Planning for Volunteer Involvement

Resource Guide & Workbook
Compiled by the Engaging Organizations Department

Using this Resource Guide & Workbook

The Planning for Volunteer Involvement resource guide & workbook has been compiled by Volunteer Toronto to help community groups, non-profits and charitable organizations with the basic tools to effectively maintain and value their volunteers. Each resource has been selected to give you an idea of the straightforward needs of each step of the process. It is important to remember that these are guidelines informed by best practices; you can adapt them to your situation as needed.

Planning for Volunteer Involvement

Your organization wants to engage volunteers. Maybe you already have dozens or hundreds of volunteers, or maybe you're just starting the volunteer recruitment process. Maybe your organization is volunteer-run and you're looking to expand your operations. Wherever you are in the volunteer engagement process, it is a necessity to ensure that you **Plan for Volunteer Involvement**.

This could be for a new program or project, a new event requiring various volunteer roles, or even general administrative volunteers to support your organization's work. This workbook includes a number of templates, tools and worksheets to help you prepare your organization/program for volunteers.

This workbook will start with the process of planning your program goals with volunteers in mind and provide a number of guidelines and teamplates to direct your volunteer management strategy.

Planning for Volunteers

Volunteer Handbook

YOUR MISSION

Whenever your organization is engaging volunteers, it's important to remember your organization's mission. It's your goal as a volunteer coordinator, manager, or supervisor to ensure that your volunteers contribute to the mission and goals of your organization in whatever role or capacity they hold. This will make it easier to justify further volunteer involvement and recruitment and to increase their impact across your organization.

Action Plan Template

Action planning is used to identify the goals of a program or project, as well as its necessary elements. This Action Plan tool can help you determine the actions/events, start and end dates, people needs, resources requirement and outcome measurements under each goal. Use this tool to determine the ways that volunteers can contribute to any new programs or projects.

Action Plan				
Goal: *Identify a goal that you'd like to reach in your program. This goal should contribute to your organization's mission, and should fit within your organization's strategic plan. The goal should be specific, measurable, achievable, relevant, and time-bound.*				
Action	**Timeline**	**People**	**Resources**	**Measurement**
List each action that will be taken in order to reach the goal.	*Identify the intended start and end dates for each action.*	*Identify who is responsible for overseeing each action, as well as any others who will be involved in its implementation.*	*Identify all resources needed to complete the action, such as money, transportation, and materials.*	*Identify how you will measure success once you have completed each action.*

Barriers to Volunteering Audit Tool

In response to each statement, place a checkmark under "yes," "to some degree" or "no." Include comments if there are some statements you're not sure about. If you have many "no's" or "to some degree's" than you need to consider those barriers potential volunteers may be facing.

	Yes	Some-what	No	Comments
Planning				
We have written volunteer program policies and procedures that reflect our commitment to diversity and inclusion				
Supervisors have the training and support they need to work with volunteers				
We have developed specific position descriptions that detail the tasks and requirements of the position				
We have reviewed our position descriptions to remove any requirements that were not actually necessary for the position				
Recruitment				
Our promotional material and position descriptions are clear and straight-forward				
Our vacancies are clearly listed on our website and on volunteer boards				
Selection				
Potential volunteers may access material (forms, info) before the interviews				
If the position allows, we accept personal references				
We have a quiet place to conduct one on one interviews if necessary				
We have a "trial period" to assess fit for both parties				

Barriers to Volunteering Audit Tool

	Yes	Some-what	No	Comments
Orientation and Training				
We explain the purpose of the orientation				
We have different ways of offering orientation (groups, one on one, online)				
We offer information in different formats				
Participants can get the material ahead of time if they wish				
Supervision and Evaluation				
Our staff knows how to provide corrective feedback to volunteers				
We ask volunteers about their experience in our program periodically				
Volunteers are clear on who supervises them and what their role is				
Recognition				
We regularly recognize volunteer contributions, both formally and informally				
We collect information from our volunteers on the type of recognition that is most meaningful to them				
We have a "trial period" to assess fit for both parties				

WHAT ARE BARRIERS?

In the non-tangible sense, a barrier indicates anything that blocks a person from achieving a goal. Barriers to volunteering could keep great volunteers from your organization, or keep your organization from being able to work with volunteers.

Volunteer Needs Assessment

One way to identify potential volunteer roles is to conduct a needs assessment with others who work in your organization.

To conduct a needs assessment, you should start by identifying your goals. Do you want to find out about what kind of support program staff need from volunteers? Perhaps you'd rather find out what needs to be done to prepare the organization for volunteer involvement, or what current volunteers need to have more rewarding and productive experiences with your organization.

Identify Goals

Do you want to find out:

- The type of support needed?
- The necessary preparations?
- Volunteer Needs?

Identify Stakeholders

Who:

- Will be involved in supervision?
- Might benefit from volunteers?
- Might have insights into volunteering?

Collect Data

Surveys

- Surveys can be distributed online or in person.
- Surveys are quick, cost-effective, and reach large numbers of people.
- They can help you collect a large amount of non-detailed information.

When creating a survey:
- Stick to one idea per question
- Don't introduce bias
- Try to avoid asking negatives
- Keep response options similar

Interviews

Interviews collect in-depth, detailed information from a limited number of people.

Interviews can be:
- Structured
- Semi-structured
- Unstructured

Interviewers should be consistent and remain neutral.

Focus Groups

- Focus groups are facilitator-led and interactive.
- They provide insight on common experiences.
- They highlight multiple viewpoints.
- Facilitators should not contribute to the discussion.

Volunteer Involvement Survey

This survey is an example needs assessment method that can be used to identify areas within your organization that could benefit from volunteer involvement. Ask program leaders to complete the survey to let you know how volunteers could contribute to their programs.

Do you need volunteers to help at special events?   Yes   No

How many volunteers?   *What duties will they perform?*

Do you need volunteers to fulfill administrative duties?   Yes   No

How many volunteers?   *What duties will they perform?*

Do you need volunteers to provide program support?   Yes   No

*How many volunteers?*   *What duties will they perform?*

**Do you have any short-term projects that could
be completed by a team of volunteers?**   Yes   No

If yes, please describe:

**Do you have any short-term projects that could
be completed with the help of individual volunteers?**   Yes   No

If yes, please describe:

Do you need volunteers with specific skills?   Yes   No

Which skills?

RESOURCE ASSESSMENT

Are people in your organization having trouble answering these questions? It could help for them to assess their department/program area's resources to determine needs. They may not realize their own workload could be supported by a clerical or virtual volunteer.
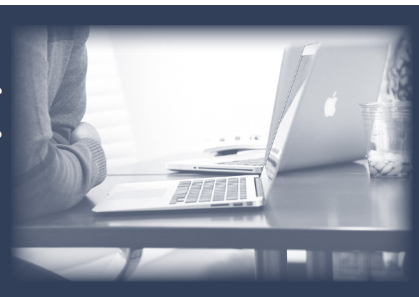
Staff Buy-In Responses

Often, one of the most difficult aspects of a volunteer manager's job is to manage how other staff members interact with volunteers. Many volunteer managers report that they encounter significant resistance when trying to involve staff in engaging volunteers in their programs. One of the best ways to address this resistance is to involve staff directly in the planning process of volunteer involvement. You can involve staff in the planning process formally, by conducting focus groups or surveys, or by organizing planning groups and meetings. This template will give you an idea of how to respond to some common staff complaints.

Staff Comment	Example Responses
"It's more trouble than it's worth"	• Benefits for the organization – volunteer involvement increases the number of work hours, skills and perspectives contributing to achieving its mission; volunteers act as ambassadors for the organization in the community, and increase its reach and ability to serve its clients. • Benefits for the community that your organization serves – volunteer involvement changes the quality/type of services that your organization can provide; helps community members connect and work towards common goals & forms relationships between the organization and those it serves. • Benefits for the volunteers – volunteering can provide valuable experience and skills, a sense of community, a social network, and a source of meaning. • Benefits for the staff who work with volunteers – volunteer program can provide them with experience in supervision and management, a group of dedicated and motivated workers, and a bank of skills, resources and time that volunteers are willing to contribute to complete projects that staff would be unable to complete on their own.
"I don't want someone else to do my job"	• Volunteers shouldn't be brought in to do the same work as program staff. • Volunteer roles should supplement the work that paid staff members are already doing, by adding value for clients and for the organization that isn't part of the responsibilities of program staff. • Try to get staff more involved in creating volunteer roles. • Consider doing a needs assessment to find out how volunteers could be useful within the various programs in your organization. • Ask staff to think about projects they wish they could develop or services they wish they could provide that they can't manage on their own.

Staff Comment	Example Responses
"I don't know how to work with volunteers"	• Staff may need to receive training on the basic elements of volunteer management to understand their role in supervising volunteers, have an understanding of the demands on their time, and feel prepared to bring volunteers into their programs. • Training staff to work with volunteers will help them increase their knowledge of volunteer engagement and help the volunteers have a better experience with your organization while the entire process runs more smoothly. • Improving the initial experience will help staff see the benefits of volunteer involvement. • Use a guide, like the Canadian Code for Volunteer Involvement, to choose training topics.
"I don't have the time"	• This may be true, and may be out of your control. • Staff shouldn't supervise volunteers unless it is part of their job description. • Management and Board of Directors need to support volunteer involvement. • Supervising volunteers should be an official part of the job description of anyone who takes on the work. • They should be given support to develop the skills they need to supervise volunteers, their job responsibilities should be realistic given the time commitment that volunteer supervision involves, they should be recognized for their efforts in supporting volunteers, and their involvement in volunteer supervision should be taken into account during performance reviews.
"We don't really need volunteers"	• Review work-plans and project/program goals to identify areas of need for human resources/volunteer resources. • Explain the benefits of volunteers (see "It's more trouble than it's worth"). • Remember your organization's mission; volunteers help support the organization's goals in serving the community. • Remind staff of challenges they may have faced on time management and how volunteers can support them.
"Where will they go?"	• Virtual volunteering and microvolunteering can often be done from people's homes or other locations, thus not requiring additional office space. • Explore using shared workspace (board room/meeting room). • Some offices can be shared by staff or volunteers to conduct work.

Volunteer Handbook Checklist

Part of planning for volunteer involvement is ensuring your volunteer program has systems, policies and/or procedures in place for volunteers. Creating a volunteer handbook will help you and your volunteers grasp the full extent of the organization's programs and effectively serve its goals. The information you include in your volunteer handbook will depend on the way your organization approaches volunteer involvement and the nature of the roles that volunteers will be fulfilling. Below are some of the things that you should consider including:

☐ **Mission, Vision, and Values**
Your organization's mission, vision and values will help new volunteers gain a better understanding of the goals and purpose of your organization, and how their contribution to your organization will make a difference.

☐ **History of the Organization**
Knowing the history of your organization can help volunteers understand the context of the work they will be doing, the importance of your organization in the community you serve, and the impact your organization has had over the years.

☐ **Structure of the Organization**
Information about the structure of your organization can help volunteers understand where their role and their program fit into the bigger picture. It will help them understand the reporting structure of the organization, and who else is involved in the development or delivery of the programs they contribute to.

☐ **Programs and Volunteer Roles**
Information about your organization's current programs, and the volunteer roles within those programs, can help volunteers identify the roles that would be a good fit for them. It also provides them with the information they need to accurately represent your organization in the community.

☐ **Policies and Procedures**
Policies and procedures relevant to volunteer involvement in your organization can be included in the handbook itself, or information about where they can be found when volunteers need to refer to them can be provided. This will help volunteers understand both their rights and their responsibilities as a volunteer in your organization.

☐ **Volunteer Code of Conduct**
Including a volunteer code of conduct in your handbook will help volunteers understand what sort of behaviour is expected of them, and what the consequences are if they don't meet those expectations.

☐ **Contact Information**
Including the name and contact information of the people who supervise and support volunteers will help the volunteers feel supported by the organization and will make volunteer involvement run more smoothly for everyone involved.

Sample Policies

Your organization might find it useful to have a formal definition of "volunteer" to make sure that everyone understands the expectations of the role, particularly if you also engage unpaid workers such as students or interns.

Sample Policy: Definition of Volunteer

A volunteer contributes time and effort working for the organization beyond the scope of normal responsibilities and without compensation or expectation of compensation. They work at the direction of the organization, and must complete an application process and be formally accepted into the organization's volunteer program before being considered volunteers.

Often, organizations reimburse volunteers for certain expenses related to their volunteer work. It's up to your organization to decide which expenses you will reimburse, whether or not the expenses need to be pre-approved and who will be responsible for tracking volunteer expenses. Having a clear policy can help the volunteer understand what they should and shouldn't expect the organization to pay for.

Sample Policy: Volunteer Reimbursement

Volunteers will be reimbursed for any pre-approved expenses incurred while fulfilling assigned duties. These may include travel expenses such as public transit fare or parking fees, and expenses related to any materials purchased for the program.

POLICIES & MORE

Looking for more material for the handbook? This workbook contains some examples and templates for some of these elements, but you can look to your organization's staff handbooks and/or board orientation handbooks to fill in the blanks! Things like your organizational history, structure and roles are handy for grant applications and other needs as well.

Sample Policies

Are current clients appropriate volunteers for your program, or would that cause a conflict of interest? What about past clients? Should there be a waiting period for past clients who wish to become volunteers? Depending on the nature of the work of your organization and the client/volunteer relationship, you may want to consider instituting a policy on whether or not clients and past clients will be accepted as volunteers.

Sample Policy: Clients as Volunteers

Current clients of the organization will not be accepted as volunteers in any direct service-delivery role. Current clients may be accepted as volunteers in other roles, if it would not constitute a conflict of interest or a conflict in service provision for the volunteer.

Past clients may be accepted as volunteers in any role, subsequent to a one year wait period after their last use of the organization's services as a client.

Any volunteer, including current and past clients, must complete an application process and be formally accepted into the organization's volunteer program.

Other policies that you may want to consider for your volunteer program:

- **Volunteer Leave**
- **Employees as Volunteers**
- **Volunteer Dismissal**
- **Volunteer Screening Process**
- **Conflict of Interest**
- **Use of Organizational Affiliation**
- **Volunteer-Client Relationships**

Sample Volunteer Code of Conduct

Volunteer involvement is a valued and integral part of the way our organization functions. Volunteers help us achieve our mission and vision, and serve as representatives of our organization in the community. The Volunteer Code of Conduct reflects the values of our organization and the high standard of behaviour we expect of our volunteers. All volunteers must read and agree to comply with the Volunteer Code of Conduct.

As a volunteer, I agree to:

- Follow the organization's policies and procedures.

- Demonstrate respect, professionalism and courtesy to all clients, community members, volunteers, and staff members.

- Participate in all required orientation and training sessions.

- Fulfill the role and responsibilities as outlined in the volunteer position description, in a timely manner and to the best of my abilities.

- Meet agreed upon time commitments, or notify my supervisor in the event that I cannot do so.

- Accept supervision in my role and respond to feedback to improve my performance.

- Inform my supervisor of progress, concerns and problems related to my volunteer position.

I have read and agree to comply with the Volunteer Code of Conduct.

Name: _____

Signature: _____

Date: _____

VOLUNTEER CONSENT

When a volunteer signs a contract, a code of conduct, or anything with your organization, they are consenting to agree with the contents of that document. You should hold onto a physical form (and a digital copy, if possible) for the duration of the volunteer's engagement with your organization AND for at least one fiscal year after their time with your organization.

Next Steps

After planning for volunteers, it's time to engage them. Your next steps are:

- Creating position descriptions and recruiting volunteers
- Interviewing and selecting volunteers
- Training, orienting and preparing volunteers
- Managing, supporting and evaluating volunteers
- Retaining, recognizing and motivating volunteers

To continue your volunteer journey, there are a number of other workbooks created by Volunteer Toronto to assist every step of the way:

- **Recruiting Volunteers** – how to write and post role descriptions, how to attract specific audiences

- **Volunteer Selection** – interviewing and making the right decisions, communicating with potential volunteers

- **Orientation & Training** – keeping volunteers informed about the organization, the volunteer program, and how to successfully fulfill their role

- **Performance Management** – coaching, supporting and evaluating for success

- **Volunteer Retention** – recognizing and motivating volunteers, planning for volunteer succession

- **Program Evaluation** – understanding and improving your program's outcomes and impact

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