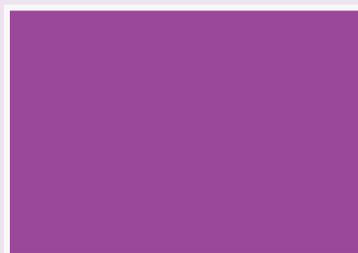# As Good As They Give

Providing volunteers with the management they deserve

Work Book Four
Managing Volunteer Training

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.

As Good As They Give
Providing volunteers with the management they deserve

Workbook Four - Managing Volunteer Training

Page

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 basic good practice for managing training and some wider development issues in relation to volunteers.

While the workbook attempts to touch on all the main issues and procedures involved in managing volunteer training, volunteers are involved in such a wide variety of organisations, and undertake such a diverse range of tasks that even the full set of workbooks cannot claim to cover all circumstances and eventualities. Instead, they seek to identify underlying good practice principles, which can be applied in any type of volunteer-involving organisation, regardless of size.

The workbook also outlines 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 encourages you to use your own knowledge and experience to tailor these suggested ways of working in 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:

- define training and understand basic good practice in training management.
- identify reasons for training volunteers in your organisation.
- identify training needs of individual volunteers.
- design training sessions or programmes to meet the needs of volunteers.
- administer and evaluate training to ensure its effectiveness.
- identify a range of accreditation options for volunteers.

The following symbols will help you to use the workbook.

Key principles 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 ones 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 that have a material 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.

Finally, you should be aware that this workbook is part of a series that addresses the key areas of volunteer involvement. Suitable volunteers must be recruited for purposeful, well-managed roles before the question of training and development arises and, like volunteering itself, training must bring benefits to both the volunteer and the organisation to be viable. You are particularly encouraged to work through the first book in the series, *Planning Volunteer Involvement* prior to starting any of the others.

Other workbooks in this series are:

One   -   *Planning Volunteer Involvement*

Two   -   *Attracting and Selecting Volunteers*

Three -   *Managing and Motivating Volunteers*

Five   -   *Volunteers and the Wider Organisation*

1. Introduction

Some key principles

Before starting to think about any particular aspect of volunteer management, it is vital to clarify what we mean when we talk about 'volunteering'. This workbook is based on three key ideas about the nature of volunteering.

★ The first key value is about the nature of volunteering. While it is often useful to think about volunteering in the broadest sense - as any community activity or as active citizenship - there are times when we need a clearer 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 use in 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.
2. Whatever the volunteer's original motivation, the benefits of their voluntary activity are felt beyond the volunteer and his/her 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 s/he volunteers.

★ The second key idea about volunteering is that **volunteering is a two-way relationship**. The traditional view is that volunteers make a gift of their time, without any desire or expectation of getting anything out of the process. 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 order to maximise the potential benefits to all concerned - the organisation itself, its clients or beneficiaries and the volunteers.

The volunteer

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

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

Volunteering

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

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

The Organisation

The third and final key idea is that **volunteers have a unique contribution to make** to the organisations, people and causes with which they work, which is different from but complementary to that of paid staff. 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 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 the economic considerations only produce 'second-choice' reasons for involving volunteers, what are the 'first-choice' reasons?

Aim: To examine your organisation's attitudes to volunteers 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 or beneficiaries.
- what, if anything, your mission statement or constitution says about volunteers.

Look at the reasons you have listed and consider if they pass this '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 to see if there are (other) 'first-choice reasons' for involving volunteers in your organisation.

First choice reasons for involving volunteers

If you play this mind game, 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 pay check 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/outsiders, bringing a community perspective and a wide range of backgrounds consciously different from the employees. Because they give a few hours of time, volunteers have a broader point of view than the paid staff who may be too close to the work to "see the forest for 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 of non-profit organisations are - by law - an intermediary between donors/funders and program 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 cannot 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 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 myopic.

- 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 job.

- 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 neighbourhood (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 agency 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 [an employment contract].

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

Finally, one last thought on the 'second-choice' or economic reasons that you may have for involving volunteers in your organisation. Volunteers do not save money but they do help organisations to spend the money they have in the most effective and efficient way. Therefore it is 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.

Why train volunteers?

> *Their niceness will let you recruit a volunteer for the first time, but only your competence will let you keep them.*
>
> **Essential Volunteer Management, McCurley & Lynch, 1994**

The most important investment an organisation can make in its volunteers is to provide competent, pro-active management for them. The basic procedures that every volunteer- involving organisation needs to address are [1]:

• induction
• 'settling in' period and review
• training
• codes of practice
• support and supervision
• procedures for dealing with difficult situations

Training is an essential element of good practice in volunteer management and is increasingly recognised as a feature of successful organisations. Recent government policy has also encouraged a lifelong approach to learning as essential to a healthy economy and vibrant communities. While choice is a defining feature of volunteering and not every volunteer will want to undertake training i.e. older people however, such opportunities are a central motivation for many, especially young people or those looking to develop their employability skills. Some skilled volunteer roles may stipulate a willingness to undertake training as part of the role's requirements. However, training offered to volunteers must have a direct bearing on their voluntary work to avoid a number of potential problems that can arise if it is not regarded as relevant to a volunteer's role.[2] Every organisation should examine their own reasons, policies and values for involving volunteers to identify how they will address the issue of volunteer training, but here are a few good reasons that might be relevant to your organisation.

• Unusual or highly skilled volunteer roles may be difficult to fill unless relevant training is provided.

• Many people volunteer in order to learn and develop new skills and knowledge, so training may be used as a selling point when recruiting new volunteers.

• Training helps ensure that everyone can meet organisational standards of work.

• Funders may expect, or demand, training for those involved in the projects they support.

• Volunteers may need training in particular organisational procedures.

• Training is an important element in risk management.

• Providing training shows the value the organisation places on the voluntary work being done and the volunteers who do it.

• Training is vital in the development of quality in an organisation.

• Training demonstrates the organisation's commitment to providing a high quality service to staff, funders, service-users and the wider community.

Take some time to discuss these ideas with management, colleagues and beneficiaries to identify the reasons that apply in your organisation, so that everyone is aware of the benefits that training volunteers can bring to the organisation. This will be a vital consideration when it comes to identifying and securing resources for this purpose. You should also discuss the issue of training with volunteers to find out what benefits they expect from undertaking training, so that any such provision can be designed to meet their needs too.

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[1] See Workbook Three, *Managing and Motivating Volunteers* for more information on the other procedures listed here.

[2] See Workbook Five, *Volunteers and the Wider Organisation* for more information on the legal implications of such a situation.
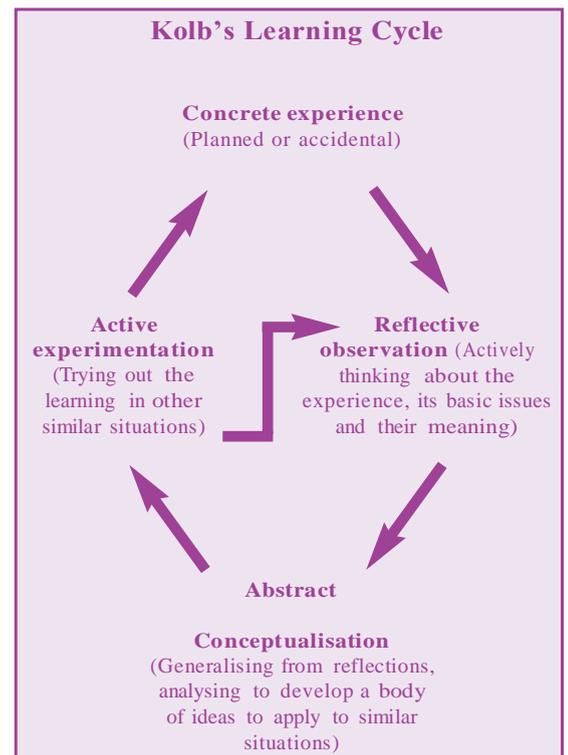
2. Theories about learning

Once you have clearly established the need for, and interest in, training for volunteers in principle, you face a considerable practical task, since overseeing training provision is essentially part of the Volunteer Manager's support and supervision function. This workbook does not assume that you will actually deliver the training directly, but that in most cases, this will fall to someone else. However, you will still

need to have a firm grasp of basic training principles and theories in order to co-ordinate and administer training provision for volunteers.

If you **do** have responsibility for training delivery, make sure your own training skills are kept up to date!

Learning and training

A straw poll of what volunteers generally understand by the term training suggests few give it much thought. Opinions vary from "an excuse to get away from work for the day" through "sitting around in a group listening to a tutor or doing role-plays" to "any process where you learn something." The former is (hopefully!) far from true and even the latter is less than accurate. However, it does raise the important issue of how learning and training are connected.

★ Learning has been defined as, *"a relatively permanent change in behaviour that occurs as a result of practice or experience."* [3] Such a definition suggests that learning is something that can occur incidentally (e.g. from everyday experience) as well as in more structured situations (e.g. a training session). The potential for learning, therefore, is present in all our daily lives. David Kolb, a psychologist, described the process or steps by which we learn as a continuous cycle:

Kolb's Learning Cycle

Concrete experience
(Planned or accidental)

Active experimentation
(Trying out the learning in other similar situations)

Reflective observation (Actively thinking about the experience, its basic issues and their meaning)

Abstract Conceptualisation
(Generalising from reflections, analysing to develop a body of ideas to apply to similar situations)

Learning in action

A simple example of this process can be illustrated by the following case study: a youth organisation involves young people in their volunteering programme. Part of the selection process involves an informal meeting with the volunteer co-ordinator and one of the project officers.

Concrete experience – During some of these early meetings, the volunteer co-ordinator started to notice that the young people seemed to be more at ease when talking to the project officer than to himself. This concrete experience suggested that their may be something creating an initial barrier for young people in engaging with him.

Reflective observation - The volunteer co-ordinator **reflected** on the interactions he had with young people, to try to work out why this was the case. He observed that the project officers tended to take a less formal approach to both their dress and language when talking to the young people. Coming from the Private Sector, he was used to wearing suits and ties and taking a more formal introduction etc. He started to reflect on whether this was appropriate for his new role.

[3] Bass & Vaughan (1967) Cited in Harrison, R. *Learning and Development,* Chartered Institute of Personnel Management, 2009
[4] Bass, B.M. & Vaughan, J.A. '*Training in industry; the management of learning'* Tavistock, 1967

Abstract Conceptualisation - The volunteer co-ordinator concluded that his suit and more formal presentation may be creating a barrier between him and the young people. He decided that he needed to consider changing his presentation at these particular meetings, by dressing less formally and taking a more relaxed informal approach.

Active experimentation - Although the volunteer co-ordinator wanted to try out his new approach, he was worried that it might not have the expected effect. What if it didn't make a difference? He took his chance to experiment the next time he had the opportunity to strike up a conversation with one of the young people that he met in the building, whilst he was dressed down. He noticed a big improvement in the flow of the conversation. The young person was more than eager to chat!

Concrete experience – With a bit more confidence that the experiment seemed to have worked; the volunteer co-ordinator decided to try out his new approach during the next planned introductory meeting with a young person. After all this was a different scenario. Almost instantly he noted a considerable change in the atmosphere between himself and the young person; everything seemed to be much more relaxed and the conversation more enjoyable and less staid. Based on this concrete experience, he decided to consider wearing his suit much less often and restrict it to days when he had meeting in which a suit was expected i.e. Conferences, Board Meetings etc.

The learning cycle will continue for the new volunteer co-ordinator as he **reflects** on the outcomes of each interaction, **formulates** new ways to handle such situations and

repeatedly **experiments** with these ideas until he achieves a satisfactory working relationship. To really learn something new, however, depends on an individual's ability to work through each stage of the cycle, and circumstances or lack of practice can result in getting stuck at a particular stage in the cycle. For instance, a fear of being punished for making mistakes can discourage people from trying out new ideas (active experimentation).

Furthermore, most people are better at some stages than at others - often described as their preferred 'learning style.' So the 'hands-on' individual may be willing to jump in and try things out, but need encouragement to think things through beforehand. Equally a more reflective or analytical personality may need support to move his or her ideas from theory into action. The way you manage volunteers will have an impact on their ability to progress through this learning cycle - providing opportunities to discuss and reflect on the work, giving constructive feedback, sharing information and so on will all make it easier. You can build opportunities to facilitate volunteers' learning into your ordinary management procedures.[5] Providing training opportunities for volunteers is just one way to do this is.

Issues for adult learners

However, before we move from thinking about learning to focusing on training, there are a few other basic issues we need to consider. Reading through the case study, you may have been able to relate the process described to a learning experience of your own. However, few of us are explicitly aware of this internal process at the time. We are probably more conscious of the external circumstances and activities that helped or hindered our progress. While it is important to understand the learning cycle, external factors are at least as important to the Volunteer Manager as you can influence these directly.

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[5] See Workbook One, *Planning Volunteer Involvement* and Workbook Three *Managing and Motivating Volunteers* for more information and ideas on this approach to volunteer management.

Aim: To identify key issues for adult learners from your own learning experiences.

By yourself or with a colleague, try to think of a recent occasion where you had a positive learning experience. Briefly describe the experience on paper or discuss it with a colleague, stating:

- what you learned (a skill, a piece of knowledge or a new understanding).
- what you actually did in order to learn it.
- why it was a good experience and how this affected the learning.

Repeat this exercise for a negative learning experience either of you have had.

Hopefully, reviewing your own experience as a learner will have highlighted a number of helpful and unhelpful factors in relation to volunteer development. Let's look at some of the key issues and their implications for training in particular.

What the learner does - In order to gain new skills, knowledge or understanding. While learning activities can take numerous formats, most fall into one of a few basic categories:

- listening/observing e.g. attending lectures, watching a demonstration, Shadowing an experienced person.
- study and reflection e.g. reading books, case studies, writing essays.
- discussion e.g. group exercises, discussion with peers, questions and answers.
- doing/practice e.g. rehearsing, games, role-plays, work experience.

Each category can be linked to a particular stage in the learning cycle and, while no one way of learning is best, most individuals prefer one to another. In addition, particular kinds of activity are best suited to learning certain things. For both these reasons, successful training usually incorporates activities from each category.

Respect - While children's education is sometimes described as writing on a blank slate, adults enter any learning situation with a wealth of existing skills, knowledge and experiences. These may or may not be relevant to the learning topic, but they will certainly influence the volunteers'

expectations. It is vital to be aware of the 'baggage' from previous learning experiences - perhaps dating back to school days - and to overcome the resistance that this can generate. This means acknowledging and respecting the **experience** that volunteers bring to training by encouraging individuals to identify existing relevant knowledge and/or skills as the starting point for learning something new. It also favours **participative** forms of training, which in turn demand a degree of **flexibility** on the part of the trainer.

Motivation - Another key difference between adult learning and childhood education is that, to a greater or lesser extent, adults have a **choice**. As mentioned earlier, this consideration is particularly important when offering training to volunteers. Therefore, the onus is always on the organisation to give volunteers a good reason to take part in any training offered. At the most basic level, this means that the training must have a clear **relevance** to what the volunteer does. S/he must be able to identify a real benefit from undertaking the training - usually greater confidence or competence in how they meet the demands of the role. While the benefits may be obvious to you, you may need to make it very explicit how, for instance, a communication skills course will actually help the volunteer to build better relationships with clients. Moreover, once on board, volunteers need to be given continuous encouragement to **participate** in the learning activities, making **variety** and **enjoyment** important qualities in a training course.

Credibility - One of the most important factors in the success of most types of training is the role of the tutor, trainer or mentor. S/he needs to have some degree of **expertise** in the learning topic and be able to facilitate the learning process and moderate the group, where applicable. Learners must be able to **trust** the trainer and will be reluctant to put up with anyone who is less than competent in any of these aspects of the role. Therefore, training must be organised and managed in a **professional** way to gain the confidence of volunteers. Not only should the tutor/trainer/mentor know the topic well, but s/he also needs to have the skills to manage the learning process successfully.

The systematic training cycle

Managing training successfully takes more than good presentation or group work skills. Put simply, 'training' is really about providing an individual or group with a structured opportunity to learn.
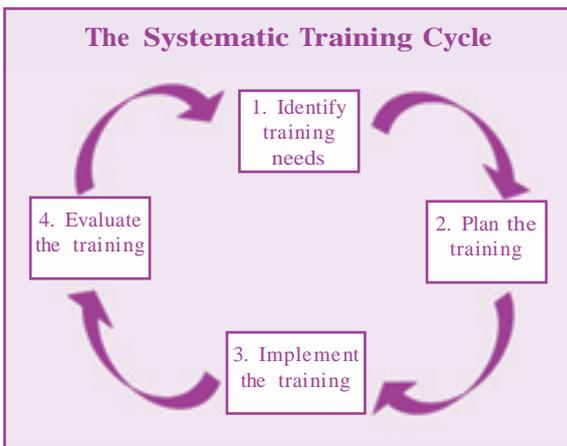
★ It has been described as, *"a systematic process through which an individual is helped to master defined tasks or areas of skill and knowledge to predetermined standards."* [6] This is a useful definition as it emphasises that training has clear goals - *"defined areas of skill"* and *"predetermined standards"* - and, therefore, that it requires planning, preparation and organisation to ensure that these goals are met. Furthermore, it suggests the importance of evaluating training against the original goals to determine how successful it has been. So, although we tend to think of training as the discrete event when trainer and volunteer(s) meet, it is, in fact, **a process**. The systematic training cycle provides a basic model for good practice in the training process.

The Systematic Training Cycle

1. Identify training needs
2. Plan the training
3. Implement the training
4. Evaluate the training

The following chapters in this workbook will examine each stage of the cycle and identify skills and techniques to manage the process. Bear in mind, however, that the same person need not be responsible for implementing every stage of the cycle. Depending on the size and structure of your organisation you may or may not define training needs, design training, deliver programmes or sessions or evaluate training directly. However, as the person with responsibility for ensuring the effectiveness of volunteers, you do need to be familiar with the basic process and liaise with those who are directly responsible for each stage.

☞ Aim: To identify volunteer training responsibilities within your organisation.

Find out who, in your organisation, is responsible for the following tasks:

- **Identifying volunteers' training needs**
  - identifying overall development needs in relation to organisational objectives
  - identifying skills needs in relation to volunteer roles and work teams
  - identifying and reviewing the training needs of individual volunteers

- **Planning volunteer training**
  - developing organisational training policy and plans
  - securing and allocating resources for volunteer training
  - developing volunteer training programmes/sessions and materials

- **Delivering volunteer training**
  - overseeing the implementation of organisational training policy and plans
  - managing and monitoring the delivery of volunteer training programmes
  - delivering training sessions direct to individuals and groups of volunteers

- **Evaluating volunteer training**
  - in the achievement of organisational goals
  - in improving individual and team performance
  - in meeting individuals' training needs and aspirations

If you are new to training, or if volunteer training is new to your organisation, it is especially important to ensure that all those involved at each stage of the cycle co-ordinate their work to ensure a consistent and effective process. If there are areas that seem to be nobody's responsibility, you may need to raise them with colleagues or your management team.

Once you are clear about your own responsibilities in relation to volunteer training, you may want to focus more on some of the following chapters than on others. However, it is useful to understand the key issues at each stage of the process, so it is recommended that you do at least read through them all. The remaining chapters are based on the assumption that most Volunteer Managers oversee the provision of training for volunteers, but responsibility for strategic training issues lies elsewhere in the organisation.

[6] Harrison, R., *Learning and Development*, Institute of Personnel Management, 2009

3. Preparing to train volunteers

When resources are scarce - as they often are in volunteer programmes - training for paid staff is often given a low priority, and volunteer training can end up very near the bottom of the list. It is essential, therefore, to be able to justify why volunteers need training and identify exactly what training is needed **before** allocating time and money to a new programme.

Furthermore, as with any aspect of volunteer management, volunteer training must have tangible benefits for both the organisation as well as the volunteer to be viable. Too often organisations decide to train volunteers because any training is perceived as a 'good thing' or as a panacea for every kind of problem from personality clashes to poor time keeping.

★ It is true that training can provide at least part of the solution to a wide variety of needs - but only if those needs are clearly identified in the first place.

Identifying the need for training

Identifying volunteer training needs is often illustrated as the process of defining the gap between what an organisation needs its volunteers to be able to do or know, and what the volunteers can do or know already. Extending this analogy, relevant training will help to bridge the gap.

At the broadest level, volunteer training needs arise from the organisation's mission and strategic objectives, and volunteer training equips volunteers to play their role in achieving these aims. This approach makes training a means to develop not just individual volunteers, but volunteering as a whole within the organisation. However, it is usually simpler and more viable to develop volunteer training to maximise volunteers' effectiveness in the tasks they currently undertake, at least in the first instance.

★ In either case, identifying training needs should start with a **functional analysis** of current or potential volunteer **roles**. This means clarifying the overall aim or **purpose** of each role, then breaking it down into the **tasks** involved in achieving this purpose, and then specifying the **skills, knowledge** and **understanding** needed to carry out these tasks to the required standard. Well thought-out volunteer role descriptions and specifications provide a good basis for this. [7]

The requirements for the variety of volunteer roles need to be collated in order to develop an overall strategy for volunteer training. Many requirements will be common to all volunteer roles within an organisation, such as core work skills like communication and teamwork,

Volunteers' existing skills, knowledge and understanding

Requirements of the organisation

Training

The Skills Gap

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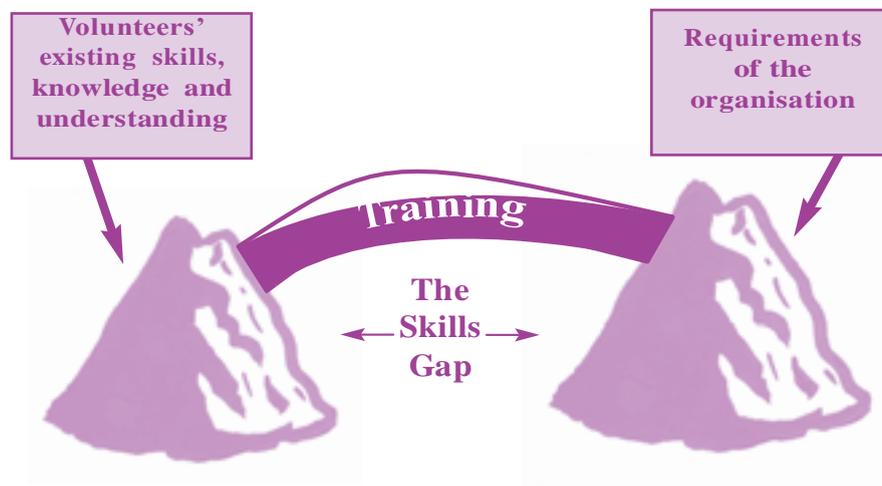
[7] See Workbook Two '*Attracting and Selecting Volunteers'* for information on volunteer role descriptions and volunteer specifications, and recruitment and selection processes in general.

or an understanding of the organisation's ethos and values. Some requirements arise from foreseeable changes or developments that will affect the purpose or nature of one or more roles or even the organisation. Others will be specific to a particular role and you may wish to start by targeting training there initially. Of course, not every requirement of a role can be met through training. Many personal qualities, such as a love of children or a willingness to work outdoors in all weathers, cannot really be taught. So it is important to be realistic in identifying skills, knowledge or understanding, which can be developed through training and to focus on the recruitment and selection processes to ensure volunteers possess the personal qualities the organisation needs. [7]

It is also a good idea to give some consideration to the needs and expectations of volunteers who undertake the role. Organisations need volunteers who are not only competent but also motivated in their roles. For some volunteers, learning and development are key motivations, but every volunteer will have their own interests and aspirations. Training can often meet these personal motivations alongside the requirements of the organisation, so it is useful to be aware of them when defining training needs.

Aim: To identify organisational requirements in relation to one volunteer role.

Complete the following training needs analysis sheet in relation to one of your existing volunteer roles. If you have a volunteer role description and volunteer specification for the role, these should provide most of the information you need. (If not, completing this exercise should help you to develop them). Where possible give some indication of the level of skill or knowledge needed.

When completing the section on the volunteers' needs and aspirations, think about the volunteers who currently undertake the role.

- What paid work, if any, do they do or wish to do?
- What other voluntary work do they do?

- What are their personal or domestic circumstances?
- What are their hobbies and interests?
- What values or beliefs are important to them?

Try to identify how the skills and knowledge needed for the role might relate to any of these. (You should, of course, check these ideas out with the volunteers themselves.)

Once the demands of the role have been established, the next step is to identify volunteers' existing skills, knowledge and attitudes - the other side of the 'skills gap.' Again, the volunteer specification should indicate which skills and abilities volunteers already bring with them to the role. Removing these items from the list provides a basic training needs analysis for the role, leaving you with a description of the 'skills gap' that training should aim to bridge.

Of course, any particular volunteer may already possess some or all of these skills, and not everyone will need training in all these areas. To identify **individual** training needs, work through the basic training needs analysis for each volunteer and mark off those skills they already possess. To identify a volunteer's existing skills, consider:

- any previous training and/or qualifications the volunteer has completed.
- previous work experience they have had, including voluntary work.
- other experience they have e.g. hobbies, travel or work inside the home.

If you use volunteer application/registration forms and references, they might provide such information, or you could use the training needs analysis as the basis for a discussion with the volunteer, perhaps as part of the induction process. These individual records of training needs can be used to plan a personal training programme for each volunteer, or collated to inform the design of a more generic course.

TRAINING NEEDS ANALYSIS

Title of volunteer role _____

Purpose of role _____

Tasks	Skills/knowledge/ understanding needed	Standard	Volunteers' personal needs and aspirations

NOTES

Setting aims and objectives

Once you have identified the skills, knowledge and/or understanding that your volunteer training should address, you can start to plan your training. As with all planning activities, the first step in planning training should be to set clear aims and objectives, based on the needs you have identified. This will clarify **what** you want to achieve, providing a number of indicators as to **how** you can achieve it and most subsequent decisions will then flow from this. While broadly the same as any sort of target-setting process, there is a certain technique for writing clear training aims and objectives.

The **aim** is a broad statement about the purpose of the training. Try phrasing it as a statement describing what the trainer intends to do, for example:

"To provide information on..."
"To explore issues and attitudes around..."
"To provide opportunities to practise..."
"To demonstrate the skills needed to..."

Objectives, on the other hand, are more precise statements of what the volunteers should be able to do or know as a result of training. Training objectives are often phrased, "By the end of the session/programme, the volunteers will be able to..." Remember too that all objectives should be short, simple and SMART:

Specific - clearly and concisely describing the skills, knowledge or understanding the learner is expected to achieve and to what standard.
Measurable - described in terms of an observable behaviour. Phrases like 'know about' or 'understand' cannot be measured objectively. Some useful words to use when writing objectives include...

describe	list	explain
analyse	evaluate	assess
demonstrate	complete	outline
identify	carry out	select
supervise	plan	suggest
critique	summarise	distinguish
define	express	develop
choose	clarify	illustrate
appraise	achieve	detail
assist with		

Achievable - for the volunteers given their level of ability, time commitments, motivation, etc.
Realistic - within the constraints in which you operate - the time, resources and expertise available to you. They also need to be consistent with wider organisational policies.
Time-limited - with set parameters for the achievement and measurement of the objectives.

Aim: To practise writing clear training aims and objectives.

In this exercise it is vital that you actually write down the aims and objectives as instructed, since the key to setting clear objectives is being able to express your ideas accurately and concisely in words.

From the previous exercise, look at the training needs analysis for one of your volunteer roles. Based on the training needs you identified:

• Write one or two sentences to describe the overall aim(s) of a training programme for volunteers in this role. Remember that you are describing what the trainer will set out to do.

  Choose words that reflect whether the focus of the learning will be acquiring knowledge, developing skills, increasing understanding or a combination.

  If you showed this to a trainer as a brief for developing a session, would s/he be able to work out roughly what topics the training should cover and what sort of learning activities should be used?

• When you are happy with the aim(s) you have written, write down a number of key objectives for the learners.

  Use the formula, "By the end of the session/programme, the volunteers will be able to..." and then list what your volunteers will know or be able to do. (See the 'How to use this book' section for an example of some training objectives).

Are your objectives SMART?

Writing really clear aims and objectives can be trickier than it seems, so be prepared for it to take a little time. You will know when you get it right because the aims and objectives will suggest answers to many questions about the nature and format of the training. For instance, the number of objectives and the standards they describe will probably give you a good idea of whether the training is likely to take place over one three-hour session or a five-day programme. Skills-based objectives would favour the use of more hands-on learning activities over discussion-based methods. Whether you intend to develop and deliver the training yourself or to buy in ready-made training from another provider, being aware of these issues will help you develop or identify the most suitable training for your purpose. The rest of this chapter looks at some of the key factors you need to consider when planning training and the options available.

Planning training programmes

Only when the aim of the training has been clearly defined, should you start to think about how, when and where it might take place.

Training does not always have to take place in a traditional class-based setting. There are many other ways to provide a structured learning experience. The pros and cons of a few options are considered below.

Choosing training methods

Training sessions are one of the most popular methods, used to train groups of volunteers with similar training needs. Group training sessions usually include tutor-led presentations and tutor-guided group or individual activities and exercises, although almost any technique can be used in this setting. Training a number of volunteers at once is cost efficient while ensuring consistency in the content and manner of the training and it provides an opportunity to draw on the experiences of the learning group. Problems can arise, however, when volunteers have widely differing training needs, learning styles or levels of ability, or if the tutor lacks sufficient time to prepare or the skills to facilitate group learning. Practical difficulties can include co-ordinating

Volunteers' availability and accessing adequate facilities and resources.

Job shadowing enables volunteers to learn role-specific skills and get a feel for other aspects of the work by observing a more skilled and experienced colleague at work. The 'real-life' quality of the learning cannot really be replicated in other training methods, and job shadowing can also be very cost-effective. As it is used with individuals or even small groups of volunteers, it can be quite flexible. However, it is not appropriate for all roles or tasks (e.g. where confidentiality or privacy is important or the learners' presence interferes with the work being done). Also job shadowing is usually more suited to developing certain types of skills than for increasing knowledge or understanding.

Resource-based learning involves providing materials - written, audio-visual, computer-based or practical equipment - to allow volunteers to develop their skills, knowledge and understanding, usually through independent study or practice. Volunteers can work at times, places and at a pace that suits them, making it both flexible and economical in terms of staff time. However, training still needs to be monitored and supported to ensure the achievement of the learning objectives, but support can be facilitated through peer study groups or ongoing support and supervision activities. Of course the purchase or production of the resources themselves can be expensive. Crucially, this method relies on the motivation of each volunteer, so it may not be suitable when the training is very important in the performance of the role, but of less importance to the volunteer.

External courses, whether one-off sessions or longer programmes, can be designed by someone external to your organisation and delivered on or off your own premises. If the skills, knowledge or understanding covered are not exclusive to your organisational context, sourcing training externally allows you to meet a much wider range of training needs than your own organisation has the expertise, time or other resources to provide in-house. Many external courses have been 'tried and tested' with a range of learners and therefore carry a wider level of recognition

(and possibly accreditation). Of course, this is not always the case and one disadvantage is the lack of control over either the content of the training or the standard of delivery. The other major consideration for most organisations is the cost of purchasing ready-made training courses.

Coaching can take place one-to-one or with a small group of volunteers to demonstrate particular skills and allow the learners to practice under close supervision with step-by-step instruction if necessary. Coaching tends to be more focussed than job shadowing and can be carried out on or off the job, allowing the volunteer to practise in a safe environment when job shadowing is inappropriate. Coaching is a useful method for developing complex practical and manual skills, but not everyone who is skilled at an activity will be a successful coach. The more complex the skill, the more intensive the coaching and therefore the more costly in terms of time.

If the learning goals are wide-ranging or complex, or the training takes place over an extended period of time, it is not uncommon to use a variety of delivery methods in one programme. For instance, a few group training sessions might outline the basic knowledge and procedures for a role and be followed up with a period of one-to-one job shadowing. While practical issues, such as cost or expertise will always limit your choices to some extent, try at least to consider the following factors when deciding on training methods.

First and foremost, your choice should be dictated by the aim of the training - do you want to develop volunteers' **skills, knowledge** and/or **understanding**? Obviously, when you aim to develop skills, it is important that the training provides opportunities for hands-on practice. Equally, when understanding and attitudes are the focus, methods that allow group discussion and individual reflection are vital. When the training objectives cover a combination of knowledge, skill and understanding, then a range of methods will be needed too.

Think about how best to **sequence** the various elements of the programme. Starting on familiar territory - things the learners can do or know already - and generalising out from this is a good way to

introduce new ideas or skills. As a general rule, factual information (knowledge) is usually needed as a precursor to developing new skills or addressing attitudes and understanding. It is also usual to progress from methods involving a lot of guidance and input from the trainer to more participative methods as learners become more familiar with the subject matter and each other. Remember too that 'variety is the spice of life', not to mention an important factor in retaining volunteers' interest and attention. Try varying the methods, trainers or even the venue for the training.

It is important to take account of **volunteers' preferred ways of learning**, level of experience and availability when choosing training methods. The more you know about your learners, the clearer you will be as to what will or will not work. Do the group know each other and/or the tutor? If not, you might decide to include some 'ice-breaker' activities, or to avoid introducing sensitive or controversial topics too early in the training. Are your learners likely to have taken part in other training or learning activities recently? If they do not know what to expect, they may prefer more input from the trainer in the early stages, moving gradually into more participative methods.

However, the **expertise of those delivering the training** is equally important. Be realistic about your own or colleagues' abilities and the time and resources available to plan and deliver the training. If potential trainers are not confident in their presentation skills, for instance, perhaps some training for them would be a worthwhile investment in the long term. Alternatively, it may be more viable to buy in a trainer with these skills, or to use methods that involve working with small groups of volunteers instead.

Of course the **availability and cost** of facilities, equipment and materials required for a particular method will always influence these decisions. It is essential that you keep in mind the original training needs and how important and how urgent it is for the organisation that they are met. In some situations, this may enable you to make a case to funders to cover these costs now or in the future, but it should always help you to prioritise the needs and make the best use of the funding you do have.

4. Making training count

So much of what makes a successful training programme is done at the planning stage. Even with the best facilities and resources and the most skilled trainers, volunteer training is unlikely to meet the needs of either the volunteer or the organisation if those needs have not been clearly identified, translated into clear, measurable training objectives and a structured programme designed to meet them. As mentioned earlier, this workbook emphasises the hands-on involvement of the Volunteer Manager at these earlier stages of the systematic training cycle rather than in the delivery stage. However, whether or not you actually deliver training directly to volunteers, you will still have overall responsibility for ensuring the quality of delivery and evaluating the effectiveness of the training.

Creating a learning environment

In chapter 2 we identified some of the factors that impact on the learning process in adults - things like motivation, credibility and respect. When you come to the delivery stage of the training cycle, there are many practical considerations in creating and maintaining conditions conducive to learning. Any good trainer should check the suitability of the venue, equipment and materials to be used, and ensure that the practical and learning needs of participants have been taken into consideration in the organisation of the course. However, it is useful for the Volunteer Manager to maintain an overview to ensure a consistent standard. The training course checklist that follows covers most of the key questions you need to ask. You may want to use it for yourself or with your trainers as a sort of action plan to set dates by which each aspect of the course should be sorted out.

TRAINING COURSE CHECKLIST			
Activity	**Date**	**Comment/Action**	✔
Venue • Is the venue suitable for: - the number of participants? - the nature of the learning activities? • Is the venue accessible to all participants? • Is the physical environment suitable? - lighting - heating and ventilation - noise - seating - accessibility i.e. people with a disability • What housekeeping or safety rules apply to the venue?			

Equipment
• List the equipment needed.
  Has it been booked/ordered?
 	
  _____
  _____			

NOTES

Activity	Date	Comment/Action	✔
• Is the equipment in working order? • Are there any back-up facilities? • What are the health and safety considerations, if any, in use of the equipment?			
Materials • What materials are needed by the tutor? ——————————— ——————————— ——————————— • What materials are needed by the learners? ——————————— ——————————— ——————————— • Who will produce/reproduce the materials? • Are the materials accurate, up-to-date and available in different formats i.e. Braille, large font?			
Catering • What refreshments will be provided for participants? • Have participants' special dietary requirements been checked?			
Communication • Have all participants been notified of the arrangements for the course? (e.g. dates, times, venue, directions, programme) • Have any special learning or support needs been identified & addressed? • Have participants received any necessary pre-course information?			
Other			

This checklist should help ensure that training courses are well organised and professional, allowing volunteers to focus on the learning objectives without being distracted by these external factors. However, some volunteers may need additional support to undertake training. There are a number of practical issues, like ensuring that volunteers are not over-committed by allowing time off their regular voluntary work to attend training. If volunteers incur extra expenses for travel or materials, for example, it is important to reimburse these to ensure equal access to training for all volunteers.

Other volunteers will require a different kind of support, with some individuals needing more in the way of help and encouragement. Try to ensure that you take time during general support and supervision activities to discuss how the training is going. If volunteers have not attended any sort of training for a long time, or if they are new to the particular subject or training method, they may need extra support with the learning process itself. Ideally this would be provided by the trainer, coach or mentor but, if this is impractical, more experienced volunteers or others undertaking the same training could provide peer support.

Monitoring and evaluating training

It is true that many training programmes and courses are run without the level of planning and organisation described in the previous and current chapters, but the quality of such training is questionable. It is impossible to make a valid judgement on the worth of a course unless the training cycle is followed through all the stages, including evaluation.

Evaluation is the process involved in making an assessment or judgement, comparing what actually occurred to what had been intended. In order to do this, certain information is needed, and the process of gathering the information is often defined separately as 'monitoring'. In this section the term 'evaluation' will be used to refer to the whole, systematic process of determining the worth or impact of a training programme. Although evaluation is positioned as the final stage of the cycle, identifying and collecting information needs to be done concurrently with the planning and delivery of the training, while the final judgement cannot really be made until some time after the training is completed. The evaluation process has four main steps:

1. Setting criteria - or deciding what to evaluate

Evaluation is ultimately a tool for quality assurance and a means to improving training, so it must not become an end in itself. If you were to evaluate every aspect of a training programme, the time and effort required would probably outweigh the resources put into the training in the first place! It is important to make a realistic decision about what the evaluation should cover. Therefore, the first question you must ask is why you are undertaking the evaluation. Who is it for? Will it be mainly for the trainer, the organisation, the participants or, perhaps, for funders? What will they want to know about?

Different stakeholders will have different priorities and therefore be interested in different broad aspect(s) of the programme. Most evaluations focus on one or more of the following issues:

- Satisfaction is about how satisfied participants or stakeholders are with how the outputs or outcomes were actually achieved (process). The trainer may want to know how participants felt about the training methods used, while funders may be more interested in how participants were chosen to ensure equality of access.

- Effectiveness is about what was actually achieved (outcomes) as a result of the training. This will probably focus on the learning aims and objectives identified when planning the programme, but the organisation may want to know about longer-term goals such as improvements in the standard of work

or volunteer motivation.

- **Efficiency** is the basic value-for-money equation of resources (inputs) against the work done (outputs). It tends to focus mainly on statistical information, such as the cost of a programme (inputs) against the number of volunteers trained (outputs).

Answering these questions will help you clarify what a successful programme would look like. This means producing clear, written statements that specify what the programme should achieve. These are the **criteria** for the evaluation, and they provide the benchmarks against which to judge the training. Evaluation criteria must:

- describe the results you are working toward, not the activities to get there;
- provide a yardstick against which to measure what you actually achieve;
- be specific, measurable and realistic;
- include both qualitative and quantitative measures;
- and take account of the needs and interests of all the stakeholders.

2. Monitoring - or identifying and collecting information

The clearer the criteria you set, the easier it should be to decide what information you need to judge whether or not you have met them. It can be helpful to start by looking at the criteria and decide what **level(s)** of information you need.

- **Reaction level** information is about the learners' (and trainer's) immediate response to the training and usually relates to 'satisfaction' issues. It may cover issues like:
  - the level and pace of the training;
  - the standard of delivery or of the materials used;
  - the appropriateness of the programme aims, content or methods.

This sort of information is usually gathered directly from participants using basic 'happy sheet' evaluation forms, verbal feedback or the trainer's observation of the learners' reactions and comments during the training activity.

- **Learning level** information is about the achievement of the programme's learning aims and objectives. It could

cover things like:
  - the learners' acquisition of specific skills and knowledge;
  - the learners' understanding of principles and procedures.

This sort of evidence could be found in the written or practical materials that learners produce during activities, exercises or tests, or it might be observed directly during such activities. Alternatively it may be demonstrated in reflective journals kept by the learners.

- **Behaviour level** information shows how well the learning has been transferred into another context (usually from the training context into the voluntary work). It could include evidence of:
  - improvements in the standard of performance of certain work tasks;
  - the ability to work more independently;
  - an increased rate of work.

This sort of information could be collected using workplace assessments, supervision or appraisal records, or by asking the supervisor or service users.

- **Results level** information is concerned with the achievement of the wider objectives that highlighted the need for training in the first place. It may touch on areas such as:
  - improvements in the overall quality of service;
  - efficiency improvements (e.g. in time or costs);
  - widening the range of services provided.

Collecting this information is probably a longer-term undertaking. It might be found in annual reports and statistics, service-user satisfaction surveys or internal quality audits.

Sometimes you will need to devise monitoring procedures solely to gather information for the evaluation but, often, relevant information is already being generated as a result of the very activity you are trying to evaluate. So try, where possible, to identify existing sources of information from the training or the volunteers' other activities to minimise the burden of both finding and recording monitoring information. Do, however, plan when the information will be gathered and by whom.

3. Analysis - or judging the information

While monitoring is generally the most time-consuming part of evaluation, this aspect is probably the most difficult to do well. It helps to approach it as two distinct tasks:

• Analysing - collating, categorising and summarising the information you have collected in order to make it usable in making judgements about the success of the programme. This task requires familiarity with the information, the ability to sort and order the information and to express large quantities of information in a way that facilitates understanding (e.g. using charts and graphs or compiling statistics).

• Interpreting - comparing the information against the criteria or benchmarks you set and making judgements about the success of the programme. This task requires a good working knowledge of the training itself and of the wider context in which it was provided. You will also need to be able to identify strengths/weaknesses and barriers/contributors to success, not to mention a degree of objectivity and openness to unanticipated results. In this task, in particular, you may benefit from seeking the views of others.

4. Recommendations - or identifying and implementing improvements

This step completes the evaluation process and often identifies unmet or new training needs, returning us to the start of the training cycle. It is because this step is so often ignored that evaluation can feel like nothing more than a paper exercise. Bear in mind the following points.

• Be realistic - recommendations are not a wish-list, so you will have to prioritise.
• While your recommendations should obviously address weaknesses, building on existing strengths will also bring real and cost-effective improvements.
• Take account of all the resources needed to implement your recommendations, not just the financial costs. Who will take responsibility for putting the changes in place, and who will monitor their progress?
• Think about who needs to know about these recommendations as this will affect how you present your findings.

Planning Evaluation - A Case Study

A women's group - set up, among other things, to help local women to identify and develop skills for working inside and outside the home - has about 30 regular members, although many more attend events and meetings on a more casual basis. The new Development Officer feels there is a need to build the confidence and motivation of members to encourage them become more active as volunteers in the group, rather than passive users of its services. She thinks that personal development training could help to do this, as well as providing a first step towards other training opportunities.

While a similar course is available at the local college, an in-house programme could be more relevant, more economical and more accessible to members. The Development Officer plans to carry out a training needs analysis with the members and develop a short series of sessions on the personal development topics identified. Free facilities and equipment are available at the community centre where they meet, but other materials and resources will have to be purchased or hired. Before the programme begins, she asks herself these questions in order to plan the evaluation.

What areas should the evaluation focus on?

First and foremost, the Development Officer wants the evaluation to help her decide how useful training is in achieving the group's aims. Therefore, her main concern is with **outcomes** - how effective the training has been in:

1. developing members' interpersonal skills and increasing their confidence, and
2. getting members to become more actively involved in the running of the group.

However, she will also need to decide whether training is an **efficient** way to achieve this and, given the reluctance of the women to take up similar available training, their **satisfaction** with the process is also important.

What criteria should be set for each of these areas?

The programme would be **effective** if:
a) participants achieve the learning objectives set for each session.
b) participants report increased confidence and motivation.
c) participants increase the time they commit to the women's group and/or take on new responsibilities.
d) participants take up further training or study opportunities.

The programme would be **efficient** if:
e) the cost per person of the training was less than that charged by the local college.
f) the extra hours committed to the group outweighed the cost of the training.

Satisfaction with the process would be shown by, for example:
g) the relevance of the programme to the personal development needs of members.
h) participants' enjoyment of the programme.

However, the Development Officer realises that these are not yet proper evaluation criteria, as they are too vague to measure results against. She clarifies each point, either
• quantifying the result e.g.
  e) The cost per person of the training is at least 10% less than the fees charged by the local college
• and/or including a time limit e.g.
  b) Within one year of completing the programme, 15% of participants undertake further training or study.
• or defining qualitative targets more clearly to make them measurable e.g.
  g) The content of the training sessions relates directly to the personal development needs of members identified in the training needs analysis.

What sorts of information would be needed to make a judgement against these criteria? Where might such 'evidence' be found?

Once the rationale and criteria are agreed by the Management Committee, the Development Officer draws up an action plan for monitoring, which, alongside each criterion, lists the information needed, when it will be gathered and how it will be

recorded. The Development Officer realises that there is a fair degree of overlap in the information needed for all the criteria, so she plans the monitoring process carefully to make best use of such 'multi-purpose' evidence.

The criteria set to measure the effectiveness of the training are the most diverse and therefore require a range of information. For instance, the Development Officer will need to gather learning level information to evaluate whether the participants have, in fact, developed new interpersonal skills and knowledge as a result of the training. Evaluating whether these new skills also produce the desired increase in participation, will require behaviour and/or results level information, gathered over a longer period.

Most of the statistical information needed to judge the efficiency of the training is already recorded by the Development Officer, as part of her project administration duties. The level of participation in the group before and after training would be found by comparing the records she keeps of hours worked by individual volunteers each month. The group's Treasurer is also helping her to set up a system to record all of the group's expenditure, including training costs. Some additional information will need to be collected specifically for the evaluation, however. For instance, the Development Officer will also need to keep a note of the time she spends planning and delivering the programme in order to work out accurate costs.

In order to make a judgement against the criteria relating to satisfaction, the Development Officer will need mainly reaction level information. As well as asking participants to fill in 'happy sheets' at the end of each session, she plans to run a focus group about a month after the training is completed to allow the participants to give more considered feedback.

If you began this workbook with the idea of running a few short training sessions for your volunteers, you may be feeling that the systematic training cycle represents a rather involved and complex process. However, whether starting to develop a volunteer training strategy, or just reviewing your current approach, working through each stage of the cycle should improve the quality of your training. Moreover, by managing volunteer training in a way that meets wider organisational needs and goals, you should find that training becomes a tool to help you develop a more effective volunteer team, rather than an extra responsibility.

5. And finally…

The last few chapters have broken the training cycle down into its component stages and then into a series of steps or tasks in each stage. While this may seem complex, you will probably find that, in practice, it helps to clarify much of what seemed difficult or problematic in training. Also, as with most things, practice makes perfect and framing concise training objectives or clear evaluation criteria will get easier with experience. There is no doubt, however, that this best practice approach to training requires a significant investment of skill and resources, so it may be worthwhile considering the added value that accreditation can bring.

Getting the credit

Accreditation is basically official recognition that a learner's achievements have been assessed as meeting a set of pre-determined standards. This recognition is usually, but not always, awarded by an external body. Accreditation is not part of the systematic training cycle and, therefore, not essential to good practice in training. However, assessing and accrediting learners can add value to training.

Most obviously, volunteers may benefit from improved employment or promotion prospects; it may increase their motivation by recognising their achievements; it may provide a first step into further training and education courses; it may increase their confidence and therefore their satisfaction in their voluntary work. Service users, too, should benefit from improvements in the quality, and possibly the range, of services. As well as enjoying more motivated volunteers delivering those services, accreditation can also reassure service-users as to the quality of volunteers' work.

The benefits to the organisation and to the Volunteer Manager, however, are often over-looked. Accrediting volunteers shows that an organisation recognises the standard of the skills, knowledge and understanding that volunteers bring to their work and should, therefore, improve motivation and retention among current volunteers. It can also send this message to the wider community, enhancing the organisation's reputation and encouraging potential volunteers (and funders!). Most

of all, accreditation can - by benchmarking the **standard** of volunteers' work - produce more effective volunteers, thereby contributing to the overall purpose of the Volunteer Manager's role.

All this is not to say, however, that accreditation is appropriate or desirable for all organisations or, indeed, for every volunteer. Accreditation may be appropriate when:

- volunteers **need** or **want** to have skills/knowledge/understanding of a specified standard;
- volunteers are **willing** or **required** to undergo assessment against these standards; and
- **clear benefits** to one or more of the 'stakeholders' from having this achievement officially recognised can be identified.

It is vital that you can answer the question, "Why do we want to accredit our volunteers?" in the context of your own organisation, as this will determine how much the organisation should be prepared to invest in volunteer accreditation and suggest which route would be most suitable.

> Aim: To assess the potential benefits to the organisation of offering accredited training to volunteers.
>
> - Make a list of the specific and tangible benefits of assessing and accrediting volunteers to each of the stakeholders in your organisation. (You may need to check out your assumptions with the people concerned to ensure they are valid).
>
> - Then prioritise these benefits - which of them are most important and contribute positively to wider organisational aims? Identify the 'bottom line' for what you want from volunteer accreditation.
>
> - Consider what resources you could potentially secure to achieve the sort of benefits you have identified.

Once you have established why you are considering volunteer accreditation, you should be able to identify what it is that you want to accredit, both in terms of topic and whether it is mainly the volunteers' skills, knowledge and/or understanding you wish to develop.[8] This should be incorporated into the process of identifying training needs.

Only when you have thought through both these questions thoroughly are you ready to consider which form of accreditation will best meet your needs. There is an ever-increasing range of options for accrediting a variety of volunteer skills and knowledge.

Programmes are available from beginner to post-graduate level, can last a few days or several years and may be knowledge, skills or competence-based. You can choose to access existing programmes through external training providers, or seek approval from the accrediting body to offer them in-house, or you could get recognition for your own training courses. As long as you are clear about why you want accreditation and what you want accredited, your local training providers and national accrediting bodies should be able to help you assess whether they have something suitable to offer.

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[8] The Volunteer Development Agency's Training Accreditation team provides advice and information on the options available to your organisation and volunteers. A directory of accredited training for volunteers *Giving Time, Getting Credit* is also available from the Agency, free of charge.

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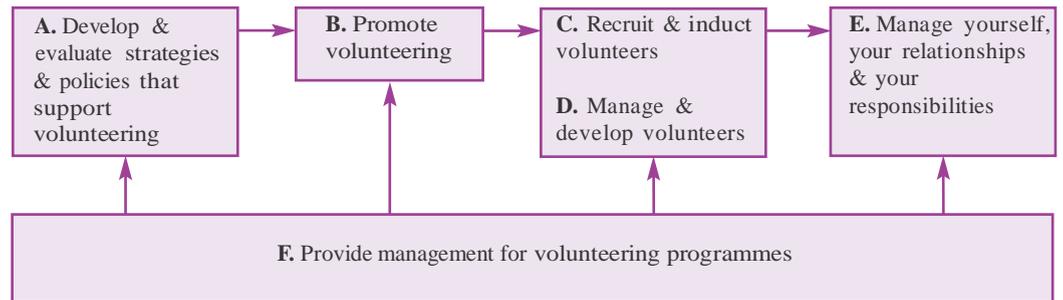
- The **main roles or functions** that can be part of your job.
- The **specific activities** involved within these roles.
- The **standards of performance** expected when carrying out these activities.
- The **knowledge, skills and understanding** which you will need to meet the performance standard.

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.

| A. Develop & evaluate strategies & policies that support volunteering | → | B. Promote volunteering | → | C. Recruit & induct volunteers | → | E. Manage yourself, your relationships & your responsibilities |
| | | | | D. Manage & develop volunteers | | |

F. Provide management for volunteering programmes

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.

NOTES

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 how to register to start the assessment process and costs. If you have any queries regarding the Investing in Volunteers Standard please email investinginvolunteers@volunteernow.co.uk

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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 Department for Social Development NI. 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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