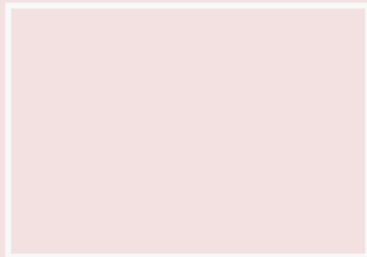
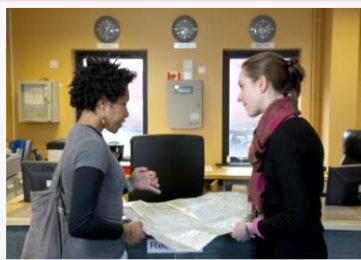


As Good As They Give

Providing volunteers with the management they deserve



Workbook One Planning Volunteer Involvement



Volunteering takes many forms - traditional service giving, mutual aid and self-help, advocacy and campaigning and community action. All such forms of volunteering are equally valid.

Volunteer Now promotes and develops volunteering as a valuable and integral part of life. We believe the following principles and values should underpin volunteering:-

- Volunteering encourages civic participation and demonstrates active citizenship
- Volunteering is an expression of the individual's freedom to choose
- Volunteering is unwaged and benefits from being a reciprocal gift relationship that meets the needs of organisations and volunteers
- Volunteering promotes inclusion and should be open to all
- Volunteering enables people and communities to influence and contribute to social change
- Volunteering works best when it is guided by good practice

This workbook was originally developed in 2001. A review of all five 'As Good as they Give' workbooks was carried out in 2012, facilitated by funding provided by The Building Change Trust.

These workbooks are available in downloadable electronic format only.

As Good As They Give
Providing volunteers with the management they deserve
Workbook One - Planning Volunteer Involvement

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How to use this book

This workbook is aimed at the individual or team responsible for co-ordinating or managing the involvement of volunteers within an organisation or project. It explores some basic good practice issues facing volunteer-involving organisations and, in particular, Volunteer Managers who want to develop a professional approach to their role.

Volunteers are involved in such a wide variety of organisations, and undertake such a diverse range of tasks that one book cannot claim to address all the issues which face every organisation and every individual Volunteer Manager. Instead, this workbook seeks to explore underlying principles, which can be applied in any type of volunteer-involving organisation regardless of size. It also identifies some procedures and skills for implementing these principles and provides examples of good practice, which, it is hoped, will make it of use as a practical tool when undertaking these tasks in real work situations. However, it also makes frequent use of exercises and activities to encourage you to use your own knowledge and experience to tailor these suggested ways of working within your own organisational contexts.

The workbook has been designed primarily as a learning resource for the individual Volunteer Manager to work through alone or, better still, with colleagues, but it could also be used as a basis for group training sessions. However you choose to use the book, it should help you acquire skills and knowledge needed to:

- outline key concepts and core values underpinning volunteer involvement.
- describe theory frameworks of relevance to the management of volunteers.
- identify and prioritise your development needs in relation to volunteer management.
- begin to identify key issues for your organisation in relation to volunteering.
- explain the purpose and basic content of a volunteer policy.
- use a simple framework to develop a volunteer policy for your own organisation.

The following symbols will help you to use the workbook:



Key principles, which represent the main focus of a chapter or section.



Indicates an **example** or **case study** that illustrates good practice in a particular context. It does not imply an 'ideal' way of applying the good practice principles, just one that worked in that setting.



Reflective **exercises** are designed to draw out ideas and knowledge on an issue, or to help place it in a relevant context.



Tasks, on the other hand, involve practical activities or research with a tangible application to the reader's work.



Finally, **references** to other materials allow more in-depth reading on specific issues which space does not allow us to fully explore in this publication.

Before starting, you should be aware that this workbook is part of a series that addresses the key areas of volunteer management. Addressing the issues explored in this workbook is an essential first step towards the more effective involvement of volunteers. However, it is only the beginning and the aim of the workbook is to help you highlight priorities for your own and your organisation's development. Further workbooks in the series outline basic good practice principles in relation to core volunteer management tasks (recruitment and selection, management, training and evaluation) and key organisational issues (legal responsibilities, equality and diversity and staff/volunteer relations).

Other workbooks in this series are:

- | | | |
|-------|---|--|
| Two | - | <i>Attracting and Selecting Volunteers</i> |
| Three | - | <i>Managing and Motivating Volunteers</i> |
| Four | - | <i>Managing Volunteer Training</i> |
| Five | - | <i>Volunteers and the Wider Organisation</i> |



1. Starting from first principles

For busy Volunteer Managers, there is always a pressure to rush straight in to dealing with the many urgent tasks that demand attention and just won't wait. However, effective management means taking time out occasionally to step back and look at the 'bigger picture' to regain our focus on the core aims and objectives of the work. This workbook aims to help you do just that by addressing some of the core values and concepts that underpin volunteer involvement and to help you identify what you need to be an effective manager of volunteers. All the workbooks in this series are based on three key values around volunteering.

The nature of volunteering

The first key value is about the nature of volunteering. While at some levels it is useful to think about volunteering in the broadest sense - as any community activity, or as active citizenship - there are times when we need a clear definition of volunteering. For instance, when we are undertaking practical tasks, such as formulating policy and procedures for volunteer involvement within our organisation or group, it is important to be able to state clearly to whom such policy and procedures apply.

Volunteering has been defined as..."
the commitment of time and energy for the benefit of society and the community, the environment or individuals outside (or in addition to) one's immediate family. It is unpaid and undertaken freely and by choice."

[Join in, Get Involved: Build a Better Future Volunteering Strategy for NI, 2012](#)

This is the definition that we will apply throughout this workbook and it raises four distinct points about the nature of volunteering:

1. Volunteering involves an active commitment. It is more than simply donating money or lending one's name to a cause. Volunteers get involved.

2. Whatever the volunteer's motivation, the benefits of their voluntary activity are felt outside or in addition to their immediate family.
3. There can be no element of compulsion or coercion in volunteering. Each individual must make the commitment of his/her own free choice.
4. Volunteering is essentially unpaid. While reimbursing out-of-pocket expenses is good practice, giving or receiving payment for work creates a different kind of relationship to that between a volunteer and the group or organisation with which they volunteer. This is explained more in Workbook 5.

Research undertaken by the Volunteer Development Agency in 2007¹ estimated that **282,067** adults in Northern Ireland are 'formal' volunteers – those being people volunteering under the auspices of an organisation. This equates to 21% of the NI population. A further **470,117** people were estimated to be 'informal volunteers' - those being people volunteering at a neighbourhood level, outside of an organisation. This equates to 35% of the NI population.

Why involve volunteers?

It is interesting to note that 67% of organisations in NI say that volunteers bring special qualities to the role that paid staff cannot offer. A further 87% stated that even if they had all the money in the world they would still involve volunteers.

[A mapping exercise](#) of volunteer involving organisations in NI carried out in 2010 showed that volunteers are involved across all Sectors and in every imaginable activity. Although the majority of volunteers are still involved in the Community and Voluntary, Church and Faith Based Sector there is a growing number involved in the Public and Private Sector.

¹ [Its All about Time: Volunteering in Northern Ireland, Volunteer Development Agency, 2007](#)

Volunteers in Northern

Ireland are involved in everything from befriending to fundraising, from trade unions to political parties, from hospitals to museums, from campaigning to counselling, from giving blood to mountain rescue and many other areas besides. The most common types of roles carried out by volunteers include Administration / Office (55%), Governance (44%), Fundraising (36%), Working with Children / Young People (36%) and Advice / Information (31%) ([State of the Sector VI](#), NICVA, 2011).

Moreover, the work volunteers do benefits all kinds of people: young people, older people and families; men and women; those with physical or mental ill health; those with physical, sensory or learning disabilities; the unemployed, the employed, the retired, students and those who work in the home; those with an interest in the arts, in history, in sports; people from minority ethnic backgrounds and other minority groups; local communities, people living on every continent, refugees and the homeless. In fact, it would be hard to think of any group or community that does not benefit from some form of voluntary service.

So what distinguishes work carried out by volunteers from that carried out by employees?² Is it simply that they do not get paid? It is true many organisations think of involving volunteers only in terms of saving money. This implies that, “If only we had enough money, we wouldn’t need (or even want) volunteers in our organisation.” So volunteers are tolerated as ‘cheap labour’ or second-class staff. This is a ‘**second choice**’ reason for involving volunteers. The motivation for involving volunteers has important implications for every aspect of how you will involve and manage volunteers, from which tasks they do, to the resources spent on their involvement.

If such **economic considerations only produce ‘second choice’** reasons for involving volunteers, what are the ‘**first choice**’ reasons? ‘**First choice**’ reasons are those where, **volunteers would still be the preferred option, even if money was available to pay staff to carry out the work volunteers are doing.**



Aim: To examine attitudes to volunteers in your organisation and its approach to volunteer involvement.

Spend 10 -15 minutes thinking about or discussing why your organisation involves volunteers and try to write down at least three or four reasons in order of importance.

Think about...

- the sorts of roles or functions that volunteers fulfil in your organisation.
- how volunteers contribute to the achievement of the organisation’s objectives.
- the relationship of volunteers to paid staff, and to your service-users.
- what, if anything, your mission statement or constitution says about volunteers.

Now consider if the reasons you have listed pass the following ‘ideal world’ test: In this particular ‘ideal world’, the needs your organisation deals with still exist, but there is limitless money to spend on meeting those needs. Do the reasons you have listed mean that there would still be a place for volunteers within your organisation?

Now read the following extract:

First choice reasons for involving volunteers



If you play this mind game (the ‘ideal world’ test), you will identify some of the unique things volunteers offer an organisation - so special to volunteers that paying a salary negates or changes them completely:

- Volunteers have perceived credibility with clients, donors, legislators, and others for the very reason that they do not receive a wage from the organisation.
- It often makes a difference to the recipient of a service that the provider is there purely because he or she wants to be.
- Volunteers are insider/outsideers, bringing a community perspective and



²For more information on the issue of job substitution see Workbook Five, *Volunteers and the Wider Organisation*.



often widening the range of backgrounds of the workforce.

Volunteers can bring a broader point of view than the paid staff who may be too close to the work to “see the woods from the trees”.

- Volunteers extend your sphere of influence and access to additional people, businesses and organisations in the community. Even the volunteer who helps you once a year becomes another person with knowledge about your work.
- Boards of Directors/ Management Committees of Charities / Voluntary Groups are - by law - an intermediary between donors/funders and programme participants, acting as “trustees” of funds from which they themselves derive no profit.
- Volunteers bring the “luxury of focus” to their work. While paid staff members must spread their time and efforts equitably among all clients and projects, volunteers can be recruited to concentrate on selected individuals and issues.
- Volunteers can be asked to work odd hours, in varying locations, and to fill special needs for which staff time can not be justified yet which are important to individual clients.
- Volunteers often feel freer to criticise and speak their minds than employees do.
- Volunteers, as private citizens, can sometimes cut through red tape and bureaucracies more directly than employees.
- Volunteers can provide new and valuable contacts and networks and extend the reach to new audiences, donors etc.
- Volunteers can experiment with new ideas and service approaches that are not yet ready to be funded - or that no one wants to fund for a wide variety of reasons. Historically, in fact, volunteers have always been the pioneers in creating new services, often against the tide of opposition from more traditional institutions.

Other Benefits of Volunteers

Since we live in the real, limited-resources world, what are the other benefits to an organisation for involving volunteers?

Volunteers offer:

- Extra hands and the potential to do more than could be done simply with limited salaried staff; this “more” might mean an increased amount of service, expanded hours of operation, or different/new types of services.
- Diversity; volunteers may be different from the salaried staff in terms of age, race, social background, income, educational level, etc. This translates into many more points of view and perhaps even a sort of checks and balances to the danger of the staff becoming short sighted.
- Skills that augment the ones employees already possess. Ideally volunteers are recruited exactly because the salaried staff cannot have every skill or talent necessary to do all aspects of the work.
- Community ownership of solutions to mutual problems. Especially if your organisation addresses issues affecting the quality of life, when people participate as volunteers they empower themselves to improve their own community (which is your mission, after all).
- Studies have shown that satisfied volunteers frequently are so supportive of the organisations with which they serve that they become donors of money and goods as well. They also support special events and fundraisers by attending themselves and bringing along family and friends.

So Why Pay a Salary?

Perhaps you have been thinking about the reverse of the question of why you involve volunteers, namely: “Why should we salary anyone?” It is important to recognise that the answer is not that offering a salary gets you people with better qualifications. A volunteer can be just as highly trained and experienced as can any employee. Instead, offering a salary gives the organisation a pre-determined number of work hours per week, the right to dictate the employee’s work schedule, a certain amount of control over the nature and priorities of the work to be done, and continuity.

Adapted from: © Lee, J F & Catagnus, J M. *Supervising Volunteers*, Energize Inc, 1999



The second key value that underpins volunteering, then, is that **volunteers have a unique contribution to make** to the organisations, communities and causes for which they work, which is different from, but complementary to, that of paid staff. It is absolutely vital to identify the unique qualities of volunteers that are important to your organisation, and to develop a 'value statement', which expresses why you involve volunteers in your organisation. It is crucial that this ethos is understood and shared by everyone connected with the organisation because those values will impact on all your policies and procedures for attracting and managing volunteers. It will make the difference between an organisation that **uses** volunteers and one that **involves** them.

One last thought on the 'second choice' or economic reasons that you may have for involving volunteers in your organisation - volunteers are not a wholly free resource, to effectively involve volunteers investment must be made in planning for their involvement, recruitment, support, training and management. To maximise the number and diversity of people that volunteer with you, offering reimbursement of out of pocket expenses is also strongly recommended.

It is therefore more accurate to say that volunteers provide excellent **value for money**, with the consequent understanding that volunteers do not come for free. Organisations must be willing to invest in this valuable resource in order to get the best value out of it.

The two-way relationship

Highlighting the unique contribution of volunteers and the value your organisation places on the individuals and their work will set the tone of the relationship between volunteers and the organisation. The traditional view of this relationship is that volunteers make a gift of their time, without any desire or expectation of getting anything back.

Although the element of altruism is felt by many to be an essential ingredient in volunteering, this 'one-way' relationship is no longer seen as either realistic or useful by many of those with a direct involvement in volunteering. Instead, volunteering is understood as a relationship that, like most relationships, requires both parties to

put something into the process in order to receive mutual benefits. On this basis, the organisation has a clear responsibility to plan and manage the way in which it involves volunteers in its work in order to maximise the potential benefits to all concerned - the organisation itself, its beneficiaries and the volunteers.



The volunteer

Ideas,
contacts,
enthusiasm,
time, skills
experience...

Recognition,
friendship,
fun, skills,
experience ...



Resources,
training,
welcome,
insurance,
support,
expertise...

Flexibility,
skills,
community,
involvement,
ideas,
diversity...



The organisation



So the third and final key value about volunteering is that **volunteering is a two-way relationship**. As you will doubtless have realised by now, each of these ideas is much more than an abstract or philosophical point, because they have a fundamental effect on how the organisation approaches the involvement of volunteers.

Acknowledging a two-way relationship with volunteers means that volunteers' reasons for volunteering become a matter of acute interest to the organisation - and to the Volunteer Manager, in particular. In fact, much of the challenge of volunteer management lies in trying to achieve the best balance between the needs of the organisation and the motivations of the volunteers, the 'best balance' being that

NOTES





which maximises the benefits of volunteering for both parties.

While the motivation for volunteering will vary from one individual to another, and indeed for one individual over time, the following chart indicates some of the most common reasons given in the [Its All About Time 2007 research](#)¹.

Top 10 Motivations to Volunteer

♦ I wanted to improve things/help people	50 %
♦ The cause was really important to me	28 %
♦ I had time to spare	24 %
♦ I felt there was a need in my community	23 %
♦ It's part of my religious belief or philosophy of life to help people	22 %
♦ I thought it would give me a chance to use my existing skills	17 %
♦ My friends/family did it	15 %
♦ I wanted to meet people/make friends	12 %
♦ It was connected with the needs of my family/friends	12 %
♦ I felt there was no-one else to do it	5 %

It pays to remember that volunteering is a leisure pursuit and just one of many options available. So, while the 'traditional' or altruistic reasons for volunteering - responding to a need in the community or a sense of duty - are still important, many people are seeking to fulfil personal needs and motivations through volunteering too - to meet new people, to learn new skills or even just to fill spare time. The implication of this for organisations is simple - volunteers are unlikely to stay with an organisation that fails to recognise the two-way relationship.

The three principles discussed in this chapter provide the foundations on which all the other ideas about volunteer management in these workbooks are built. It will be important to keep these three ideas at the forefront of your mind as we begin to look at how best to approach the management of volunteers. **So, before proceeding to the next chapter, take a few minutes to look again at the three key ideas and note down any ideas or questions they raise for your organisation, your volunteer programme and, in particular, your role.**

¹ *Its All about Time Volunteering in Northern Ireland*, Volunteer Development Agency, 2007

2. Some useful ideas and theories

The first thing to realise about volunteer involvement is that it needs to be managed. This may seem an obvious statement, but many organisations still operate on the assumption that goodwill alone will be enough to ensure the success of their volunteer effort. Yet poor organisation is one of the most common negative experiences to volunteering; 2007 research¹ and other research³ has found that processes such as volunteer recruitment are more efficient when organisations have a dedicated person responsible for them. Due to the professionalisation of volunteering, the importance of having volunteer managers has risen substantially over the last decade, however, it is still quite usual for volunteer management to be treated as an additional duty, tagged on to another role, rather than as a job in itself.

Even where the need for a volunteer manager role is recognised, there remains a huge issue over the level or status of the role. Yet managing volunteers requires all the 'generic' management skills and competencies associated with any other management role - a simple fact which often escapes even those in volunteer-involving organisations. As one manager of volunteers, designated a 'Volunteer Co-ordinator', put it, "You co-ordinate colours - volunteers are a little more complicated than that!" Managing people - whether they are paid or unpaid - is a complex process that requires a range of administrative, interpersonal and problem-solving skills.

However, there is still some way to go before volunteer managers are given a place in most organisations alongside other managers whose responsibilities include marketing, recruitment, training, supervision, evaluation, risk management and so on. While much of this workbook will try to pinpoint the **differences** between volunteer management and other types of management, the basic fact that this is a management role remains true.

Managing volunteers vs managing paid staff

According to the Management Charter Initiative's (MCI) National Occupational Standards for management, the 'key purpose' of any management activity is, *"To achieve organisational objectives and continually improve its performance"*. Within this overall purpose, four 'key roles' of management are specified - managing information, resources, activities and people, with people management easily the largest of the four functions.

The emphasis in the 'key purpose' statement on the central importance of meeting their organisation's needs is important, although many managers of volunteers have commented that this statement lacks any reference to the vital 'human element' of their role. While the skills required for the first three of the key roles are broadly transferable, those who manage volunteers may require different or additional skills and knowledge in people management.

This is because the relationship with volunteers differs in a number of important ways from that with paid staff. The employer/employee relationship is based on two elements that, by definition, cannot be present in a voluntary relationship - obligation and remuneration. Without the 'carrot' of monetary reward or the 'stick' of a legally binding contract, volunteer managers need to be more flexible and resourceful in their approach to management. As highlighted in the previous chapter, the motivations of individual volunteers become central to effective management.

Don't worry if you have trouble with the following exercise. It is difficult to summarise any role in just a few words and a possible key purpose statement for volunteer management is suggested later. The point is to focus your mind not so much on **what** you do as **why** you do it. Keeping focused on the purpose of your work will help clarify **what** you need to achieve it and even **how** these things should be done.



³ A Unique Way of Sharing, Volunteer Development Agency, 2001



Aim: To identify the key purpose of volunteer management.

Spend 5-10 minutes thinking about the overall purpose of your role in relation to volunteer management. Don't get caught up in describing the work you do, but focus on the bigger question of "What am I here for?" In working this out you should consider:

- Your job description – What does it say about the aim or purpose of the role? How much of this is directly related to managing volunteers and how much relates to other areas of work?
- Your organisation's mission statement – How does your role relate to this and to the organisation's strategic objectives?
- The key values highlighted in the introduction.

Now take 10 minutes to try to summarise the key purpose of your role by drafting your own key purpose statement. You should include some sort of commitment to the welfare and interests of volunteers, as well as the organisation. Keep it concise - just one or two sentences are enough.

- Does this statement reflect the focus of all your various volunteer management duties and activities?
- Does it highlight the common ground you share with other Volunteer Managers?

See workbook Three Managing and Motivating Volunteers

Management approaches and styles

Managing volunteers is different from managing paid staff, but this does not mean that 'conventional' management theories, skills and models are of no relevance in managing volunteers. As stated before, many areas of management require broadly similar skills and knowledge whatever the particular context of the work. The rest of this chapter looks at some of those ideas that are most applicable to the unique context of managing volunteers.

The earliest theories of management were based on a view of the average human as someone who dislikes work and seeks to avoid responsibility, preferring to be directed. This view of people at work was designated 'Theory X' by Douglas McGregor, a sociologist, in the 1960s. He found that most organisational and management practices were based on this belief, with managers using a combination of rewards and threats to control the workers. The basic problem with this concept is that, **if it were true, people simply would not volunteer in the first place.** The very fact that people undertake the work voluntarily makes this 'carrot and stick' approach inappropriate to volunteer management.

McGregor, however, also suggested an alternative view (his 'Theory Y') which said that work is as natural to human beings as rest or play. So, in the right circumstances, most people not only accept responsibility but seek it out. From this perspective, control and coercion are not the best ways to manage people at work, let alone the only ones. If the work itself is satisfying, then people will be committed to the role and, by extension, to the organisation. McGregor suggested that if people feel this way they will go beyond the basic physical or mental effort required to do the work and will use imagination and ingenuity to tackle their work creatively. In fact, McGregor believed that Theory Y people represent a huge resource of untapped talents and abilities, which are rarely fully developed or utilised in the context of work.



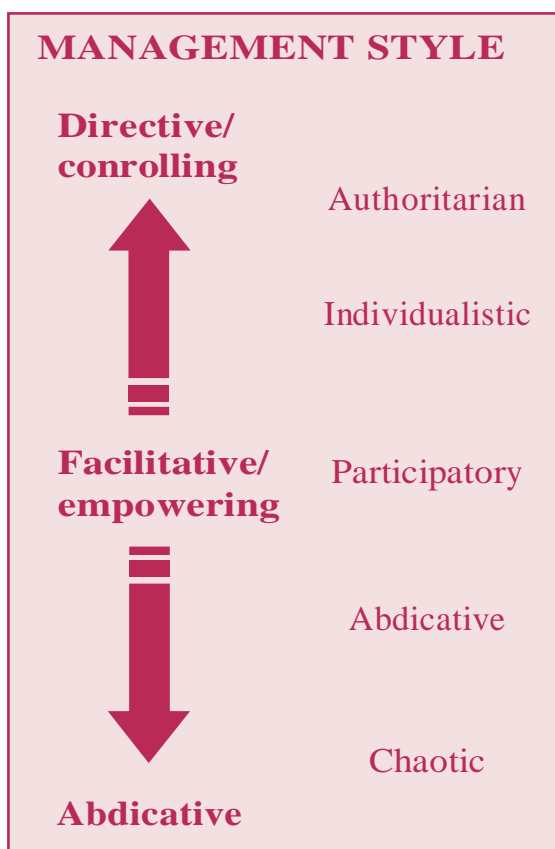
If we agree that volunteers do not fit the Theory X model, then Theory Y holds enormous

implications for how we should approach the management of volunteers. From this perspective, volunteer management should focus on **helping people realise their potential in ways which meet both personal motivations and the organisation's objectives.**

This idea summarises a number of important points about the role of the volunteer manager so well that it makes a good alternative key purpose statement. It still emphasises the importance of organisational objectives, but recognises that individual motivations are key to the

effective management of volunteers. In fact, this approach amounts to a **strategy** for involving volunteers - that is, managing not just to achieve limited (organisational) goals, but also to realise individuals' potential. From this point of view, we can also make suggestions as to how the volunteer manager might go about implementing such an approach.

For a start, a Theory Y approach holds important implications for what we might call an individual's *management style* - meaning their overall approach to the role and, in particular, how they interact with those they manage. While personality and the organisation's structure will affect this to some extent, the defining feature of one's management style is control. Based on the research of another management theorist, Rensis Likert, we can describe management style as a continuum with a very high level of control at one end and total neglect at the other, with different ways of influencing and directing people at various points along that line.



While any individual manager might employ a variety of styles in a range of circumstances, the approaches at either extreme of the continuum are unlikely to

provide effective management in any situation. Likert found that the participative approach near the centre of the continuum, where all those involved in the work take part in planning and decision-making, was the most effective in all kinds of organisations, people-oriented as well as profit-making, backing up McGregor's more optimistic view of people's approach to work.

A participative approach, however, demands that paid staff and management trust volunteers and have enough confidence in their abilities and motivation to delegate real responsibility to them. It can therefore require a considerable investment of effort and resources to enable and empower volunteers to participate effectively. The Volunteer Manager who views his or her volunteers as a resource of huge potential, willing and capable people who work best in a participative team, will want to manage volunteers in a way that can help people to realise their potential. One of the key questions they must ask therefore, is, "How can I help my volunteers to learn and develop the skills and qualities that they need to work most effectively?"

Managing to learn

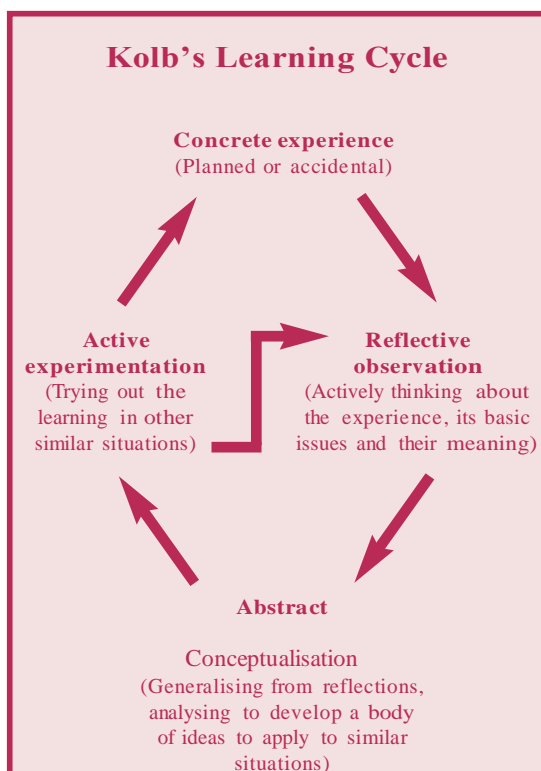
The concept of 'lifelong learning' has become very popular over the last few years. Government policy on education and training is now heavily influenced by the idea that learning does not and should not stop when we leave formal education. There are numerous initiatives to create a 'learning society' in which learning is part and parcel of our daily lives, inside and outside work. The emphasis in these initiatives is usually on increasing access to, and uptake of, structured training programmes, but this is not the only way to learn.

Training has been described as "Is a process which is planned to facilitate learning so that people can become more effective in carrying out aspects of their work." (Bramley, 2003) It is a deliberate and structured process with clearly defined goals or outcomes against pre-determined standards. **Learning**, however, is much broader. One of many definitions describes learning as, "a relatively permanent change in behaviour that occurs





as a result of practice or experience”⁵. David Kolb, a psychologist, described the way in which adults learn as a continuous process or a cycle:



to get the upper hand and Mary never quite managed to get a satisfactory result from these meetings. In fact she often ended up agreeing to something which she knew might make the original situation worse. Thinking these things through, Mary **observed** that, because they were so difficult, she had always tried to avoid such meetings until the last minute. This meant she rarely had time to prepare what she would say, to think through Andrew's objections and work out her own response. In fact, she could see now that sometimes she didn't even know what she wanted from him in the first place.

Abstract Conceptualisation

She began to **analyse** what she should have done to handle these situations more effectively. First, she thought that she should be clearer about what she wanted from Andrew and then work out what each of them would have to do to achieve this. Of course that would not guarantee Andrew's co-operation – she needed to be able to show him that he would get something out of it too. Better still, if she could offer him some choices, it would allow him to feel that he had some control – something she felt sure was important to him. Making a note of all these ideas, Mary searched out the book on volunteer management she had bought when she first got the post and re-read the chapter on conflict management. Before long Mary had worked out a set of 'Golden Rules' – a sort of checklist to help her prepare for these sort of situations.

Active Experimentation

Mary still felt nervous as she arranged to meet Andrew for yet another 'chat', but this time she had decided to **try out** her new strategy. She made sure she had time to prepare and used her checklist to work out what she wanted to say and to try to anticipate Andrew's likely response. Of course, she didn't expect everything to go perfectly this time, but she was pretty sure that at least she wouldn't end up making the situation worse! She wanted to try to be open-minded and learn from the experience. She may need to add to – or even subtract from – her 'Golden Rules', but that was how she would learn.



LEARNING FROM EXPERIENCE

Concrete Experience

As Volunteer Manager, it was part of Mary's job to deal with 'difficult' volunteers, but it was not a part that she relished. Andrew had been volunteering with the organisation for much longer than Mary had worked there and, although he had always been 'strong-willed' and rather blunt, he was also enthusiastic and a hard worker. However, he had become less and less co-operative over the last year, despite Mary's repeated attempts to deal with the situation. Things seemed to have come to a head recently, and he had now become obstructive. Mary was nervous at the prospect of confronting the issue and, when she remembered previous **experiences** of trying to sort things out with Andrew, she began to panic.

Reflective Observation

Mary began to **reflect** on a number of recent meetings – Andrew always seemed

5 Bass, B.M. & Vaughan, J.A. Training in industry; the management of learning, Tavistock, 1967

You can probably relate the sort of process described in the case study to a learning experience of your own. In fact, you have probably gone through such a process many times but not really regarded it as 'learning' as such. Increasing our ability to learn and become more effective requires not only an awareness of the process but an ability to move through each phase of the cycle. This requires specific skills and knowledge – what we might call **learning skills**. Some of the key skills and knowledge are listed below, but this is by no means a complete list. Add any that you have identified.

Skills

- Assessing own performance
- Identifying own needs
- Analysing processes
- Learning from others' example
- Asking for and accepting help
- Planning
- Taking risks and facing anxieties

Knowledge

- Acceptable standard of work/behaviour
- Own duties and responsibilities
- Purpose of own work
- Opportunities to learn
- Sources of advice and information
- Resources available
- Sources of support

Perhaps the single most effective way a Volunteer Manager can help people to realise their potential in ways that meet both personal motivations and organisational objectives is by helping volunteers to develop these learning skills. Then they will be able to take more responsibility for their own development, whether that is in relation to their particular volunteer roles, as members of a team, in employment (if applicable) or in their personal lives.



Aim: To identify ways in which the Volunteer Manager can increase a volunteer's capacity to learn.

- Work through the **knowledge** list (including those you have added).

Consider:

- Do you have access to this information? If not, where would you find it?
- What opportunities do you have to convey this information to volunteers?
- How could you best convey the information? (e.g. verbally, in a handbook, training etc.)

- Now look at the **skills** list and consider:
 - Do you know any techniques, methods or tips for putting the skills into practice?
 - How could you help a volunteer to master these skills? (e.g. discussion, coaching, modelling etc.)
 - What opportunities do you have to do this? (e.g. support meetings, on-the-job supervision, group training sessions)

On a clean sheet of paper, write down your ideas about what you could do and how and keep it inside this workbook as you work your way through. Keep adding to the sheet as you read so that you develop a list of effective management behaviours and techniques that will enable your volunteers to develop their own skills and abilities in ways which are beneficial to them and to the organisation.

Chinese Proverb

“Tell me and I will forget. Show me and I may remember. Involve me and I will understand.”





3. The Volunteer Manager's role

So much for the theory - now it is time to think very closely about the reality. This chapter is devoted entirely to you and your particular role in relation to volunteer management. While the previous chapter focused on the widest purpose of the role, which all Volunteer Managers have in common, this chapter moves on to looking at what you need to enable you to make that happen on a day-to-day basis, taking account of the unique context of your organisation.

The work of the Volunteer Manager

While volunteer management should have a clear aim, common to all those involved, the actual work of any individual responsible for managing volunteers is likely to vary from one organisation to the next. This may be partly attributed to the individual's personal abilities, but will probably be largely the result of each organisation's differing structure, which means that the place of the Volunteer Manager within that structure is also different. Some managers have responsibility for securing funding and controlling expenditure within the volunteer programme, while in other organisations a finance department will deal with funding for all projects. Some managers will have direct responsibility for training volunteers, while those working in larger organisations may have dedicated training staff to do that.



However, every manager fulfils a number of broad responsibilities and will, at least, need to:

- Set objectives
- Plan
- Organise
- Communicate
- Develop people
- Motivate
- Control
- Evaluate

Thinking back over the activities of the last week, you will be able to identify a number of volunteer management tasks such as policy development, recruitment and selection, supporting volunteers or supervising their work. Furthermore, for each task or area of work, you should be able to see a cycle of activities: from the setting of targets; planning, organising and monitoring of work; communicating with those you manage; motivating them and developing their skills to achieve the targets set; while continually reviewing and evaluating the process and outcomes. If any part of this cycle is conspicuously absent from any of the tasks you identified, it is unlikely that you are working as effectively in this area as you could. The approach of the other workbooks in this series is to focus on skills, knowledge and techniques specific to the different areas of volunteer management activity, but the broader management skills listed above are essential to underpin all tasks.

The skills of the Volunteer Manager

Of course, while every manager will need these broad skills, any specific management role will have other, more specific development needs. As for your particular job, you are probably the best person to identify the specific skills needed in your job and decide on their relative importance, perhaps in consultation with your line manager. You have already spent a few minutes trying to describe the sorts of activities that fill your working day. The rest of this chapter is given over to a series of tasks designed to help you identify the essential skills and knowledge needed in your role and begin to prioritise your individual development needs.⁶

⁶ The skills audit process uses exercises from The Skills Audit and Action Planner, NCVUK, 1992



Aim: To clarify the key aims of your role and to identify the tasks and duties associated with achieving these aims.

- List the key aims of your role in the first part of the Role Analysis sheet overleaf. Use the information from the first exercise in the last chapter to help you.

- Now complete the second part, listing all the actual activities or tasks involved in achieving these aims.

You may find your job description a useful starting point, but be aware that some of the things you actually find yourself doing in work may not contribute to the achievement of the aims you identified. Equally, you may decide that there are things that you need to do in order to meet your aims but do not currently do, perhaps due to a lack of time or know-how.

Include all the tasks you need to do to meet the key aims of the job, whether you do them currently or not, and leave out any tasks that do not contribute clearly to any of the aims.

If, when you have completed this task, you find there is a significant difference between the activities on the Role Analysis sheet and your job description, you may need to discuss this with your line manager. When you are satisfied that your completed Role Analysis sheet matches both your own and your manager's understanding of the job, you are ready to complete the next task.



Aim: Identify the skills, knowledge and qualities needed in your role and prioritise your individual development needs.

- Work through the tasks listed on your Role Analysis sheet, listing the skills and knowledge required to perform each one effectively on to the Skills Audit sheet. It is useful to do this with a colleague or manager, especially if you are unfamiliar with some tasks. You will find that many skills come up repeatedly as they are important in a wide range of tasks - list each only once.

- When you have completed your list, you will need to give each skill or piece of knowledge a score from 1 - 10 on each of the following two elements:

- **Job need** is how important the skill/knowledge is in relation to the effective performance of your job. You may give a particular skill a high score because it is vital to one key aspect of your work, or because it is quite important for many different tasks. Skills or knowledge which are not essential or relate to only one minor part of your job would receive a low score.
- You also need to decide on your current **ability level** in relation to the skill/knowledge. Again, it is useful to get the opinion of a close colleague or manager who knows your work. Don't forget that skills and knowledge can date or decline with lack of practice, so make sure the score you give reflects your current level of ability.

You can quickly identify your main development needs by picking out the skills and knowledge which you have given a high job need score, but scored low on ability level. However, the Job Skills grid on page 16 may help you to discover some other useful ideas about your job.





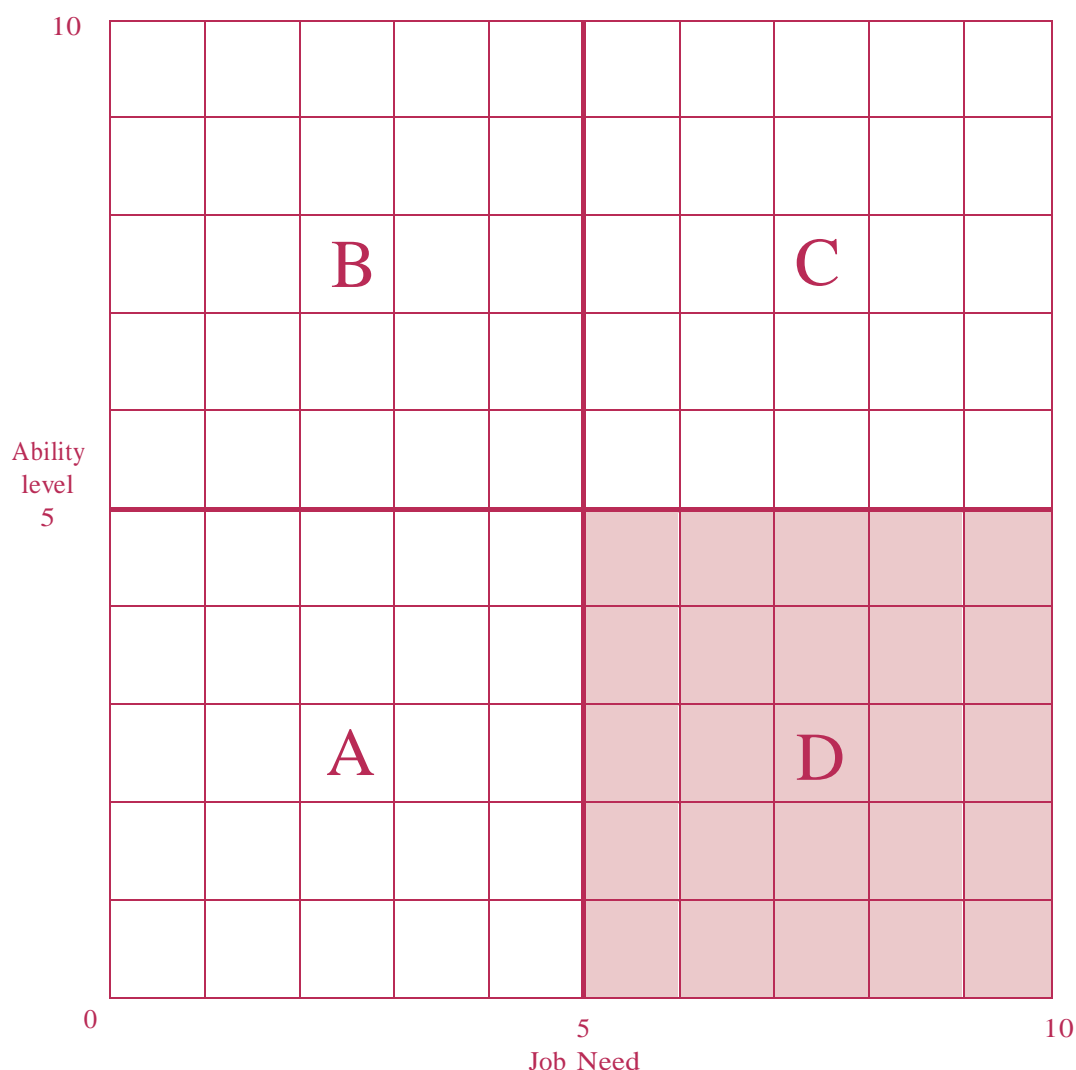
ROLE ANALYSIS	
<p>What is the purpose of your role?</p>	
<p>List up to five key aims:</p>	
<p>a)</p>	
<p>b)</p>	
<p>c)</p>	
<p>d)</p>	
<p>e)</p>	
<p>List the main tasks or activities involved in achieving these aims. Where a task is relevant to more than one aim, list it only once:</p>	
<p>1)</p>	<p>2)</p>
<p>3)</p>	<p>4)</p>
<p>5)</p>	<p>6)</p>
<p>7)</p>	<p>8)</p>
<p>9)</p>	<p>10)</p>
<p>11)</p>	<p>12)</p>
<p>13)</p>	<p>14)</p>
<p>15)</p>	<p>16)</p>
<p>17)</p>	<p>18)</p>
<p>19)</p>	<p>20)</p>
<p>21)</p>	<p>22)</p>
<p>23)</p>	<p>24)</p>
<p>25)</p>	<p>26)</p>



SKILLS AUDIT			
Skills and knowledge	Job need (1-10)	Ability level (1-10)	Zone



JOB SKILLS GRID

**Using the job skills grid**

1. Find the point on the left hand edge of the grid that matches the ability level score you have given a particular skill.
2. Follow this line across the grid until you meet the vertical line that matches the score you have given for job need.
3. Note which zone it falls into in the last column of the Skills Audit sheet.

The skills and knowledge in zone A of the grid are not among your particular talents, but, since they are not of great importance to your job either, they are not priorities for development. The tasks associated with the skills/knowledge in this zone often feel like **chores** and, if someone else in your team, project or organisation is better able to deal with them, it may be appropriate to **delegate** these tasks to them.

Zone B of the grid contains skills and knowledge which you do possess at a higher level. Your **confidence** in these areas means you probably quite enjoy the

tasks associated with them, but these are not the most important aspects of your work. You may be able to utilise your talents to greater effect in your job, by **developing** these areas of work, if you can do so in ways which are relevant to the key aims you identified on the Role Analysis.

You probably don't need to be told that the skills and knowledge in zone C relate to the areas of your work where you are most **effective**. Not only are you good at these things, but they are vital to your work too. Not surprisingly, these are often the aspects of your work that give you the most **satisfaction**.

For the moment, however, it is zone D that is of most interest. The skills and knowledge in this area are vital in your work, but are not currently your strong points. These are the skills and knowledge that you need to **develop** to become more effective in your work.

The Volunteer Manager and the organisation

You have examined your role as a Manager of Volunteers very closely in this chapter, breaking it down from its broader goals to the daily tasks and the specific skills involved. Such close scrutiny can make you start to think as if your role exists in isolation. However, it is important to remember the organisational context of your work, and to take account of this in considering your development needs. While the previous exercise should have helped you identify skills and knowledge that you need to develop specifically for the role, you should also consider particular strengths, weaknesses, opportunities and challenges facing your organisation and how these impact on your own development needs and priorities. It is also important to take account of organisational objectives and requirements when planning and prioritising how you will address these needs.



Aim: To consider the impact of organisational issues on the Volunteer Manager's role and vice versa.

Take a few minutes to think about the following issues and how they impact on the organisation as a whole now and in the foreseeable future. What effects might these have on your role or vice versa? Note down any issues or ideas that you will need to address.

Policy - What policies exist in your organisation and how are they implemented? Are they relevant, current and understood by everyone? Do new policies need to be drawn up or existing policies updated? How do they impact on volunteering - if at all?

Procedures - What strategies, systems and arrangements exist in the organisation? Do they help everyone to work effectively or do they create barriers? Are there better, quicker, easier or more efficient ways of working?

Resources - What resources exist within your organisation - financial, facilities, equipment, materials, people, expertise, etc? Who has

access to them and how? Are they managed in a way that makes best use of them?

Relationships - How are relationships between individuals and teams conducted? Do they foster an inclusive and co-operative atmosphere? Does everyone understand their role and how it relates to others?

Quality - How is success or progress defined in the organisation? How is it monitored and measured? How are judgements arrived at and how is this information used to plan and develop the organisation's work?

Development - Where is the organisation going in the medium and long-term? What strengths should it build on and what weaknesses does it need to tackle? What might be gained and lost in the process?

You should use all the information from the exercises in this chapter to begin to create your own personal development plan. Since this is a medium to long-term plan, it is important to prioritise areas for development, taking into account the relative importance of particular skills and knowledge and their urgency in relation to the needs of both your role and the wider organisation. It may then take some research to identify opportunities to meet your needs. Your line manager should be able to help you identify opportunities and resources within and outside the organisation, and don't forget about the other workbooks in this series!





4. A framework for good practice

It is impossible to predict, as you start to draft your own development plan, which areas any individual reader will prioritise among their particular development needs when drafting their plan. Obviously, in selecting the topics for the rest of the workbooks in this series, some assumptions have been made about what the most common needs will be. But it is probably a safe bet that few Volunteer Managers have placed skills and knowledge for policy development at the top of their lists.

Many Volunteer Managers would consider themselves far too busy with the practical, day-to-day demands of their job to get tied up in a paper exercise on policy. Or it may be that policy is regarded as the preserve of large, highly structured organisations, or the proper concern of senior management. Yet good policy underpins good practice, and a clear and practical volunteer policy can be one of the best aids a busy Volunteer Manager has in developing volunteering and their own practice. It is certainly preferable (although rarely the case) that policy development is taken as the starting point for effective volunteer management, rather than a distant aspiration for some time in the future.

What is policy?

In order to get around any negative preconceptions we might have about policy, let's start from the basics - what is policy?



"Policy is a principle, course or plan of action adopted by a person group or state."

Webster's New World Dictionary

So, policy is essentially a thoroughly practical tool, giving direction and providing a structure for good management in the values and plans on which procedures are based. It is useful at this point to clarify the distinction between policies and procedures. **Basically, policies tell people what to do, while procedures tell people how they must do it.**



Policy and procedure

Policies are statements of intent which are "secondary to legislation and the organisation's by-laws. They serve as guidelines for decision-making; they prescribe limits and pinpoint responsibilities within an organisation."

Procedures "give directions according to which daily operations are conducted within the framework of policies. They are a natural outgrowth of policies supplying the 'how to' for the rule. Procedures describe a series of steps, outline a sequence of activities or detail progression."

Cryderman, P., *Developing Policy and Procedure Manuals*, Canadian Hospital Association, 1987

When we understand this definition of policy, we can see that even the newest, smallest and least formalised groups make policy decisions regularly - they just do not call them policies or write them down. For example, deciding that volunteers should not be asked to do work which is the responsibility of a paid member of staff is making policy. Writing such decisions in the form of policies lends them greater weight and encourages people to comply. It also makes clear that the principle or plan expressed in the policy applies to everyone associated with that group - directors, staff, volunteers and service users. **Therefore, the policy sets a boundary for the whole organisation. Inside the boundary, things are acceptable and outside the boundary, things are not.**

In this sense, policy is tough - contravening a policy carries consequences. Not surprisingly, therefore, policies are often developed when a problem arises or something goes wrong. By establishing boundaries, policies can help prevent a similar situation occurring, or at least determine what should be done if it does. They can clarify responsibilities and define lines of communication. Importantly they also provide continuity over time and across the organisation, promoting equity and stability in the organisation as individuals come and go.

Why develop a volunteer policy?

In light of the benefits listed above, now is a good time to think about why Volunteer Managers should be interested in developing a policy on why and how the organisation involves volunteers.



Aim: To identify benefits to you, your organisation and volunteers in developing a volunteer policy.

Consider the following questions in relation to your own organisation or project and note down any issues or problems that they raise:

- Does everyone in your organisation understand why volunteers are involved and value their input?
- Could policy help to clarify roles and expectations and to ensure appropriate behaviour?
- Are volunteers engaged in activities that may pose some risk to themselves or others? Could policy reduce or eliminate that risk?
- Could policy enhance the quality of service provided?
- Are there unwritten beliefs, values or rules that everyone involved in the organisation should know about?

The issues identified will vary for each organisation, but you will probably be able to relate them to one or more of the following benefits of developing a volunteer policy. A policy which sets out how volunteering is promoted and managed within your organisation will:

- highlight the value of volunteers and the contribution they make.
- make clear to everyone the role of volunteers within your organisation.
- provide a framework from which procedures or practices in working with volunteers should be developed.
- provide a mechanism to establish strategies for the monitoring, review and development of volunteering within your organisation.



Policy and volunteer involvement

Policy also serves a number of distinct functions in the context of volunteer involvement:

1. Policy can be a **statement of belief, position or value**, allowing the organisation to articulate what it believes, what it holds to be important in its structure and its operation e.g.
"Anytown project is committed to equal opportunities and the elimination of discrimination in Anytown. It will strive to reflect the community in its structure, both volunteers and staff, and to promote equal access to its services."
2. Alternatively, policy can be a form of **risk management** when it is used to articulate what the organisation will do to try to eliminate risks or liability and to protect both volunteers and those they work with e.g.
"All volunteers are required to submit to a criminal record/references check prior to acceptance as a volunteer." Or, "Volunteers are required to inform their own insurance company of their volunteer driving activity to ensure continuance of protection."
3. Policy can also articulate certain **rules or guidelines** for behaviour that have been established by the organisation to apply to volunteers e.g.
"Volunteers may not use their organisational affiliation in connection with politics, religious matters or community issues contrary to positions taken by the organisation." Or, "Volunteers will not be asked in times of industrial action to do the work of paid staff."
4. Finally, policy can operate as an **aid to effectiveness** by communicating that systems are set up to enable the Manager of Volunteers to plan, organise, and monitor performance or help volunteers with problems e.g.
"Volunteers will submit expenses claim forms to the Manager of Volunteers within five working days of month-end. Expenses can be collected on the last day of each month."





The process of policy development

So, the good news is that a good volunteer policy is a really useful tool for managing the involvement of volunteers. The bad news is that the process of developing a complete policy package for a volunteer programme will take time and effort, but it should pay dividends in the long run. Since good policy underpins good practice it is never too early to begin developing a volunteer policy. The process outlined below assumes that you will be starting with a 'blank sheet' but can be adapted to whatever stage of development your organisation is at.

If your organisation is well established and has involved volunteers for some time, you may find that some of the steps described below are already in place. However, do be aware that simply having a written policy on volunteering does not automatically mean that any part of this process can be by-passed. Policies that were written or 'borrowed' because 'we need a policy' may not serve any real function and therefore are never actively implemented. Even the most relevant policies can become out of date.

1. Recognise that volunteering needs attention

First, make sure that everyone in the organisation recognises the value and importance of volunteer involvement. This includes the committee who, whilst volunteers themselves, may not be fully familiar with the range of volunteering activity within the organisation. It is up to the Volunteer Manager to keep raising the profile of volunteering in the organisation – send articles, press clippings, provide reports to committees. You could supply information on the number of volunteer hours contributed, the number of clients served or tasks completed, the difference volunteers make to clients' lives etc.

Once everyone has come to understand that volunteers' presence is significant, then they need to understand that volunteers deserve attention in order to be involved appropriately. Management committees need to realise that a lack of appropriate policy and procedures can

result in mismanagement, which places both the organisation and its management at considerable risk.

2. Establish the value base

Once everybody in the organisation has recognised that volunteering is important enough to warrant attention, then a clear value base or values statement about their involvement is needed. This links to the question 'Why involve volunteers?' that we addressed in Chapter 1 and is the first question which every organisation wishing to involve volunteers should ask. This kind of values and belief statement or broad policy statement will provide a context for all other policy statements regarding volunteer involvement.

3. Develop policies

Only when the first two steps are in place can an organisation begin to formulate actual policy statements. While the Volunteer Manager could work independently to develop programme policies and guidelines, he/she will rarely have the authority to implement them. Moreover, working independently misses the opportunity to educate senior management as discussed above. And if the management committee has not, at least, approved policies and apprised itself of volunteer activities, it still may run the risk of liability in the event of injury or damage.

The volunteer policy framework provided at the end of this chapter is divided into four key stages of volunteer involvement:

- i. Developing a value-base.
- ii. Preparing and planning to involve volunteers.
- iii. Recruiting and selecting volunteers.
- iv. Supporting and supervising volunteers.

The guidelines under each heading will help you to identify the main issues for consideration and sample policy statements are provided. However, they should not be taken as a formula for writing policy statements, as these will be unique to your organisation (some tips for drafting policy statements are given below). The points identified in the framework represent a basic standard for the effective involvement of volunteers, but there are many other issues that you will want to include due to

the nature of your own organisation and particular volunteer roles. As a result, you may decide not to use the framework in its entirety and/or you may identify issues in your organisation under any of the four headings that the framework does not address. Remember the difference between policy and procedure though, and try to keep the document reasonably brief with an appropriate level of detail.

You will need to consider each of the issues raised in relation to your own organisation's values and its other policies and procedures in order to decide what form your policy on that aspect of volunteer involvement should take. For this very reason it is not advisable to simply borrow policy statements - or whole policies - directly from this or any other source. Unless you work through the **process** of policy development, your policies will not reflect the unique circumstances of your organisation and, therefore, cannot properly fulfil the functions discussed earlier.



Aim: To consider the volunteer policy framework and begin to identify how it could be tailored to your organisation.

Read through the volunteer policy framework at the end of this chapter, working through one section at a time, and consider:

- Are the statements broadly applicable to your organisation?
- What issues might be raised for your organisation by developing such policy statements? (e.g. What practice or procedures will need revised or developed?)
- Are there gaps in the framework that your organisation would need to address? (e.g. working with other organisations)
- Would the process of developing and implementing such a policy raise other issues for your organisation? (e.g. responsibility for monitoring implementation)

Do not be daunted by the size of the task. The whole process of developing a volunteer policy is a major undertaking and each organisation's policy will be unique, reflecting the organisation's particular ethos, history, values and structure. The basic framework will help you identify what your policy should include, but there are other ways to ensure an efficient process.

You will need to **set a realistic overall timescale** for completion of the volunteer policy and then take it one step at a time. **Break it down** into manageable tasks and set interim targets for each step. You must also **get some help**. Even in small organisations, it is sensible to form a policy committee to develop new policies and possibly to review and revise them in the longer term. You might include service volunteers, staff, management committee volunteers, service users, community representatives and/or trade unions. **Keep it small**, though, and make sure everyone knows they will actually be given work to do!

When you do get your working group together, make sure to **prioritise**. Consult your committee and other relevant people to devise a list of policy issues or questions that need to be addressed, then decide the order in which they should be addressed according to:

- a. Risk, liability and legal requirements.
- b. Beliefs and values that need to be articulated as the basis of other policies.
- c. Positions that need to be taken and rules that need to be clarified.
- d. Areas where policy might help improve a poor level of effectiveness.

Finally, it is helpful to note that textbooks recommend that policies be written in a **directive tone** (i.e. they should sound like a command or order). They should use the **present or future tense** and the **active voice** (i.e. 'All volunteers will attend supervision meetings' rather than 'Supervision meetings will be attended by all volunteers').

Impact of Language

All volunteer documents should be written in plain English avoiding employment terms and jargon to ensure effective communication.





VOLUNTEER POLICY FRAMEWORK

Values

Your volunteer policy will need to be based on a clear set of values around the involvement of volunteers. It is a good idea to begin the policy development process by agreeing a Value Statement, based perhaps on your organisation's historical perspective, its wider values and ethos and your reasons for involving volunteers.

- 1 The policy should value the distinctive contribution that volunteers can make.
"Anytown Community Project values the involvement of volunteers in our work because they help reflect the interests, needs and resources of the community we aim to serve and bring a unique perspective on all our work."
- 2 The policy should recognise the status of volunteers as a legitimate and complementary resource to that of paid staff.
"Anytown Community Project recognises volunteers as a core part of our team, with a distinctive but complementary role alongside paid staff."
- 3 The policy should acknowledge that volunteering is a beneficial experience for both volunteers and service users.
"Insofar as Anytown Community Project benefits from the skills, experience and enthusiasm of volunteers, we believe that volunteers should be able to gain personal benefits from the experience too. We are committed to managing volunteers in a way that ensures that the needs of both parties are met."
- 4 You should also include a statement in this section on the organisation's beliefs about quality, equal opportunities, diversity, etc. and how they apply to volunteer involvement.
"Anytown Community Project strives to create a diverse and inclusive organisation within a diverse and inclusive community. Therefore, we are committed to ensuring equality of access to high quality volunteer opportunities and equality of treatment for our volunteers in all our policies and practices."

Preparation and planning

The next areas that the policy should address are those actions and systems that need to be put in place before the organisation is ready to actually involve volunteers. Even if volunteers are already active in your organisation, it is important to discuss the reasons for involving volunteers with staff, existing volunteers, service users or beneficiaries, Trade Unions etc. and agree on the nature and purpose of the volunteer involvement.

- 5 The policy should identify the ways in which the work of the organisation can be extended by the involvement of volunteers and ensure that these opportunities complement rather than substitute the work of paid staff (if applicable).
"Any town Community Project identifies roles for volunteers which extend the work of the organisation. Volunteers are involved at every level of the organisation in roles which complement, but never substitute, the work of paid staff."
- 6 Furthermore, the policy should make clear the position of volunteers in any staff dispute or action.
"Volunteers will not be used in times of industrial action to do the work of paid staff. They may continue with their regular tasks, but will not be asked to undertake additional duties."
- 7 The policy should specify how volunteer roles would be defined, including the purpose of each role and tasks involved.
"All volunteers are provided with a written role description, outlining the purpose, tasks and main expectations of their role. This role is reviewed at least once a year with the volunteer's supervisor."
- 8 The policy should clarify what protection volunteers can expect from the organisation in terms of insurance.
"Volunteers with Anytown Community Project are fully protected by the organisation's public liability and personal accident insurance. However, drivers using their cars in connection with their voluntary work must inform their own insurance company to ensure adequate and continued cover."
- 9 The policy should state the organisation's position on the reimbursement of expenses to volunteers including what expenses can be claimed, and how to make a claim.
"Anytown Community Project reimburses volunteers' out of pocket expenses for travel and dependant care when claims are submitted on a standard Expenses Claim Form and accompanied by proof of expenditure."



- 10** It is essential that the policy commits the organisation to providing volunteers with adequate resources to do the work for which they were recruited.
"Anytown Community Project endeavours to provide adequate and appropriate facilities, equipment and resources to enable volunteers to fulfil their roles."
- 11** The policy should make clear where the responsibility for day-to-day management of volunteers lies, specifying a member, or members, of staff as appropriate and making a clear commitment to providing such staff with appropriate training.
"The Project Manager is responsible for the overall management of volunteer involvement, including overseeing the implementation of this policy and dealing with any complaint or grievance relating to volunteers. The volunteer's designated supervisor provides support and supervision, identifies training requirements, countersigns expenses claims etc. All staff required to undertake such duties are provided with training in the management, supervision, support and training of volunteers."

Recruitment and selection

While attracting and selecting volunteers is a different process from staff recruitment, you should still aim to provide a fair, effective and transparent process that is truly inclusive. Although you may wish to keep the procedures fairly informal in practice, it is still vital to lay down minimum requirements clearly in your policy to help ensure that they are consistently implemented.

- 12** The policy needs to lay down the organisation's approach to volunteer recruitment, stating how volunteer opportunities will be made accessible to all sections of the community.
"Anytown Community Project is committed to serving and representing all the people of Anytown and wishes to see all sections of the community represented among our volunteers. Volunteer opportunities are widely promoted throughout Anytown, and we will endeavour to make recruitment and selection materials available in a format accessible to any individual or group, upon request. Furthermore, Anytown Community Project regularly reviews the make-up of the volunteer team to identify and target any under-represented group(s)."
- 13** The organisation should have an agreed recruitment and selection procedure for all volunteers which are appropriate to the role and which reflects best practice in relation to equal opportunities.
"Anytown Community Project implements a fair, effective and open system in the recruitment and selection of volunteers and treats all information collected in this process confidentially."

All potential volunteers will go through a recruitment and selection process that is appropriate to the role offered. Anytown Community Project uses registration forms, references and informal chats / interviews. Additional measures may be implemented depending on the nature of the volunteer role and police records checks are conducted where appropriate.

*The process is conducted by appropriately briefed/trained staff and aims to allow **both** parties to give and receive sufficient information to assess whether the volunteer opportunities available match the potential volunteer's skills, qualities and interests.*

If unsuccessful, individuals will be offered an opportunity to discuss the outcome and identify possible alternatives within or outside of Anytown Community Project."

Management of volunteers

This section will specify how you intend to manage volunteers once they have become involved in your organisation. Goodwill alone is not enough to guarantee success and a pro-active approach is essential both to achieve the organisation's objectives and to ensure that volunteer interests and motivations are met. Remember the voluntary nature of the relationship between volunteers and the organisation as you develop this section and try to ensure that the policy holds benefits for both parties.

- 14** The policy should outline how the expectations of both parties are to be agreed and communicated.
"Volunteers are provided with a written letter of welcome, which outlines the expectations and responsibilities of both the volunteer and Anytown Community Project. This agreement may be reviewed at any time with the consent of the volunteer and his/her supervisor, including during the initial review meeting at the end of the settling in / taster period (see point 16)."



- 15** Volunteers will need to be properly briefed about the activities to be undertaken, and given all the necessary information to enable them to perform them with confidence. The policy should commit the organisation to an appropriate induction procedure.
"All volunteers are provided with an induction within six weeks of commencing their voluntary work. The induction: provides background information on Anytown Community Project; explains its structures and procedures; describes the volunteer role and the work team and outlines how s/he will be supported, including practical information on e.g. expenses.
- During the induction period volunteers will be provided with written information on relevant legislation, organisational policies and codes of practice and will be given the opportunity to discuss any of the issues with the Project Manager and/or supervisor."*
- 16** A settling in period is helpful in providing an opportunity to assess the suitability/progress of the placement, and allowing any problems to be resolved at an early stage. A policy statement should help ensure consistent implementation of the procedure and reassure new volunteers as to the reasons for such a measure.
"All volunteer placements are subject to a settling in period, the length of which depends on the nature and hours of the voluntary work. During this period volunteers are given additional support and a review meeting between the volunteer and his/her supervisor is held at the end of the settling in period to ensure that all parties are satisfied with the arrangement."
- 17** Access to regular support and supervision is key to maintaining effective and motivated volunteers. While the level of support and supervision needed will vary for different volunteers and different volunteer roles, the policy should commit the organisation to providing each volunteer with a named individual to provide this.
"All volunteers are allocated a named member of staff as their supervisor (although the Project Manager can also be contacted in case of an emergency or if the designated supervisor is unavailable). This individual can provide day-to-day help and guidance on any issue related to the voluntary work and is responsible for providing regular support to, and supervision of, the volunteer. The frequency, duration and format of this support and supervision is agreed between the volunteer and his/her supervisor at the end of the settling in / taster period."
- 18** Training will enable volunteers to develop their capabilities and personal competence. The organisation must decide on what basis such training will be offered, and to whom. A clear policy statement will ensure fair and equal access to these opportunities.
"Anytown Community Project is committed to improving the effectiveness of volunteers. Volunteers may choose to attend any in-house training course that they feel is relevant to their voluntary work, subject to the approval of their supervisors and availability of places. Volunteers may also apply to the Project Manager for financial and practical support to attend external courses, where they can be shown to have a clear relevance to the voluntary work. (c/f Training and Development Policy). Volunteers attending approved training courses, internal or external, may do so within their normal hours of voluntary work and may reclaim out-of-pocket expenses."
- 19** The organisation must make arrangements to deal with any difficulties with the volunteer or their work in a fair, open and effective way. Equally volunteers should have access to an equivalent process to address grievances about any aspect of their work or how it is managed. The aim of such a policy is to protect all concerned while maintaining good relationships and effective volunteers where possible.
"Anytown Community Project aims to reflect the voluntary nature of our relationship with volunteers in all our policies and procedures for managing their involvement. Therefore, the volunteer's designated supervisor deals with minor complaints or grievances about or by volunteers or their work through the usual support and supervision procedures, in the first instance.
- However, we recognise our duty to protect the wellbeing and interests of all our stakeholders and therefore operate a formal complaints procedure in the case of more serious complaints. In the case of particularly serious offences, as specified in the Code of Practice, this process may be bypassed and/or the subject of the complaint asked to leave. Where a criminal offence is suspected, the matter will be handed over to the police."*



- 20** Volunteers should, as far as possible, be fully integrated into the organisation. You may want to include a commitment in your policy to specific communication systems to keep volunteers informed, special measures to recognise and publicise their contributions, opportunities to take part in decision-making etc.

"Anytown Community Project recognises the core role that volunteers fulfil at every level of the organisation. It endeavours to communicate with volunteers in appropriate ways, including bulletin boards, e-mail and the monthly 'Volunteer Update' newssheet.

It also recognises the importance of seeking volunteers' ideas and opinions at regular intervals and conducts an annual volunteer survey and provides suggestion boxes at each site. Feedback from volunteers is always welcome and any volunteer may make representations to the monthly meeting of the Management Committee."

- 21** Records should be kept of the work done by volunteers, to enable their involvement to be monitored effectively.

"In order to effectively monitor the work that volunteers do and how they are managed, a personal file is maintained for all volunteers, which includes: contact details and other relevant personal information; details of the application and selection process; agreements made; hours worked; records of support and supervision activities; training undertaken and any complaints or grievances made or received. Some of this information and other relevant information may also be recorded in computerised records. All such information is treated in accordance with the Data Protection Act (1998) and volunteers are entitled to inspect all such information pertaining to their own involvement."

- 22** If relevant, an organisation should make it explicitly clear that intellectual property rights of original work produced by volunteers has been transferred to the organisation i.e. flyers, photos, reports that volunteers have written in etc.

"Both volunteers and the organisation agree that the intellectual property rights of original work produced by volunteers automatically transfers to the organisation."

Volunteer Now has a wide range of information sheets and template documents to support you to meet the aims set out in your volunteer policy. These are available from the publication section of Volunteer Now under 'Volunteer Management'.

<http://www.volunteernow.co.uk/supporting-organisations/publications>

It is recognised by Volunteer Now that the guidelines in the Volunteer Policy Framework must be considered in the light of individual organisation's needs and/or situation.

The sample statements (in italics) are provided only as an illustration of the relevant guidelines and are not

intended as a standard or model for use by any other organisation. There may be other issues that you may want to address through your volunteer policy due to the nature of your organisation and particular volunteer roles.



5. And finally...

The issues raised by the process of volunteer policy development go to the heart of what effective volunteer involvement is all about, but a policy will not actually manage volunteers for you. The process does not finish once the written policy document is finalised - in fact, it is only the start! Policies need to be brought to life and made relevant to everyday activities through the development of procedures, guidelines and standards. It is vital to monitor how (or if) the policies and procedures are implemented by staff and volunteers and to attempt to measure their impact on the organisation. And policies cannot be written in stone - they must be revised and updated regularly.

Policy into practice

So the process of policy development has two further steps (steps 1 - 3 are on page 20):

4. Develop procedural guidelines and standards

Once policy statements have been written and approved by the management committee, more detailed tasks regarding operating procedures, performance standards etc. can take place. Normally, this activity would be delegated to relevant staff, depending on the size and structure of the organisation, but much of it will fall naturally to the Volunteer Manager.

It is highly likely that some systems and procedures will already exist, perhaps on an informal or unwritten basis. Some procedures will stand as they are, others may simply need to be put in writing, while others will need revised in light of the new policy statements. The process of developing policy is also likely to highlight gaps where no systems exist or specific procedures are unclear. The other workbooks in the series - covering recruitment, selection, support and supervision, training and organisational issues - contain suggested procedures for many volunteer management activities, which can be tailored to your particular circumstances.

5. Monitor, review, revise

The policy process never really stops. Once policies and procedures are 'on the books', they need to be implemented, monitored for compliance, reviewed regularly for relevance and revised as needed. Ensure that appropriate structures for regularly reviewing policies and procedures are in place.

Evaluation is a core management skill (see chapter 2) which will allow you to assess the effectiveness of policy and procedures in meeting the organisation's and the volunteers' needs⁷. Gaps in policy will continually surface as factors in the volunteer environment, the organisation, the community or the law change. The careful and regular attention required is usually shared among management committee, staff, and volunteers and particularly the Volunteer Manager - although again, ultimate responsibility will probably continue to rest with the management committee.

This ongoing process of policy development and review may seem arduous, but the process itself can carry benefits for volunteering within the organisation, over and above the development of a volunteer policy document. It provides the opportunity to involve a range of volunteers, staff and management (who may not have any other direct involvement in volunteering) at policy level. This will allow you, as Volunteer Manager, to highlight both the costs and benefits of volunteering to the organisation, encouraging awareness and investment. It should raise understanding and appreciation of the roles of volunteers and the Volunteer Manager.

Finally, returning to the issue of your own professional development, the process may also highlight gaps in your own skills and knowledge. The individual development plan you began to draw up in chapter 3 must be maintained as a working document. This series of workbooks should address some of the needs you have identified and will, perhaps, help you to identify other areas for development.

⁷ See Workbook Five, *Volunteers and the Wider Organisation*, for more information on monitoring and evaluation.



Appendix

Standards relevant to volunteer management

There are two complementary standards, both important for those who work with volunteers and have an interest in improving practice - **National Occupational Standards for Managing Volunteers and Investing in Volunteers.**

NATIONAL OCCUPATIONAL STANDARDS FOR MANAGING VOLUNTEERS

The National Occupational Standards for Managing Volunteers have been developed and agreed by a group of national organisations with expertise and experience in volunteer management, including Volunteer Now in Northern Ireland.

What are occupational standards and what do they describe?

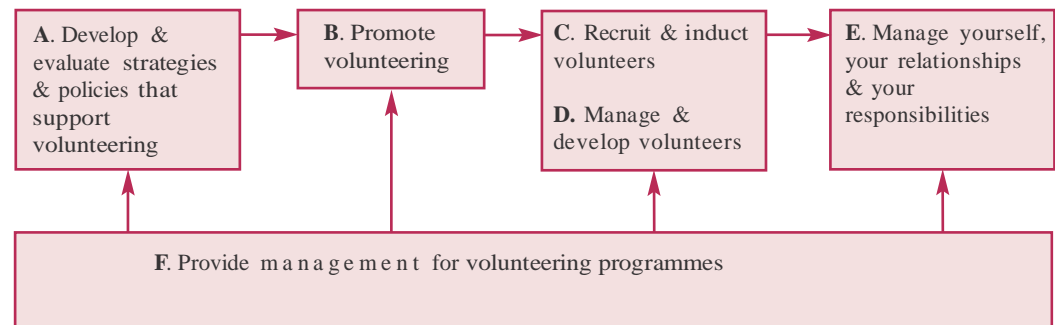
Occupational standards define a framework of good practice in the way people work, based on the functions of their job. They describe:

- The **main roles or functions** that can be part of your job
- The **specific activities** involved within these roles
- The **standards of performance** expected when carrying out these activities
- The **knowledge, skills and understanding** which you will need to meet the performance standard

What are the national occupational standards for volunteer managers?

The National Occupational Standards (NOS) for Managing Volunteers specify the standards of performance that those recruiting and supporting volunteers should be working to across the UK. They also describe the knowledge and skills that managers of volunteers need in order to perform to the required standard.

The occupational standards define the whole spectrum of activity required to develop and implement a volunteering strategy within an organisation effectively. They are based around 5 key areas, each with their own units of competence.



These standards are for you if you perform, manage or support any of this work, either as a volunteer or as part of your paid work. Whatever the circumstances, you should find these standards relevant. They have been designed primarily with those working in the voluntary and community sector in mind but should also be appropriate if you work in the public sector, such as in a hospital or school. You are not expected to be carrying out every activity described in these standards - there are rarely two volunteer management roles that are exactly the same so the NOS do not intend to provide a single template job description. What they do is describe the functions, activities and tasks that **can** be part of volunteer management.

The benefits of national occupational standards to those who manage volunteers include having a:-

- Clear description of the work standards you need to meet.
- Statement of knowledge and skills required to meet each standard.
- Tool to help you plan your current career development.
- Qualification structure to support your career development.
- Heightened awareness of your job role and responsibilities.
- Chance to obtain objective appraisal and feedback from your manager.
- Better understanding of how to transfer your skills from one situation to another.
- Sense of achievement from a job well done.
- Greater confidence to do your job well.

Volunteer involving organisations can also use the standards to ensure that those involved in the management of their volunteers are competent and have the knowledge and skills to do so effectively and appropriately.

Full text and further information about the standards can be downloaded free of charge from www.skills-thirdsector.org.uk Follow the link for National Occupational Standards and then Managing Volunteers



INVESTING IN VOLUNTEERS

Investing in Volunteers is the UK quality standard for the involvement of volunteers within an organisation. It is designed to help volunteer-involving organisations review and improve their volunteer management. It is a nationally recognised award that allows organisations to publicly demonstrate and promote their commitment to volunteering. Investing in Volunteers complements National Occupational Standards by providing a motivating framework for reviewing and improving how **your organisation** attracts, values, supports and develops volunteers.

The Investing in Volunteers standard clearly lists the organisational practices and procedures that should be in place to effectively manage volunteers. Whether an organisation chooses to go through the assessment process or not – the Investing in Volunteers Quality Standard is an invaluable tool that all volunteer involving organisations should refer to. Those organisations not yet ready to commit to Investing in Volunteers can still use the standard as a **self-assessment tool** to benchmark the organisation and drive up performance, and as a resource **for developing knowledge, good practice and learning** within the organisation.

Organisations that achieve the Investing in Volunteers standard will be able to prove to funders, stakeholders, volunteers and service users that the contribution of volunteers is valued and that they are well-managed. This means organisations can demonstrate that they meet these *Nine Indicators*:

- There is an expressed **commitment** to the involvement of volunteers, and recognition throughout the organisation that volunteering is a two-way process which benefits volunteers and the organisation.
- The organisation commits appropriate **resources to working with volunteers**, such as money, management, staff time and materials.
- The organisation is open to involving **volunteers who reflect the diversity of the local community**, and actively seeks to do this in accordance with its stated aims.
- The organisation develops appropriate **roles for volunteers** in line with its aims and objectives, and which are of value to the volunteers.
- The organisation is committed to ensuring that, as far as possible, **volunteers are protected** from physical, financial and emotional harm arising from volunteering.
- The organisation is committed to using **fair, efficient and consistent recruitment procedures** for all potential volunteers.
- Clear procedures are put into action for **introducing new volunteers to the role, the organisation**, its work, policies, practices and relevant personnel.
- The organisation takes account of the varying **support needs of volunteers**.
- The whole organisation is aware of the need to give **volunteer recognition**.



For those organisations that want to be assessed against the Standard, Volunteer Now offers a tailored package of support and assessment to help the organisation through a 6 step process of accreditation.

Check out www.investinginvolunteers.org.uk for a copy of the Standard and for information on the registration process and costs. If you have any queries regarding the Investing in Volunteers Standard please email investinginvolunteers@volunteernow.co.uk

Governance Best Practice

[The Code of Good Governance](#) is a best practice document, it sets out the standards for all governing committees/boards in the Voluntary and Community Sector in Northern Ireland. It is endorsed by the Charity Commission and the Department for Social Development. The Code of Governance covers 7 key principles:

1. [Leadership](#)
2. [Responsibilities and obligations](#)
3. [Effectiveness](#)
4. [Reviewing and renewing](#)
5. [Delegation](#)
6. [Integrity](#)
7. [Openness](#).

The principles provide a valuable checklist for Voluntary and Community Sector Organisations in complying with their statutory responsibilities and meeting best practice.

Resources to Support the Code

A range of resources have been developed to support the implementation of the Code:

- **DIY Committee Guide**; this is an online governance resource with a range of information mapped against the seven key principles www.diycommitteeguide.org
- **Governance health check** A self assessment tool developed as a practical resource to assist committees/boards to work towards adhering to the principles of the Code of Good Governance. The aim of this health check questionnaire is to help committees/boards review their governance arrangements, check that they have appropriate systems in place and identify areas where they could improve. It is a best practice tool - it is not mandatory. However, this resource can also help committees/boards of any size to demonstrate their good governance practices to their stakeholders, beneficiaries and funders alike. Available to download from <http://www.diycommitteeguide.org/resource/governance-health-check>



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