Volunteer toronto

Volunteer Supervision

Resource Guide & Workbook

Compiled by Engaging Organizations Department

Using this Resource Guide & Workbook

The Volunteer Supervision resource guide & workbook has been compiled by Volunteer Toronto to help community groups, non-profits and charitable organizations with the basic tools to create effective boundaries and plan for dismissal of volunteers if necessary. Each resource has been selected to give you an idea of the various elements of supervising volunteers. It is important to remember that these are guidelines informed by best practices; you can adapt them to your situation as needed.

Volunteer Supervision
Resource Guide & Workbook

Volunteer supervision may come naturally as a volunteer manager, but there are a variety of factors in effectively supervising volunteers and ensuring their success. You may also need the support of other staff and leaders to help in the supervision process as keeping track of progress, evaluating volunteers and being a strong team leader might be a shared job. It's necessary to consider how risks involved with volunteer roles may impact the way a volunteer is supervised.

This workbook will cover many of the factors necessary to effectively supervise your volunteers, from determining who the direct supervisor should be and who volunteers should report to, to managing the volunteer program and its projects and tasks appropriately. Altogether, the guides, templates and charts in this workbook will help you ensure your program is successful and your volunteers have the support they need. Here are the contents of this workbook:

Designated Supervisor

Supervising volunteers requires a supervisor – and this shouldn't necessarily be the volunteer manager or coordinator. Each volunteer may require a different supervisor based on their work, the risk involved in their role and a number of other factors. You may need other staff to become volunteer supervisors, or even volunteer leaders. Use the following examples as a guide to determine who should be a volunteer's designated supervisor.

Volunteer Role	Potential Risk	Suggested Supervisor
Friendly visitor for isolated seniors in their home	Working with clients one-on-one often in an unsupervised environment	Staff program leader or volunteer manager
Front desk administration	Working with potentially private information of walk-in/phone-in clients	Front desk staff person or lead volunteer
Weekly program volunteer	Single volunteer with a position of authority over a group of clients	Staff program leader, lead volunteer
Festival support volunteer	Could misdirect clients while answering informational questions	Lead volunteer
Volunteer recruitment volunteer	Working with private volunteer information, decision making for volunteer roles	Volunteer manager

The risk and the nature of the role determines who would be an appropriate supervisor. Staff can supervise volunteers if it is a part of their roles, and volunteers can be supervisors of other volunteers with the right training. There should be distinctions of what each type of supervisor can do:

Volunteer Manager

The volunteer manager is likely the one to recruit, screen and select the volunteers and will have the best knowledge of their past experience, potential risks and other important details. In most cases, the volunteer manager is also the only one with decision making authority to choose to dismiss a volunteer. The volunteer manager should also set the requirements for volunteer supervision (as you'll learn more about throughout this workbook) and standards for evaluation, communication and more. In large organizations, the volunteer manager will often manage other volunteer supervising staff and leadership volunteers.

Staff

Some staff will have volunteer coordination and supervision as a major part of their role, while others may simply be required to check in with volunteers or provide evaluations from time to time. Either way, volunteer supervision must be included as part of the staff person's role if they are to be expected to be involved in supervising volunteers. Staff should receive training on their specific requirements as volunteer supervisors. While staff can recommend disciplinary action and provide a number of the same functions as the volunteer manager, certain responsibilities such as selecting and dismissing volunteers should be resolved by the volunteer manager.

Volunteer Leaders

Long-serving volunteers, or those with relevant skills or expertise, can become supervisors of other volunteers. As with staff, these leaders should receive adequate training on their requirements as supervisors. These types of supervisors are often involved in hands-on oversight of the volunteer's work and may also support some administrative functions such as scheduling and shift planning. While volunteer leaders can support the evaluation process and provide informal feedback, a staff person or volunteer manager should manage major decisions about volunteer reprimand, dismissal and role changes.

Risk Continuum

Lower Risk   **Higher Risk**

⟵————————————————————————————⟶

Less supervision needed,   More supervision needed,
minimal supervisor contact   direct (frequent) supervisor contact
Supervised by volunteers or staff   Supervised by volunteer manager or staff

CREATING SCHEDULES

While there are various types of people that can supervise volunteers, schedules should be created by the direct supervisor rather than the Volunteer Manager. To avoid over (or under) scheduling, knowing what each volunteer will do on their scheduled shift can help maximize efficiency and enjoyment. The program and/or volunteer supervisor is best suited to determine the needs of the schedule.

Reporting Structure Flowchart

Once you've determined who should be supervising each volunteer, you should create a reporting structure. By creating a reporting structure that takes risks into account, you'll ensure the right information is going to the right people. Depending on how many volunteer roles you have, consider the ways every volunteer would report to their supervisor and, eventually, to the volunteer manager and/or program leader. Reporting structures are also useful for volunteers to know who they are accountable to, who will oversee them and their work and who to approach to get questions answered.

Consider these questions to plan your structure, then use the template below to fill in the pieces.

- Who do your volunteers report to?
- Is there one supervisor for all volunteers, a group of supervisors?
- Who do supervisors of volunteers report to?
- How do you communicate this structure to your volunteers?

In this example, the Volunteer Manager oversees volunteer engagement through the coordinator and program staff, who then have their own reporting structures. *Use the template on the next page and make your own connections!*

```
                    Volunteer Manager
                    /              \
        Program Staff          Volunteer
                                Coordinator
        /          \                |
  Volunteer    Volunteer      Volunteer Group 4
  Supervisor   Supervisor           |
     |            |            Volunteer Group 5
  Volunteer    Volunteer
  Group 1      Group 2
```

WHAT SHOULD VOLUNTEERS REPORT?

You should inform volunteers of what they should be communicating to their supervisors – it's important to report incidents and accidents alongside accomplishments, successes and challenges. There might be some things they won't know who to report to, so make your reporting structure clear from the beginning!

Project Charting Template

Keeping track of all the pieces in a project can be challenging – especially with many volunteers supporting the work. Regardless of who is supervising volunteers, it's important to track the progress of the work volunteers are completing. A Gantt chart is a project management tool that can help volunteer supervisors (and project managers) visualize the work that needs to be completed for time-limited and on-going projects. There are simplified versions that can show individual project elements or volunteers and more complex charts that highlight the critical path of work that needs to be completed.

In this example chart, each task takes a certain number of days and finishes before the next one starts. These charts can be made using spreadsheet software or Microsoft Project. This chart was created using the charting function in Microsoft Excel, and a tutorial can be found **here**.
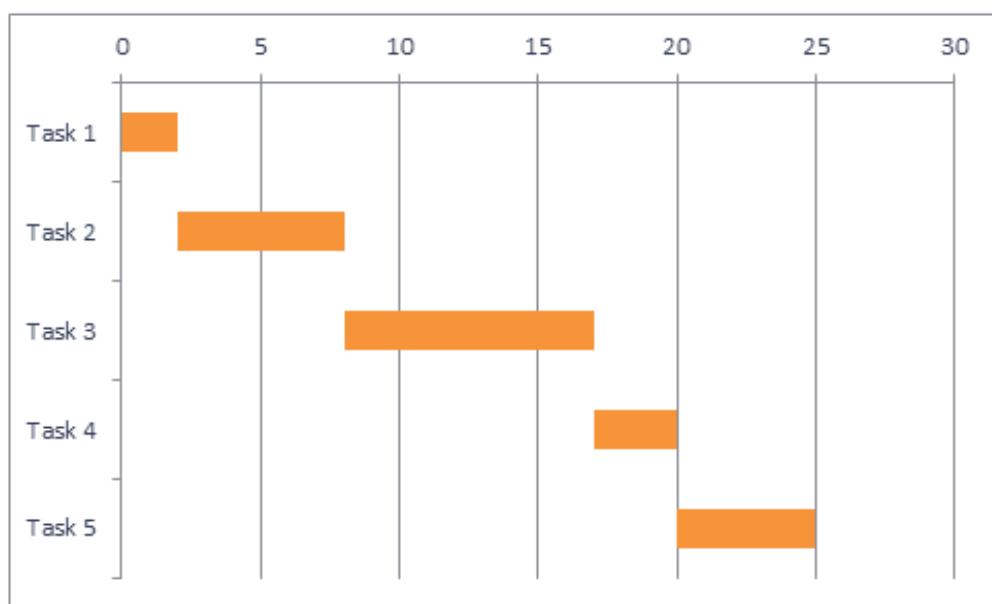
For a simpler example, this chart shows the work of a project by certain volunteers and how they might overlap in getting a project done. In some cases, as between tasks 1 and 2, or 3 and 4, one task needs to be finished for another to start. For tasks 2 and 5, the same occurs despite task 2 overlapping with other tasks.

Volunteer A	Day 1	2	3	4	5	6	7	8	9	10	11	12	13	14
Task 1	██	██	██											
Task 2				██	██	██	██	██	██	██	██	██		
Volunteers B + C	▓▓	▓▓	▓▓	▓▓	▓▓	▓▓	▓▓	▓▓	▓▓	▓▓	▓▓	▓▓	▓▓	▓▓
Task 3		██	██	██	██	██	██	██						
Task 4								██	██	██	██	██	██	██
Task 5													██	██

When creating your own Gantt chart, consider the lengths of time you'd need for a task – such as weeks or months. *Use the template on the next page.*

Volunteer toronto

Name														
Time unit -->														
Task														
Task														
Task														
Name/Task														
Task														
Task														
Task														

Evaluation Formats

Evaluation is an important part of supervising volunteers. Determining the right forms and format of evaluation should depend on your reporting structure and the formats you employ in performance evaluation in your organization in general. When evaluating your volunteers, there are two common methods:

Evaluation Forms

- Can be digital (e-mail) or physical (mailed, handed out, printed)
- Can be available before, during and after shifts
- Should be somewhat standardized across your organization with variations based on the role
- Can be perceived as impersonal by volunteers

Example: Volunteers receive an evaluation form at the end of a program from their direct supervisor, or at the end of a three-month period, highlighting their successes and some room for general improvement

Face-to-Face

- Can be scheduled or impromptu
- Can follow a standardized set of questions/evaluation areas
- Directed at a specific volunteer (or occasionally a group of volunteers)
- Comes across as more personal for volunteers
- Allows for immediate response from volunteers during evaluation process

Example: Volunteer supervisor meets with volunteer after probation period to talk about the role, volunteer challenges and successes

It's important to provide an evaluation and/or feedback on a regular basis so that volunteers know how they're doing. The schedule should depend on the work of the volunteer and the amount of time they are committing to your program. If a volunteer breaks a rule or boundary, you should address this immediately and provide your feedback – preferably in person – to help this volunteer solve the problem.

Getting Feedback

When you're evaluating your volunteers' performance, it's important to take the time to listen to their feedback about the role and the program. You can do this informally, by asking a few general questions about their experience volunteering either face-to-face or by email. You can also include it as a formal part of a more structured evaluation, by providing them with a standardized set of questions to provide feedback on, either through an online survey or by giving them a form to prepare before a face-to-face evaluation meeting. You can also consider asking the volunteer to evaluate their supervisor's performance.

Determining Supervision Needs
of Off-Site Volunteers

Off-site volunteers are any volunteers doing their work – and the work of your organization – outside of your main facility or operation. This includes clients' homes, workplaces or vehicles, offices, satellite locations of your organization or even public locations (such as coffee shops). Supervising these volunteers requires a bit of extra thought compared to your on-site volunteers. Use the following worksheet to determine your supervision needs for these volunteers:

Volunteer		Facility	
Alone No oversight Some training	In a group Some oversight Adequate training	Private (home/office) Public Not controlled	Run by organization Secure/supervised Controlled
Volunteer's Work		**Policies & Procedures**	
Vulnerable clients Single client High risk	Non-vulnerable clients Group of clients Low risk	Governing on-site Broad for staff & volunteers Specific to your facility	Governing on-site & off-site Focused for volunteers Applicable in all areas of work

The left column of each category is higher risk and would require greater supervision, while the right column would require less. If you chose a mix, then the volunteer may need occasional on-site supervision with more frequent checking in on logs & work completed, but not necessarily constant oversight.

You can provide on-site supervision, occasional check-ins and even video surveillance as methods of supervision for off-site volunteers. Tracking logs, volunteer reports and client feedback can also provide insight into off-site volunteer work and success. Consider the following questions to help you determine other needs for your off-site volunteers.

- Will volunteers be the only point of contact for clients?
  Consider how you may want to connect clients with your organizations in additional ways

- Will volunteers be giving advice, making recommendations or suggesting courses of action for clients?
  Training should cover the extent a volunteer can give this advice, and your organization should be able to back this up

- Will volunteers be traveling from place to place?
  How will they be travelling? Will they be taking clients? Is the mode of transportation insured and protected?

- Will volunteers have a level of autonomy in their work?
  The risk of the role should help determine the level of autonomy, and you should be screening for the right volunteers for this type of role

Some issues may need to be dealt with on-site and immediately while others should be escalated directly to a volunteer manager. On-site supervisors can directly address task-related issues, but if an off-site volunteer doesn't quite fit - or the issues are more personality-related - then the volunteer manager should step in.

OFF-SITE VOLUNTEER SUPERVISION...AND MORE!

Check out the free online "Volunteer Management Basics" course on Volunteer Supervision – Lesson 4 goes in-depth into Off-Site volunteering, and the other lessons explore a variety of topics that go hand-in-hand with this workbook. Check it out here!

Measuring & Improving Volunteer Engagement

The Conference Board of Canada has identified 8 drivers of employee engagement. The list below is an adaptation of these 8 drivers that you can apply to your volunteers and volunteer program through support and supervision.

1. Trust and integrity
2. The work of the role
3. Individual contribution impact on organization performance
4. Personal/professional growth opportunities
5. Pride in the organization/cause
6. Working with other volunteers
7. Volunteer development
8. Relationship with supervisor/manager of volunteer

You may notice that some or all of these line up with the motivations that brought your volunteers to engage with your organization. The effectiveness of these drivers depends on each volunteer's needs and motivations, but having most or all of them in place will help you ensure your volunteers are engaged and actively working toward the mission with your organization.
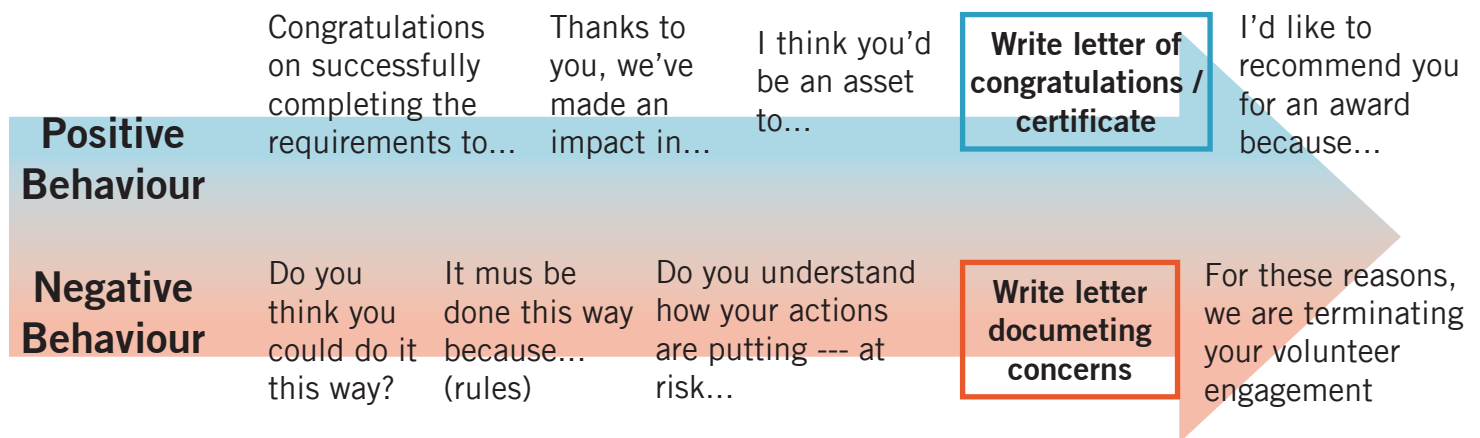
How do you measure your volunteer's level of engagement or satisfaction? You can use a survey (with the drivers in mind) like the one below to assess this and determine which drivers you may need to enhance to improve satisfaction and engagement.

	Strongly Disagree	Disagree	Neutral	Agree	Strongly Agree
I feel trusted to do my work (1)	1	2	3	4	5
The work is fulfilling and enjoyable (2)	1	2	3	4	5
I have the right amount of work to keep me busy without feeling overwhelmed (2)	1	2	3	4	5
I feel that my work is contributing directly to the mission (3)	1	2	3	4	5
I am making an impact on our community (3)	1	2	3	4	5
My volunteer work helps me meet my personal and/or professional goals (4)	1	2	3	4	5
I believe in the mission of this organization (5)	1	2	3	4	5
I have the opportunity to meet and work with other great volunteers (6)	1	2	3	4	5
I feel well trained and prepared for my role (7)	1	2	3	4	5
I have the opportunity to ask for help when I need it (7/8)	1	2	3	4	5
I feel appreciated by my supervisor(s) (8)	1	2	3	4	5

If you're seeing a lot of "disagrees" for certain responses, consider how you can increase these drivers for your volunteers and improve their engagement.

Feedback Continuum

One of the main aspects of supervising – and supporting – volunteers is giving meaningful and constructive feedback. Constructive feedback doesn't mean it is negative, but there's a general path of feedback and responses you should follow for your volunteers. In this example continuum below, consider the ways your feedback can change over time, especially depending on the progression of a volunteer's behaviour.

Positive Behaviour	Congratulations on successfully completing the requirements to…	Thanks to you, we've made an impact in…	I think you'd be an asset to…	**Write letter of congratulations / certificate**	I'd like to recommend you for an award because…
Negative Behaviour	Do you think you could do it this way?	It mus be done this way because… (rules)	Do you understand how your actions are putting --- at risk…	**Write letter documeting concerns**	For these reasons, we are terminating your volunteer engagement

This continuum is a basic version of how positive and negative behaviour can extend to different outcomes. It is possible for volunteers to switch from the negative to the positive side once they have an understanding what they're doing wrong and how it might impact clients, volunteers, staff and/or the organization. The way you respond to situations both in the moment and afterward can help guide your volunteer to success and better engagement.

- Consider the following scenarios – what would you say to these volunteers and how would you say it?
- A volunteer is a consistent no-show to shifts but keeps saying they'll come to the next one
- Members of your Board have received letters from a client about a particular volunteer's aggressive behaviour toward them
- One volunteer raised a significant amount of money in your street campaign
- A volunteer talking to their sibling shared personal information about a client
- A volunteer took it upon themselves to plan a birthday celebration for an isolated client with no cost to the organization and involving all the volunteers and staff who work with this client

Keeping Tabs on Volunteers

One of the challenges of supervising volunteers is keeping tabs on all of them at once. It's not possible for you to be in a hundred places at the same time, so a variety of methods can be used for you to know what's going on with your volunteers, even when they're in the same facility.

Volunteer Logs

Volunteers can be expected to fill out logs at the end of their shift. They can range from simple logs asking for shift times, a rating scale to indicate how the shift went and any comments to more robust logs asking for specific details and more information about interactions with clients or other aspects of the role. These can even be made online using tools such as SurveyMonkey or Visual Form Builder.

Online Tracking/Check-In System

Some volunteer management software that is online-based has capabilities for volunteers to check-in/out of shifts as well as record details on the activities of the shifts. The capabilities range based on need and software cost, so consider your total volunteer numbers and what systems would work for you.

Dating Work

Depending on the work of your volunteers, they can simply date (or otherwise identify) what they've worked on during the shift. For example, if your volunteers are stuffing envelopes or making phone calls, they can indicate how far they got with their name and date in the pile/list.

E-mails/Phone Calls

Checking in by e-mail and/or by phone may use a lot of your time but can be an easy and straightforward way to connect with your volunteers. You can ask that they e-mail you after shifts, or you can set up times for phone calls. Getting the full picture of what happens on a shift is important and you may need to connect frequently, so having a formalized system in place for communicating this way would be important.

Reports from Others

Even though you may not be able to oversee a volunteer's work, there may be other supervisors and staff that can give you their report. If they notice something especially out of the ordinary or questionable, they should let you know right away so you can follow up with the volunteer.

What kind of information might you be looking for? Consider any or all of the following options:

- Shift start & end times
- Self-assessment of how the shift went
- Specifics on work completed
- Client(s) worked with
- Staff and/or other volunteer(s) worked with
- Comments or stories
- Anything alarming/cause for alarm
- Satisfaction with volunteer role overall
- Questions for next shift

Volunteer Boundaries & Dismissal
Resource Guide & Workbook

Next Steps

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

Basic

- Planning, Recruiting & Selecting
- Training, Supervising & Supporting
- Evaluating, Retaining & Developing
- Engaging Group Volunteers
- Professional Development for Managers of Volunteers

Intermediate

- Planning for Volunteer Involvement
- Volunteer Recruitment
- Volunteer Selection
- Training & Orientation
- Volunteer Retention & Recognition

Advanced

- Accessibility and the AODA
- Giving Volunteers Feedback
- Short Term Volunteers
- Long Term Volunteers
- Volunteer Boundaries & Dismissal

Check out our **Online Learning Centre** for a variety of courses to further enhance your learning and improve your practice - go to volunteertoronto.ca/?page=OnlineLearning

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