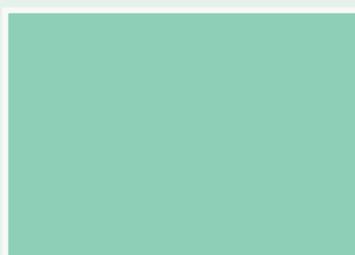
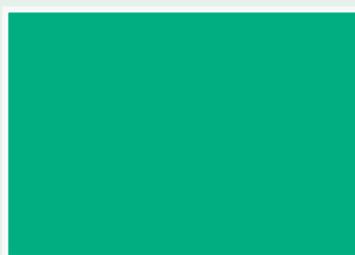


As Good As They Give

Providing volunteers with the management they deserve



Workbook Three Managing and Motivating Volunteers

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. All workbooks are available in downloadable electronic format only.

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

Workbook Three - Managing and Motivating Volunteers

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How to use this book?

This workbook is aimed at the individual or team responsible for co-ordinating or managing the involvement of volunteers within an organisation or project. It explores basic good practice for managing and motivating groups of volunteers.

The workbook attempts to touch on the broad issues and procedures involved in managing volunteers, and some are dealt with in more detail in other books in this series. It must be understood that 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 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 encourage you to use your own knowledge and experience to tailor these suggested ways of working to 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:

- understand the need to pro-actively manage volunteers.
- identify and implement key procedures for effective volunteer management.
- explain the functions of support and supervision.
- identify key principles and methods for supporting and supervising volunteers.
- outline an approach for handling conflict constructively.
- develop fair and effective ways of dealing with difficult situations involving volunteers.
- understand factors in volunteer motivation.

The following symbols will help you to use the workbook:



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



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



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



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



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

Finally, you should be aware that this workbook is part of a series that addresses the key areas of volunteer involvement. To focus on only the issues explored in this workbook is to miss the bigger picture. The volunteer-involving organisation (or Volunteer Manager) which tackles good practice only insofar as they apply to administration or direct volunteer management issues may ultimately find their hard work a waste of effort. No matter how well volunteers are managed, an organisation needs to continually review and develop the role of volunteering if it is to avoid both the volunteer programme and the organisation as a whole becoming stagnant. Readers 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*
- Four - *Managing Volunteer Training*
- Five - *Volunteers and the Wider Organisation*



1. Introduction

Some key principles

Before starting to think about any particular aspect of volunteering, 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 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 and client

groups 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?

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 paycheck 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/outside, 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 nonprofit 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 can not be justified yet which are important to individual clients.



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.
- what, if anything, your mission statement or constitution says about volunteers.

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



- 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.
- Studies have shown that satisfied volunteers frequently are so supportive of the organisations with which they serve that they become donors of money and goods as well. They also support special events and fundraisers by attending themselves and bringing along family and friends.

So Why Pay a Salary?

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

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

Other Benefits of Volunteers

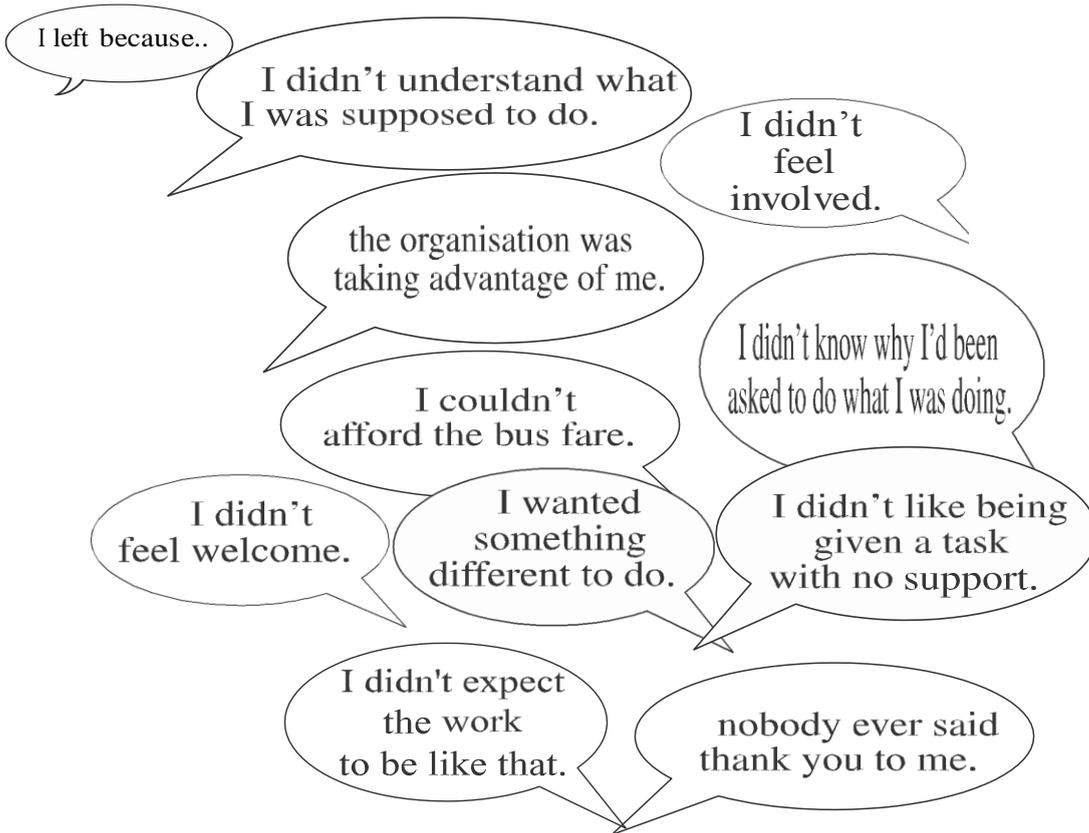
Since we live in the real, limited-resources world, what are the other benefits to an organisation for involving volunteers? Volunteers offer:

- 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).

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 volunteers leave

It seems though, that paid staff and managers in some organisations resent spending any time or money on involving volunteers. They regard it as a waste of resources because, in their opinion, volunteers are so unreliable. It may be regarded as downright pessimistic to think at this early stage in the workbook about why volunteer turnover is so high in some organisations. However, this is exactly the right time to think about why we sometimes find it so hard to keep volunteers - and blaming the volunteers just won’t do! Here are common reasons well-intentioned volunteers have given:



Aim: To explore the things we value in a work situation.

- Think about what you would look for in your ideal job, given that the work itself may still be difficult or pressured. Try to work out what makes a good work experience - what you value and what makes you feel valued. Make a list under the following headings and add any others you can think of.

1. Working conditions - e.g. a safe, clean physical environment; good facilities (kitchen, crèche etc.) for staff; a pension scheme; opportunities for relevant training.

2. The work itself - e.g. work that is interesting and meaningful; a clearly defined area of responsibility; work which matches your abilities; being involved in planning and organising your own work.

3. Management procedures - e.g. a manager who takes time to discuss your work with you; a process for airing grievances; a clear contract and terms and conditions.

4. Relationships with colleagues - e.g. a spirit of co-operation among staff; opportunities to socialise with colleagues; outside pressures and circumstances being acknowledged.

- Next, think about your worst experiences of work, using the same headings to make a second list. What did you dislike about the experience? What made you feel undervalued?
- Review the second of the two lists - the things that you find unacceptable in paid work. How many of them do your volunteers experience on a regular basis? Are these things any more acceptable for unpaid workers than for paid workers?



Many of these issues can be addressed through good volunteer management, but developing a comprehensive system is a long-term task, involving a wide range of procedures. For the purpose of this workbook we will concentrate on the basic procedures you should put in place and the skills you might need to implement them effectively. Some of the topics we will look at briefly are addressed in more detail in other workbooks in the series.¹

A good practice approach to managing volunteers



The basic procedures that every volunteer-involving organisation needs to address are:

- induction
- ‘Settling in period’ and review
- training
- code of practice/guidelines
- support and supervision
- procedures for dealing with difficult situations

Ideally you should decide how you will approach each of these areas before you start to involve volunteers and have them written into a clear volunteer policy - that way everyone knows what to expect from the start.

Volunteer Now has developed a [Volunteer Policy template](#) that you could use as a guide when developing your own.

It can also be helpful to provide each new volunteer with a written Volunteer Agreement / Welcome Letter, summarising some basic information on these procedures. However, it is never too late to improve your practice and procedures. Just remember that some volunteers and staff may need more help and encouragement to adapt to change than others!

Their niceness will let you recruit a volunteer for the first time, but only your competence will let you keep them.

McCurley & Lynch 1994

¹ See in particular Workbooks Two *Attracting and Selecting Volunteers*, Four *Managing Volunteer Training* and Five *Volunteers and the Wider Organisation*.



2. Right from the start

Talk to almost anyone who is responsible for overseeing volunteer involvement in an organisation and one of the most persistent problems they are likely to mention is in finding enough 'good' volunteers (i.e. volunteers whose qualities, experience and motivations match those that the organisation needs). As a result, much energy is put into recruiting and selecting these very special individuals, sometimes at the expense of those (equally special) individuals who have already made a commitment to the organisation. Not surprisingly, the result can be a high turnover of volunteers as their needs remain unmet or they encounter problems in their work and lack a way to address them.

The procedures we will look at in this chapter set out to address these issues from the moment a new volunteer becomes involved. By taking care of those you have already recruited, you should find that you need to spend less time recruiting new volunteers to replace those who leave. Moreover, these procedures should help volunteers to get off to the best start in their role leading to more effective and more satisfied volunteers.

Getting started

Induction

The first priority for the new volunteer is to provide a full induction as soon as - or even before - s/he commences work. The purpose of induction is simply to enable the volunteer to get off to the best possible start in his/her role and within the organisation. There are five main types of information they need to do so:

1. **Organisational information** - e.g. mission statement, background, size and structure.
2. **Procedural information** - e.g. health and safety, code of practice, grievance procedures, communication.
3. **Role-related** - e.g. tasks, responsibilities, training, equipment and materials, supervision.
4. **Personal** - e.g. cloakrooms, toilets, kitchen, parking, expenses.
5. **Team-related** - e.g. who they will work with, line management, availability, meetings.

As well as deciding what new volunteers need to know, you will need to plan:

- **Who will tell them** - While you, as Volunteer Manager, will probably take the major responsibility, there may be other staff or volunteers who should be involved in explaining the role.
- **When and where will they be told** - It is not a good idea to try to get all this information into one meeting. You don't want to overwhelm the volunteer before s/he has even started. Prioritise the information and spread it out over a few days or weeks. Think about the information volunteers need to be aware of straight away.
- **How will you convey all this information** - Try to vary the ways in which the information is presented as well as spreading it over a period of time. Some details may need to be agreed with each individual, but most of it can probably be covered with a group. What resources and written materials will you need?



Aim: To develop an appropriate and comprehensive procedure for inducting new volunteers into the organisation.

Use the induction checklist overleaf to plan a volunteer induction programme. Some suggestions as to the relevant information in each category are given, but there may be other things specific to your organisation. For each category in the list decide:

- What information needs to be included?
- Where will you find the information, if you don't already have it?
- Who is the best person to present the information to new volunteers?
- When and how it should be done?

When you have completed this task, the sheet can be adapted as both a tool for those involved and as a record of the process. You may decide to circulate a copy to everyone involved in the process, to make them aware of their particular area of responsibility. A master copy could be used as a checklist, initialled and dated by the volunteer as each section is completed and kept as a record in the volunteer's file.



INDUCTION CHECKLIST

The first priority for any new volunteer is to receive a full induction before they start their role or as soon after they start as is possible. The aim of any induction should be to ensure that the volunteer understands their role, the contribution they will make to the organisation's goals and to ensure that they can fulfil their duties safely and effectively. Below are a range of areas that are applicable to most volunteering situations and which you can consider using in your volunteer inductions. However, this is only a template and each organisation should tailor the induction to their own organisational context/ volunteering roles and review it's regularly.

Name _____ Volunteer Role _____

What	Who	When & Where	Ho
About the organisation - the mission, objectives, aims - the kind of work done and why; - structure: teams & management; - importance of volunteers to the organisation.	<i>Volunteer Manager</i>	<i>At the start of the first day, as part of initial meeting</i>	<i>e.g. Presentation-highlight Volunteer policy.</i>
The building / volunteer base - Office layout, toilets, parking, fire exit and procedures etc; - Facilities for volunteers e.g. break out area, parking, notice board, kitchen, pigeon holes, health and safety guidelines.			<i>e.g. Tour of the Building;</i>
The role - Outline of volunteer role, tasks involved, confirm agreed commitment day / time etc; - Staff / Volunteers working with directly; - Boundaries of role / Expected Conduct / Confidentiality; - The process to follow if difficult situations arise; - Insurance cover; - Health and Safety.			<i>Go through role description, volunteer handbook and any other relevant policies or information, code of practice or guidelines.</i>
The support system - Key contact and their details; - Outline length of settling in period and explain initial review; - Other support available i.e. supervision/support meetings; - Resources, equipment, - Training; - How expenses are paid; - Guidance on expenses for those on social security benefits			

Volunteer: I confirm that I have completed all items in the induction checklist and where indicated understand the policies and procedures. Print Name: _____ Signature: _____

Volunteer Supervisor: I confirm that all items in the induction checklist, including policies and procedures have been explained. Print Name: _____ Signature: _____

‘Settling In Period’ and review

In reality, it is only when a new volunteer has actually started the work and successfully completed a ‘Settling in period’ that the recruitment and selection process is truly finished. The purpose of having an agreed ‘Settling in period’ is to allow both the organisation and the volunteer a way of ensuring that their expectations of the relationship are in fact being met. By agreeing to review the relationship at an early stage the volunteer is reassured that any initial anxieties will be addressed, and the organisation can identify any potential problems before they become major crises. It allows a graceful way out for both parties if things are not working out, helping your organisation to maintain a positive relationship with the individual. Even if it is not as a volunteer, s/he may contribute to the work of the organisation in ‘one off’ or ‘occasional’ roles, from supporting fundraising events to increasing awareness of your organisation in their own community.

The length of the ‘Settling in period’ depends on the nature of the work, the number of hours the volunteer works etc., but should be long enough for all the parties to form realistic opinions of how the arrangement is working out. During the ‘Settling in period’ you should be prepared to offer the volunteer additional support while they get used to the work and the organisation. They should also be supervised more closely to ensure that the work is being done in the right way and to the necessary standard, which also provides an opportunity to make an initial assessment of the new volunteer’s training needs.

It is important that the ‘Settling in period’ is clearly brought to a close, usually with some sort of a review meeting between the volunteer and the Volunteer Manager, and perhaps the volunteer’s direct supervisor. This meeting should be structured to allow all parties to discuss what is going well, and what is not going so well, to raise any anxieties and address any potential problems. The meeting must conclude with a clear decision on how the relationship is to proceed, agreed on and followed through by everyone. You may decide to:

- continue with the current arrangements.
- add to or amend the arrangements, for

instance by reducing the number of hours the volunteer works or providing additional training.

- change the arrangements by agreeing with the volunteer on a different role.
- terminate the arrangement by ending the relationship.

Doing it right

Training

Training for all workers, whether paid or unpaid, is increasingly being recognised as a feature of successful organisations. Government policy understands education and lifelong learning as essential to a healthy economy and vibrant communities. When thinking about training volunteers, it must be remembered that choice is an essential element of volunteering, and not every volunteer will want to undertake training. Organisations should also be aware that training offered to volunteers must have a direct bearing on their voluntary work to avoid being regarded as a taxable ‘perk’.

However, for many, these opportunities are a central motivation in their volunteering, and some skilled volunteer roles may have training as part of their requirements. Every volunteer-involving organisation should look at their own reasons, policies and values for volunteer involvement 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.
- Training helps ensure that everyone can meet organisational standards of work.
- Funders may expect or demand training for workers involved in the projects they fund.
- Volunteers may need training in particular organisational procedures.
- Training is an important element in risk management and meeting regulations i.e. health and safety, data protection.
- Training demonstrates the value placed 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.

The next workbook in this series, *Managing Volunteer Training*, addresses practical and theoretical training issues in some detail. It is especially appropriate for Volunteer Managers working in smaller organisations without the luxury of a dedicated training department. However it is also relevant to all Volunteer Managers who recognise that they have a role in the ongoing development of all those individuals for whom they have responsibility.

Code of practice

A code of practice is a set of guidelines that lay out how you expect volunteers involved with your organisation to behave - basically the 'dos and don'ts' for volunteers. Along with the Volunteer Role Description, it makes clear each volunteer's role and defines the limits of their work and responsibilities. The code of practice should also make clear the consequences of contravening the standards set. Putting these standards in writing makes them explicit and gives them weight, so that everyone is aware of what is and is not acceptable.

Some Volunteer Managers are initially reluctant to introduce such a formal document for fear of appearing intrusive or inflexible. However, having a code of practice is as much for the benefit of the volunteer as the organisation. Most volunteers will be more than happy to use such guidance if it is presented to them properly. It is vital to provide an opportunity to discuss the code of practice fully with new volunteers. Avoid at all costs appearing just to give out a book of rules. It may be more appropriate to present the code of practice in a volunteer handbook, taking time to introduce and explain it at induction.

The actual content of a code of practice will reflect particular organisational activities, client group and culture and therefore will be unique to each organisation. Much of it is likely to focus

on the relationships of volunteers with each other, with staff and particularly with clients. For instance, it may be deemed unacceptable for volunteers to accept gifts from service-users or it may be expected that all personal information about clients is kept confidential. This may also be where standards for the work are specified, such as the importance of punctuality and reliability. Often the issues to be addressed in a code of practice will be suggested by incidents or problems that have arisen in the past. Indeed such guidelines will need to be reviewed and updated continuously in the light of changing circumstances and experience.

Volunteer agreements

As emphasised throughout this chapter, one of the keys to using these procedures effectively is to ensure that every volunteer is aware of and understands the plethora of arrangements which pertain to their particular placement. A volunteer agreement is simply written confirmation of the understanding between the volunteer and the organisation, on which the volunteering is based.

In the past some organisations have been reluctant to put anything in writing for fear of implying a formal employer-employee contract. However employment contracts, in law, do not depend on the existence of a written agreement. Rather it is the nature of the relationship - which imposes binding obligations on each party and is based on remuneration - that defines an employee. Volunteer-involving organisations that are honest and open about the nature of the voluntary relationship and pay only out-of-pocket expenses to volunteers should have nothing to fear.² It is common to make a statement to this effect in the agreement itself, for instance; ***'This agreement sets out expectations and intentions, not obligations, and is binding in honour only'***.

Other Volunteer Managers have been concerned that a written agreement is too formal and may intimidate new volunteers. However, all the procedures recommended for the effective management of volunteers in this workbook aim to help satisfy the needs of both the volunteer and the organisation. It is, therefore, often a

² See Workbook *Five Volunteers and the Wider Organisation* for more detailed information on some of the legal issues around volunteering.



question of presentation that is the key to successful volunteer management - **how** something is done rather than what is done. As will become clear throughout this book, while many good practice principles for managing paid staff can contribute to the management of volunteers, they cannot be applied wholesale without some adaptation which recognises the difference between these relationships.

In relation to **volunteer agreements**, the relevant information could be laid out in a **'welcome' letter** instead of as a formal agreement, if that is deemed more suitable for your volunteers. **It is also wise to avoid the use of jargon or employment-related terms in this and in all volunteering documentation.**

Depending on the nature of the volunteer role, the content of the **volunteer agreement/ welcome letter** may include any or all of the following:

- The nature and purpose of the voluntary work.
- Availability of individual for voluntary work (e.g. times/days and hours per week; dates/days unavailable).
- Length of 'Settling in period' and arrangements for review.
- Position and name of main contact person for support / information and contact details for them.
- What the volunteer hopes for from the organisation.
- What the organisation hopes for from the volunteer.
- The volunteer's commitment to abide by the organisation's values and policies.
- Any meetings, events, committees etc the volunteer is entitled to be involved in.
- Any training that is available or mandatory.
- How and when support will be provided.
- How problems/complaints can be reported and how they will be dealt with.
- Reimbursable expenses and how to claim for them.
- Information on any insurance/safety requirements.
- Notice requested if the volunteer is unable to attend or wishes to leave

This covers quite a lot of possible inclusions, not all of it will be relevant to the roles you offer. Keep it as simple as possible and make sure to clarify all these points during induction. A copy of the agreement/ welcome letter, should be kept in the volunteer's individual file with the date it was discussed and a copy given to the volunteer for their own records. If it was discussed as part of the induction, tick it off the induction checklist as being covered. It can be useful to refer back to this if there are difficulties or queries in the future. An example of a volunteer agreement in letter form follows.

Most of the procedures we have considered so far are aimed at clarifying expectations and understandings between the volunteer and the organisation. A proper induction procedure, a volunteer agreement/ welcome letter and an agreed 'settling in period' should get new volunteers off to a good start, equipping them with what they need to feel part of the organisation and become comfortable with their role. Providing a code of practice and relevant training should not only keep the volunteer on the right track, but also underlines the importance of the work they do by setting standards of performance and behaviour. Next we will consider how Volunteer Managers can hold on to and develop good volunteers through support and supervision.



SAMPLE VOLUNTEER AGREEMENT / WELCOME LETTER

Anytown Community Project

Dear John,

I am pleased to welcome you as one of Anytown Community Project's volunteers. As you know, I am the Volunteer Manager and will be your main contact for support as a charity shop volunteer. Do not hesitate to contact me regarding any queries you have about your volunteering.

As agreed we look forward to you starting with us on Monday 2nd June 2012 with a 6 week settling-in period. This will include giving you an opportunity to work in the shop and will include an induction programme and initial training to support you in carrying out your role. After the 6 weeks, we will sit down and review your voluntary work placement with us. As agreed at the meeting, you are able to volunteer 6 hours each week, over 3 days - Mondays, Wednesdays and Fridays. If you cannot attend, or have a particular problem, please contact me at the office. If you want to change this, please discuss it with me.

You have been given a copy of your role description, outlining the nature and purpose of the voluntary work. A full induction session will be arranged on your first day to go through our volunteers' handbook. This will provide you with what you need to know to make your volunteering experience with us a worthwhile and enjoyable one. You will of course receive a copy of the volunteer handbook.

I would like to take this opportunity to outline the expectations of both Anytown Community Project and you as one of our new volunteers. This of course is a voluntary arrangement – it is binding in honour only and you are free to withdraw at any time.

What we expect from you:-

- That you will volunteer at the times agreed or inform us if this is not possible.
- That you will abide by our organisation's objects and its equal opportunities, health and safety confidentiality and other policies.

What you can expect from us:-

- A full induction and any training necessary to help you carry out your role
- support from myself to help you carry out your role.
- To be treated with respect and in line with our organisation's policies on e.g. equal opportunities, health and safety.
- To be provided with reimbursable expenses, and clear information on how to claim them.
- To be covered by our organisation's insurance.

I hope you find this arrangement satisfactory and I look forward to discussing your role in more detail at induction.

Yours
J Bloggs
Volunteer Manager

3. Support and Supervision

While all of the procedures discussed in the last chapter are essential elements of good practice, this chapter looks at some of the most important (and most neglected) skills and procedures for managing and motivating volunteers. Support and supervision are key tools for the Volunteer Manager in balancing the needs of the organisation with those of the volunteer to achieve a productive and fulfilling volunteering experience.

Spot the difference

★ The words ‘support’ and ‘supervision’ are often used almost interchangeably and, in practice, they are frequently delivered through the same activities or methods. However, they do in fact fulfil very distinct functions, and it is important to distinguish between them in order to achieve the balance mentioned above. It may be useful to think of support and supervision as a continuum with the needs of the volunteer at one end and the demands of the role at the other:



Support has been defined as, “*The interest, understanding and care which is provided for volunteers, which keeps them going all the time and additionally in times of crisis and enables them to satisfy their needs and those of the organisation.*”

The **functions of support** activities are to:

- focus on the person;
- set up an environment where volunteers can express themselves;
- combat isolation which sometimes accompanies some volunteer roles;
- help resolve problems, usually of a personal nature;
- help a volunteer feel good about what they are doing and show that they are valued.

Supervision, on the other hand, is described as, “*A way of monitoring a volunteer’s performance to help them benefit from their placement, to make sure they are*

carrying out tasks appropriately, encourage problem solving and provide guidance.”

The main **functions of supervision** are:

- monitoring work and work performance;
- evaluating work and work performance;
- clarifying priorities;
- identifying training needs;
- discussing the volunteering task and responsibilities;
- providing a framework for agreement on change;
- improving confidence and competence in doing the work;
- sharing perceptions on how the work is progressing;
- recognising and dealing with problems.



Aim: To consider ways of providing support and supervision to volunteers.

- List all the methods and techniques which you use to communicate with and manage your volunteers, from formal, scheduled meetings to casual daily contacts.
- Compare each item on your list against the functions listed above to identify which, if any, that activity fulfils. Are there any functions that are not fulfilled by any of your current activities?
- Review the list and consider whether the activities tend more towards support or supervision, or if there is a good balance.

You will probably find that you are already fulfilling many of the functions of support and supervision, although it may be in an unstructured and informal rather than a systematic way. Aim to develop a systematic approach to volunteer support and supervision, combining a variety of activities and options which are suitable to the needs of your particular organisation and volunteers. The overall system needs to be capable of fulfilling all the functions listed above, and should reflect the following **four key principles**.





Climate

It is vital that you foster a climate that allows volunteers to ask for help. Volunteers have no monetary incentives and so will seek other rewards from their work. A clear message should be given to volunteers that they should ask for help if they need it. Some volunteers can feel that people who do voluntary work shouldn't 'annoy' the busy staff by asking questions and should just get on with it. A point of contact for support should always be available, especially when a volunteer has just started, support needs to be accessible and carried out in a way that makes them feel it is ok to ask. Equally, supervision must be seen as part of the volunteering experience and not something that only happens when there is a problem.

Accessibility

Support and supervision must be provided at appropriate times and places for volunteers. Think about arranging the meeting around their volunteering role i.e. meet up at their place of volunteering 30 mins before they are due to start. Sometimes this means taking support to volunteers and offering it on their terms, even though this may mean making further demands on the resources of the organisation. This is particularly important in terms of developing an equal opportunities approach to volunteer management.

Flexibility

This is the ability to accommodate the needs of individual volunteers. It may suit the organisation to plan a highly structured system of support and supervision, but this may be quite inappropriate for some of its volunteers. It is a matter of offering a range of options to the volunteer and tailoring a system to that individual's requirements. Organisations also need to take on board the culture and language needs of different groups and provide support according to those and other special needs.

Appropriateness

The support given must bear some relationship to the work that volunteers are being asked to do as well as being obviously helpful to them. A balance should be maintained between the primary needs of the organisation for the completion of tasks and delivery of services

(supervision) on the one hand and on the other, the personal needs of the volunteer (support). Volunteering is not therapy although much of the activity may be therapeutic for the volunteer.



Aim: To review current procedures for volunteer support and supervision against the needs of the organisation and those of volunteers.

- Answer the questions below in relation to your own organisation/project.
 1. How many volunteers do you manage?
 2. What role(s) do they fulfil?
 3. Where and when do they carry out their voluntary work?
 4. With whom do they do the work (i.e. colleagues, supervisors, clients)?
 5. What are the most difficult/problematic aspects of the work?
 6. What level(s) of supervision does the role(s) require?
 7. What characteristics or circumstances (if any) do your volunteers have in common?
 8. What are their support needs most likely to be? What level of support are they likely to require?
- Review your answers against the information from the previous exercise and consider:
 - Do the range of activities you identified form a coherent system for supporting all your volunteers and supervising their work ?
 - Does this system meet the four key principles?
- List key issues that your current support and supervision activities do not address.

Now we will look at some approaches and methods for providing both support and supervision that should help you to address those gaps.

Supporting the person

Support for volunteers can be offered in both formal/structured ways (e.g. induction, training, one to one meetings and/or group support meetings) and informal/unstructured ways (e.g. by listening and communicating with your volunteers on a daily basis). We can distinguish between eight broad types of support that may be offered through these and other activities. These are:

- **Offering advice** - Sharing your ideas on what would be the best course of action for them to take, based on your own experience;
- **Giving information** - Providing volunteers with the information they need in a particular situation (e.g. role description, relevant contacts etc.);
- **Direct action** - Doing something on behalf of the volunteer and relieving pressure;
- **Training** - Helping someone to acquire knowledge and skills;
- **Changing systems** - Working to influence and improve systems which cause difficulty for volunteers - working on organisational development rather than with individuals;
- **Personal support** - Helping volunteers to explore problems and alternative ways of dealing with them;
- **Facilitating mutual support** - Enabling volunteers to support each other (e.g. group support, buddying);
- **Supervisory support** - Giving feedback on volunteer performance.

Each category may amount to a 'strategy' for support for a particular volunteer in a specific work context. A good support system can accommodate any strategy or combination of strategies, and should use a variety of methods and activities for making that support available to volunteers. Consider the following issues in relation to how you provide support:

One-to-one vs group support - Group support can be difficult to do well, but it can be a very time-efficient way of providing support to a large number of volunteers. It can increase the uptake of support by providing the incentive of social contact with colleagues, but it may not be

a suitable environment to address certain individual needs. A good support system combines both and will also address many of the functions of supervision for volunteers. Some advantages of working in a group include:

- ✓ One person does not have to spread themselves so thinly and support is available from a wider range of people.
- ✓ Groups lend themselves to more imaginative ways of dealing with skills development and discussion of important issues.
- ✓ Giving and receiving feedback can become part of the culture of a group and can enhance self-awareness and learning, as well as improving volunteer effectiveness.
- ✓ Groups can enable volunteers to become more active within an organisation - for example giving the opportunity to exchange ideas on the way that their own work is organised, or by looking at policy development issues.
- ✓ Groups can be social and fun!

Manager/supervisor vs. peers - Volunteers can be facilitated in supporting each other through support group meetings or a buddy system. This can take some of the burden off you, the Volunteer Manager, although you should still monitor the effectiveness of such methods and be available to facilitate meetings when required. While peer support can tap into creative and varied ways of developing volunteers and dealing with problems, the responsibility for providing support to volunteers still lies ultimately with the Volunteer Manager.

In person vs at a distance - It is not always possible to meet every volunteer face-to-face on a regular basis (e.g. when volunteers work at different locations or during different hours from you) but they still need support. In this situation, communication is vital and volunteers should receive regular and timely updates on issues affecting them and the wider organisation. Telephone contact allows direct discussion of the volunteer's situation. If you have difficulty getting hold of a volunteer, contact him/her by letter or email and if necessary schedule a 'telephone meeting'. Volunteers who are based away





from the main office may feel isolated or unrecognised, so try to get out to see them in their own environment occasionally and consider organising social get togethers for volunteers which will include those volunteers that tend to work 'solo'.

Scheduled vs on demand - Many volunteers feel they want to give to the organisation and don't expect to get anything back. They may be reluctant to ask for support even when they face real difficulties. By having regular scheduled support opportunities, volunteers are encouraged to view support as part and parcel of their volunteering structure. However, difficulties don't always arise just in time for the volunteer's next support meeting, and experienced volunteers may not want to be tied to monthly meetings "whether they need it or not". So you will also need to find ways of providing support on demand which fit with your own responsibilities and workload.

Supervising the work

The factors discussed above are also relevant to supervision but, since supervision is one of the main ways in which you ensure that volunteers are working effectively for the organisation, it is usually appropriate to include some more structured methods in the wider support system for this purpose. With regard to supervision 'strategies', Jacqui Long³ identified three broad approaches:

Managerial - Volunteers need to fulfil the roles that have been assigned to them by the organisation and to do this in ways which the organisation considers appropriate (e.g. equal opportunities, setting boundaries with clients, etc). In supervision, the managerial function is about making sure the volunteer is doing what is expected of them. It may also involve exploring how they are balancing the sometimes conflicting expectations placed on them by the organisation and its clients, as well as their own standards and values.

Educative - This focuses on the development of the individual volunteer in their voluntary work. An important aspect of this will be giving feedback to enable people to reflect on particular situations in order to learn from them, identify strengths

and weaknesses, and explore areas for development and training. This process will mainly focus on enabling the volunteer to draw insights from their experience, but may also include sharing of information by the supervisor in order to develop someone's understanding or knowledge.

Supportive - This is concerned with creating a safe space in which volunteers can talk about their feelings about their work and any problems or issues around it. It may also involve enabling someone to explore and deal with feelings in their personal life which are affecting their volunteering. The aim will not necessarily be to resolve these problems, but to identify ways of getting appropriate support. The other key aspect of the supportive function is giving recognition and encouragement, which helps a volunteer to feel valued and empowered.

It is important to remember that supervision is not the same as support, or having a friendly chat, nor is it 'checking up'. **Supervision is making sure that the needs and interests of the individual are being balanced with the need and interests of the organisation.** Where they aren't, as manager, you must take action to sort it out.

For this reason among others, most managers find one-to-one meetings are essential in fulfilling the supervisory functions. Obviously, this can be time-consuming so, if you have responsibility for a large number of volunteers in sensitive or demanding roles, it may be appropriate to delegate this duty to each volunteer's direct supervisor. As Volunteer Manager, you will need to ensure that all staff (and/or volunteers) involved in such duties understand good practice in providing supervision to volunteers. It is also a good idea to make time to meet directly with every volunteer on a one-to-one basis at some stage during the year. For certain volunteer roles with limited responsibility this may even suffice. Both types of meeting need to focus on the following seven key supervision tasks:

- ✓ Establishing good working relationships among volunteers and with paid workers.

³ Does the supervision of volunteers differ from the supervision of paid staff within an organisation?

Jacqui Long, 1995



- ✓ Encouraging attitudes that motivate people towards improving their performance.
- ✓ Interpreting and applying the organisation's policies, systems and standards.
- ✓ Assisting volunteers to work safely and within their abilities.
- ✓ Dealing with any problems regarding the volunteer's performance.
- ✓ Initiating or recommending volunteers for new tasks or training.
- ✓ Planning and maintaining work schedules.

The following questions will help to ensure that you cover all these tasks:



Questions for supervision meetings

CHECKLIST OF QUESTIONS

These are general headings. You may not cover them in this order or you may not need to ask them all as the volunteer will answer several in one go or you may not feel they are relevant.

- 1 **GENERALLY:** How do you feel about your volunteering generally?
- 2 **WHAT'S GOING WELL?:** Is there anything you've done which: you are pleased about? you have particularly enjoyed?

3 **WHAT'S NOT BEEN GOING SO WELL?:**

Is there anything that has happened which you are unsure about? Are there particular situations that you would like to talk through?

4 **WORKLOAD:** How are you finding the workload? - too much, too little, too easy, too demanding? Is volunteering fitting in with the other commitments you have in your life?

5 **ACTIONS AGREED LAST SESSION:** Last meeting you/I agreed to do ____, let's chat about the progress with this.

6 **RELATIONSHIPS:** How are you getting on with the rest of the team – staff/volunteers/service users/clients?

7 **IDEAS FOR IMPROVEMENT:** Discuss and record any suggestions the volunteer may have given on how to improve the project. Explore if there are aspects of their volunteering they (or you) feel they could improve on. Any concerns you have with the volunteer (e.g. performance) should be raised during the session. Serious concerns may invoke the formal part of a 'Complaints and Dealing with Concerns' policy and may require a specific meeting.

8 **PERSONAL DEVELOPMENT:** Explore if any issues/concerns/problems discussed in the session could be addressed with additional information or training. Agree what these would be and the processes for achieving them.

9 **DEVELOPMENTS TO ROLE:** Are you happy with your present volunteer role? Are there any special projects/new areas of work you would like to explore (This may depend on staff capacity/funds to support new work)? The volunteer may want to end the volunteer relationship and try a new role.

10 **NEW ACTIONS:** Are there any actions that we should set ourselves between now and next time we meet? Is there any particular issue that you would like me to bring to the team/management?



This chapter contains a lot of information, covering a number of broad ideas on support and supervision. However, it does not - and cannot - tell you how a system for supporting and supervising volunteers in your organisation should look. Therefore, take a break now, and when you come back spend some time on the following task. You may want to work on it over a number of days or, if you can, use it to stimulate a few initial ideas for discussion with relevant colleagues. A really effective support and supervision system can only be developed over time by testing out what works and what doesn't work for particular volunteers and particular volunteer roles.



Aim: To begin to plan a system for supporting and supervising volunteers, which can meet the needs of individual volunteers and the organisation.

- Use the information from this chapter and from the earlier exercises, and the 'System Planner' overleaf to identify the most suitable methods or activities for providing support and supervision to volunteers. For each method or activity, consider:
 - What is the balance between support and supervision?
 - Which functions of support &/or supervision could it fulfil?
 - Would it be most effectively used one-to-one or in a group?
- Decide how you will implement these methods to build a system of support and supervision, considering:

Who

- Who will have access to this?
- Who will be responsible for implementing it?
- Who else should be involved in it?
- Will it be supervisor or peer-led?

When and where

- Frequency
- Duration
- On demand or scheduled?
- Location
- Flexibility
- In person or at a distance?

Resources

- How much time will it require, including preparation?
- What facilities, equipment or materials might you require?
- What expenses might volunteers need reimbursed in order to access it?
- What information or expertise might you need to access?
- Review the system as it develops to ensure it meets the four key principles.

SUPPORT AND SUPERVISION SYSTEM PLANNER

Method	Who	When and Where	Resources

REMEMBER - First and foremost, your system must address the need of the organisation to have work done to an acceptable standard, but good volunteer management means it must also meet the needs of your volunteers if it is to be effective.





4. Meeting the challenges

Volunteers are an invaluable resource, but the management of any resource can at times be problematic. Even though you have a fair recruitment and selection process to make a good match between the volunteer and the task and put in place the sorts of management procedures discussed in the two previous chapters to manage them - problems can still occur. There will be minor issues, which, although not needing immediate attention, may need monitoring. At the other end of the scale are the potential or actual crises that require clear thinking and decisive action. It can be a useful (if somewhat frightening!) exercise for the purpose of risk assessment⁴ to list the sorts of problems that could potentially occur with volunteers in your particular organisation. For now, however, suffice to say that most of the issues you identify will come down to three basic situations:

- A complaint about a volunteer.
- A complaint by a volunteer.
- Unsatisfactory performance by a volunteer.

No matter what the size or seriousness of the problems, dealing with them can often be difficult and is almost always unpleasant. Having to do this without an agreed procedure can be an extremely stressful experience, not only for the volunteer and Manager concerned, but for the organisation as a whole. However certain procedures, if in place, may make it easier. As with all your volunteer management procedures, it is good practice to have procedures for dealing with difficult situations involving volunteers written and in place before you begin to involve volunteers.

Dealing with difficult situations

At the more serious end of the scale is the situation where a formal complaint is made to an organisation. The same basic procedure should be appropriate whether a complaint is by or about a volunteer. The point of having a complaints procedure is that the organisation acts (and is seen to act) in a fair and appropriate way to address the problem. The procedure must

be written down and made known to all new volunteers and to those who work or have contact with volunteers. As stated previously, while your organisation's standard complaints/grievance procedures can provide a basic model for this, it is vital to ensure that procedures relating to volunteers are appropriate to their unique place in the organisation. Avoid convoluted processes, which are overly bureaucratic or inaccessible to volunteers, but as a minimum the following issues should be addressed:

- 1 **Who is the first point of contact for a complaint?**
Most likely it will be the Volunteer Manager but, whoever it is, suggest an alternative in case he/she is unavailable (e.g. on holiday) or the subject of the complaint!
- 2 **If the complaint is not resolved at the first stage, what will happen subsequently?**
It is not always necessary or appropriate to have a whole series of stages in a complaints procedure. Remember - the aim is to provide a clear and fair process which is appropriate to the voluntary nature of the relationship.
- 3 **Where does the final decision lie?**
Is there any option to appeal against it?
- 4 **How long should each stage of the process take?**
Be realistic!
- 5 **Who will be involved?**
Both the complainant and the subject(s) of the complaint should be allowed to bring someone along for moral support - friend or colleague.
- 6 **How will the process be recorded?**
As a formal process, every stage should be clearly and accurately recorded. It is also a good idea to confirm arrangements and decisions in writing. All information from the process - written or verbal - should be accurately recorded and kept confidential.

⁴ For more information on health and safety issues, see Workbook Five *Volunteers and the Wider Organisation*.

Working within such a procedure can help to 'depersonalise' the process, making it a less emotional experience for the subject of the complaint and, therefore, increasing the likelihood of resolving the complaint without permanent damage to the relationships between individuals and with the organisation. If you find yourself in the position of arbiter or referee in a complaint it is vital that your handling of the situation is seen to be fair and open. When dealing with a complaint by or about a volunteer, you should be very clear about:

- the particular incident of concern;
- any previous incidents taken into account;
- any remedial action to be taken e.g. an apology, training, money to be paid back, etc.;
- any new behaviour expected;
- what will happen if the arrangements agreed are not adhered to.

Of course, all of this can and should be overridden in the case of a particularly serious incident - but it should be clear to all what 'a particularly serious incident' is. This is best dealt with in the Code of Practice, which means you need to give some consideration to this now! If the incident involves a criminal offence, the police, not the organisation, should investigate.



Aim: To identify the sorts of conduct that might result in asking a volunteer to leave immediately.

Try to compile a list that describes the sorts of incidents that would result in immediate suspension or a volunteer being asked to leave. Be realistic - not all 'serious' problems will require such drastic action, but the safety of clients, staff and volunteers is paramount.

- Consider the issues below in relation to your volunteers and their work.
 - Violence/physical abuse.
 - Inappropriate relationships (e.g. with service-users).
 - Sexual or emotional abuse.
 - Possession/use of/sale of alcohol or drugs during work.
 - Theft/financial abuse.

- Reckless/careless behaviour.
 - Fraud/misrepresentation.
 - Bullying / harassment.
- Look at organisational policies e.g. on conduct, harassment and discrimination. A few of these may be specific to employees, but most will be applicable to everyone in the organisation. Should the Code of Practice simply refer to the policies in question or do they need to be 'contextualised' for volunteers?

Try to find opportunities to discuss your list with service-users or their representatives, experienced volunteers, colleagues and Volunteer Managers in other organisations. They may be able to identify areas you have missed.

Dealing with poor performance

Happily the sorts of situation described above are very rare. Most volunteers - and service-users and staff - are genuine and well-intentioned. Still relatively rare, but by far the more likely situation, is that such volunteers are unable to live up to their intentions or unwilling to live up to your expectations. Dealing with this situation obviously requires a different approach to handling a formal complaint. No set of rules can cover all circumstances that may arise, so instead of laying down a formal procedure as above, try to specify clearly and concisely the process necessary for the safe and efficient performance of work and for the maintenance of satisfactory relations with clients, volunteers and staff.

Processes for dealing with problems with a volunteer's performance should usually be incorporated into standard support and supervision arrangements, in the first instance at least. Managerial approaches to supervision emphasise and encourage improvement in a volunteer's conduct and should not be viewed as a means of imposing sanctions. Problems with a volunteer's work should always be addressed on a one-to-one basis and good supervision should follow a pattern in dealing with problem behaviour:





1. The volunteer is made aware of the particular behaviour causing concern, and the consequences of the behaviour (e.g for the client, the organisation or the volunteer) are made clear.
2. Offer the volunteer some motivation to change, focussing on the positive benefits of the desired behaviour and avoiding negative motivations (i.e. threats).
3. Ensure that the volunteer understands the change expected by explaining exactly what s/he needs to do and agreeing on some measurable goal or target.
4. Make sure that the volunteer gets the opportunity to practice the correct behaviour. Ensure s/he has enough time and support to make the change.
5. Recognise and praise the new behaviour to reinforce the change.

Even if the above steps are followed, the volunteer's behaviour may not change and it is vital that you follow through with further action. Where ongoing problems lead to a formal complaint, the agreed complaints procedure should be implemented (see above). Depending on the nature of the volunteer role and the tenor of the relationship between volunteer and organisation, you may feel it is appropriate to develop a formal 'disciplinary type' procedure for volunteers. While the actual process would be similar to that described above, you could formalise it by:

- putting the procedure in writing;
- setting a limit on the duration of the procedure; and,
- recording the process in a standardised format.

All of this simply emphasises the seriousness of the situation and you need to be sure that this approach is both effective and appropriate to the voluntary nature of the relationship. If a problem goes this far, it may be simpler and more appropriate to the needs of both the volunteer and the organisation to simply agree to end the relationship. However, if

the problem is with a specific aspect of the volunteer's performance, and not their attitude in general, there are alternatives to asking him/her to leave. You may consider these options:

- **Reassign** to a new area of work.
- **Retrain** to refresh or develop skills.
- **Revitalise** by offering some 'time out'/ break from their voluntary work.
- **Refer** to another organisation or a source of help.
- **Retirement**, making sure to recognise their contribution and encourage ongoing (social) links to the organisation.

However, if it does come down to asking a volunteer to leave, it is unlikely to be either pleasant or easy - for you or for the volunteer. Minimise the blow by keeping the following tips in mind:

- Be certain about your decision. Write down your reasons for asking the volunteer to leave or talk it over with your supervisor if necessary.
- Always tell the volunteer in person and in private, but be mindful of your own safety if you think there is any danger of a bad reaction.
- Keep it brief and be direct. Have it in writing if you think this will help to emphasise the finality of the decision.
- Don't get drawn into argument or negotiation - that stage has passed.
- Tell others who need to know that the volunteer has left - the volunteer's supervisor, clients, personnel or reception for instance. You don't necessarily need to say why.

Handling conflicts⁵

Even where clear and fair processes exist for managing difficult situations involving volunteers, few people feel really comfortable with these sorts of situations. The truth is that most of us hate conflict and will do what we can to avoid it. All the procedures in the world will not dispel the feeling that pointing out a volunteer's shortcomings or refereeing a dispute might make people dislike us - and everybody wants to be liked. However, the truth of

⁵ This section is based on Chapter Four of *Handling Problem Volunteers* by S McCurley and S Vineyard.



the matter is that working with people will involve having to deal with difficult situation from time to time.

If we accept this, then we need to find new ways of thinking about and dealing with these situations that allow us to use a more positive approach. The following concepts underpin such an approach:

★ **Conflict is neither good nor bad - it is simply there.**

It is a simple fact of life that, since everyone is not exactly alike, people have differing needs and interests which sometimes conflict with those of others. However, while conflict in itself is neutral, our reaction to conflict can be positive or negative.

Conflict generates energy.

This can be seen as a potentially positive opportunity - and is certainly preferable to apathy. The challenge is to harness the energy created by conflict for the good. Blame, defensiveness, personal attacks and harping on past problems are all typical signs of negativity in the process.

Resolving conflict is about finding a resolution acceptable to all those involved.

There is no such thing as a 'win-lose' outcome, as the conflict remains unresolved and ultimately everyone loses.

Solutions can only be reached when the real issues are addressed.

In conflicts, the real issues, or interests, are often masked by symptoms or the position the protagonists take (i.e. the response or how a person reacts). Focussing much energy on dealing with these side issues can 'win the battle but lose the war' diverting us from the real issue. When people refuse to engage in a process to resolve their conflicts, continually raising new problems and objections, it may be that the real issue(s) have not yet been identified.

A solution that makes everyone 100% happy is an impossible goal.

Resolution usually involves compromise, with those involved getting some, but not all, of what they want. It is natural, especially for those in people-focussed professions, to try to make everyone happy but this is not usually possible when there are two or more conflicting sets of interests. People don't need to see eye to eye on everything to work well together as long as they share a common goal.

Negotiating peace

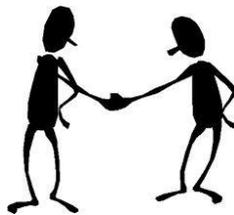
Resolving conflict is basically the process of negotiating acceptable agreements. When Volunteer Managers find themselves managing negotiations there are **three factors** that they must address in order to achieve an effective resolution:

- 1 **Creating common ground** - effective negotiators help people to focus on what they have in common. With volunteers this will often be the shared desire to assist the service users or achieve the organisation's aims. Another may be the desire for a return to harmonious working. The aim is to find a shared basis for an agreement, no matter how far apart those involved may feel themselves to be. It provides a point to which everyone can return when negotiations falter.
- 2 **Loosening deadlocks** - One of the first barriers to successful negotiation is when one or more parties take 'absolute' positions from which they refuse to move. Since this allows for no compromise the Volunteer Manager should try to:
 - Find more ways to meet peoples' needs. This involves identifying people's real 'bottom line' needs and exploring the widest possible range of ways to meet those needs.
 - Cut the 'costs' of compromise by finding out what is behind the objections. Often conflict is the result of one party feeling they have forfeit too much if a change is implemented - loss of recognition, responsibility or even competence. Look for ways to reduce or eliminate costs.



- Compensate people for their co-operation so that they have something to gain from a positive outcome to the conflict. Rewards might come in the way of public recognition, involvement in decisions, direct help for a pet project, etc.
 - Secure small concessions to help move toward resolution. These are the start of a real solution but usually only come after real issues have been identified, costs cut and compensation offered. At that point parties tend to relax a bit and are open to offering small concessions.
 - Identify a middle ground that requires both parties to move from their extreme positions a little way towards the other. The focus then moves from 'always' and 'never' to deciding on the conditions for 'sometimes'.
- 3 **The agreement itself** - The key to a good agreement which can be enforced is to be specific and measurable and to include consequences for breaking it. Attach timelines, list ultimate goals and make them measurable. Identify lines of authority, responsibility and how grievances will be handled so that everyone involved knows who to turn to when questions arise. Legal or financial issues will require expert advice.

Finally don't forget to give suitable recognition to those who hammered out the resolution and try to ensure that those who make it work are openly rewarded and praised. This will not only thank those who used their energies positively, but will model behaviour that can be repeated in the future.



Listed below are a range of useful policies and procedures that can help you, as a volunteer manager to be prepared to deal with difficult situations involving volunteers. All new volunteers should be made aware of these as part of their induction.

Problem Solving Procedures- these will outline the process that the organisation will follow when a problem involving a volunteer arises.

Complaints Policy and Procedure- this sets out the process that the organisation will follow when a complaint is made about or by a volunteer.

Difficult situation can be prevented or minimised in the first instance by providing clear communication about the role and the expectations to all volunteers at induction, before they begin their role.

Code of Practice is a set of guidelines which sets out the do's and don'ts of your volunteers.

Equal Opportunities statement / policy which sets out the organisations values and expectations in this respect.

5. And finally...

We have now looked at quite a range of procedures, approaches and skills to manage that worth-their-weight in gold commodity - good volunteers. But this workbook is called 'Managing and Motivating Volunteers' - so what about procedures and skills for motivating volunteers? This is undoubtedly one of the most challenging aspects of volunteer management and, as was emphasised in the Introduction, it is also a central value in volunteer involvement and key to the Volunteer Manager's role. Understanding why people volunteer and managing volunteers in a way that meets those needs is the single biggest factor in keeping your volunteers happy and committed to their work. So, from this perspective, everything covered in the workbook has a direct relevance to volunteer motivation.

Motivation

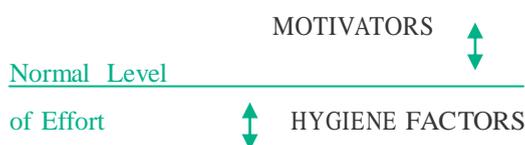
However, most of us wish to do more than merely keep those we manage content. When we talk about motivation, we are usually thinking of something that will fire and enthuse people to work a little harder, take on a little more responsibility or be a little more creative. Many theories of worker motivation seem to find it difficult to think beyond the pursuit of (usually financial) rewards, which is rather unhelpful in relation to motivating workers who are not paid. However, another line of thought distinguishes between external motivators (basically, punishments or rewards) and internal motivators, which have more to do with personal goals and values and is therefore very relevant to the volunteering context.

Frederick Herzberg suggested that there are two sets of factors at play in the motivation of people at work, and that each had quite distinct effects. He identified a number of 'hygiene factors' - external factors such as the physical working conditions, safety, organisational policies and procedures and relationships. He believed that, while these factors could not in themselves motivate people to work harder or better, they could be the cause of dissatisfaction. In other words, a bright well-equipped office will not motivate a volunteer to increase his or her time commitment, but a dark poorly-equipped office is likely to discourage even a willing volunteer.

Herzberg believed that real 'motivators' were linked to an individual's internal values and goals. In relation to work, he identified five key factors for most workers:

- ✓ achievement
- ✓ recognition
- ✓ interest in the work itself
- ✓ responsibility
- ✓ advancement/growth

When work provides these things, workers would be motivated to rise above the normal level of effort.



It is important to understand that this does not imply that 'hygiene factors' are unimportant in volunteer motivation. It is vital to get the hygiene factors right just to keep your volunteers, but it requires something more if you really want to motivate them towards an effort that is above the norm. Therefore, in practice, you must first ensure that the 'hygiene' factors are right as, where these are unsatisfactory, volunteers may be too demotivated to respond to the (internal) motivators. The volunteer left working alone in a gloomy office with a temperamental computer is unlikely to be enthused by you offering them more responsibility. Many of the good practice procedures discussed in this workbook should help to ensure that the external working conditions are right for your volunteers. Many volunteers are 'self-motivated' and removing these demotivators may be enough to 'keep them going'.

However, if you want to encourage your volunteers to increase their effort and/or their commitment to the work you must think about creating conditions that help fulfil the individual's internal motivations. It is important to remember that it is an individual's personal goals and values that largely define these internal factors. For instance, recognition needs to come from someone the individual respects if it is to motivate them. People choose to volunteer





for a variety of reasons, and most people have more than one reason to do so. Don't forget that volunteers' motivations will change over time, too. It is not really possible therefore to motivate another person directly - let alone to find a 'one size fits all' technique to enthuse every volunteer. As a manager, however, you can certainly help to create the conditions where the individual volunteer's values can be achieved alongside the goals and priorities of your organisation.

A few examples of this are given below, which reflect both the good practice principles identified elsewhere in the workbooks. You will be able to identify many more which are specific to each of your volunteers if you take the time to get to know their particular goals and aspirations.

- Loosen direct controls on experienced and competent volunteers, while retaining accountability (achievement and responsibility).

- Ensure volunteer roles reflect a natural area of work - all rather than part of a task (recognition, responsibility and achievement).
- Share organisational information with volunteers (recognition).
- Providing training and accreditation for volunteers (growth and recognition).
- Show genuine and specific appreciation of the work done (recognition).
- Set new more challenging targets for effective volunteers (advancement/growth, interest).

Obviously, such an approach requires you to get to know your volunteers, their particular values and motives in order to adapt your approach to get the best from each individual. This is a labour-intensive strategy but, as stated from the start, developing an effective and comprehensive system for managing volunteer involvement is a long-term project. The important thing is to make a start.

Good luck!



Appendix

Standards relevant to volunteer management

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

NATIONAL OCCUPATIONAL STANDARDS FOR MANAGING VOLUNTEERS

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

What are occupational standards and what do they describe?

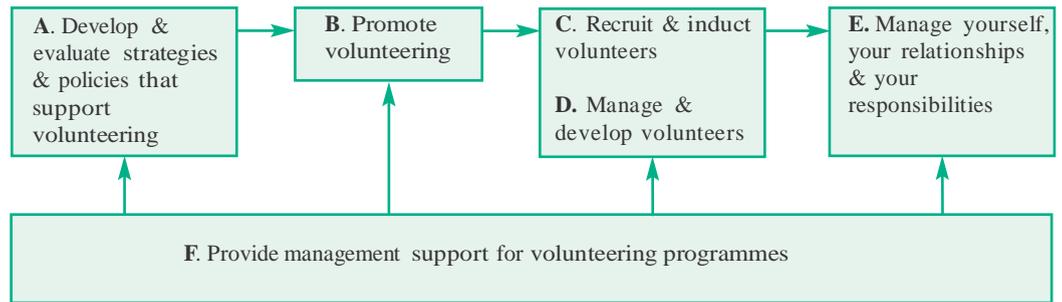
Occupational standards define a framework of good practice in the way people work, based on the functions of their job. They describe:

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

What are the national occupational standards for volunteer managers?

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

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



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

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

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

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

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



INVESTING IN VOLUNTEERS

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

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

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

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



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

Check out www.investinginvolunteers.org.uk for a copy of the Standard and for information on 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

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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