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### ***How-to-Guide for Managers of Volunteers***

***An outcome of the Volunteering New Zealand Leadership Roadshow in Christchurch in June 2012 was an agreement to put together a 'how-to' guide for Volunteer Managers. A working party (consisting of representatives from Cancer Society, IHC, Presbyterian Support, Volunteer Army Foundation, and Volunteering Canterbury) was formed to progress this idea.***

***The resulting guide is a generic document for use by a variety of volunteer-involving organisations of different sizes and with different interests. If there is anything you specifically want to know, or have something you feel should be included, please contact us at [mgr@volcan.org.nz](mailto:mgr@volcan.org.nz).***

## **Effective volunteer management involves:**

- **Having clear policies and procedures;**
- **Practically measuring outcomes and impacts;**
- **Possessing appropriate management information;**
- **Keeping records of volunteers; and**
- **Maintaining and establishing an effective working relationship with the volunteers.**

**(Rochester et al., 2010)**

# INDEX

## Page

<a href="#">Accountability</a>	4
<a href="#">Acknowledgment/recognition</a>	4
<a href="#">Code of Practice (rights of volunteers; responsibilities of volunteers)</a>	4
<a href="#">Communication</a>	5
<a href="#">Conflict Resolution</a>	5
<a href="#">Decision-making (involving volunteers)</a>	5
<a href="#">Dismissal</a>	6
<a href="#">Emergency Procedures (Disaster responses)</a>	6
<a href="#">Evaluation</a>	6
<a href="#">Expenses</a>	7
<a href="#">Forms – templates</a>	7
<a href="#">Fraud</a>	8
<a href="#">Funding</a>	8
<a href="#">Health</a>	8
<a href="#">Inclusiveness – encouraging diversity; volunteers with disabilities</a>	8
<a href="#">Interviewing and selecting</a>	9
<a href="#">Legal issues</a>	9
<a href="#">Mission Statement</a>	9
<a href="#">Motivation</a>	9
<a href="#">Networking</a>	10
<a href="#">Online resources</a>	10
<a href="#">Paid staff</a>	11
<a href="#">Personal development</a>	11
<a href="#">Police checks</a>	12
<a href="#">Policy – commitment to volunteering</a>	12
<a href="#">Public relations</a>	12
<a href="#">Recognition</a>	12
<a href="#">Recruitment</a>	12
<a href="#">Retention</a>	13
<a href="#">Risk management</a>	13
<a href="#">Role descriptions for volunteers</a>	13
<a href="#">Social media</a>	13
<a href="#">Succession planning</a>	14
<a href="#">Supervision</a>	14
<a href="#">Training</a>	14

## **Accountability**

Evaluate your programme at least annually, in consultation with stakeholders, and ensure policies are up-to-date and practical.

Have an organizational chart which clearly shows lines of communication and accountability.

## **Acknowledgement/Recognition**

It is important to learn why a person chooses to volunteer with your organisation (see Motivation). The organisation that understands what motivates a person to volunteer will be better able to recognize the contribution made. Appropriate recognition is closely related to an organisation's ability to retain volunteers.

For suggestions for recognition, go to:

<http://www.volcan.org.nz/resources/recognition.pdf>

## **Code of Practice**

### **Rights of Volunteers**

- To be treated as co-workers – respected by paid staff and encouraged to take part in agency decision-making
- To have clearly defined tasks suited to their preference and ability
- To be offered training, support and supervision
- To be given clear communication and consultation channels
- To be given information about the organisation and the way it operates, and to be kept informed of relevant new developments
- To be provided with a safe working environment free from any discrimination based on age, disability, religion, or sex - as set out in the Human Rights Act 1993
- To be made aware of safety, emergency and complaints procedures

### **Responsibilities of Volunteers**

- To choose voluntary work which they can support wholeheartedly
- To work within the policies and guidelines of the organisation
- To be loyal to the organisation, respect its place in the community and help to maintain its credibility and integrity
- To be realistic about capability and availability, and avoid over commitment

- To be punctual, regular in attendance, and advise of periods of unavailability
- To treat co-workers as they would wish to be treated themselves
- To observe confidentiality and privacy at all times
- To report accidents, hazards, etc. immediately
- To speak up when concerned or unsure

## **Communication**

Excellent communication systems are essential – the organizational chart will show communication channels.

It is useful to have templates for standard forms of communication (both letters and emails).

Social Media provide new ways of keeping contact within a group of volunteers, e.g. a Facebook Group can be restricted to invited persons only.

## **Conflict resolution**

“Conflict is inevitable but combat is optional” *Max Lucade.*

Whether we like it or not, conflict happens. Our response to conflict is the underlying factor which will determine whether the conflict limits, or enables our success.

Ensure you have policies in place which give a clear process to follow in event of conflict, and which will assist in mitigating its effects.

[http://www.volcan.org.nz/resources/complaints\\_procedure.pdf](http://www.volcan.org.nz/resources/complaints_procedure.pdf)

If you need further assistance with grievance issues, contact:

[www.mediationservices.org.nz](http://www.mediationservices.org.nz)

## **Decision-making – involving volunteers**

Volunteers who have opportunities to be involved in organisational decision-making are more likely to feel part of the team and to stay.

## Dismissal

If a volunteer is not performing satisfactorily we suggest you follow the same process as you would for a paid employee, i.e. talk about the problem, offer training, give verbal and written warnings. All performance related communication should be documented.

When dismissing volunteers, be aware that though they may not be suitable for your organisation or the role in which they have been placed, there may be another volunteering role elsewhere which will suit them. Suggest they contact the local Volunteer Centre.

[http://www.volcan.org.nz/resources/when\\_the\\_role\\_doesnt\\_suit\\_the\\_volunteer.pdf](http://www.volcan.org.nz/resources/when_the_role_doesnt_suit_the_volunteer.pdf)

An exit interview provides an opportunity to review the experience of the volunteer and can be helpful to all those involved.

[www.volcan.org.nz/resources/exit\\_interview.doc](http://www.volcan.org.nz/resources/exit_interview.doc)

## Emergency Procedures

When an emergency occurs, it is too late to decide who will do what, and what equipment will be needed. Involve staff in planning how to manage emergencies that might arise in each workplace.

### ***Disaster Response Volunteer Management Plan***

Having a Disaster Response Volunteer Management Plan will ensure that services provided to the community by your organisation through the effort of volunteers are able to be maintained throughout an emergency. This Plan will include offsite records and viable methods of communicating with volunteers and clients.

## Evaluation

Reviewing a volunteer's performance is very important and provides an opportunity to give feedback and for a volunteer to be heard. Volunteers generally welcome the chance to discuss their work, and this can be done in an informal way.

## Expenses reimbursement

Familiarise yourself with the law regarding reimbursement of volunteers' expenses. These must be for actual expenses and proof needs to be provided by the volunteer to claim reimbursement. Clarify your organisation's position on what it will/will not reimburse during the interview process or at orientation.

[http://www.volcan.org.nz/resources/reimbursement\\_of\\_expenses\\_dec\\_2010.pdf](http://www.volcan.org.nz/resources/reimbursement_of_expenses_dec_2010.pdf)

## Forms – templates

Learn your organisation's requirements for record keeping and have a process for filing confidential information.

It is important that all forms meet the requirements of the Human Rights and Privacy Acts. For example, it is good to have dates and months of birthdays (for recognition) but birth years can be optional.

Know which forms your organisation requires, e.g.

*Application*

*Confirmation of volunteer position*

*Evaluations*

*Exit interview questionnaire*

*Expense/reimbursement claim*

*Interview record*

*Orientation check list*

*Parental consent form*

*Police Vetting form*

*Programme assessment*

*Reference check*

*Request for volunteer service*

*Time sheet*

*Training record*

*Volunteer Agreement*

*Volunteer Record*

## **Fraud**

“Fraud prevention should be an integral component of any organisation’s risk management policy. Unfortunately many organisations respond only once a fraud has occurred, as opposed to taking a proactive approach towards preventing fraud.” BDO New Zealand

<http://www.bdo.co.nz/sectors/not-for-profit/fraudpreventiontoolkit>

## **Funding**

Funding Information Service is a not-for-profit organisation providing comprehensive funding information to New Zealand community groups.

<http://www.community.net.nz/resources/community-resource-kit/applying-for-funds/>

## **Health**

It’s a good idea to ask prospective volunteers whether they have any health issues which may affect their ability to do their work. Some organisations may require volunteers to have a health screening as part of the intake process.

## **Inclusiveness – encouraging diversity**

Your organisation can benefit from having volunteers from diverse backgrounds and ethnicities.

[http://www.volcan.org.nz/resources/avoiding\\_discrimination.pdf](http://www.volcan.org.nz/resources/avoiding_discrimination.pdf)

### ***Volunteers with disabilities***

People with disabilities want to be involved for the same reasons as everyone else – to make a contribution to, and be connected with, the community.

Often, their skills and time are underutilized. Look at what they can do. Ask what they think, how something could be adapted to enable them to undertake a task, and what they can and cannot cope with. At all times apply the same processes as for other volunteers.

[http://www.volcan.org.nz/resources/working\\_with\\_volunteers\\_with\\_disabilities.pdf](http://www.volcan.org.nz/resources/working_with_volunteers_with_disabilities.pdf)



## **Interviewing and selecting**

Not every role will suit every volunteer. To get this 'right' can be challenging, but it will be helpful if:

- position descriptions are clear
- you understand who you are recruiting for and develop a recruitment plan
- there is ongoing communication/support/feedback
- time and care is put into the selection process
- a trial period is available to the volunteer and the organisation before they make a final commitment
- regular supervision/support is available

[http://www.volcan.org.nz/resources/when\\_the\\_role\\_doesnt\\_suit\\_the\\_volunteer.pdf](http://www.volcan.org.nz/resources/when_the_role_doesnt_suit_the_volunteer.pdf)

## **Legal issues**

Community organisations have legal responsibilities. Advice is available from Community Law Canterbury <http://www.canlaw.org.nz/>

## **Mission Statement**

If the volunteer programme has its own mission this needs to be in line with the organisation's Mission Statement. The key to preparing a Mission Statement is to keep it simple. Always have your organisation's Mission Statement in mind. Every decision you make should reflect that statement. Volunteer programmes frequently choose a Philosophy Statement which supports the organisation's Mission Statement.

## **Motivation**

Volunteers are all unique and their motivation to volunteer will also reflect this. Good volunteer management takes into account motivation when recruiting and placing within an agency. Getting it right is integral to volunteer retention.

McLelland's Motivation Model identifies three types of volunteers:

1. Achievers (achievement motivated): these volunteers want feedback and praise. Practical projects with goals to work towards are satisfying for these volunteers.
2. Influencers (authority motivated): these volunteers are willing to take responsibility and enjoy having an influence. They like to lead, give advice, make decisions and train others.
3. Team players (affiliation motivated): these volunteers prefer to work in groups. Friendly interaction will achieve their goal of mutual friendship.

## Networking

The Volunteering Canterbury Volunteer Co-ordinators' Network meets at least monthly and dates and topics are advertised on [their website](#). These meetings provide an opportunity to share ideas and concerns with other Volunteer Co-ordinators, and receive peer support.

Networking online is an option if local opportunities are not available.

Some examples are:

[www.ozvpm@yahogroups.com](http://www.ozvpm@yahogroups.com)

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

[www.djcronin.blogspot.co.nz](http://www.djcronin.blogspot.co.nz)

[www.management4volunteers.wordpress.com](http://www.management4volunteers.wordpress.com)

## On-line Resources

### *Useful websites:*

[www.volcan.org.nz](http://www.volcan.org.nz)

Volunteering Canterbury's website. Check out the 'Organisations' page for resources

[www.volunteeringnz.org.nz](http://www.volunteeringnz.org.nz)

Volunteering New Zealand's website

[www.coyoteblog.posterous.com](http://www.coyoteblog.posterous.com)

Jane Cravens/Coyote Communications - a blog about and for non-profits/ngos

<http://www.business.govt.nz/worksafe/> The Worksafe website has information on health and safety.

[www.management4volunteers.wordpress.com](http://www.management4volunteers.wordpress.com)  
a blog for volunteer managers

[www.community.net.nz](http://www.community.net.nz)

An information sharing resource for New Zealand community and voluntary groups. Here you will find guides, news and tools for and by charities, clubs, groups, hapu, iwi and trusts.

## **Paid staff**

Orient all paid staff to volunteers and volunteering. Help them understand the types of people who volunteer - their diverse motivations, range of skills, abilities, interests and needs. Let paid staff voice their fears and reservations. Take their concerns seriously.

Orient and train volunteers to what paid staff do, their skills, training, motivations, needs, and pressures.

## **Personal development**

Volunteering Canterbury regularly runs workshops for volunteer managers/coordinators. These are posted on the website.

[www.volcan.org.nz](http://www.volcan.org.nz)

Volunteering New Zealand hosts a bi-annual conference [www.volunteeringnz.org.nz](http://www.volunteeringnz.org.nz) and an online training programme for Volunteer Managers <http://volunteer.xperts.co.nz/>

Those who manage numbers of volunteers deserve outside supervision.

[www.supervisioninfo.org.nz](http://www.supervisioninfo.org.nz)

Engaging with other organisations in the community will provide further training (and networking) opportunities, e.g. Community Law, and Aspire seminars.

## **Police checks**

If organisations are working with vulnerable clients, or if your organisation has funding from Child, Youth and Family, best practice is to check whether potential volunteers have a criminal record before they become involved.

The NZ Police process requests for information from organisations/agencies which deal with the care of others. This process is called 'Police Vetting'.

<http://www.volcan.org.nz/resources/policevetting.pdf>

## **Policy**

### **Commitment to volunteering**

A clear policy on volunteering will demonstrate a commitment to volunteers within your organisation. See Code of Practice (above) for suggestions.

## **Public Relations**

Appropriate training/induction in your organisation provides knowledge which will enable volunteers, especially if they are the first point of contact to your organisation by members of the public and clients, to play a significant PR role for your organisation and its work. Ensure they are aware of your P.R policy and who is authorized to speak on behalf of the organisation.

## **Recruitment**

Effective recruitment follows the development of a position description that clearly delineates the task to be undertaken. Targeted recruitment is usually most effective. The focus should be on recruiting the right person for the role in order to meet the needs of the volunteer and the organisation. If this is a new role inform paid staff, prior to starting recruitment, so that they are fully on board with bringing new volunteers in.

A recruitment plan should include:

- goals for recruitment
- position description details
- methods and sources of recruitment (media, FB, newspaper, newsletters, polytech courses, etc.)
- timeline for completion

## **Retention**

The process of knowing what motivates people to volunteer for your organisation and using that knowledge to recognize them appropriately will assist in retention. Organisations, and roles within those organisations, become a part of a long-term volunteer's identity. Changes to organisations/positions must therefore be handled with sensitivity.

## **Risk management**

Identify and minimise risks within the workplace. A useful resource compiled by Volunteering NZ is available at:

[http://www.volunteeringnz.org.nz/files/evhsg\\_final.pdf](http://www.volunteeringnz.org.nz/files/evhsg_final.pdf)

## **Role descriptions for Volunteers**

A written role description should outline work to be done, reporting relationships, schedules, and expectations. Both the volunteer and the supervising staff member should have a copy of it. It should be regularly reviewed (by both volunteer and staff member) and modified where necessary.

[www.volcan.org.nz/resources/role\\_descriptions](http://www.volcan.org.nz/resources/role_descriptions)

## **Social Media**

“A good social media policy will provide clear guidelines as to what staff should and shouldn't do when posting and interacting with the community on a day-to-day basis, freeing them up to think more strategically. It's also likely to help leadership feel more comfortable with the less-formal nature of social media by letting them establish boundaries for its use.” The Non Profit Social Media Policy Workbook

## **Succession planning**

A successful volunteer programme will have its policies and procedures well documented and available. This will ensure that volunteers are supported while a new co-ordinator/manager learns how things have been done in the past. A prudent co-ordinator will leave a 'manual' that notes:

- community contacts
- policies & procedures
- details of any volunteer-related events (recognition)
- recruitment practices
- intake process
- personnel files

## **Supervision**

Supervision is one of the keys to demonstrating responsibility and accountability, both of the organisation and its staff (volunteer and paid). It provides an opportunity to give feedback and for the volunteer to be heard, and can be done in an informal way.

## **Training**

Ensure that volunteers have, or develop, sufficient knowledge/skills to be able to do their tasks. Offer orientation and ongoing training. Regular training sessions can also provide an opportunity for feedback and supervision. A buddy system can be a good form of training.