

Getting Started



1. GETTING STARTED

Introduction

This manual has been developed to familiarize you with the principles of volunteer management. The information will help you:

- Recruit, train and manage volunteers
- Be aware of attitudes and trends relating to volunteers,
- Understand your role as a supervisor of volunteers reporting to you; and
- Understand policies that relate to the volunteer, and management.

The manual has been organized in the following manner. The process of volunteer program management has been broken down into its major components and each is dealt with in a separate section. A brief explanation, covering both the procedures to be followed and the purpose behind these procedures, is given for each section.

Minimum standards of operation for volunteer management are **highlighted in BOLD TYPE** for easy identification. **Programs utilizing volunteers must not fall below the minimum standards, or reduced program effectiveness and difficulties with safety and insurance protection may result.**

Several standardized forms have been developed and included in the appendix. The “Volunteer Application Form” contains essential information and must be used in its’ entirety to protect the WRHA from liability. You are welcome to add placement specific or client-related questions or components to what exists in the other forms.

More information and suggestions regarding volunteer involvement are available from the Manager, Volunteer Services. To assist you in your planning for volunteer involvement, a statement of purpose, values and guiding principles have been developed.

Statement of Purpose

In meeting the WRHA’s mission and vision, WRHA Volunteer Services will, through meaningful public engagement, develop effective partnerships, mobilize appropriate volunteer and community resources, support a positive working environment and enhance the WRHA’s capacity to support and deliver quality services.

WRHA Values for Volunteer Involvement

(Adopted from The Canadian Code for Volunteer Involvement Values)

- *Volunteer involvement is vital to a just and democratic society.* It fosters civic responsibility, participation and interaction.
- *Volunteer involvement strengthens communities.* It promotes change and development by identifying and responding to community needs.
- *Volunteer involvement mutually benefits both the volunteer and the organization.* It increases the capacity of organizations to accomplish their goals, and provides volunteers with opportunities to develop and contribute.
- *Volunteer involvement is based on relationships.* Volunteers are expected to act with integrity and be respectful and responsive to others with whom they interact.

Guiding Principles

- Volunteers assist WRHA staff in providing quality services to clients and communities by sharing their skills and talents
- Volunteer engagement at the WRHA supports meaningful public participation.
- The WRHA Volunteer Program works collaboratively and cooperatively, thus ensuring that there is not a duplication of services.
- The WRHA is committed to building capacity in communities and achieving service excellence.
- Volunteering is a learning experience for both the volunteer and WRHA staff.

Roles and Responsibilities

A clear understanding of the roles of staff members and volunteers, as they relate to one another, is essential to the smooth operation of a volunteer program.

The Role of Manager - Volunteer Services

The role of the Manager, Volunteer Services is to facilitate the coordination of the volunteer program for WRHA Community and Corporate programs by consulting/assisting in the following areas:

- To develop and monitor infrastructure and systems support for the WRHA volunteer program;
- To assist in the development of new volunteer programs;
- To ensure that there are written activity descriptions for volunteer roles, and that these roles are appropriate and safe for volunteers to perform;
- To assist with the recruitment of volunteers;
- To establish and communicate screening protocols for volunteers;
- To develop and monitor an orientation process;
- To provide training for WRHA staff;
- To provide support to sites and programs in their recognition of volunteers;
- To establish a process for ongoing evaluation of the volunteer program;
- To promote community knowledge of the WRHA program and volunteerism;
- To identify staff needs to provide support as required;
- To ensure volunteer involvement does not violate collective agreements; and
- To maintain membership in professional associations.

The Role of WRHA Staff

Staff members involved in volunteer program management are encouraged to take advantage of the training and consultation services offered by the WRHA Volunteer Services Program to further equip them for their duties in this area. They may also wish to pursue training opportunities offered by Volunteer Manitoba and/or the Continuing Education Departments of the Universities and Community Colleges.

When a volunteer is assigned a position within a WRHA program or service area, an understanding comes into effect. The staff members of that particular program/service area and the volunteer enter into a partnership, with all its attendant benefits and responsibilities. Volunteers must agree to come under instruction and direction of the staff members with whom they work, and the staff members must provide training and supervisory support to encourage and guide volunteers in the proper fulfillment of their duties.

The management of volunteer programs and supervision of volunteers are important functions for which staff members should receive recognition in their regular staff performance appraisals.

The role of WRHA staff utilizing volunteers is to:

- Assist the Manager, Volunteer Services to design and develop volunteer placement and activity descriptions;
- Screen volunteers;
- Orient and train volunteers;
- Supervise and evaluate volunteers;
- Recognize volunteers; and
- Assist in the evaluation of the volunteer program.

The Role of WRHA Volunteers

The role of the WRHA volunteer is to enhance the essential services provided by staff by:

- Assisting with programs/projects;
- Supporting clients; and
- Linking with the community.

Appropriate Use of Volunteers

Volunteers are best used to perform purposeful, clearly defined tasks, which make use of their individual abilities and foster self-esteem. Every volunteer activity must be approved by the Manager, Volunteer Services.

An appropriate volunteer placement is one in which the tasks listed in the volunteer activity description are related to one another, are relevant to current departmental needs, and are specific enough to give volunteers a framework within which to work. Although some of the tasks that volunteers are asked to do may be similar to those performed by employees, an appropriate volunteer activity differs from a paid position in the limited range of responsibility given, the number of hours required, and the need for close supervision by a staff person. In such an arrangement, volunteers give of their time and expertise and receive satisfaction from learning new skills and exercising areas of personal competence in partnership with WRHA staff members. By contrast, an inappropriate volunteer placement might ignore the wishes and skills of the volunteer, consist of a grab-bag of "joe-jobs" that no one else wants to do, or actually be a full-time paid position disguised as a volunteer opportunity.

While it is important to provide volunteers with worthwhile tasks to do, it is also essential to safeguard both the volunteers and the staff members from the possible abuse of volunteer labor. **Volunteers must not be used to displace or replace staff positions.** It is unfair to staff members to jeopardize their job

security and equally unfair to volunteers to ask them to do, for free, the kind and amount of work that people normally get paid to perform.

The same protections and expectations that are applied to employees should be granted to volunteers. Volunteers should be expected to perform their duties responsibly and to meet the identified standards of the job to the best of their abilities. Correspondingly, they should be treated in the same manner as their employees in such areas as sexual harassment, confidentiality of information, selection practices or any other issues that may be perceived as discriminatory in nature.

Definitions of Volunteers

The WRHA will not be in competition with community organizations and initiatives that also utilize volunteers. In order to ensure that the WRHA continues to support collaborative efforts with community organizations and initiatives, a 2-pronged approach to the utilization of volunteers will be adopted. This 2-pronged approach will include volunteers who register directly with WRHA as well as collaborative volunteers who are individuals who are registered with, and work on behalf of another agency as a volunteer but part of their volunteers’ role also assists with WRHA projects or programs. These volunteers do not need to undergo WRHA’s screening procedures unless the requirements of the role have not been met by the collaborative organization.

WRHA Direct Service Volunteers

All WRHA volunteers be officially accepted and enrolled by the WRHA. To be considered a registered WRHA volunteer, the following conditions must be in place. The volunteer:

- Is recruited to an approved volunteer activity;
- Fills out an application form and submits to WRHA Volunteer Services;
- Is interviewed by WRHA staff;
- Has cleared the screening procedures for their specific activity by Volunteer Services staff;
- Signs an organization/volunteer agreement;
- Attends PHIA training and signs a PHIA pledge and Corporate Confidentiality form; and
- Is oriented to the WRHA and receives appropriate training to their role.

WRHA staff will provide ongoing supervision and evaluation to the volunteer. The length of the commitment is identified in the activity description.

Collaborative Volunteers

WRHA sites and programs may utilize a number of “collaborative” volunteers to assist with special activities or projects, which are short term in nature, or assist with WRHA programs on an on-going basis. Collaborative volunteers may serve at a location other than a WRHA service site. While assisting with WRHA programs, collaborative volunteers are supervised by WRHA staff or volunteers.

The collaborative agency must have an agreement with the WRHA that ensures that the volunteer(s) has met all screening and eligibility criteria and that the agency/organization covers the volunteer for all insurance requirements.

All collaborative volunteers must be:

- Recruited for approved volunteer activities; and
- Registered with WRHA Volunteer Services (complete an application form).

Planning for Volunteer Involvement

Planning for the involvement of volunteers is important to ensure a positive experience for you, persons receiving health services and the volunteer. The success of your volunteer program depends on the planning, motivation and attitudes you have regarding volunteers.

Why Involve Volunteers?

Knowledge and understanding of volunteerism are important to the planning process. Volunteers are not just extra hands that are expendable in times of plenty; they are a significant resource within the WRHA.

Reasons to involve volunteers in your programs include:

- Volunteers have credibility because they are unsalaried;
- Service from a volunteer makes a difference to persons receiving health services;
- Volunteers have abilities that can complement the skills of paid staff;
- Volunteers’ access to the community can enhance WRHA’s public image;
- Volunteers can focus their energies on one particular problem more easily than staff members with multiple duties can; and
- Volunteers can bring viewpoints from many different cultures and backgrounds to the WRHA.

Needs Assessment

To help staff members determine whether and how volunteer assistance might be used in Program/Service area, it is necessary to conduct a needs assessment. This step will enable staff to clarify the need for volunteers, the role volunteers can play and the commitment within the Program/Service area to using volunteers.

The information obtained through the assessment will allow needs to be identified, priorities established and resources targeted. Tasks can then be determined, grouped appropriately and used as a basis for volunteer activity descriptions.

To ensure the support of proposed volunteer positions, both Program/Service staff and the staff members responsible for managing the volunteer program should participate in the assessment.

Program Planning

Once the Program/Service area’s need for volunteer assistance is determined, a program plan must be devised. A program plan is a step by step outline of the goals and objectives of the volunteer program; the tasks to be done; who will do them; and the time frame within which the activities are to be accomplished. The information gathered in the needs assessment provides a foundation on which to develop the plan.

The success of the volunteer program is dependent upon a clearly articulated program plan. It is essential that adequate time be spent on this activity in order to ensure that the direction of the program is clearly understood by all of the personnel involved and that the division of labour is defined.

Because volunteer programs/activities require the participation and cooperation of departmental staff, program planning must involve collaboration between the staff member responsible for volunteer management and other participating staff members.

Volunteers want to know their contribution makes a difference to WRHA clients and programs. Consider the following when planning volunteer programs.

What tasks are there?

- What are you doing now that you would like to do more of?
- What unmet needs do our clients have?
- What unmet needs do you have? How can volunteers support you in your work?
- What might you do differently if you had more skills or time available to you?

Office/Program Culture?

- Does your team want volunteers?
- Do you understand how to involve volunteers?

Resources Required

Volunteers are not “free” labor! The following resources should be allocated to support the work of volunteers:

- Staff time
- Space and other facilities – furniture and equipment
- Supplies
- Recognition
- Enabling funds
- Training

The resources required should be allocated from your site/program budget.

What Needs To Be Done Around Here?

This is the first question that should be asked when beginning a task analysis.

To begin:

- Identify the unmet needs of clients and staff;
- List large and small projects;
- Consider what you would like to do differently if you had more skills or time available; and
- Consider the work of the WRHA and how volunteers can support our goals.

Other Role Design Considerations

- Volunteer work is done in limited blocks of time. Can you develop meaningful assignment that can be accomplished in 2-4 hour intervals, weekly or periodically?
- Consider continuous and on going assignments versus short-term and one-term projects.
- Things that can be done by individuals, teams of 2-3 volunteers or larger groups.
- Periodic assignments that allow volunteers to be on-call.
- Work done on-site or work that can be done off-site.
- Assignments dealing with people, things or ideas.
- Hands on work, thinking/planning work, work based an observation. Your goal should be to have as diverse a set of volunteer activity descriptions as possible.

Trends in Volunteerism

Trends in volunteerism will affect your ability to recruit volunteers to your program. The 2010 *Bridging the Gap Report* have identified gaps between the opportunities organizations provide and the volunteer experiences that Canadians are seeking. The report also indentifies trends among today's volunteers and volunteer organizations.

Identifying the Gaps

- Many people are looking for group activities BUT few organizations have the capacity to offer them;
- Many people come with professional skills BUT many professionals are looking for volunteer tasks that involve something different from their work life;

- Organizations are expected to clearly define the roles and boundaries of volunteers BUT many volunteers want the flexibility to initiate what they have to offer (i.e., create their own volunteer opportunity);
- Many organizations want long-term commitment BUT more volunteers want shorter-term opportunities; and
- Many organizations focus on what they need BUT many volunteers come with personal goals to be met.

Common Trends Among Today’s Volunteers

- Volunteering changes throughout our lifecycle, along with evolving priorities, circumstances and interests;
- Today’s volunteers are more goal-oriented, autonomous, tech-savvy and mobile;
- Volunteering is a two-way relationship that needs to meet the goals of the volunteer and the organization;
- Volunteering is personal and stems from individual preferences and motivations;
- Volunteering is a way to transfer and develop skills by gaining or sharing experiences;
- Volunteering in groups appeals to all ages for social and business networking;
- Finding satisfying volunteering is not easy for everyone.

Trends in Volunteer Involving Organizations

Advances in technology, shifting demographics and increased resource pressures mean today’s organizations must re-evaluate all facets of their volunteer policies and practices, and ultimately embrace different approaches.

The *Bridging the Gap* report indicated that organizations reported six common characteristics of their volunteer programs:

- Their volunteer base tends to be younger;
- Many of their leadership volunteers are older;
- More new Canadians are seeking volunteer opportunities;
- More volunteers do not necessarily want to volunteer doing what they already do all day at work;
- Most organizations do not have the tools, training, and strategies in place to engage youth, families, baby boomers, and employer-supported volunteers, particularly using a skills-based approach; and
- Many organizations do not have the capacity to involve groups.

Organizations Can Improve the Volunteer Experience By:

- Building meaningful relationships – get to know volunteers’ unique needs and talents;
- Developing integrated HR strategies – use similar approach for paid employees and volunteers;
- Being flexible and accommodating – recognize volunteers’ other time commitments;
- Being sensitive to differences – respect volunteers’ gender, culture, language and age;
- Capitalize on technology options -- provide more online volunteer opportunities;
- Clearly outlining the purpose of the proposed volunteer activity and how it will help people, as well as follow up by letting volunteers know the impact of the time they contributed; and
- Telling volunteers what they need and when they need it, but not how to do it and what time to do it.

Myths About Volunteering

There may be some reluctance to begin utilizing volunteers in your programs. Here are some common concerns.

1. Volunteers take too much time and become an additional burden rather than being helpful.

Volunteers do take staff time - particularly in the early stages of program planning and implementation. However, once programs are established you should expect to get back at least 10-15 hours of work from volunteers for every hour you invest in them.

2. You can't ask volunteers to leave even when they can't or won't do their roles.

From the beginning, in all volunteer program policy statements, good practice guidelines and orientation materials make it clear to volunteers and staff that a volunteer's services can be terminated with just cause.

3. Volunteers pose a threat to confidentiality.

All WRHA volunteers are required to attend a Personal Health Information Act (PHIA) orientation session and must sign a PHIA pledge form as well as a Corporate Confidentiality form. Volunteers should have access only to information that is absolutely necessary in her/his work.

4. Volunteers will take roles away from employees or be used as justification for a reduced budget.

Volunteers must be seen as strengthening the capability and control of staff. Volunteers should enhance staff competency rather than challenge it.

Infrastructure - “The Basics”

Budget

Involvement of volunteers is not free. Include the cost of utilizing volunteers in your overall program costs.

Operational costs:

- Equipment;
- Supplies;
- Recognition;
- Enabling funds/ out-of-pocket expenses; and
- Training.

Organizational resources:

- Staff time;
- Space; and
- Access to organizational equipment and supplies.

Insurance Coverage

Third party liability coverage is provided on behalf of volunteers for liability that might accrue to them for injury to others arising from their activities as a volunteer. There is no insurance coverage for injury to WRHA volunteers. However, if the accident is the result of negligence by the WRHA facility, the volunteer can file a claim against the facility/WRHA and general liability insurance of the WRHA could then apply. Volunteers who use their motor vehicle to perform their volunteer duties are covered for liability by the WRHA’s third party coverage, once Autopac (MPI) third party insurance limits are exceeded. There is no insurance coverage provided by the WRHA for injury or damages to the volunteer as a result of an automobile accident. Autopac (MPI) provides personal injury coverage.

Good Practice Guidelines

Good Practice Guidelines for WRHA Volunteer Services fall under the following categories:

- Roles and Responsibilities of Volunteers;
- Expectations of Volunteers/Professional Conduct Guidelines;
- Management of Volunteer Resources;
- Health and Safety; and
- Evaluation and Quality Monitoring.

Good Practice Guidelines are also available on the WRHA INSITE, and can be obtained by contacting Volunteer Services.

WRHA Regional policies relating to Volunteer Services are located on the WRHA INSITE.

Record Keeping

For risk management and volunteer management purposes, a file folder is maintained on each volunteer. Information should include:

- A copy of the completed application form;
- Interview and screening documentation;
- Activity description signed by the volunteer; and
- Completed evaluations of the volunteer’s performance.

Volunteers’ Privacy

In accordance with the Federal governments’ *Personal Information Protection and Electronic Documents Act* (PIPEDA) volunteers’ personal information (information that is collected, used or disclosed by WRHA Volunteer Services) must be fully protected.

Volunteer Management Database

WRHA Volunteer Services uses a database system to:

- Track volunteer service in a wide range of placements;
- Monitor volunteers’ interests and skills so that we can offer them meaningful volunteer opportunities; and
- Report on Volunteer Services program statistics.

Specific programs/service areas who have a large pool of volunteers may obtain a license to access the volunteer management database. Please contact Volunteer Services for more information.

Recording Volunteer Hours of Service

A record of hours contributed by each volunteer is maintained in the volunteer management database, centrally administered by Volunteer Services.

Volunteer hours are reported at the end of each quarter within the fiscal year (end of June, end of September, end of December and end of March). This can be done in a number of ways:

- 1) Using a *Volunteer Services Hours Sheet* volunteers can complete the form and either the volunteer or their placement supervisor can fax it to Volunteer Services at 787-7316 or place it in interdepartmental mail (IDM).
- 2) Volunteers can email Volunteer Services directly at volunteer@wrha.mb.ca
- 3) In some program areas, the placement supervisor will forward the volunteer sign in sheets to Volunteer Services, or if they have access to the volunteer management database, will enter them directly.

Statistics

The Manager of Volunteer Services, collects statistics regarding volunteer involvement quarterly and at the end of each fiscal year. The information is used for program evaluation, planning and accountability. Outcome measures regarding volunteer involvement should be built into your program evaluations.

Volunteer Retention

Volunteer Retention is when a volunteer remains on the role for whatever time he or she originally committed during the placement process. Retention is relative to each assignment and to each volunteer.

To work effectively with volunteers, you need to understand that eventually every volunteer will leave your program. What you need to do is manage the turnover rate so that it is at an acceptable level.

Retention occurs when all the pieces are in place – it is a result of having meaningful volunteer work done by the right volunteer in a welcoming environment. Volunteers will at times leave their activity due to a change in their personal circumstances, which is beyond your control. An example is a volunteer who is transferred to another city. However, you can and should minimize the factors affecting retention over which you do have control. Volunteer retention is a consequence of doing things right.

Factors Effecting Volunteer Retention

- Realistic activity descriptions;
- Volunteer - paid staff relations;
- Working conditions;
- Meaning or the value of the work;
- Degree of difficulty of the work;
- Quality of the training;
- Feeling appreciated;
- Feedback regarding the quality of their work; and
- Access to supervision.

To begin to develop a successful program, the concerns regarding volunteer involvement must be addressed. Staff must see the benefit volunteers can bring to the WRHA service/program and be prepared to spend adequate time in the planning, implementation and ongoing support of volunteers.

Part of effective volunteer management is ensuring systems and supports are in place for the benefit of staff, volunteers and management.

Are the following system and supports in place?

- Site or program budgeting for the involvement of volunteers;
- Policy and procedure development and monitoring;
- Maintaining volunteer records;
- Collecting and reporting of program statistics and outcomes; and
- Best practice is identified and followed when involving volunteers.