

Chapter 3

Volunteer Management Policy Templates



CORE QUALITY STANDARDS

- ◆ Program Mission
- ◆ Practitioner Training
- ◆ Program Accountability
- ◆ Administrative Accountability
- ◆ Program Evaluation

Applicable Service Quality Management Requirement

“A process for recruiting, screening, training, supporting and managing volunteers”

LBS Program Guidelines June 1998: Part 2, Section 1, Page 9

This requirement deals with volunteer management policies and procedures. Many of the policies and procedures are similar to the personnel policies and procedures found in Chapter 2 but there modified to deal specifically with the management of volunteers. The templates found in this section focus on areas of addressed by the core quality standards and are by no means an exhaustive collection of volunteer management policies and procedures.

Many community-based agencies depend on volunteer tutors. Establishing a clear set of policies and procedures in this area will make it easier to manage volunteers effectively.

ADDITIONAL RESOURCES:

The Screening Handbook Protecting Clients,
Staff and the Community

By Lorraine Street

© March 1996 Canadian Association of
Volunteer Bureaux and Centres
Ottawa, Ontario

The Gift of Time: The Provincial Training
Program for Volunteer Management

© 1991 Queen's Printer for Ontario

This series provides useful information about
volunteer management. Titles include:

"Volunteer Staff Relationships"

"Orientation and Training"

"Interviewing, Screening and Placement"

- ☐ **VOLUNTEERS:** Appropriately screened, trained and supervised volunteers may be involved in the provision of direct and support services.

WHY?

Volunteers are a significant and integral part of the working team and consequently, the agency has high standards for volunteers who wish to work with our learners. The same steps are required to be taken for volunteers as for staff because the same need to ensure their personal suitability exists as it does for staff. The agency must ensure that the volunteer is suitable to the program and the learners that the agency serves.

Procedures:

1. *The program coordinator will:*
 - *Interview volunteer applicants*
 - *Screen the applicants including reference checks where necessary*
 - *Make the final approval for acceptance of the volunteer if they feel that the volunteer is suitable for the agency*
 - *Match the volunteer with an appropriate learner*
 - *Arrange for a start date for the volunteer*
2. *Each volunteer will complete an orientation and training with respect to the program (see the policy entitled "Volunteer Orientation")*
3. *Volunteers will be provided with ongoing training to assist them in the provision of service.*
4. *Volunteers may be required to attend further training sessions where appropriate.*
5. *After orientation, the volunteer will complete a contract with the agency, specifying:*
 - *Supervisor (i.e.: Program Coordinator)*
 - *Time commitments*
 - *Job description*
 - *Program responsibilities to the volunteer*
 - *Agreement to adhere to the policies and procedures of the agency**(See sample contract that follows)*
6. *Each volunteer will be placed on probation for at least three months after the orientation during which time his/her suitability will continue to be evaluated.*

7. *Each volunteer will receive ongoing formal/informal supervision by his/her supervisor:*
 - *Documentation of these sessions will be maintained in the volunteer's file.*
 - *The program coordinator is ultimately responsible for the supervision of each volunteer.*
8. *Volunteers are expected to abide by established guidelines regarding acceptable behaviour and to remain familiar with the Agency Policies and Procedures.*
9. *Volunteers will log all time spent in the capacity as a volunteer on the quarterly hours sheet.*
10. *Volunteers are required to clear any expenditure through the program coordinator prior to purchase, or reimbursement may not be authorized.*
11. *A volunteer may be suspended from his/her assigned duties in the case of:*
 - *Actual or alleged inappropriate behaviour.*
 - *Issues arising in his/her life which may negatively affect performance. These issues will be discussed with the program coordinator at the earliest opportunity.*
 - *Re-instatement of assigned duties will occur in consultation with the executive director.*

Key Core Quality Standard:

12. Practitioner Training: A quality literacy program has practitioners trained in adult education with a focus on basic education. They have initial and ongoing training.

Features:

Practitioners, including staff and volunteers, are competent to provide literacy training.

- ◆ The program has a policy for defining the minimum qualifications of its practitioners.
- ◆ The program policy specifies if practitioners are expected to have previous education, training and experience, or if the program will provide training, such as for volunteer tutors, to enable them to acquire the necessary skills.
- ◆ Qualifications include the ability to assist adults in acquiring skills in literacy and numeracy, as well as an understanding of the program's philosophy and policies.
- ◆ The program assesses the competence of practitioners before they begin, taking into account prior learning and practical experience.

Source: Adapted from Boys and Girls Clubs of Greater Victoria

TUTOR AGREEMENT

You will be asked to sign this Volunteer Tutor Agreement when you volunteer at this agency.

When you sign this agreement you are saying that you agree with the statement and will abide with it.

You will not be kept as a volunteer tutor at the agency if you don't abide by this agreement.

I, _____, agree to do the following:

1. I will meet with my learner at least once per week.
2. I will arrive on time.
3. I will prepare my lessons in advance of each session.
4. If I am sick and cannot meet with my learner, I will call the learner or the agency office.
5. If I miss three scheduled sessions I may lose the learner that I have been matched with.
6. If my learner misses too many lessons, I may request a new match.
7. If my learner and I decide to meet outside of the agency offices, I will not hold the agency responsible for anything that happens.
8. I have read and understand the volunteer policy and procedure manual and agree to follow the policies and procedures of the agency.
9. I agree to keep track of all preparation and contact hours with the learner on the form provided by the agency. I will ensure that the record of these contact hours are submitted to the agency office on a quarterly basis (on or before March 31, June 30, Sept 30 and Dec 31).

I have reviewed the above agreement and agree to meet all of the conditions outlined:

Volunteer Tutor

Date

Agency Representative

Date

- ❑ **VOLUNTEER REVIEW OF MISSION STATEMENT:** All volunteers receive a copy of the agency's mission statement when they start. The volunteer must understand the goals and objectives of the agency prior to commencing tutoring.

WHY?

It is imperative that all volunteers understand the mission of the agency so that the goals and objectives are accurately portrayed to all stakeholders.

Procedures:

- 1. When a volunteer joins the agency, they are given a copy of the mission statement.*
- 2. The mission statement will be discussed to ensure that the volunteer understands the goals and objectives of the agency. The program coordinator will make a record of the discussion in the volunteer's file.*
- 3. The volunteer coordinator shall ensure that the mission statement is reviewed on a yearly basis with all of the volunteers, either individually or in groups.*
- 4. The mission statement will be included in all newsletters sent out to the volunteers.*

Key Quality Standard:

1. Program Mission: A quality literacy program has a clearly written statement of mission and objectives which it follows and shares with the people involved in the program and with other stakeholders in the community.

Features:

There is a statement of mission and objectives in plain language.

- ◆ The statement exists in written form.
- ◆ The statement has been checked for understanding by asking learners/students, tutors/instructors/staff/faculty and stakeholders to review the statement, through questionnaire, interview or group discussion.
- ◆ Some form of record has been made of comments, casual or formal, indicating understanding/lack of understanding

The mission objectives are followed.

- ◆ There is a process for the regular review and revision of the mission and objectives
- People involved in the program and other stakeholders are familiar with the mission and objectives.
- ◆ The mission statement is given to and discussed with all new learners, staff and volunteers.
 - ◆ The mission statement is referenced in written materials (for example, pamphlets, newsletters), included in training for staff and volunteers, mentioned in orientation to new learners.
 - ◆ A questionnaire, interview or group discussion (learners, tutors/instructors/staff/faculty/, and volunteers) is conducted to review familiarity with mission and goals.

Source: Adapted from Boys and Girls Clubs of Greater Victoria

- ☐ **VOLUNTEER ORIENTATION:** Every new volunteer shall be provided with an orientation prior to the assignment of duties. At the completion of the orientation each agency volunteer shall sign a form stating that the orientation is completed and that all of the policies and procedures have been understood. This form shall be retained in the agency volunteer's personnel file.

WHY?

The orientation process enables new volunteers to get their bearings in a new situation, and to adapt to the agency. It familiarizes new people with the philosophy and the policies of the agency. It instills the agency's attitude in a new volunteer so that when they face an unfamiliar situation, they can make the decision that contributes to the agency goals while remaining within the policies and procedures.

Procedures:

1. Volunteer Orientation will include:

- *an overview of the agency's mission statement*
- *a review of written policies and procedures*
- *instruction regarding agency rules and daily routines*
- *emergency procedures and a list of emergency telephone numbers*
- *a review of the code of ethics*
- *a review of the time commitments*
- *a review of the job description*
- *an introduction to staff and program participants*

2. Emergency Procedures

Prior to the commencement of work and annually thereafter, each volunteer shall:

- *be instructed in all emergency procedures of the agency*
- *be trained in CPR and First Aid*

3. Volunteer Meetings

Volunteer meetings, for all agency volunteers, should be held twice per year to facilitate a common understanding of purpose and to provide a forum for sharing ideas.

4. Supervision Sessions

Individual supervision should be held on an annual basis to:

- a) Provide an opportunity to discuss the volunteer's personal concerns in relation to their role with the agency.*
- b) Allow for personal growth and development in their work.*

Key Core Quality Standard:

1. Program Mission: A quality literacy program has a clearly written statement of mission and objectives which it follows and shares with the people involved in the program and with other stakeholders in the community.

Features:

People involved in the program and other stakeholders are familiar with the mission and objectives.

- ◆ A mission statement is referenced in written materials (for example, pamphlets, newsletters), included in training for staff and volunteers, mentioned in orientation to new learners.

Key Core Quality Standard:

12. Practitioner Training: A quality literacy program has practitioners trained in adult education with a focus on basic education. They have initial and ongoing training.

Features:

The program provides initial training of some form to all new practitioners.

- ◆ Initial training is provided to all new practitioners in the program. This may range from extensive training for volunteer tutors with no previous experience to orientation for practitioners with previous training and experience in adult literacy.

Source: Adapted from Boys and Girls Clubs of Greater Victoria

- ☐ **ACCESS FOR VOLUNTEERS:** The program sites are accessible to people with disabilities.

WHY?

The sites should be accessible to allow for equal volunteer opportunities for people with disabilities.

Procedures:

1. *When an access issue arises, the agency will make a bona fide effort to accommodate the volunteer.*

Key Core Quality Standard:

7. Equity: A quality literacy program respects differences. It has structures and supports in place to increase access and equity outcomes to help learners from all backgrounds reach their goals.

Features:

All components of the program are accessible to people with disabilities.

- ◆ The program sites, including interior spaces, equipment and materials, are accessible to people with disabilities.

Source: Adapted from Boys and Girls Clubs of Greater Victoria

- ☐ **VOLUNTEER EQUITY:** The agency is committed to applying the principles of equity in its volunteer recruiting practices.

WHY?

Principles of equity must be applied when recruiting volunteers.

Procedure:

1. *The agency is committed to dealing fairly and justly with all volunteers.*

Key Core Quality Standard:

7. Equity: A quality literacy program respects differences. It has structures and supports in place to increase access and equity outcomes to help learners from all backgrounds reach their goals.

Features:

The program is committed to serving people from all equity groups.

- ◆ The program has a policy of employment equity for all staff and volunteers.

Source: Adapted from Boys and Girls Clubs of Greater Victoria

- ❑ **VOLUNTEER TUTOR TRAINING:** All volunteer tutors shall complete a 15 hour Laubach tutor training workshop *[or other training that your agency offers]* prior to tutoring any learner.

WHY?

To ensure that all tutors have the necessary skills to tutor a learner effectively. It also ensures that a tutor understands the philosophy behind the programming that the agency is offering.

Procedures:

1. *When volunteer tutor joins the agency they are signed up for the next available Laubach tutor training workshop [or other training that your agency offers].*
2. *Once a volunteer completes the prerequisite training successfully they will be matched with a learner or group of learners.*

Key Core Quality Standard:

12. Practitioner Training: A quality literacy program has practitioners trained in adult education with a focus on basic education. They have initial and ongoing training.

Features:

The program provides initial training of some form to all new practitioners.

- ◆ Initial training is provided to all new practitioners in the program. This may range from extensive training for volunteer tutors with no previous experience to orientation for practitioners with previous training and experience in adult literacy.
- ◆ Training provided by the program covers all aspects of the required qualifications for practitioners in some way.
- ◆ All practitioners must participate in initial training before beginning.

- ☐ **VOLUNTEER TRAINING OPPORTUNITIES:** Volunteers shall have access to training opportunities on a regular basis.

WHY?

To ensure volunteers are kept up to date on the latest developments in the field.

Procedures:

1. *The program coordinator will be responsible for informing volunteers about upcoming training opportunities. All opportunities will be published in the quarterly newsletter and posted in the agency office.*
2. *Volunteer training needs and opportunities will be formally addressed at each board meeting as a regular agenda item.*
3. *A reasonable amount shall be budgeted each year to support volunteer training.*
4. *Volunteers shall be formally surveyed each year regarding training opportunities they have attended during the year preceding. This will inform evaluation of the policy.*
5. *The program coordinator will record all training undertaken by volunteers.*

Key Core Quality Standard:

12. Practitioner Training: A quality literacy program has practitioners trained in adult education with a focus on basic education. They have initial and ongoing training.

Features:

All practitioners participate in ongoing training to update their skills

- ◆ The program has a policy regarding requirements for ongoing training and the forms and frequency this should take
- ◆ Ongoing training can include training such as workshops, provided directly by the program as well as support for outside professional development.
- ◆ The program provides ongoing, formal informal training such as on-the-job support.
- ◆ The program has a budget to pay for the training of practitioners.
- ◆ The program keeps track of the training received by all practitioners.

The program regularly assesses its staff/practitioner training and development needs and uses this information to refine its training policies and practices.

- ◆ Staff/practitioner development and training needs are determined in part on a review of the accomplishments, shortcomings, and future needs of the overall program, which are identified through program evaluation.
- ◆ The program assesses appropriateness and effectiveness of its current training policies and approaches.
- ◆ Peers/practitioners are involved in a review of the effectiveness and future needs for training.
- ◆ Learners are involved in the review of the effectiveness and future needs for practitioner training.

Key Core Quality Standard:

18. Program Evaluation: A quality literacy program evaluates its effectiveness annually. Evaluation of the program is a participatory and continuous process.

Features:

Evaluation takes place on a continuous basis.

- ◆ The program collects, maintains and reviews data on an ongoing basis as specified in its evaluation plan.
- ◆ The program seeks informal feedback, on an ongoing basis, from its staff, practitioners, and learners, and reviews this information to continuously improve the program.

- ☐ **VOLUNTEER JOB DESCRIPTIONS:** The agency has written job descriptions for all volunteer positions.

WHY?

In order to ensure that volunteers have the necessary training and experience to provide the best possible service for our clients, written criteria for each position regarding qualifications shall be maintained and followed.

Procedure

1. *The written volunteer job description shall include but is not limited to:*
 - *The position title*
 - *The purpose of the position*
 - *Reporting relationships and accountability*
 - *Responsibilities*
 - *Qualifications and skills required*
2. *The written criteria for each position regarding the qualifications required of staff to perform the respective duties and responsibilities of the assigned position shall include:*
 - *Minimum educational requirements*
 - *Minimum related work or experience*
3. *Volunteer job descriptions are reviewed on an annual basis.*

Key Core Quality Standard:

17. Administrative Accountability: A quality literacy program develops and maintains sound financial and administrative systems in order to provide accurate and timely program, statistical and financial information.

Features:

The program has a human resources system to maintain information about both its paid staff and volunteers.

- ◆ The program maintains and regularly reviews job descriptions for all positions, including volunteer positions (such as tutors).

Source: Adapted from Boys and Girls Clubs of Greater Victoria

- ❑ **VOLUNTEER PERSONNEL FILE:** All relevant information pertaining to the acceptance, evaluation and discipline of a volunteer is kept in the volunteer's "Personnel File" and is kept confidential. A volunteer is entitled to review his/her own personnel file, without removing it from the office within which it is kept.

WHY? A record must be kept and maintained of each volunteer's history with the agency for management purposes. However, the sensitive and personalized nature of the information requires that it be kept secure from unauthorized access and remain confidential.

Procedures:

The personnel file will contain the following types of information:

- *Volunteer application/resume*
- *Reference checks*
- *Criminal record check*
- *Letter of acceptance*
- *Emergency contacts*
- *Current job description*
- *Training certificates*
- *Signed acknowledgements (e.g. of Policies and Procedures, MET documents)*
- *Performance Appraisals*
- *Disciplinary actions*

1. *Personnel files will be kept in a locked cabinet to ensure against loss, destruction or unauthorized access.*
2. *The executive director/program coordinator will be responsible for keeping the contents of the personnel file up-to-date.*
3. *A volunteer requiring access to their personnel file will make a written request to the executive director/program coordinator to review it at least three days in advance of the review date.*

Key Core Quality Standard:

17. **Administrative Accountability:** A quality literacy program develops and maintains sound financial and administrative systems in order to provide accurate and timely program, statistical and financial information.

Features:

The program has a human resources system to maintain information about both its paid staff and volunteers.

- ◆ The program maintains personnel files and keeps these confidential.

Source: Adapted from Boys and Girls Clubs of Greater Victoria

- ☐ **VOLUNTEER CONFIDENTIALITY:** All personal information disclosed by a volunteer is held confidential within the agency unless otherwise authorized by the volunteer in question.

WHY?

To prevent unwanted access to and disclosure of information deemed confidential by a volunteer.

Procedure:

1. *Information about any volunteer will not be released outside the agency without their written authorization.*

Key Core Quality Standard:

17. Administrative Accountability: A quality literacy program develops and maintains sound financial and administrative systems in order to provide accurate and timely program, statistical and financial information.

Features

The program has a human resources system to maintain information about its paid staff and volunteers.

- ◆ The program maintains personnel files and keeps these confidential.

Source: Adapted from Boys and Girls Clubs of Greater Victoria

- ☐ **VOLUNTEER OATH OF CONFIDENTIALITY:** Every volunteer signs an oath of confidentiality. Breach of confidence is a serious matter and grounds for dismissal.

WHY?

It is imperative that volunteers keep information about clients confidential.

Procedures:

1. *Volunteers shall not disclose confidential or classified information to any unauthorized person at any time.*
2. *If a volunteer is asked for confidential information, they should refer the questioner to the executive director.*

Source: Adapted from the Literacy Council of Brantford and District

- ❑ **VOLUNTEER SUPPORT AND COMMUNICATION:** The program coordinator is responsible for ensuring that volunteers receive ongoing support.

WHY?

In order to maintain a volunteer-based program it is essential that volunteers feel that they have support in place. The volunteer needs to know that they can talk to the coordinator when there is a problem or a need.

Procedures:

1. *The program coordinator is available during regular program hours of operation.*
2. *An annual or bi-annual volunteer evening is held so that tutors have an opportunity to network with other tutors. These evening will have an in-service component where current literacy issues are addressed (i.e.: program reform).*
3. *A "Volunteer Information Book" will be kept in the agency office. It will contain the following sections:*
 - *Frequently Asked Questions (FAQ's)*
 - *Staff contact information*
 - *Policies and Procedures that affect volunteers*
 - *Newsletters*
 - *What's New*
 - *Feedback (a place for the volunteers to express opinions, thoughts, complaints etc.)*
4. *It is the responsibility of the program coordinator to maintain the "Volunteer Information Book". The book should be reviewed and updated weekly/monthly/quarterly [depending on the needs of the agency].*

Key Core Quality Standard:

16. Program Accountability: A quality literacy program does what it says it will do. It is accountable to its learners, sponsoring organizations, partners, community, and funders. All stakeholders, not only program staff, are accountable for the success of the program.

Features:

The program meets its commitment to its partners, the community and its other external and internal stakeholders.

- ◆ The program provides the support and assistance it promises to its volunteers, such as keeping in regular contact with its tutors.

- ☐ **VOLUNTEER PERFORMANCE APPRAISALS: All volunteers of the agency receive a performance appraisal evaluation as necessary.**

WHY?

The agency has a commitment and obligation to ensure that the clients receive the best possible training, guidance and support from staff. Volunteers have a right to participate in and be appraised of their assessment so that they can progress and receive additional training if necessary.

Procedures:

1. *The annual performance appraisal shall be:*
 - *A discussion between the program coordinator and the volunteer.*
 - *Provided with and discussed with the volunteer in confidence with opportunity for his/her review and response*
 - *Recorded in writing and signed by the executive director/program coordinator if requested by the volunteer*
 - *Kept and maintained in the volunteer's personnel file*
 - *An opportunity for the volunteer to appraise the agency*
2. *All relevant areas of the job description will be discussed.*
3. *When a written record of the appraisal is made the volunteer will be given a copy and a copy will be placed in the volunteer's personnel file.*
4. *If there are ongoing problems with the volunteer's performance, the problem(s) will be identified to the volunteer and the executive director/program coordinator will encourage and support the volunteer's self-improvement in these areas.*

Key Core Quality Standard:

17. Administrative Accountability: A quality literacy program develops and maintains sound financial and administrative systems in order to provide accurate and timely program, statistical and financial information.

Features:

The program has a human resources system to maintain information about both its paid staff and volunteers.

- ◆ The program maintains and regularly reviews job descriptions for all positions, including volunteer positions (such as tutors).
- ◆ The program keeps records of the training and professional development undertaken by its staff and volunteers.
- ◆ The program carries out reviews of its paid and volunteer practitioners on at least an annual basis.

Source: Adapted from Boys and Girls Clubs of Greater Victoria

- ☐ **VOLUNTEER APPRECIATION:** The agency recognizes the commitment of volunteers on an ongoing basis.

WHY?

To encourage volunteers to continue with the program. Volunteers are more likely to continue volunteering if they feel that their efforts are appreciated.

Procedures:

1. *A "Volunteer of the Year" will be recognized each year at the Annual General Meeting. The criteria for this award may include dedication, devotion and long-time service.*
2. *A volunteer with 1000 or more hours of service will be recognized at the Annual General Meeting.*
3. *The program coordinator will attempt to recognize volunteers spontaneously throughout the year by telephone or in person.*

FURTHER POLICIES TO CONSIDER:

Some of the "Further Policies to Consider" found at the end of Chapter 2 may apply to volunteer management as well. For example:

- ☐ **CRIMINAL RECORDS CHECK**
- ☐ **ABSENCE POLICIES**
- ☐ **RELATIONSHIPS WITH CLIENTS**
- ☐ **CODE OF CONDUCT**