



Citizens **Information** Board  
information · advice · advocacy

# Managing Volunteers

## A Good Practice Guide



# contents

## Preface

### 1. Introduction

---

### 2. Introduction to Volunteer Management

---

### 3. Preparing for Volunteers

---

### 4. Volunteer Policies and Procedures

---

### 5. Attracting and Recruiting Volunteers

---

### 6. Day-to-day Volunteer Management

---

### 7. Induction and Training

---

### 8. Dealing with Problems

---

## Preface

The third edition of Managing Volunteers: a good practice guide has been produced by the Citizens Information Board to provide up-dated information on good practice for the wide range of voluntary and statutory agencies in Ireland, who involve volunteers in their activities. Increasingly, it is being recognised that volunteering is a valuable resource and should be managed and supported as effectively as possible.

The materials used in this Guide can be adapted by individual organisations to help them design volunteer management policies and procedures and develop volunteer policies suited to their needs. The information contained in this Guide can be used not only by well established organisations who wish to formalise or update existing practice but also new

organisations and statutory bodies in the start-up phase of their development who are becoming involved in volunteer management.

The Guide begins with an introduction to volunteer management and proceeds to work through all the stages of volunteer management from drawing up policies and preparing for volunteers to recruitment, selection, induction and training, day to day volunteer management and dealing with any problems that might arise. A list of resource materials is referenced at the end of this Guide.

Thanks to Janet Kehelly who revised and substantially rewrote this edition of the Guide and also to Yvonne McKenna of Volunteer Centres Ireland who reviewed the content and made many helpful suggestions.

The information contained in this Guide can be used not only by well established organisations who wish to formalise or update existing practice but also new organisations and statutory bodies in the start-up phase of their development who are becoming involved in volunteer management.



## Introduction

Who is the guide for?

What is volunteer management?

Is volunteer management a new concept?

The benefits of managing volunteers

Current developments

How to use this guide

Glossary of terms used

## Introduction

The guide is an introduction to volunteer management. It works through the sequence of tasks which would be typical when involving volunteers for the first time. It starts with a volunteer plan and then looks at putting together policies and procedures, recruiting and selecting volunteers, training, day to day management of volunteers and dealing with problems that may arise on an on-going basis.

While the guide uses the term 'volunteer' involving organisation and volunteer manager throughout, it is intended as much for groups with two volunteers as for organisations with two hundred volunteers. Most of the principles and tasks are the same regardless of size and structures.

It is likely that the guide describes what many of you are already doing but have not actually got round to putting into words, so in that way it will hopefully give you both a framework to build on and an incentive to get started. This chapter gives background information on how to use the Guide and briefly answers some of the common questions asked about volunteer management. The rest of the Guide explores the subject of volunteer management in more depth.





## Who is the guide for?

This guide is aimed at people with responsibility for managing volunteers, specifically those who have limited specialist knowledge in this area, or none at all. You may not have a formal title or job description which says you “manage” volunteers, but if you are involved in recruiting, training or rostering volunteers, that means that you have a management role.

## What is volunteer management?

Management in general can be described as making **the most effective and efficient use of resources in order to achieve your goals**. Good people management ensures that everyone involved helps the organisation to achieve its goals in the most effective way possible.

## So how does this apply to volunteer management?

Once an organisation has a clear mission and goals, it has to decide what resources it needs to succeed. Whatever the initial

reason for choosing to involve volunteers, organisations which address the following are far more likely to have volunteers who give their best to the organisation and in return, receive satisfaction and a sense of well-being from their volunteering.

You need to develop:

- » A **mission statement** which says why volunteers are involved
- » A shared vision of why the organisation exists and what volunteer involvement brings to it
- » Short and long term **goals and objectives** which everyone understands
- » A statement outlining the **scope** for volunteer involvement
- » Ring fenced financial and human **resources** to support volunteering
- » Effective **monitoring and evaluation** of volunteer involvement

Having clear and short statements on each of these will provide a solid foundation for good volunteer management.





Volunteer management is about ensuring that the organisation benefits as much as possible from volunteer involvement and that the volunteer benefits by being part of it.

## Is volunteer management a new concept?

In the past, many organisations involving volunteers relied on informal structures, systems and relationships. Although this often worked well and a certain understanding and culture evolved, more recently many organisations involving volunteers have put in place more formal structures which help both the organisation and volunteer understand their relationship better.

Some of the reasons why this is happening are:

- » Funding sources requiring greater accountability and evidence of how things are managed
- » Growing evidence to show that volunteer management benefits organisations and volunteers
- » Some organisations had difficulty in attracting volunteers which prompted organisations to review why this was happening. Poor organisation and management was a key reason.

- » Volunteers were leaving organisations because their expectations aren't being met. Again this prompted organisations to review their work
- » The development of a national network of volunteer centres has meant that organisations are now able to get advice, support and guidance in all aspects of involving volunteers. These centres are becoming a focal point for local volunteer activity.

## The benefits of managing volunteers

There are a number of benefits to managing volunteers including:

- » Clarity for the organisation and volunteer
- » More likely to attract the right volunteers, hold on to volunteers and benefit from their involvement.
- » A standardised approach to dealing with volunteers which provides organisations with direction and ensures that volunteers get treated fairly and equally.
- » Volunteer management practices continue even when people leave.



## Current developments

There is a growing body of research on volunteering activity which provides useful insights and recommendations for the future. Contrary to the perception that volunteering is on the decline, research shows that anywhere between 16.4% and 37% of the adult population volunteered their time and skills in 2006 which is slightly up than earlier studies.<sup>1</sup> However, the overall number of hours contributed by volunteers is fewer than earlier studies.<sup>2</sup> While this probably reflects the busier lives that people have, it does indicate that people will opt for volunteering opportunities that fit with their existing commitments and meet their expectations.

Therefore, organisations are going to have to be more creative and flexible about the type of opportunities they offer. Furthermore they are going to have to ensure that volunteers feel their contribution is valued. Otherwise, volunteers will look elsewhere.

One of the most interesting findings from research carried out by Volunteer Centres Ireland (VCI), who facilitate the national network of Volunteer Centres, in 2006 is that 60% of people registered with them had never volunteered before.<sup>3</sup> This clearly shows that if asked, people are ready and willing to volunteer. This is extremely encouraging for organisations hoping to attract volunteers.

The message for organisations involving volunteers is clear: If you want to attract, keep and benefit from volunteer involvement then you have to look after your volunteers and manage them properly and professionally.

---

1 The Active Citizenship Taskforce Report and the 2006 Census

2 The Hidden Landscape: Forays Into Mapping  
Non-profit Organisations in Ireland: 2006: Centre  
for Non-profit Management, Trinity College Dublin.

---

3 Volunteer Centres Ireland (VCI) supports a growing network of  
volunteer centres. See [www.volunteer.ie](http://www.volunteer.ie)



The following statistics give a snap shot of volunteering in Ireland today.<sup>4</sup>

465,624 hours were spent volunteering in 2006

70% of people volunteer for an average of 5 hours per month

Male volunteers outnumbered female volunteers by 3:1

Estimates on the in-kind revenue from volunteering in Ireland range from €200 - €600 million

Up to 80% of volunteers are given no training

## How to use this guide

This guide gives an overview of what effective volunteer management involves. It introduces you to various aspects of volunteer management and provides some ideas and suggestions on how to get started. You may choose to read it in sequence or just pick out a particular chapter which contains answers to the specific questions you have and that's fine too as each section stands alone.

There are seven sections which broadly follow the cycle of volunteer management. The content is intended to give basic information and suggestions on getting started. It is recommended that you look at the additional material resources which are referenced in the manual. Resource material on websites is constantly being added to so it's worth rechecking on a regular basis.

Although you can “*cut and paste*” some of the templates, it's important to make sure that what you develop suits your organisation. You may have to make some changes to our templates to meet the particular needs of your organisation.

When writing your own materials, remember that the tone and language should reflect the message you want to get across. For example a volunteer handbook will likely use “*you and us*”, whereas your volunteer policy and procedure will likely say “*volunteers and organisation*”. Always keep things short and simple and avoid jargon. And finally, it's important to review your documents to make sure they remain relevant.

<sup>4</sup> Statistics available from Volunteering Ireland Facts & Figures Sheet. Volunteering Ireland is the national volunteer development agency. See [www.volunteeringireland.ie](http://www.volunteeringireland.ie)



## Glossary of terms used

**Volunteer involving organisations:** term used to describe organisations which have volunteers

**Volunteer management:** organising volunteer involvement in a systematic way that mutually benefits the organisation and volunteer

**Volunteer management programme:** the plan for how good volunteer management happens. It sets out the sequence of activities which ensure effective volunteer management

**Volunteer manager or manager (co-ordinator) of volunteers:** the person, or persons with responsibility for managing the volunteer programme and volunteers.

**The team:** everyone involved, paid or voluntary

When writing your own materials, remember that the tone and language should reflect the message you want to get across.

## Introduction

What is volunteer management?

Knowing what motivates volunteers

What is a Volunteer Management Programme?

When does volunteer management happen?

Getting started

How do you know when your volunteer management is effective?

Useful resources

## Introduction

This section looks at the skills and competencies which volunteer managers need in order to do the job well. The section starts by reviewing some of the basic principles of management which you may or may not already be familiar with. It goes on to look at the specific skills and competencies which are unique to volunteer management and distinguish it from other types of management.

As often happens, people find themselves in management roles with little or no experience. While this can be a challenge, new managers often feel thrown in the deep end, so you should avail of volunteer management training when you can<sup>5</sup>. There may also be a volunteer managers' network in your area which can be an excellent way of sharing experiences, learning and getting support. If there isn't, it could be worth starting one!

---

<sup>5</sup> Local volunteer centres and Volunteering Ireland run volunteer management training courses on an ongoing basis.

## What is volunteer management?

The term “volunteer management” is familiar to all of us working in organisations involving volunteers, but actually defining it, or describing what it looks like, may not be so easy. This section looks at some of the common aspects of management and also what is specific to volunteer management. This section also attempts to answer some of the common questions raised by volunteer managers.

Let’s start by looking at **what needs managing**:

- » The overall organisation
- » Day-to-day activities
- » The budget
- » The people working there
- » The material resources
- » Internal and external communications and information
- » Strategic planning for the future

Depending on the size and structure of the organisation, these activities could be managed by one person or a number of managers who in turn are managed by a senior manager.

## Good management means:

- » Having a clear and understood mission statement
- » Having a shared vision which sets out where the organisation is going in the short and long term
- » Building a committed and skilled team
- » Using all the resources available to ensure that the organisation achieves its aim and objectives
- » Having an appropriate training, support and supervision programme for staff
- » Ensuring there is adequate funding to achieve goals
- » Responding efficiently and effectively to issues that arise
- » Making decisions
- » Showing leadership.

In addition to these, and core to volunteer management is:

- » An understanding of, and commitment to, the ethos of volunteering; and
- » An understanding of what motivates each volunteer

If an organisation involving volunteers and the volunteer manager have an appreciation of these core values, then the experience for the volunteers and the organisation is more likely to be a positive one.

## Knowing what motivates volunteers

Knowing what motivates someone to volunteer is important in assessing whether you can meet their expectations. For example, if someone says they want to volunteer to meet people, then the volunteering opportunity must involve working with others. Sometimes people can't pinpoint exactly what has motivated them so you may have to dig a little so check your opportunities suit.

A volunteer's original motivation for joining is not always the same as their reason for staying, so it's always worth asking what motivates them to stay.

This will help to alert you to new opportunities that these volunteers might like to try.

In order to manage volunteers effectively, you must:

- » Understand why the organisation involves volunteers
- » Know how volunteers fit in with the overall structure of the organisation
- » Be committed to the involvement of volunteers
- » Know what motivates people to volunteer and to stay
- » Match the right volunteers with the volunteer opportunities
- » Validate the contribution that volunteers make
- » Build a team which values the contribution made by all members
- » Ensure the efficiency of the service at the same time as meeting the needs of volunteers
- » Deal with problems that arise

**It's a challenging task!**

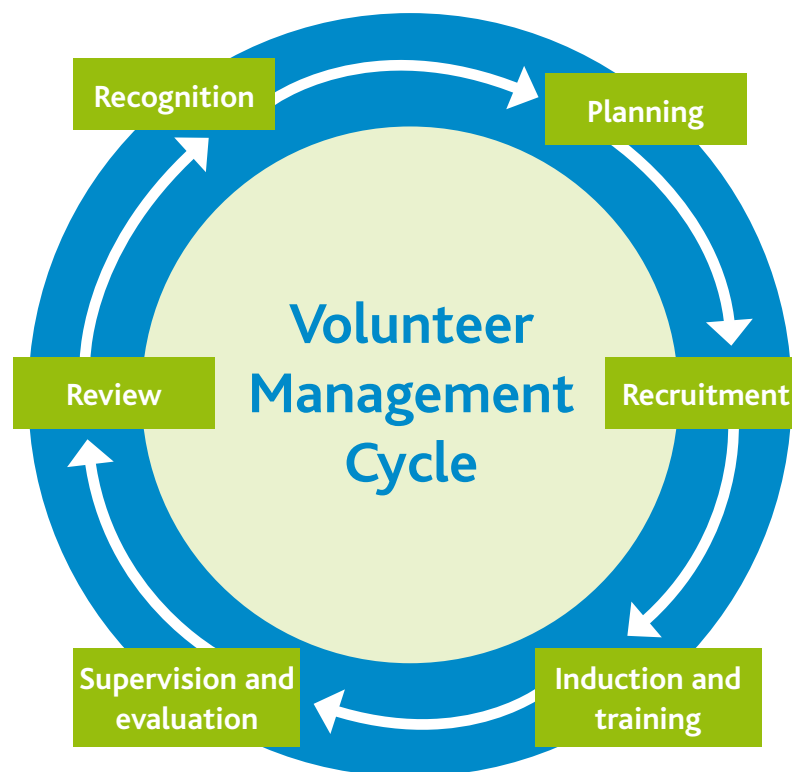
## What is a Volunteer Management Programme?

Having a volunteer management programme in place is the most straight-forward way to ensure effective volunteer management. It is about having a system which manages the volunteer process; it's the way it's done.

Regardless of the structures or size of a volunteer involving organisation, volunteer management generally follows the cycle illustrated in the diagram.<sup>6</sup>

## Volunteer Management Cycle

Each of these tasks is detailed in the sections which follow.



<sup>6</sup> Volunteer Benevoles Canada: Volunteer Management Theory.  
[www.volunteer.ca/en](http://www.volunteer.ca/en)

## When does volunteer management happen?

Volunteer management happens once an organisation has a volunteer. It doesn't require a set number of volunteers. The system above applies as much to an organisation with two volunteers as it does to an organisation with two hundred volunteers. However the amount of time and management required at each stage will depend on the type of volunteer opportunities and the number of people involved. For example, an organisation with two volunteer counsellors is likely to require more volunteer management time and skill than an organisation that has fifty volunteers painting a mural over a weekend. Equally, the extent of reliance on volunteers to deliver a service, regardless of numbers, will impact on the type and amount of volunteer management required.

So, for example, an organisation which has recruited twenty volunteers for one evening to pack envelopes does not need the same management as five volunteers going on a week long holiday with children with special needs.

Each volunteer-involving organisation should aim to have a volunteer management programme suitable to its own needs. It should be detailed enough to explain why volunteers are involved and how tasks are managed.

## Getting started

Getting started is never easy and the idea of starting to draft your volunteer management programme can seem overwhelming. The following tips are intended to keep you motivated for what lies ahead.

- » You, your organisation and the volunteers all benefit by having a volunteer management programme in place
- » The programme is essential in developing and maintaining a positive volunteer environment
- » Volunteer management is often about formalising what you are already doing. You'll be surprised how much you can write in an hour about what you already do.
- » The size and detail of your volunteer management programme should reflect what you need at a particular time so don't be put off by the size of some of the documents you see.
- » It doesn't have to be done as a single task. Break it into manageable tasks, based on what is needed most.
- » Introduce, implement or use what you've agreed as you go along.
- » Involve others. Delegate
- » Recruit a volunteer(s) to help you or see if an existing volunteer(s) is interested
- » Get advice from organisations who already have programmes in place
- » Get help from the local volunteer centre

Organise an information sharing meeting with organisation involving volunteers and pool and exchange materials.

## How do you know your volunteer management is effective?

The most obvious way to know if you are managing your volunteers effectively is to establish a timetable to monitor, review and evaluate in the same way as you would for other aspects of the organisation's work. Whether you are reviewing your existing volunteer management programme or starting for the first time, it is important to set out dates for monitoring, reviewing and evaluating.

On a very informal level, your instinct can tell you how things are going. However, there are more quantifiable indicators such as:

- » Does the contribution of each volunteer make a measurable difference?
- » Does the organisation benefit from the volunteers' contribution?
- » Are volunteers supported and valued because of that contribution?
- » Are volunteers turning up as agreed?
- » Are volunteers staying for the agreed amount of time?

Volunteer management is about ensuring that volunteers contribute to the overall effectiveness of the organisation and help it to meet its strategic goals while at the same time, find it a rewarding experience.

### Activity

You may find it useful to adapt this checklist to your situation:

**Download the Word version of the Volunteer Management Checklist Word document.**



### Volunteer Management checklist

Task – have you in place	Have/don't	Would like	By when
A volunteer mission statement?			
A clear understanding of how volunteers fit into the structure of the organisation?			
Have a volunteer budget?			
A volunteer manager/person with responsibility for volunteer involvement			
Paid staff, management and scheme staff who understand the role of volunteers			
Clear roles for volunteers which are meaningful			

## Useful Resources

Adironack, S.(1997) **Just About Managing?; effective management for voluntary organisations and community groups** London Voluntary Services Council

Campbell, K.N. and Ellis, S.J. (2004) **The (Help) I-Don't-Have-Enough-Time Guide to Volunteer Management:** Energize Inc.

Connor, T.D. (1999) **The Volunteer Management Handbook:** Wiley Nonprofit Series

Fisher, J.C. and Cole, K. (1993) **Leadership and Management of Volunteer Programs: A Guide for Volunteer Administrators:** Jossey-Bass Non-Profit Series

McCurley, S. and Lynch, R. (1998), **Essential Volunteer Management.** Director of Social Change

Volunteer Development Agency (2001) **As good as they give: planning volunteer involvement,** Volunteer Development Agency: Belfast, Northern Ireland.

## Websites

- » [www.volunteer.ie](http://www.volunteer.ie)
- » [www.energizeinc.com](http://www.energizeinc.com)
- » [www.volunteer.ca/en](http://www.volunteer.ca/en)
- » [www.volunteering-ni.org](http://www.volunteering-ni.org)
- » [www.volunteeringireland.ie](http://www.volunteeringireland.ie)

## Introduction

Why do you involve volunteers?

How do volunteers help the organisation to achieve its objectives?

Is it necessary to manage volunteers?

Who manages volunteers?

## Introduction

Preparation is key to successful volunteer management. It means taking time to ensure that everything is in place to ensure that both the organisation and volunteer benefit from the experience. Whether you have existing volunteers and want to recruit new ones, or are recruiting volunteers for the first time, you should take the time to reflect on and answer the questions posed in this section. They form the basis of a successful and sustainable volunteer programme.

The key questions to answer are:

- » Why you have volunteers?
- » What is their role?
- » What limits, if any, are there to the range of activities volunteers get involved in?
- » What can you offer volunteers?

These are all key questions that guide how you work with volunteers and will influence the volunteer's experience in return.



This section sets out some of the basic issues that you should think about before recruiting volunteers or when reviewing your current volunteer programme. Having answers to them will give you direction as you develop a volunteer programme that suits your organisation.

The better prepared you are, the better your volunteer programme will be for you and your volunteers, and the more likely the volunteer experience will be a good one.

## Why do you involve volunteers?

Being clear why you involve volunteers helps you to:

- » Put a volunteer programme together
- » Connect volunteers to the work of the organisation
- » Decide what structures and supports volunteers need

Here is a checklist giving reasons for involving volunteers. Tick the box if the reason applies to your organisation.

- ☐ Your organisation believes in the volunteer ethos
- ☐ Volunteers allow you to do more
- ☐ Volunteers bring expertise, experience and a perspective which is unique
- ☐ Volunteers raise the profile and awareness of the service
- ☐ We've always had volunteers
- ☐ The management structure of a board of directors is by law not permitted to derive a profit and is, therefore voluntary.

## How do volunteers help the organisation to achieve its objectives?

Most organisations have a vague rather than a specific answer to this question but it is important in order to clarify:

- » The roles that volunteers have
- » The relationship between volunteers and paid staff
- » The potential and/or limits for volunteer involvement.

All volunteers, whether new or existing, should have a **role description** that includes an explanation of how the role fits with the work of the organisation. This will help you define the parameters for involvement and lets the volunteer know the scope for volunteer involvement. It's a very good way of checking that the role meets the expectations the volunteer has.

Look at how your organisation currently works with, or is likely to work with, volunteers and decide which of the following descriptions of volunteer involvement best describes how volunteers fit in.<sup>7</sup>

The **service delivery model** is one where volunteers deliver services directly and a small number of paid staff manage and support them. Volunteers are usually attracted to these organisations because of the voluntary activity and the defined volunteer roles.

The **support role model** applies to organisations with more paid staff and fewer volunteers or where volunteers are recruited for specific work, such as fundraising. Volunteers are often motivated by the overall work of the organisation rather than the actual role they do. Some organisations evolve into this model as the organisation grows, funding becomes more secure and roles require greater expertise.

In the **member/activist model** there are usually no paid staff and people are motivated to join because of strong personal commitment to the work or cause.

The **co-workers model** is one where the roles of volunteers and paid staff are indistinguishable. Volunteers in these organisations tend to have a high degree of involvement and identify with the organisation's aims.

---

<sup>7</sup> Models of Volunteer Management As Good As They Give, Volunteer Development Agency 2001

## Is it necessary to manage volunteers?

It is widely accepted that the “unwritten but understood” style of volunteer management is no longer enough to ensure a mutually beneficial volunteering experience. Volunteers deserve more and organisations need to have policies and procedures in place to ensure things run smoothly and effectively.

Furthermore, volunteers have chosen to give your organisation their time, skills and expertise. In return, you should be offering them a volunteering experience that meets their expectations and is well managed. Good volunteer management means:

- » you know what motivates each volunteer
- » volunteers know what their role is and what sort of training they can expect,
- » volunteers and others in the organisation know how their contribution fits in with organisation’s goals,
- » volunteers know who to turn to for help and support
- » volunteers receive affirmation and recognition for their contribution.

For volunteers to stay and be effective, volunteers and organisations must be a good match, therefore clear role descriptions, and recruitment and selection procedures are essential.

Organisations need to be able to refer to policies and procedures to ensure their work with volunteers is consistent over time and across staff.

The key role of management is to ensure that the resources of the organisation are managed effectively, including volunteers. Organisations with solid structures, clear lines of communication and good relationships will attract and keep good people.

## Who manages volunteers?

Having an effective volunteer programme and being an effective volunteer manager requires commitment and skill and choosing who has this role is key to the success of your volunteer programme.

Who actually has this role depends on the organisation. Factors such as the size of an organisation, the number of volunteers, the type of work volunteers do and the skills and expertise required all impact on who actually takes on this role. It could be the manager/CEO, a paid staff member, a paid volunteer manager or a volunteer volunteer-manager.

**The reality in many organisations is that the role is added on to already stretched manager. It's important to cut your cloth to suit your measure and not make commitments to volunteers that you can't keep. Only recruit the number of volunteers that you can effectively manage.**

Here is a checklist of tasks involved in managing volunteers. Tick the box if you feel you have the time and capacity to carry out all of these activities. Now decide if any of the tasks can be delegated:

- ☐ Ensure that the role of volunteers is understood and valued in the organisation
- ☐ Identify volunteer opportunities
- ☐ Defining volunteer roles
- ☐ Recruit and select volunteers
- ☐ Organise volunteer induction
- ☐ Develop team building strategies
- ☐ Maintain volunteer records
- ☐ Organise volunteer roster
- ☐ Provide one-2-one support for volunteers
- ☐ Carry out volunteer reviews
- ☐ Design volunteer policies and procedures
- ☐ Plan training programmes
- ☐ Deal with difficulties that arise

The personal qualities and skills of a good volunteer manager include:

- » A commitment to the role of volunteers
- » An understanding of volunteer issues
- » Experience in managing or willingness to learn
- » Excellent communicator
- » Good organiser
- » Recognises the importance of team building
- » Ability of identify training needs
- » Creative
- » A motivator
- » Combines efficiency with flexibility

Not everyone will have all the skills required so you will need to offer training and support to someone taking on this role. If there is an existing volunteer (or two) who you think would be good managers, suggest it to them and consider introducing them into the role incrementally. If they aren't interested in all aspects of the role there may be elements that they would like to do, for instance, writing a specific policy and procedure or helping with the volunteer induction programme.

Organisations involving volunteers need to recognise that volunteer management needs to be resourced and supported. It also needs to be connected with the wider organisation and not seen as something self sustaining just because there is a volunteer manager in place. Volunteer managers must be given the opportunity and mandate to develop the skills and capacity of the organisation and its staff to work with and value the contribution of volunteers.



The personal qualities and skills of a good volunteer manager include:

- » A commitment to the role of volunteers
- » An understanding of volunteer issues
- » Experience in managing or willingness to learn
- » Excellent communicator
- » Good organiser
- » Recognises the importance of team building
- » Ability of identify training needs
- » Creative
- » A motivator
- » Combines efficiency with flexibility

Not everyone will have all the skills required so you will need to offer training and support to someone taking on this role. If there is an existing volunteer (or two) who you think would be good managers, suggest it to them and consider introducing them into the role incrementally. If they aren't interested in all aspects of the role there may be elements that they would like to do, for instance, writing a specific policy and procedure or helping with the volunteer induction programme.

Organisations involving volunteers need to recognise that volunteer management needs to be resourced and supported. It also needs to be connected with the wider organisation and not seen as something self sustaining just because there is a volunteer manager in place. Volunteer managers must be given the opportunity and mandate to develop the skills and capacity of the organisation and its staff to work with and value the contribution of volunteers.

## Activities

Start by discussing the following questions with others involved.

- » Why you have volunteers in your organisation?
- » What roles do volunteers do?
- » Do you limit the role of volunteers and, if so, why?

Once you can answer each one of these questions, then you can write a clear statement on volunteer involvement. This will form the basis of your volunteer policy.

The example below reflects an organisation that has volunteers in both support and management roles.

**Volunteers** make a vital contribution in helping us achieve our aims.

**Volunteers** support paid staff in service delivery and manage our net work of fund raising committees.

**Volunteers** join specific teams and are given induction and on-going training and support to carry out their roles

**Volunteers are involved** in service delivery, fund raising and boards of management. Our volunteers are supported to take up new volunteer challenges.

**We expect volunteers** to commit to a minimum of 1 year and work the agreed number of hours.

Look at the volunteer management systems that you currently have. Even if not written down, you will have an informal way of doing things.

This list identifies some of the basic management responsibilities.

## Basic Management responsibilities

Question	Yes	Partly	No
Do you have someone with responsibility for volunteers?			
Do volunteers know who that person is and what their role is?			
Do volunteers have role descriptions?			
Does that person meet with volunteers to discuss their work?			
Do volunteers attend meetings?			
Do you have a system for volunteers to keep up to date in what is going on?			
Do you have induction training?			
Do you have ongoing training?			
Do you keep a file on each volunteer?			
Do you have any volunteer policies and procedures in place?			

**Download the Word version of the above table**

## Further information sources

Volunteer Development Agency (2001) **As good as they give: planning volunteer involvement**, Volunteer Development Agency: Belfast, Northern Ireland.

## Websites

- » [www.volunteer.ie](http://www.volunteer.ie)
- » [www.energizeinc.com](http://www.energizeinc.com)
- » [www.volunteer.ca/en](http://www.volunteer.ca/en)
- » [www.volunteering-ni.org](http://www.volunteering-ni.org)
- » [www.volunteeringireland.ie](http://www.volunteeringireland.ie)

## Introduction

What are policies and procedures?

Getting started

What should be included?

Volunteer policy checklist

Introducing new policies and procedures  
to existing volunteers

## Introduction

The very mention of policies and procedures can give some managers a headache so let's start by dispelling two myths: policies and procedures don't have to be complex and wordy and they don't take forever to write.

Policies and procedures are often about writing down what you are already doing. Make it a manageable task by keeping it simple and doing it over a period of time. Remember to go back to it regularly and update it if necessary.

Having a volunteer policy is essential for organisations intending to involve volunteers; it underpins effective volunteer management. A volunteer policy will help to:

- » clarify volunteer roles and responsibilities
- » establish values, beliefs and direction for volunteer involvement
- » strengthen good relationships within the team
- » ensure continuity over time and from staff to staff
- » formalise current practice

## What are policies and procedures?

A **volunteer policy** states your position and/or your belief about something. It gives direction and guidelines for making decisions. Policies tell people **what** to do. For example, you should have a **policy** on volunteer expenses which clearly states under what circumstances volunteers will be eligible to make a claim.

A **volunteer procedure** describes the steps and sequence of activities that support a policy. Procedures tell people how to do it. For example, your expenses **procedure** will tell your volunteers how they apply for expenses and how much they can claim.

## Getting started

It's common to feel a bit overwhelmed by policy-making so here are some tips to keep the task manageable:

- » Remember that policies are often about writing down what you are already doing
- » Policies don't have to be complicated. In fact, the more straight-forward the better

- » Individual policies can be written over a period of time
- » Prioritise according to which policy is most needed
- » Don't reinvent the wheel: if there are similar organisations with established policies and procedures see if you can get a copy.

Think creatively about how the task can be achieved. One possible option would be to delegate the task, or parts of it, to a small group. If your organisation already has volunteers, involve them in the process too.

Ask existing volunteers would any of them like to be involved in a new challenge or Recruit a volunteer with knowledge and expertise to help draft the document.

## What should be included?

The volunteer policy should reflect what your volunteers and organisation need. When making a list of what to include, think about the order in which the policies should be written. Start with the policies which you need most and don't avoid the more contentious ones.

## Volunteer Policy Checklist

Have you a policy on	Yes/No	Next steps (write/review)
Why you involve volunteers		
Role descriptions		
Recruitment and selection		
Relationships between volunteers and the team/management		
Relationships between volunteers and the client group		
Training and development		
Working conditions		
Recognition		
Support and supervision		
Expenses		
Insurance		
Involvement in organisational structures		
Dealing with problems		

Policies should be written in the present tense, using clear and concise language.

**Download the Word version of the Volunteer Policy Checklist**

Below is an example of what an expenses policy might include.

### Expenses Policy

The cost of volunteering should never be allowed to discourage volunteering. Volunteers will be reimbursed for out of pocket expenses incurred directly as a result of their volunteering activity.

Expenses include

- » public transport to and from the service: up to a maximum of €5 per day or the cost of disc parking for the hours worked
- » mileage allowance for travel agreed in advance with the manager
- » lunch allowance of €5 if working over 4 hours
- » exceptional costs agreed in advance with the manager
- » specialist protective clothing or other essential equipment
- » car insurance

The procedure follows the policy:

Procedures for claiming expenses

- » costs can only be reimbursed for receipts submitted
- » volunteers must submit an expenses form to the manager for approval
- » expenses must be submitted within one month of being accrued
- » expenses will be reimbursed within 10 working days of being submitted



## Introducing new policies and procedures to existing volunteers

While most volunteers will welcome having policies and procedures in place, you may find resistance from some volunteers. They may see their introduction as threatening or unnecessary, too formal, contrary to the spirit of volunteering or too closely resembling a paid work situation. If volunteers have concerns you need to acknowledge them and look at how you can promote the positive aspects of having a volunteer policy and minimise the concerns of volunteers.

### Keep in Mind

- » The introduction of policies and procedures will make the volunteer programme better for everyone.
- » Change can be hard to implement. Make sure you promote the positive aspects of having policies and procedures.
- » Policies and procedures are often written in response to unforeseen problems. Avoid this by being ready.
- » Involve the team in drafting policies. Set up a working group or involve people on an interest basis.

- » Start by introducing a policy which the team will welcome.
- » Be firm that everyone will have to follow policies and procedures that are agreed.
- » Accept that the introduction of more formal volunteer management may result in volunteers leaving.

## Further information sources

Ask other volunteer involving organisations for a copy of their Volunteer Policies & Procedures

Volunteer Development Agency (2001) As good as they give: planning volunteer involvement, Volunteer Development Agency: Belfast, Northern Ireland

## Websites

- » [www.volunteer.ie](http://www.volunteer.ie)
- » [www.vds.org.uk](http://www.vds.org.uk) (Volunteering Development Scotland)
- » [www.energizeinc.com](http://www.energizeinc.com)
- » [www.volunteer.ca/en](http://www.volunteer.ca/en)
- » [www.volunteeringireland.ie](http://www.volunteeringireland.ie)



## Introduction

### Getting started

### Attracting the right people

### Finding the right people

### Dealing with enquiries

### Where are the right people?

### Volunteer applications and interviews

### References and vetting

### Saying 'no'

### Evaluating your recruitment process

## Introduction

Once you have made a commitment to involve volunteers and have identified specific roles for volunteers, then the next step is to find the right number and the right type of volunteers. This involves:

- » **Attracting** the right people
- » **Matching** people with the right job
- » **Trusting** your instinct!

How you go about organising the recruitment of volunteers will depend on a number of factors including:

- » The number of volunteers you need
- » The sort of roles that you are offering
- » What commitment you are asking volunteers to make
- » What resources you have



## Getting started

The following steps apply to all volunteer recruitment:

1. Write a role description which gives an overview of the volunteering opportunity and how it fits into the overall work of the organisation; a breakdown of the tasks; what time commitment is required; what training is offered
2. Write out a person specification describing the skills and attributes which the person needs to fulfil that role
3. Agree who is responsible for supervising the volunteer and what level of support will the volunteer have

If you are planning a big recruitment campaign it might be worthwhile setting up a recruitment group to share the work and include existing in the group.

## Attracting the right people

It's time to put on a marketing hat and think about what you need to do to attract the right people to your organisation. What you are trying to do is **connect** with potential volunteers. They include people who may or may not know you exist, and who may or may not have thought of volunteering before. You have to prompt the link between them and you. And you're only going to do that if people see themselves connected to you, either because they can offer you something or you can offer them something.

Start by thinking about how you are perceived by the public. What image do they have of your organisation? Does the public even know you exist? Do they know you have volunteers?

### What is your image?

If you feel that your image needs to be improved to attract the right volunteers, start by highlighting the positive aspects to volunteering with your organisation, such as the opportunity to:



- » be part of an organisation working to ...
- » be part of something that makes a difference
- » influence the work of the organisation
- » learn new skills or use existing ones
- » meet new people
- » help your community
- » contribute in a way that fits with other commitments

Also highlight what the volunteer can expect:

- » an enjoyable experience
- » being part of a motivated team
- » well organised volunteer programme
- » option to get involved at different levels

The more appealing your message, the more potential volunteers you will attract. It is competitive and you have to 'sell'.

**Ask someone with marketing experience to volunteer an hour of their time to give you advice and tips on making your recruitment campaign a success.**

## Finding the right people

Most recruitment campaigns use some of the following strategies:

- » Word of mouth - let the team and board know what opportunities are available
- » Print eye catching leaflets and posters
- » Attend promotional events
- » Have a stand in the local shopping centre or library
- » Invite people to an information meeting
- » Give talks to target groups
- » Contact and register with your Volunteer Centre<sup>8</sup>
- » Put an ad on the Activelink website<sup>9</sup>

If your volunteer opportunity requires someone with particular expertise then you could go directly to where the potential volunteers work or live. For example if you are looking for a web designer, you could put an ad in a trade magazine or a website. Or if you are looking for people from a particular community then use the local venues like shop windows, local papers and radio or existing community networks.

<sup>8</sup> See [www.volunteer.ie](http://www.volunteer.ie) for a list of centres

<sup>9</sup> Activelink site on [www.activelink.ie](http://www.activelink.ie)

## Dealing with enquiries

Enquiries happen in one of two ways:

- » In response to a recruitment campaign
- » When it suits the potential volunteer

Once you've started your recruitment campaign you need to have a system in place to deal with enquires. You need to follow up enquiries quickly and professionally, otherwise people will lose interest and they're likely to give you bad publicity! Prepare by

- » Telling front line staff how to deal with enquiries
- » Designate someone to deal with specific queries
- » Have application forms ready to send in the post or be collected
- » Let applicants know when they can expect to hear from you

Many potential volunteers will contact you when they are ready to volunteer and not in response to an ad. You will need to:

- » Tell front line staff how to deal with enquiries
- » Designate someone to deal with specific queries
- » Have an up to date Volunteer Information leaflet
- » Develop a system for keeping in touch with potential applicants



## Volunteer applications and interviews

Recruiting the right volunteers for the right roles is the key to a having a successful volunteer programme. Therefore a well put together application form and set of interview questions are essential in helping you make the right selection.

### Volunteer application forms

Many organisations use application forms to shortlist people for interview while others invite anybody who expresses an interest to come in for an informal chat. While staff resources may influence which option you choose, it is in your and the applicant's interest not to meet if the applicant is obviously not suited to the role. It's not only time wasting but it might also build up expectations which aren't going to be met.

Applications have many advantages over CVs:

- » You get tailored information
- » Helpful in structuring interviews
- » Useful for comparing applications
- » Makes it easier to compile statistical data about your recruitment programme
- » Gives the applicant an idea of what information is important

In designing your Volunteer Application Form consider:

- » Having a template Volunteer Application Form covering the main areas, such as personal details, work-life experience, reason for applying, availability, referees
- » Adapting the application form to suit the role
- » Including background information on the organisation

#### Interviews

Whether you call your interview an interview or a meeting, the purpose is the same:

- » To see if the applicant suits the role and the organisation
- » To give an applicant the opportunity to see if the role and organisation is likely to meet their expectations

In preparing for the interview you need to:

- » Decide who is involved in the interviews and agree the style and questioning format
- » Prepare yourself properly by reading the applicant's form
- » Be familiar with the role on offer
- » Draft questions that will give the applicant the opportunity to demonstrate their suitability for the role
- » Predict what the applicant will want to know and have the relevant information ready
- » Organise a suitable place to meet

#### During the interview

- » Start by clarifying the purpose and structure of the interview
- » Be clear what the role involves and doesn't involve
- » Explain what is on offer to volunteers - training, being part of a team, and developing skills. Be specific and have examples at hand.
- » Clarify any preconceptions the applicant might have about the role

**A successful interview is one that reaches the right decision.**



## References & Vetting

Most organisations look for references and increasingly organisations are looking for proof of identity. If you have not already got a policy on this, the following questions could help you get started:

- » Do you require references for every role?
- » What potential risks are attached to the volunteer role (theft, client abuse)?
- » What references are acceptable - phone/written?
- » How valid are these?
- » Are exceptions made for people who cannot provide references?

## Vetting

If you are recruiting volunteers who will come into contact with children or vulnerable client groups, then you will have to have as stringent a reference policy as possible and you should also apply for Garda vetting.<sup>10</sup>

Certain organisations can vet applicants through the Central Garda Vetting Unit. Many large national organisations will have Garda vetting signatory within them. Alternatively, your local volunteer centre will be able to either take on this task themselves, or sign post you in the right direction.

If the role requires vetting then make this clear at application stage and explain the process. The outcome of this process is only a part of what forms your decision to recruit a volunteer.

---

<sup>10</sup> For an up-to-date position on vetting contact the Garda Vetting Unit in Thurles on 0504 27300.

## Saying “No”

Not everyone who wants to volunteer will be suitable. As mentioned, it is wise only to interview people who seem suitable. If you decide after the interview that they are not suitable then you have to say “no”. You owe it to the person, your team and yourself to make the right decision. Contact the person by phone and be clear why you are turning down the offer.

While there is no easy way to do this, the following can help keep you focused.

- » Write down your reason
- » Write down any positive parts to the interview.
- » Are there other options which you could genuinely suggest?
- » Avoid spelling out obvious shortcomings unless pressed.
- » Don’t get caught up in long explanations.
- » Don’t get drawn into things which aren’t relevant or appropriate.
- » It’s ok to repeat yourself.
- » Try to end on a positive note.

## Evaluating your recruitment process

Evaluating your volunteer recruitment process may not seem a priority once it's over, but you will need to do it if your recruitment isn't going well. Indicators of this would be

- » Little or no interest
- » Interest, but not from the right people
- » People not taking up the offers
- » Volunteers starting but not staying

There are a number of reasons why these things may be happening and it's important that you ask the right questions to find the answers. If there is a Volunteer Centre near you, it would be worth talking to them to see what advice they could give.

It is always worth reviewing your recruitment procedure before starting on a new one. The tendency is often to dust down the previous one and hope for the best. However an hour of a review could be a very worthwhile investment.

## Recap on steps in recruiting

- » Identify roles
- » Write the role description
- » Target the potential volunteers
- » Agree the interview and selection procedure

**Download the Word version of the  
Sample Recruitment Application Form.**

## Sample Application Form

**YOUR ORGANISATION NAME AND LOGO**

Volunteer Application Form for (name role)

Name: \_\_\_\_\_

Address: \_\_\_\_\_  
\_\_\_\_\_

Tel. No.: \_\_\_\_\_

Email: \_\_\_\_\_

Where did you hear about our organisation?

In the media

The Volunteer Centre

Word of mouth

At a talk

At a recruitment fair

Used the service

Other (please specify) \_\_\_\_\_

Age Group (information used to compile statistics on volunteer profiles)

☐ Under 18☐ 18-24☐ 25-39☐ 40-55☐ 55 +Why do you want to volunteer with us? \_\_\_\_\_  
\_\_\_\_\_What kind of voluntary work would you like to do?  
\_\_\_\_\_  
\_\_\_\_\_Please list any skills/qualities you have which might be useful in our organisation? \_\_\_\_\_  
\_\_\_\_\_

**Availability**

Please tick when you would be available?

	Morning	Afternoon	Evening
<b>Monday</b>			
<b>Tuesday</b>			
<b>Wednesday</b>			
<b>Thursday</b>			
<b>Friday</b>			
<b>Saturday</b>			

Is there anything else you wish to tell us about yourself?

Please use space below or a separate sheet if necessary:

---



---



---



---



---



---

**REFERENCES**

Please provide us with the names of two people over the age of 18, not related, who can provide you with references. These can be personal acquaintances, former/current colleagues, employers or anyone else who would be able to comment on your suitability for this volunteer role.

1. Name: \_\_\_\_\_

Address: \_\_\_\_\_

Tel. No.: \_\_\_\_\_ Relationship: \_\_\_\_\_

2. Name: \_\_\_\_\_

Address: \_\_\_\_\_

Tel. No.: \_\_\_\_\_ Relationship: \_\_\_\_\_

Thank you for completing this application form and please sign and return to:

The named manager and address

Signature \_\_\_\_\_ Date: \_\_\_\_\_

## Further information sources

Adirondack S. (1998): **London Voluntary Services Council: Just About Managing**> Chapter 15 Managing the Recruitment Process:

Clarke, J. (1996) **Managing Better: The Staff recruitment Process**.> Combat Poverty Agency

Dyer, F. and Jost, J. (2002) **Recruiting Volunteers ("How To" Manage)**

Ellis, S.J. (1996) **The Volunteer Recruitment (and Membership Development) Handbook**.> Energize Inc.

McCurley, S. and Lynch, R. (1998), **Essential Volunteer Management**. Director of Social Change

## Websites

- » [www.volunteer.ie](http://www.volunteer.ie)
- » [www.energizeinc.com](http://www.energizeinc.com)
- » [www.volunteer.ca/en](http://www.volunteer.ca/en)
- » [www.volunteering-ni.org](http://www.volunteering-ni.org)
- » [www.volunteeringireland.ie](http://www.volunteeringireland.ie)

## Introduction

### Getting off to a good start

### Language

### Team building

### The relationship between paid staff and volunteers

### Support and supervision

### Recognising volunteers' contribution

### Volunteer reviews

### Volunteer expenses

### Volunteer insurance

## Introduction

A good volunteering experience means that the volunteer's expectations are met and the organisation benefits by their involvement. This happens because the initial "match" is right and because the organisation recognises that the ongoing management of volunteers is essential in keeping volunteers motivated and committed to staying. This section looks at ways to achieve this.

Let's start by recapping on some of the tasks you do at recruitment stage which can have a significant bearing on whether volunteers stay or leave.

- » Understand individual motivation: Knowing exactly what a volunteer wants from the experience is key. You should only offer a volunteer an opportunity that is likely to meet their expectations. This is known as matching the volunteer with the right role.
- » Demonstrate an organisational commitment to your volunteers by having actions and written policies and procedures which set out your commitment to volunteer involvement.

**Remember volunteers aren't contractually bound to stay, so they will walk (and rightly so) if you don't look after them.**

## Getting off to a good start

First impressions are lasting so make a good one by having these in place:

- » A welcoming team
- » A positive environment for volunteers
- » Worthwhile roles for volunteers
- » Role descriptions
- » An induction programme
- » A training plan
- » Someone to manage and support the volunteer

## Language

Organisations rarely reflect on how their use of language influences the culture of the organisation and the relationship between its staff and members. Organisations are often unaware of potentially negative signals which their everyday language has.

### The “onlys”

How many times have you heard a volunteer say “I’m only a volunteer”? It’s up to the organisation to ban the word only and create a status for volunteers which recognises their contribution as an integral part of the organisation’s work.

### Titles

Job titles have their place but they tend to be used when not always necessary. Referring to people all the time as paid staff, scheme staff or volunteers can create a notion of hierarchy and division. The description “team” sounds a lot better, so use it as often as possible.

There are a number of titles used to describe the person who is responsible for managing volunteers. Choose the one that what suits your organisation best.

- » Volunteer manager
- » Manager for/of volunteers
- » Volunteer programme manager
- » Volunteer co-ordinator
- » Volunteer supervisor

The verb commonly attached to volunteers is “use”: “we use volunteers to ...” Think of other words which describe the contribution in a more positive way.

- |            |               |
|------------|---------------|
| » involve  | » need        |
| » rely on  | » delegate to |
| » count on | » allow       |
| » ask      | » assign      |



## Team building

While all management tasks are important, special attention needs to be given to team building because it is the ability of people to work well together that is key to a positive and effective working environment.

Whether team building happens formally or informally, you need to know it's working and act when it's not. Here are some examples of how team building happens.

Informal	Formal
Creating a friendly atmosphere (don't underestimate this!)	Clear understanding of the different roles and how they contribute to the work of the organisation Clarity about work boundaries Regular team meetings on topics of common interest Team support sessions Team case study reviews
Going out to lunch together or bringing it in	Team training Training delivered by team members
A social event	Team input into planning
Celebrating special events like birthdays or national volunteer days	Clear procedures for dealing with difficulties that arise between paid staff and volunteers
Having tea breaks together	Special projects involving volunteers and paid staff
	Team input into volunteer recruitment

## The relationship between paid staff and volunteers

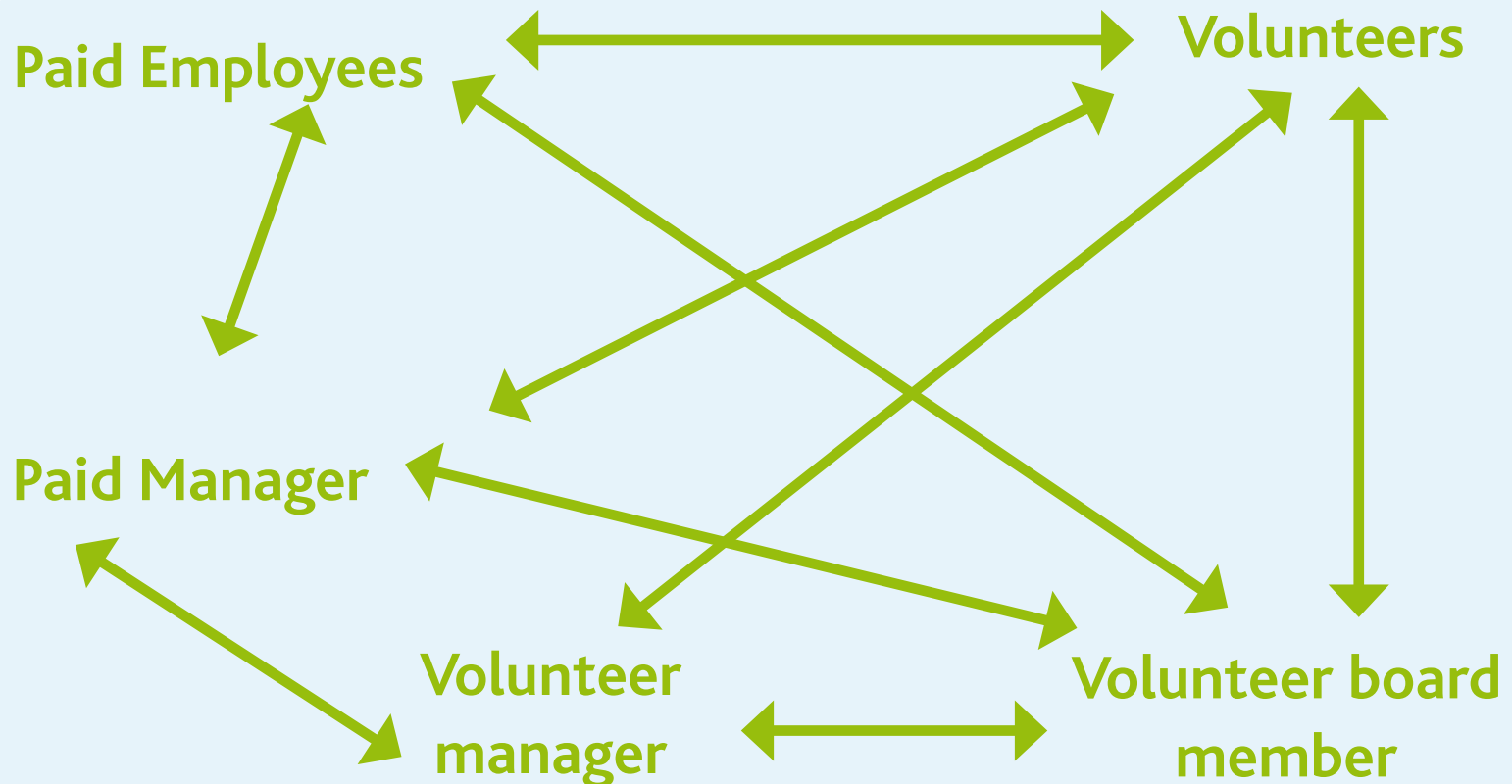
Whether there are two or two hundred roles, there needs to be clarity within every organisation about each role and how they relate to each other. This avoids confusion and misunderstanding, as well as ensuring things run smoothly.

One of the only ways to get a high degree of clarity is to have things in writing. You could start by listing the various roles in your organisation and then write down what their core duties are and how they relate to each other. The relationships between them are not always obvious so you may have to consult with others involved.

The diagram on the next page shows an organisation with five distinct roles common to many volunteer involving organisations. You might find it useful in charting how the roles connect with each other and what the main task of each role is. It only needs to be detailed enough to give a basic understanding to volunteers of who does what.

Many organisations have written descriptions outlining the relationship between paid staff and volunteers. This is done to clarify roles and responsibilities and to avoid confusion at best, and clashes at worst. These usually include:

- » Volunteers should not be substitutes for paid staff. There should be clear boundaries around the roles of paid staff and volunteers, each having a good understanding of the other's role, its scope and limitations and relationship between the two.
- » The roles of both paid staff and volunteers should be mutually enhancing
- » There should be good integration of paid staff and volunteers within teams where practicable
- » Communication structures should be in place to facilitate team work, mutual awareness and respect
- » Support for, and commitment to, the volunteering programme should be modelled at the highest levels of the organisation



## Volunteer support & supervision

Regardless of the words you choose to describe “support and supervision”, the task of supporting volunteers and supervising their contribution is core in volunteer management. Whether you have a formal system in place or not, all organisations with volunteers have some a system of showing the volunteer firstly how to do the job and secondly, ensuring that the job is done well.

Whatever you choose to call support and supervision, the purpose is generally the same:

- » To provide an opportunity to give and get feedback
- » To review the contribution the volunteer is making
- » To ensure that the work of the volunteer is in line with the aims and objectives of the organisation

The time and resources given to volunteer support and supervision will vary. Be guided by:

- » The role - for example, a volunteer working as a volunteer advocate will require a different level of support and supervision than a volunteer driver

- » The level of specialism - for example, a volunteer working as legal adviser or translator will not require skills training so your support and supervision session is more likely to be more about case work
- » The time commitment - for example, the number of hours worked has a bearing on how often you do support and supervision
- » The volunteer: some volunteers will require more support and supervision than others. Beware if the demands of an individual volunteer are disproportionate to other volunteers and/or the time you can reasonably give to the volunteer.
- » The level of formality/informality appropriate to the role
- » Having consistency between volunteers in the same role.

Support and supervision are about enabling the volunteer to do the job to the best of their ability and to the satisfaction of the organisation. It's also about saying thanks.

### What's involved?

- » Agree to meet the volunteer shortly after they start volunteering to review how things are going. Exchange feedback and clarify what, if any, issues have arisen.
- » Decide what support and supervision each role or volunteer requires.
- » Clarify the role of support and supervision with each volunteer, emphasising the positive aspects.
- » Agree how often it will happen
- » Prepare properly by finding out what the volunteer has been doing, acknowledge specific work that they have done and get feedback on the training they attended.
- » Make sure that other team members involved in volunteer support and supervision are adequately trained and supported to do the task
- » Have an open door policy for volunteers to talk to you at other times

It's important to address any issues that arise while volunteering during the support and supervision meeting. Doing so as early as possible will hopefully avoid problems escalating.

**Try to meet all volunteers at least once a year and more often if possible to review how the work is going.**

### Recognising volunteers' contribution

Everyone likes to be thanked for the work they do and as a manager, it's your job to make sure that the contribution of volunteers is acknowledged individually and collectively. The more obvious ways this happens are:

- » Thanking volunteers at the end of the day
- » Knowing your volunteers by name
- » Acknowledging specific contributions undertaken by a volunteer
- » Being genuine in your praise
- » Holding special volunteer events

The less obvious ways include:

- » Making sure volunteers know what they are entitled to without having to ask and encouraging volunteers to avail of what is on offer, such as training and claiming expenses
- » Ensuring volunteers are kept informed about service and organisational changes
- » Being proactive in getting volunteers involved in planning and developing the service
- » Act on volunteers' ideas, where possible
- » Offering volunteers the option to try new roles and take on new challenges

- » Giving volunteers the option to attend conferences and events
- » Ensuring volunteers are included on internal communications systems
- » Keeping volunteers updated by having a notice-board or volunteer folder
- » Maintaining records about volunteers' role, length of service, training attended, reviews etc
- » Giving volunteers positions of responsibility
- » Supporting volunteers who have a difficult experience. This has to be done as soon as the volunteer needs it and not when you have the time!
- » Passing on from the team and the users of the service
- » Attending volunteer support and supervision meetings.

## Volunteer Reviews

This template could be useful in providing a structure to an annual review.

Download the Word version of the  
Annual Review Template Word  
document.

## Volunteer Expenses

It's accepted as good practice that volunteers should not incur any financial costs when volunteering and that cost should not be a barrier to volunteering. However, the reality is that many organisations could not afford to have volunteers if they adopted this guideline.

Consider what costs you can realistically afford.

- » Parking
- » Public transport
- » Mileage
- » Car insurance
- » Food
- » Childcare costs
- » Carer costs

And then set out a procedure for claiming expenses.

Download the Word version of the  
Volunteer Expenses Claim Form Word  
document.

## Volunteer insurance

Check with your insurance company that your policy covers the range of volunteer activities you plan to undertake and make any adjustments to the policy prior to the volunteer starting.

You will need to specify at induction what the insurance includes and what is not. It's useful for everyone to know about:

- » Using their car for work purposes
- » Theft of personal items while volunteering
- » Damage of personal items while volunteering
- » Injury while volunteering

Design a leaflet with the relevant information for volunteers to refer to.

## Further information sources

### Citizens Information Board Group Resource Scheme

Clarke, J. (1997) **Managing Better: Staff Support and Supervision**. Combat Poverty Agency

McCurley, S. and Vineyard, S. (1998) Handling problem volunteers. Heritage Arts

Volunteer Development Agency: (2001) **As Good As They Give**

## Websites

- » [www.volunteer.ie](http://www.volunteer.ie)
- » [www.energizeinc.com](http://www.energizeinc.com)
- » [www.volunteer.ca/en](http://www.volunteer.ca/en)
- » [www.volunteering-ni.org](http://www.volunteering-ni.org)
- » [www.volunteeringireland.ie](http://www.volunteeringireland.ie)

## Introduction

### Induction

### Trial period

### Volunteer agreement

### Training

- Structured training programme
- On-the-job training
- Ongoing training

### Evaluating training

### Training magnets versus training resistors

### Induction checklist

### Training record

### Training budget

## Introduction

Having a good volunteer induction programme shows the volunteer you care and take their contribution seriously. Appropriate, quality and timely training gives them the skills and information they need to do the job to the best of their ability and to your satisfaction.

While this may seem like common sense, a number of organisations think that once the volunteers are in, everything else falls into place. This misplaced assumption is one of the main reasons why volunteers leave.

This section goes through the common sequence of training inputs offered from induction onwards.



## Induction

Everyone remembers their first day so make sure that your volunteer's first day is memorable for the right reasons and avoid comments such as the following

*"No one had a clue what I was meant to do"*

*"She handed me the health and safety manual and I never saw her after that"*

*"They all went off to a meeting and left me answering phones"*

The first thing is to invite the volunteer to start on a day when you have time to welcome them and help them settle in. That first day is a key part of the induction.

All volunteers need some level of planned induction that covers:

- » Background on the organisation
- » An introduction to the team
- » A tour of the work area
- » An overview of the role
- » A breakdown of the tasks involved

- » What supervision and training is available
- » An overview of how volunteers fit into the organisational structure
- » Other activities which volunteers are involved and invited to
- » Completion of documents
- » Clarity on the trial period

### Download the Word version of a Volunteer Induction Checklist Word document

Induction can happen in groups or individually. If your recruitment process is staggered and you plan to run an induction after some volunteers have started, you will have to go through the points above with each individual.

In-house preparation: this list will help you prepare for the new volunteer starting.

- » Brief the team/relevant staff about the volunteer, their role and how they fit with the team
- » Make sure that they are working alongside someone with experience and positively disposed to volunteers
- » Make sure there is space for the volunteer to do their work
- » Include their name in the team details, rota sheets, computer records

## Trial period

A trial period is very useful for testing the water. It gives the volunteer an insight into the work and you get a chance to see if the person is suitable for the job. The length and components of the trial period vary according to the role and resources. Either way they need to be structured and keep to the agreed time frames and sequencing. Here is an example of how it might work.

**Download the Word version of a Trial Period example Word document**

## Volunteer Agreement

Once the trial period ends, it's important to clarify the ongoing commitment agreed between the volunteer and the service. The advantages of using a Volunteer Agreement are

- » It clarifies the commitment in writing
- » It recognises the importance of the volunteer contribution
- » It can be referred to as needed

**Download the Word version of the Volunteer Agreement Template Word document**

## Training

Training is an investment in staff aimed at developing their skills and abilities to do the job well. Because funds are always limited you have to be clear about what training people actually need to do the job and what training would be good to offer, if the budget permitted. One way of doing this is to list the core, essential training for each role and the team and then what would be additional. Some organisations make a point of offering non-work related workshops as a way of thanking staff. Sessions such as relaxation, stress management or music therapy can be very enjoyable and good for team building and morale.

The two most common ways in which training happens are:

- i) structured training programmes prior to starting work as a volunteer
- ii) volunteer jobs where the training/learning happens by doing the job

### **Structured training programme**

Organisations which require volunteers to do certain jobs often run compulsory training programmes which

volunteers must successfully complete before they can join as a volunteer. These courses can take a number of weeks or months and they form another opportunity for the organisation to get a sense of the commitment people are willing to make as well as give an insight into their potential suitability for the role. They may also be attractive to the volunteer, for a host of reasons. Courses are resource intensive and can result in people choosing to opt out of the volunteering experience. However on the positive side the organisation benefits by having a well trained and committed group of volunteers.

### On the job training

Every job requires some element of learning. New skills might need to be learned and even if the volunteer already has the skills, they still have to learn how the work is done in your particular organisation.

The application form and the interview you tell you what skills the volunteer has and what skills they will need to learn to do the job well. On the volunteer's first day, or very shortly after, you will need to sit down and discuss with them bridging the gap between the two. The methods of learning a new skill include:

- » Demonstration: where the person is shown how to do something
- » Mentoring: where an expert guides the person
- » Coaching: where an expert teaches the person
- » Experiential: where the person tries something and learns from the experience

You will have to decide what is the most effective way for volunteers to develop their skills within the resources available. However it is important that you include a training budget for volunteers so that volunteers can access expert training either in-house or by attending courses externally. A sample of a Training Budget can be downloaded below.

### On-going training

You should provide on-going training as the role changes or develops. Below are some pointers for you to remember:

- » Ring fence a training budget
- » If changes are due to happen, predict what team or individual training people will need and organise it to coincide
- » Organise training as it is needed
- » If you have to delay training for any reason make sure that some basic training is given or appropriate support
- » Develop the training skills of the team to provide training



**It's important to specify that on-going training is part of the volunteer commitment and a refusal to attend can result in asking a volunteer to leave.**

It is important to keep a record of all training undertaken. A sample training record sheet can be downloaded below

## Evaluating training

It's important that the training offered does what is intended. You can assess this by asking participants for their impressions of the training but also by observing what, if any, impact it has in the workplace. Some training outputs may be easier to measure, for example computer skills. Others, such as dealing with queries, may be difficult to assess. Where a volunteer is dealing directly with the public, the best way to check the impact of the training is to observe the person dealing with the service user.

You must decide what is the most appropriate way to assess training and what impact it has on the volunteer's ability to do the job better.

Some key questions could include

- » How do you assess the value of training?
- » What follow up do you do?
- » How do you know you are getting value for money?
- » What feedback mechanism is there for people to share what they have learned at external training courses?
- » Who is responsible for keeping volunteer training records?
- » Do you make training materials available to everyone?

## Training magnets vs. training resisters!

Most managers face these extremes at some stage and even if you haven't yet it's worth putting a training policy in place. With new volunteers you can be clear from the start what the training plan is and what is expected. With existing volunteers it can be difficult for some of them to accept the introduction of a training policy.

One way to make it easier is to involve the people directly affected in drafting the policy. Some guidelines on what it could include would be:

- » An opening statement on the value of training
- » A comment on how training needs will be identified
- » How is training organised
- » Where training happens and what, if any, travel might be required
- » Who pays for training
- » How training is assessed
- » If there is a limit to how much training a volunteer can have
- » What the consequences are of refusing training that is suggested?

## Induction checklist

[Download the Word version of a Volunteer Induction Checklist Word document](#)

## Training record

[Download the Word version of a Volunteer Training Record Word document](#)

## Training budget

[Download the Word version of a Volunteer Training Budget Word document](#)

## Further resources

Vineyard, S. (1995) **The Great Trainer's Guide**. Heritage Arts

## Introduction

### Common problems

### A 'not serious' complaints procedure

### A serious complaint

### When a volunteer doesn't suit the role or organisation

### Volunteers who have been with you a long time

## Introduction

Undoubtedly, the hardest part of volunteer management is dealing with problems that arise between people. It is human nature to want to put off dealing with the problem in the hope that it'll sort itself out, but unfortunately that rarely happens. You need to deal with problems as soon as possible so as to avoid things escalating. This section will hopefully give you some suggestions on how to approach this sensitive part of the work.

Let's start by distinguishing between problems that can be dealt with informally and those which require a formal procedure. Problems that can be dealt with informally are those which have a limited consequence or can be resolved satisfactorily without affecting the service and/or reoccurring. Formal procedures on the other hand are required for more serious problems, or problems which are not resolved informally and reoccur.

A good rule of thumb is to try to resolve problems informally by having a discussion with the volunteer concerned. Formal proceedings start if the problem isn't resolved to the satisfaction of the volunteer manager or volunteer.

Regardless of how smoothly your volunteer programme works, it's good management to predict what problems might occur and be prepared to deal with them. Although it's not possible to predict everything, it's likely that most problems fall into one of these three categories:

- » A complaint by a volunteer
- » A complaint about a volunteer
- » Where the volunteer doesn't suit the role/organisation.

Having a procedure in place that gives clear guidance on what to do can make this unenviable management task that bit easier.

## Common Problems

It's often the niggling things that bother people most but, for whatever reason, they're let drift on because it's easier all round. Some managers might choose not to act because the volunteer is only in for a few hours a week or because "managing" it goes against the spirit of volunteering. That's OK if the "niggling" doesn't affect the service or the team but often it does and as a manager you need to deal with things as soon as they arise because:

- » It shows that volunteers contributions are taken seriously
- » The team expect you to
- » It sets standards.

Here are some common niggles and how to deal with them. It's better to approach it from a solution rather than a problem perspective. In all these situations, use your common sense to distinguish between the occasional and an on-going problem. The intended outcome in dealing with any issue is that the volunteer will take your comments on board and that will be the end of it. The more complex issues that can arise are dealt with in the next section.

The Niggle	Possible response
Being late	Discuss whether the commitment the volunteer made is still manageable. The solution might be a change in hours
Not attending	Ring the person to see if there is a problem. Explain the procedure around notifying you if they can't make it in. Offer the option to take a break until the person can make the required commitment
The constant questioner	Start positive and then explain about the importance of getting on with the work and when the best time is for questions.
The unofficial spokesperson	Remind the volunteer what the organisation's procedure is.
Appearance	It's always advisable to tell volunteers at the beginning if there is a dress code. Otherwise you have to deal with it on a personal basis
Personal hygiene	Say it for everyone's sake!
Personality clashes	Listen to both sides and consider the context and experience others have with that person(s). Consider the practical options of reassigning one person.



## A “not serious” complaints procedure

A complaints procedure sets out a clear, fair and appropriate way to address the problem, regardless of whether it’s made by the volunteer or about them.

Keep it simple and don’t get caught up in multiple stages, which go on and on. Depending on your organisation, your procedure should address the following issues at a minimum<sup>11</sup>:

Issues	Your Procedure
Who is the first point of contact?	
What if that person isn’t available?	
Who is the next point of contact?	
What happens if the problem is not resolved at the first stage?	
Where does the final decision lie?	
Is there an option to appeal?	
How long should each stage take?	
Who is involved at each stage?	
Can the person/s continue working while the complaint is being looked into?	
How will the process be recorded?	

[Download the Word version of the above table Word document](#)

<sup>11</sup> Managing and motivating Volunteers As Good As They Give, Volunteer Development Agency page 20

When dealing with a complaint you should

- » be very clear you understand what the complaint is
- » assess whether it could be dealt with informally or requires recourse to the procedure
- » consider whether the issues affects other people
- » establish if it happened before
- » decide what remedial action has to be taken
- » decide what is expected from the people involved
- » decide what will happen if the situation doesn't improve and recurs.

## A serious complaint

Let's start by distinguishing a serious complaint from a not so serious one: a serious complaint is anything that threatens or puts at risk your team, your customers, your service or the organisation.

Each organisation needs a list of issues it would consider as 'a serious incident'. A serious complaint is one that requires a volunteer being suspended or being asked to leave immediately. The incidents are likely to be the same as those for paid staff though there may be a need for some changes to suit the volunteer relationship.

The procedure or code of practice could include some or all of the following:

Issues	Your procedure
List of incidents which require a volunteer to stop work immediately	
Do the Garda need to be contacted?	
Recording the incident	
Follow up with the volunteer/s involved	
Any options for appeal?	
Formally ending the volunteer's relationship with the organisation	

**Download the Word version of the above table Word document**

## When the volunteer doesn't suit the role/organisation

Thankfully the issues above are rare. It is more likely that the problem you will have to deal with is volunteers who are either not suitable for the role or are not keeping to their volunteer agreement.

It's not possible to draft a procedure outlining how you should deal with problems around suitability because the actual problem, the context and most importantly, the individual volunteer will require different actions or approaches from you. So instead of drafting a procedure, this section will look at actions and approaches you could take depending on the problem and the volunteer.

Be very clear what the problem is and how it impacts on the team, service and/or the organisation.

Some management reminders include:

- » As a manager you have to deal with problems
- » Your team expect you to deal with problems
- » The integrity of your volunteer programme requires you to act
- » Your action validates the contribution of volunteers doing a good job
- » Discuss it with someone
- » Be very clear what the problem is
- » Keep focused and don't get sidetracked
- » Don't argue
- » Appear calm
- » Conclude quickly if it's obviously not going to be resolved
- » It's ok to ask a volunteer to leave.

Action	Approaches
Meet with the volunteer as soon as it's obvious that the problem isn't going to go away	Use the support and supervisor meeting to discuss the problem Start by saying that the purpose is to try resolve the problem Discuss how the behaviour is affecting the team/work Be prepared to say what will happen if it is not resolved
Consider other roles	If the issue is related to ability to do the job, and you think the volunteer would be better suited to another role, then suggest they transfer (maybe for a period of time)
An agreement	You need to specify what needs to happen/change and by when, if the volunteer is to stay on
Review	Agree a time frame for reviewing the situation, with the proviso that any re-occurrence of the problem will result in ...

## What about volunteers who have been with you for a long time?

It's relatively easy to deal with problems that happen with new volunteers or volunteers who are indifferent. However it's much more difficult if the volunteer is someone who has been with a long time, but for whatever reason, isn't suitable for the role. Once again the outcome really depends on the volunteer, the actual problem and how flexible you can be without having a negative effect on your team or service.

Approaching this sensitively is essential and the outcome needs to be balanced with the impact on your team and service.

- » Talking to the volunteer about how things are going
- » If they are unaware of any problems you will need to give an example (being sensitive means giving just enough examples to show what you are talking about)
- » Discuss how they would like to resolve it
- » Judge if this is realistic

- » Offer a change in role if appropriate
- » You could agree that a break might be the best option (this can be an ideal solution)
- » In the rare situation that the volunteer doesn't agree with your assessment, then you will need to start a formal complaints procedure.

Remember that a procedure once in place has to be applied to everyone, so a volunteer who has been with you a week can enact a procedure.

Most volunteers who aren't suitable recognise this themselves and an informal chat or a support and supervision meeting usually resolves things. It's human nature to want to slide out with minimal fuss.

If this doesn't happen and you have to ask someone to leave, remember

- » Sometimes you will have no option
- » Your responsibility is to the team and the service, and anything that affects the delivery of your service has to be addressed
- » Once you've acted, you'll be relieved!

## Resource Material

### Management of Volunteers

Adironack, S.(1997) **Just About Managing?; effective management for voluntary organisations and community groups** London Voluntary Services Council

Campbell, K.N. and Ellis, S.J. (2004) **The (Help) I-Don't-Have-Enough-Time Guide to Volunteer Management:** Energize Inc.

Connor, T.D. (1999) **The Volunteer Management Handbook:** Wiley Nonprofit Series

Fisher, J.C. and Cole, K. (1993) **Leadership and Management of Volunteer Programs: A Guide for Volunteer Administrators:** Jossey-Bass Non-Profit Series

Charles Handy (1990) **Understanding Voluntary Organizations: How to Make Them Function Effectively** Penguin Business

McCurley, S. and Lynch, R. (1998), **Essential Volunteer Management.** Director of Social Change

Volunteer Development Agency (2001) **As good as they give: planning volunteer involvement,** Volunteer Development Agency: Belfast, Northern Ireland.

### Recruitment

Clarke, J. (1996) **Managing Better:** The Staff recruitment Process. Combat Poverty Agency

Dyer, F. and Jost, J. (2002) **Recruiting Volunteers** ("How To" Manage)

Ellis, S.J. (1996) **The Volunteer Recruitment (and Membership Development) Handbook.** Energize Inc.

McCurley, S. and Lynch, R. (1998), **Essential Volunteer Management.** Director of Social Change

### Support

Clarke, J. (1997) **Managing Better: Staff Support and Supervision.** Combat Poverty Agency

McCurley, S. and Vineyard, S. (1998) **Handling problem volunteers.** Heritage Arts

### Training

Vineyard, S. (1995) **The Great Trainer's Guide**. Hertigae Arts

### Volunteering Reports

*Tipping the Balance. Report of the National Committee on Volunteering in Ireland* : 2002

*Report of the Task force on Active Citizenship*. 2007. Available on [www.activecitizen.ie](http://www.activecitizen.ie)

*The Hidden Forays into Mapping Non-profit Organisations in Ireland*: Donaghue, Prizeman, O'Regan and Virginie: 2006: Centre for Nonprofit Management, Trinity College Dublin

### Volunteer Insurance

Citizens Information Board: Group Insurance Scheme for Voluntary Social Service Organisations

### Legal Structures

Clarke, J. (1996) **Managing Better: Becoming a Limited Company**. Combat Poverty Agency

Cousins, M. (1994) **A Guide to legal structures for voluntary and community organisations**. Combat Poverty Agency

### Useful Agencies

VCI (Volunteer Centres Ireland) [www.volunteer.ie](http://www.volunteer.ie)

Volunteering Ireland [www.volunteeringireland.ie](http://www.volunteeringireland.ie)

Resource Material: Citizens Information Board [www.citizensinformationboard.ie](http://www.citizensinformationboard.ie)

Combat Poverty Agency [www.cpa.ie](http://www.cpa.ie)

## Websites

There is a huge amount of material available on the web.  
Google areas of interest and save as favourites the websites  
which you find most useful.

[www.volunteer.ie](http://www.volunteer.ie)

[www.managementhelp.org](http://www.managementhelp.org): A complete integrated library  
for nonprofits and for- profits

[www.volunteering.org.uk](http://www.volunteering.org.uk)

[www.volunteering-ni.org](http://www.volunteering-ni.org)

[www.volresource.org.uk](http://www.volresource.org.uk)

[www.ozvpmbbookstore.com](http://www.ozvpmbbookstore.com) resources for volunteer  
programme managers

[www.energizeinc.com](http://www.energizeinc.com)

[www.volunteeringwa.org.au](http://www.volunteeringwa.org.au)

[www.volunteeringireland.ie](http://www.volunteeringireland.ie)