No	
Cooking program assistants	☐ Yes	☐ No	**Why did this stop?**
Administration assistants	☐ Yes	☐ No	
Home visitors / mentors	☐ Yes	☐ No	
Board members	☐ Yes	☐ No	
Promotions / Marketing	☐ Yes	☐ No	
Fundraising	☐ Yes	☐ No	
Other: (please list)			**Are there plans to utilize volunteers in the future?** ☐ Yes ☐ No If yes, please explain:

3. Do you have a Coordinator of Volunteers? ☐ **No** ☐ **Yes** (If yes, Paid ☐ or Volunteer ☐) If no, whom do your volunteers report to?	**4. Do you have a job description for this position?** ☐ Yes ☐ No

5. How do you support your volunteers?	Pay their program mileage	☐ Yes	☐ No
	Pay childcare expenses	☐ Yes	☐ No
	Family friendly volunteering	☐ Yes	☐ No
	Honorariums	☐ Yes	☐ No
	Appreciation activities	☐ Yes	☐ No
	Orientation	☐ Yes	☐ No
	Training	☐ Yes	☐ No
	Performance Appraisals	☐ Yes	☐ No
	Job Descriptions	☐ Yes	☐ No
	Meal Allowances	☐ Yes	☐ No
	Other (please specify)		

6. Please complete the following table asks you to identify the resources that you have, whether you are willing to share these resources and which resources you need / would like for the management of your volunteers.

	Do you have?				Are you willing to share?		Would you like this resource?	
	For Volunteers		For Paid Staff		Yes	No	Yes	No
	Yes	No	Yes	No				
Vision statement								
Recruitment flyers								
Application form								
Interview questions								
Screening tools								
Insurance check policy								
Security / Police check								
Driver's record check								
Reference check form								
Letter of acceptance								
Contract agreement								
Service agreement form								
Profile information form								
Confidentiality form								
Volunteer placement policy								
Orientation package								
Job description(s)								
Rights and responsibilities								
Training package / manual								
Mileage form								
Time sheets								
Expense form								
Tracking form								
Activity / communication log								
Computer software								
Filing system								
Length of service policy								
Absence / illness policy								

6. continued	Do you have?				Are you willing to share?		Would you like this resource?	
	For Volunteers		For Paid Staff		Yes	No	Yes	No
	Yes	No	Yes	No				
Substitutions policy								
Dress code policy								
Volunteer driver policy								
Discipline policy								
Dismissal policy								
Grievance / complaint procedure								
Harassment policy								
Conflict of interest policy								
Bereavement policy								
Professional development policy								
Risk management policy								
Conflict management policy								
Performance appraisal form								
Exit interview questionnaire								
Recognition / Appreciation activities								
Evaluation of Volunteer service program								
Other: (please list)								

7. Please list your 4 most successful volunteer positions in your organization.

1.	2.	3	4

8. What issues do you face? (Please list)

	With Volunteering	With Staffing
With the volunteer…		
With participants…		
With staff…		
Time managing…		

8. Continued…	With Volunteering	With Staffing
Budgeting / expenses…		
Ethically…		
Other…		

9. Please specify the resources you use or that you would recommend for…		
	Volunteers	**Employees / Human Resources**
☐ Books		
☐ Internet links		
☐ Videos		
☐ Organizations		
☐ Guest speakers		
☐ Other: (please specify)		

10. In what formats can you comfortably receive and share further information?			
	Receive	**Share**	**Final Product Format**
English			
French			
Bilingual (French / English)			
Email			
Binder			
Website			
CD ROM			
Other: (please specify)			

11. What other information would you like to share regarding your volunteer program?

12. Would you interested in reviewing this draft resource during development?	Volunteer Resource ☐ Yes ☐ No	HR Resource ☐ Yes ☐ No

APPENDIX D: INDEX

APPENDIX E: ENDNOTES

[1] Taking Action on Population Health: A Position Paper for Health Promotion and Programs Branch Staff, Health Canada

[2] Volunteer Canada

[3] Volunteer BC

[4] Canadian Code for Volunteer Involvement, developed by Liz Weaver, Volunteer Canada, Ottawa, 2001.

[5] 1997 survey on volunteering (UK), Volunteer Centre of Ottawa Carlton, 1992, for example

[6] Webster's Dictionary

[7] Ibid

[8] Websters

[9] Ibid

[10] Recruiting Volunteers Fact Sheet written by Nancy Larmer, Ontario Ministry of Agriculture Food and Rural Affairs. ©November 1996

[11] Chapter 6 page 3

[12] Caring Canadians, Involved Canadians : Highlights from the 2000 National Survey of Giving, Volunteering and Participating.

[13] Chapter 6 page 4

[14] Chapter 6 page 4

[15] Chapter 6 page 4

[16] Caring Canadians…

[17] Safe Steps: A Volunteer Screening Process

[18] Ibid

[19]

[20] NSGVP p 32.

[21] Ibid

[22] Ibid

[23] Merriam-Webster Online