



Handbook on Best Practices in Volunteer Management



Quetzaltenango
Guatemala

Founded in 2001, EntreMundos is a nonprofit organization located in Quetzaltenango, whose mission is to strengthen the capacities of organizations and associations working in development and human rights in Guatemala. EntreMundos accomplishes this mission through our three core programs: the capacity building program, which offers training workshops and computer classes to local NGO workers; the volunteer program, which connects over 100 Guatemalan organizations with local and foreign volunteers; and the *EntreMundos* magazine, a bilingual publication that explores human rights and development issues in Guatemala.

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Introduction I: Volunteers

Who are volunteers?

Volunteers come from all walks of life. In Central America, most volunteers fit into one, or several of these categories:

- Foreigners and locals
- University students
- School or university groups
- Professionals on sabbatical leave from work
- Spanish students
- Families with children
- Retirees
- Missionary groups
- Short-term volunteers (tourists)
- Long-term volunteers (a few months +)

Why do people volunteer? (What motivates them to volunteer?)

Volunteers' motivations for dedicating their time vary, and fall into two main categories.

1) Ideological, ethical and moral reasons – volunteers want to:

- Work for positive social change
- Share their skills, abilities and knowledge to contribute to a social cause
- Give something back to society, rather than only receive

2) Personal reasons – volunteers work to:

- Get gratification and satisfaction from helping others
- Learn and acquire work experience and new skills
- Add something new to their CV
- Learn and/or improve their Spanish
- Have an opportunity to interact with a different culture
- Have an alternative experience to standard trips
- Make new friends, as well as personal and professional networks

How can our project benefit from volunteer support?

- Depending on their management, volunteers can be highly beneficial to organizations:
- Volunteers bring new knowledge, experience and skills
- They bring new ideas and energy
- They can expand your organization's contacts, particularly overseas
- They can act as a long-term contact and support

The relationship between volunteers and organization is characterized by the 'Exchange Principle':

Volunteers Give	Organizations Give
Time Energy Commitment Enthusiasm Knowledge and Skills Experience Friendship	Orientation and Training Tasks and a Schedule Supervision Support Resources Motivation Recognition
Volunteers Receive	Organizations Receive
Knowledge Experience New Skills Friendship Satisfaction	Knowledge and Skills Support Achieving Goals Increased Public Awareness Representation Network Contacts

Introduction II: Volunteer Management

What is Volunteer Management?

“Volunteer Management” is the all-encompassing term referring to activities related to the reception of volunteers. It includes the recruitment, selection, and supervision of volunteers. It involves the training, motivation, and long-term contact with volunteers. Volunteer management refers to the tactics and strategies for making the most of volunteers’ help, to ultimately ensure that their potential contribution is maximized.

Volunteer management is important to the success of your volunteer program, as well as to the overall success of your organization in its efforts to achieve its goals. As stated by Idealist.org, it is critical “in the leveraging of an organization’s resources, on par with fundraising/development and human resources.”

Why is Volunteer Management Important?

“It wasn’t very organized and sometimes I didn’t know where to be/ with whom/ to do what...”

“Not particularly well organized, there was a mixed number of volunteers week to week. I felt that with better organization, volunteers could have been utilized much more.”

Consistently, the number one negative feedback EntreMundos receives from volunteers that use its services is related to host organizations’ volunteer management practices. This can affect the volunteer’s decision to stay in contact with the organization, as well as their decision as to whether they would recommend the volunteer experience to others.

Research discussed by Idealist.org found that the amount of time an organization devotes to volunteer management positively correlates with the organization’s capacity to work with more volunteers. They also found that the more time an organization spends managing volunteers, the more likely an organization will be able to use the volunteers’ support to accomplish their goals.

Myths about Volunteers

While there are many volunteers annually in Guatemala and other Central American countries, myths persist about volunteers and about volunteer management. These include:

- Volunteers are free labour (ie. they replace the need for hired staff)
- All organizations, irrespective of their projects and capacities, can/should have volunteers
- All interested volunteers are a constructive addition to your organization
- Volunteers don’t need training or direction
- Volunteers can manage themselves
- Volunteers work for free and therefore can’t be fired
- Volunteer management is easy and doesn’t need allocated time or resources

The perpetuation of these myths can damage an organization’s volunteer program, resulting in a lost opportunity to maximally benefit from volunteers’ support, and can even cause larger problems for the organization’s operation, mission, vision and goals.

What follows is the EntreMundos *Handbook on the Best Practices in Volunteer Management*. This Handbook’s objective is to help organizations design a volunteer program that is beneficial for their projects, goals, beneficiaries, as well as for the volunteers themselves.

1: Preliminary Analysis and Preparations

Volunteers are a very specific resource that is helpful to some organizations. Not every organization has the capacity to make constructive use of this resource, and this is not a reflection of the quality or the importance of the organization's work.

An analysis of your organization and its capacity for a volunteer program is critical to the success of both. As outlined by Idealist.org: "assessing an organization's capacity to engage volunteers can ensure that a volunteer program is well-thought out, [that] volunteer positions are both valuable and meaningful (in other words, benefiting both the volunteer and the organization), and that infrastructure and resources are available to support volunteers in the organization."

The Preliminary Analysis can be divided into 3 equally important steps.

Step #1: Who are we as an organization?

Before evaluating your volunteer program, consider your organization itself to provide an important foundation for the volunteer program. Some starting points include:

- What is our mission and vision?
- What are our short-term and long-term goals as an organization, independent of volunteers?
- In what ways do we work to reach these goals?
- Which population do we serve?
- Why do we work in this sector?

Secondly, consider your organization's history.

- Has the organization accepted volunteers in the past?
- What kind of work was performed by past volunteers?
- What successes/failures were the outcomes of past volunteer involvement?

Third, evaluate your organization's internal work culture.

- How would staff members react to working with outside (volunteer) help?
- Would volunteers help contribute or detract from the organization's reputation?
- Who could be responsible for managing volunteers?

Step #2: Justify your volunteer program.

Once you have asked these important questions about the nature of your organization, you must be able to identify the real need (if any) you have for volunteers. By being able to identify and justify your need for volunteers, you will be able to design a more focused program.

Why should we involve volunteers?

- In what ways can volunteer contributions further our mission and goals?
- What benefits are there for the organization to gain from involving volunteers?
- What project needs could be met by volunteers?

What can volunteers do for our organization?

- Which tasks are appropriate for volunteers, and which need the attention of project staff?
- What opportunities exist in our organization that would be meaningful for volunteers?
- What skills and knowledge do volunteers need to fulfill these tasks/roles?

What capacity does our organization have for a successful volunteer program?

- What resources (financial and otherwise) are available?
- Who can directly manage the volunteer program, and how do they feel about that responsibility?
- How will volunteers and staff communicate?

Step #3: Talk to Staff Members

Having your whole staff on board is critical to the successful running of a volunteer program. By discussing the volunteer program with other staff members, you ensure that the volunteer program is planned with a real understanding of different areas of need. Further, these conversations demonstrate your organization's readiness for volunteers and the areas of training needed for both staff and volunteers.

Ask your staff members the following questions:

- Have you ever worked with volunteers?
- Have you ever supervised volunteers?

- Should we involve volunteers? Why?
- Through what tasks could volunteers contribute to our mission?
- Who is best positioned to manage and support volunteers?
- Is there anything we need to implement before starting, or to improve the operation of, our volunteer program?

- How would you feel about directly working with volunteers in your position?
- Are there any jobs you feel volunteers should not do?
- Do you have any concerns about receiving volunteers?

Once you have answered all of these questions, critically evaluate your organization's need and ability to work with volunteers. These answers operate as the foundation for your volunteer program, and are of utmost importance to your organization's ability to channel volunteers' work into a constructive contribution to its goals.

2: Establishing Volunteer Positions

Many organizations receive volunteers for open-ended, general positions. In this capacity, volunteers are seen as an extra body or an extra pair of hands to help run errands, support team members, and help where needed.

The advantages of well-defined volunteer positions

While this approach is widely used, it alters the way volunteers perceive their role in the organization. Indeed, defining roles for volunteers is fundamental to ensuring their successful contribution to your project. The advantages of well-defined positions include:

- A clear foundation for your volunteer program
- Structure and formality for the volunteer program
- A sense of identity and importance for the volunteers
- A greater sense of responsibility and commitment from volunteers
- Greater chances of recruiting skilled, committed volunteers

How to design volunteer positions

There are 7 areas to consider when designing a volunteer position. The more details your organization can provide, the more likely that you will be able to recruit suitable volunteers and that those volunteers will find the position meaningful.

1) Identify suitable tasks for volunteers

Start by considering tasks that would be appropriate for volunteers to fulfill – tasks that do not need to be filled by a permanent team member. Note that *all* volunteers need guidance and support, and roles that cannot receive qualified supervision should not be made. For example, an organization without a trained psychologist should not accept volunteer psychologists, as they will receive no guidance from project staff.

- Considering the mission of your organization, what tasks would be suitable for a volunteer?
- Given the capacity of your organization's staff, what roles could be supervised?
- Considering your supervision capacity, what tasks would be *inappropriate* for volunteers?
- With the volunteer tasks identified, does it make sense to offer one position, or multiple?

2) Outline the tasks and responsibilities

A clearly outlined position helps volunteers fulfill their role and facilitates support and supervision.

- What are the volunteer position's primary tasks?
- Who (or what) will they be serving?
- Who will they be working with?
- Where will they be working, and when?
- What secondary tasks the position(s) be required to perform?

3) Name the position(s) and its purpose(s)

Giving an expressed title and purpose to volunteers can fundamentally improve their identity and sense of purpose with the organization – improving their overall motivation.

- What will you call the volunteer position(s) that you have outlined?
- What is the measurable purpose of those volunteer positions? (For example: "Classroom Support: Enriches students' learning by decreasing the student/teacher ratio and providing one-on-one support to the students.")

4) Other qualifications and requirements

Identify the qualifications and requirements necessary for each position identified above.

- What personal traits or qualities are you looking for?
- What skills or qualifications does the volunteer need?
- What kind of experience does the position require?

5) Specify the necessary Spanish language level

In Guatemala, a volunteer’s Spanish level is often the cornerstone of their success. By identifying their language-related tasks, you will be able to better articulate the necessary Spanish level.

- Do volunteers need to operate in a Spanish-speaking environment (i.e. take public transit, run errands)?
- Are there any staff members that can communicate instructions in another language?
- How available would those staff member be for translation purposes (i.e. do they have time)?
- Would a volunteer be required to *understand spoken* or *written* Spanish?
- What tasks require a volunteer to *speak* to staff members or project beneficiaries in Spanish?
- How independently are volunteers expected to perform the above tasks?

Given the above answers, which of the following Spanish-level does each position require?
Someone with a _____ level of Spanish can:

Basic	Intermediate	Advanced
<ul style="list-style-type: none"> - Use and understand basic phrases and familiar expressions - Understand basic instructions if the speaker talks slowly and simply - Communicate information about simple and routine tasks of personal importance - Perform very basic, routine tasks in Spanish-speaking environments 	<ul style="list-style-type: none"> - Communicate basically with native speakers on familiar topics - Produce clear but simple texts on familiar topics - Perform technical communication in a field of specialization/knowledge - Handle most situations while travelling in a Spanish-speaking environment 	<ul style="list-style-type: none"> - Express themselves independently, fluently and spontaneously - Use language flexibly in a range of different settings - Produce complex texts on technical areas of specialty - Understand and read virtually everything encountered

6) Specify the minimum time commitment

When articulating the time commitment for the position(s), include the time that will be taken to orient and train volunteers, as this also takes time.

- What is the minimum time that a volunteer could work in order to successfully fulfill the tasks outlined in 2) and to achieve the purpose stated in 3)?
- How many hours per week does the volunteer position require?

7) Training and Support

It is important for your organization to identify the resources available to the volunteer, as well as the support that can be provided to the volunteer position(s).

- What training is available?
- What materials can your organization provide?
- What kind of additional support can you give?

Once you have answered all of the above questions in detail, you will have established the basic foundation for your volunteer program and will be ready to write the formal volunteer position descriptions.

EntreMundos uses the following template for listing volunteer positions in our Volunteer Program, particularly in the Volunteer Database. This framework will help you conceptualize your organization’s different volunteer positions.

Project Name		
One Summarizing Sentence		
Project Description		A summary of the project's work – see <u>1: Preliminary Analysis</u> for further direction
General Location		
Founding Year		
Category of Volunteer Work (pick a maximum of 3)		Agriculture/Animals/Art and Culture/Construction/Education/Elderly/ Environment/ Health and Medical/ Small Business Support/ IT and Workshops/ Women/ Children and Youth
Volunteer Information		
Volunteer Position 1	Position Description	A complete volunteer description will include the following information: - <i>Position Title</i> - <i>Job Description (as outlined in 2) above</i> - <i>Purpose (as outlined in 3) above</i>
	Requirements	
	Spanish Level	Nothing/ Basic/ Intermediate/ Advanced
	Time Commitment	
Volunteer Position 2	Position Description	
	Requirements	
	Spanish Level	Nothing/ Basic/ Intermediate/ Advanced
	Time Commitment	
Application Process		
Other comments / Information		<i>**Include Training and Support as outlined in Point 7 (above).</i>
Contact Information		
Contact Person and Languages Spoken		
Contact email(s)		
Contact telephone number(s)		
Website		
Address		

3: Risk Analysis and Policy Creation

Volunteers can bring valuable skills, expertise, energy, and resources to your organization; however accepting volunteer support comes with a set of risks – for your clients, beneficiaries, staff and for your organization’s reputation.

The only way to limit these risks is to identify and assess the problems, and to subsequently create policies about how to control, minimize and eliminate them. This takes a four-step approach:

Step 1: Risk Analysis – Identify the risks

All volunteer positions have associated risks, but not all have the same risks. It is important to identify all the risks associated with each independent position. Risks can be divided into:

- **People** (offense to project beneficiaries, bystanders, staff members)
- **Property** (damage to project buildings, tools, equipment)
- **Reputation** (misrepresentations or behavioural problems that affect your organization in the eyes of your beneficiaries, funders, the community, etc.)
- **The volunteer** (personal injury, illness, harassment the volunteer may suffer)

Taking into account your organization, your beneficiaries, and the environment in which you work:

What could go wrong with regards to each of the 4 areas above?

Step 2: Risk Evaluation – Prioritize the problems

Once you have identified all of the individual risks, it is important to evaluate them.

- a. What would the consequences be for your organization for each of these problems? (i.e. poor treatment of a vulnerable population, damaged relationship with beneficiaries, lost funds, or volunteer injury)
- b. Identify the risk level
 - High** – The risk and its consequences must be prevented
 - Medium** – This risk and its consequences can be prevented or managed
 - Low** – The risk and its consequences are acceptable

Step 3: Risk Response – Identify strategies for each situation

It is fundamentally important that your organization has a planned response to each of the risks to insure the avoidance of harm to your project, your beneficiaries, and your volunteers.

Primary strategies include:

- Change the volunteer activity/position to minimize or eliminate the risk
- Cancel the position/activity to eliminate the risk completely
- Establish behaviour rules and policies
- Supervise the work (by a team member)
- Orientation
- Training
- Screening (interviews, background checks)
- Waiver forms

Step 4: Application – How will these strategies be implemented?

- What resources/materials does your organization need to develop to perform this response?
- Who needs to be informed of the risks associated with volunteers?
- Who will be in charge of the response to these risks?

Considering these risks, is it still reasonable to have a volunteer do this work?

Use the following table to conceptualize the three steps of the Risk Analysis for each volunteer position.

	Risk Identification	Risk Evaluation		Risk Response	
		What are potential consequences?	Level	Strategies	Implementation
Volunteer Position:	People				
	Property				
	Reputation				
	The Volunteer				

Volunteer policy design

Policy documents are a cornerstone to effective volunteer programs, and are fundamental to avoiding and minimizing risks.

Why would your organization need a written volunteer policy? To:

- Express the values of your organization
- Manage any potential risks
- Make clearly defined boundaries and rules, and to avoid any misunderstandings
- Clarify roles, responsibilities, and relationships
- Achieve quality and consistency in the management of volunteers
- Ensure professional, intentional and strategic planning with respect to volunteers
- Help the organization maximize the utility of their volunteers

The policy drafting process has many steps.

- 1) **Research:** Find out which written and unwritten policies the organization already has to ensure that any volunteer policies would not conflict with these.
- 2) **Consult** staff members, beneficiaries, long-term volunteers, and your Risk Analysis conclusions to identify appropriate policies. Ensure that these policies match the internal culture of your organization.
- 3) **Write** your policy in clear, specific, direct language.
- 4) **Organizational Approval:** Confirm the acceptance of the policies by the appropriate members of your organization, like management staff members, board of directors.
- 5) **Distribute, Communicate and Implement.**
- 6) **Regular Review:** Evaluate your policies on a regular basis to make changes and updates as necessary.

Use the following template to help structure your document. Be thorough, direct, and detailed. A strong volunteer policy needs the following sections:

Organization Name
Organizational Mission Statement
Volunteers Statement of Purpose: Why do we involve volunteers?
Policies Statement of Purpose: What are the intended purposes of this policy?
General Behaviour Policies: What behavior do we expect of volunteers? <ul style="list-style-type: none">• Personal behavior (respect, discrimination, aggression, swearing, etc.)• Dress code and hygiene• Policy on smoking, alcohol, drug use• Minimum expected time commitment• Schedule and absences• Confidentiality

General Behaviour Policies (continued)

Risk Minimization Policies

What policies will minimize the risks identified in the Risk Analysis?

Cross reference your Risk Analysis to ensure that all identified risks are addressed

Outline:

- The relationship between volunteers and staff members
- The relationship between volunteers and the organization's client group
- Behavioural rules for risky situations with vulnerable populations or project equipment

Examples:

- "Volunteers will not leave the project with beneficiaries unsupervised"
- "Volunteers will not use project equipment without supervision"
- "Volunteers will not represent the organization publicly without prior consent from organization staff"

Volunteer Protection Policies

What protection can your organization provide volunteers?

- Volunteer treatment (respect, discrimination, harassment, safety, etc.)
- In the case of injury or offense to the volunteer?
- In the case of a miscommunication or misunderstanding?
- What are the limits to this protection?

Supervision and Grievances

Who is the primary contact person for volunteers? How can volunteers express concerns, both personal and about project activities?

Termination

Under what circumstances will the relationship with a volunteer end?

4: Creating an Orientation Program

Before your organization begins recruiting and screening volunteers, it is important that you are actually ready to accept them – and have an orientation program designed and ready.

As in anything, first impressions are important for your volunteer program. The first impressions you give volunteers, and the associated formal or informal orientation that goes along with them, can strongly affect a volunteer's perception of your organization and their decision whether or not to dedicate their time to your cause.

Whether you have a formal or informal orientation program, it is important to have an established strategy as to how volunteers will be introduced to your organization.

Why is it important to have a planned orientation program?

- **Sharing knowledge** – The orientation process introduces volunteers to your organization, its history, mission, goals, policies, and rules. This can help create a sense of identity for the volunteer, and a sense of commitment to your project.
- **Motivation and enthusiasm** – A well-developed orientation provides lasting motivation and enthusiasm for volunteers. A positive orientation reinforces interested volunteers' decision to work for your organization: not only does it explain why their support is necessary, it reaffirms that by supporting your organization, they will be contributing in a meaningful way.
- **Confidence and comfort** – A strong orientation program which explains your organization's work can make volunteers more confident, directed, and comfortable in their work
- **Avoiding future problems** – By explaining important information from the start, you can save time and energy, and avoid misunderstandings. By communicating your organization's rules and policies, your orientation can play a key role in the risk minimization and avoidance.

What kind of orientation program would best suit your organization?

Orientation programs' structure and amount of detail vary. The level of formality of your program will depend on the following:

- The number of people needing orientation at any given time.
- The number of staff members available for orientation, and their positions.
- The complexity and risk level of the relevant volunteer position.
- The experience of a new volunteer – have they previously performed the task or a similar one?
- Whether there are elements of an orientation program have already been established.

Larger organizations, those with many volunteers, and those with more complicated or risk-associated positions need a more detailed orientation. Small organizations with less complex, low-risk positions, and high volunteer turn-over may choose to have a briefer orientation.

Because an orientation is so fundamental to your volunteer's ability to perform their tasks, it is critical that you identify the specific objectives of the orientation program. As suggested by the University of Kansas' Community Tool Box, some helpful strategic questions include:

- When new volunteers leave after the orientation, what should they know?
- What should they be prepared to do?

***Remember that orientation is not the same as Volunteer Training, which is explored in Chapter 5.*

Decide how formal you want the orientation to be; answers to the following questions will help with identify the appropriate level of formality/structure.

- Will you accept new volunteers on an on-going basis, or have a specific application process?
- Will orientation be part of their first day, or on a separate occasion? ***Orientation is not the same as Screening, which will be discussed further in Chapter 8.*
- Who will be in charge of new volunteers' orientation?

- How much time can those team members devote to the orientation?

An Orientation Program – Three Steps

A volunteer orientation has three steps, and each part is central to a volunteer program's success.

1) Initial Contact

The initial contact a volunteer has with your organization, whether via email, on the phone, or in an interview, serves as a preliminary form of orientation. However informal this first contact may be, it communicates the follow to the volunteer:

- The way your organization works
- How organized and serious your project is
- The importance you place on volunteers
- Your organization's openness, friendliness, and/or sense of humor
- Your priorities (punctuality, responsiveness, organization)
- Your general expectations about the volunteer and the related position

A volunteer's interest in working with your project may be determined by this initial contact. Note that working with foreign volunteers complicates this, as they may interpret the above in ways you do not intend or expect due to cultural and/or linguistic communication barriers.

** At this stage, your organization has not yet committed to working with the volunteer; the initial contact is before the volunteer screening process. For more information on volunteer screening, see Chapter 8.

2) Personal Component

The first phase of orientation involves some form of personal communication, whether in person, via email, or on the phone. It consists of a staff member (or long term volunteer) introducing the organization to the volunteer, as well as answering any questions. This element of the orientation allows volunteers to become familiar with the organization itself, as well as its personal character and internal culture.

The Personal Component of your orientation program can be as formal as you wish – an official meeting, or a brief chat. The specific content of this component varies depending on your organizations' needs, but this component has the following goals:

- Introduce the volunteer to your organization
- Explain its overall operations and the volunteer's role within the organization
- Explain rules and policies
- Familiarize the volunteer with your facilities and staff
- Make the volunteer feel welcome and comfortable
- Highlight any priorities or expectations your organization has with respect to the volunteer

3) Written Component

As in the case of your organization's policies and rules, it is helpful to have some aspects of the orientation in writing. A written orientation provides distinct benefits, as it can:

- Emphasize priorities of your organization
- Provide more detail and formality than the Personal Component
- Express the values of your organization
- Make clearly defined boundaries and rules, and avoid any misunderstandings
- Achieve quality and consistency in the orientation of volunteers
- Give volunteers a greater sense of clarity and understanding of your organization

The length of the Written Component depends on your organization's needs and the amount of in-depth information that you need to share with volunteers. The more complex a position, and the

greater the risk associated with it, the more complete the Written Component needs to be. This component has the following goals:

- Officially formalize policies, guidelines, and expectations
- Emphasize, clarify or elaborate information given in the Personal Component
- Highlight the organization's priorities
- Ensure that volunteers have a deeper understanding of important points
- Ease communication and allow for volunteers to review information and vocabulary independently, especially if a language-barrier is involved

If the volunteer is from outside of your community – especially if they are not from Guatemala – the following are also advisable to include in the orientation program, whether in the Personal Component, Written Component, or both:

- Tips about cultural behavior
- A map of the local area
- Transportation instructions
- Safety advice and important phone numbers
- Any other information specific to the cultural/environmental context of your work

***Please be aware that information and cultural norms that are easily understood between Guatemalans are unfamiliar to foreigners. Your volunteer program will benefit if the entire orientation is as clear as possible, especially if a language barrier is involved.*



Use the following table to identify which of the many items listed above will be involved in your Personal Component and/or Written Component, and which do not apply to your organization.

	Personal	Written	Does Not Apply	Comments
Mission and vision				
Termination process				
Description of the beneficiaries				
Definitions of technical terms or jargon				
Volunteer program purpose				
Dress code				
Bureaucratic/Organizational structure				
Financial expectations of volunteers				
Explanation of projects and programs				
Behavioral guidelines and expectations				
Volunteer work schedule				
Organization's policies and rules				
Supervision and evaluation				
Safety advice and phone numbers				
Volunteer training schedule				
Volunteer benefits				
Emergency procedures				
Organizational history				
Statement of thanks for volunteer support				
Reimbursement policy				
A map of the local area				
Short and long-term goals				
Information about other staff members				
Confidentiality or legal restrictions				
Tour of the facilities				
Volunteer position description(s)				
Grievances procedure				
Culturally-relevant information				
Other: _____				

5: Volunteer Training

Many volunteers are given tasks without the understanding and knowledge to perform them. True, some arrive with the skills and experience you are looking for, but the vast majority of volunteers will need some form of training to help them succeed in their work.

Not all positions require training. Volunteer work like attending a store, cleaning or garbage pick-up, some basic forms of physical labour, or putting up publicity may require very little training. In these cases, a thorough orientation can serve as basic training.

Orientation differs from training because orientation paints an overall introductory picture about your organization and its purpose, while training is more focused on the position and the associated skills.

***A Note about Foreign Qualifications and Experience**

Many foreign volunteers are keen to use their professional skills in volunteer work in Guatemala, like lawyers, psychologists, social workers, nurses, and teachers. However, it is important to remember that foreign qualifications are not the same as Guatemalan qualifications.

Qualifications mean very different things in different countries.

- An Guatemalan undergraduate degree in psychology addresses methodology for therapy, a foreign psychology undergraduate is less practical and more academic
- In some countries, “nurses” have major responsibilities in terms of patient care, in Guatemala nurses are essentially assistants to doctors
- A “social worker” refers to different job in Guatemala than it does overseas

Further, experience abroad does not necessarily prepare a volunteer for the Guatemalan context.

- A foreign lawyer will not be familiar with Guatemalan laws
- A volunteer working with indigenous women will not fully understand the specific social challenges facing that population
- A teacher will be unfamiliar with the Guatemalan curriculum, education system, and classroom management strategies

In some capacities, these foreign volunteers may be quite helpful, but it is important to remember that their experience and qualifications may not be what you’re looking for. This needs to be considered when designing volunteer positions, training procedures, and when ultimately deciding whether it makes sense to work with a foreign volunteer in a professional role.

What are the benefits of a training program?

The following points need to be considered when you decide whether your organization needs a training program:

- Setting the bar: Through training, an organization establishes that there is a minimum competency that all volunteers are expected to obtain to continue working with the project.
- Professionalism and seriousness of purpose: By training volunteers, your organization makes the statement that you are professional, do important work, and are committed to doing it well.
- Screening: Through the training process, you can evaluate volunteers’ competencies – Do they have the skills, language level, and personality to perform the position?
- Benefit to the volunteer: After their training, many volunteers feel more confident in their work.

Developing a Training Program

1) Identify what you want to teach volunteers

Identify the objectives of training beforehand. If the trainer doesn't have clear ideas of what volunteers should leave knowing, the volunteers may leave the training confused.

- When new volunteers finish training, what should they know?
- What should they be able to do?

2) Decide how this will be achieved

What strategies will you use to share information with volunteers? Simpler training procedures are appropriate for simple, low-responsibility jobs, while more lengthy training processes are appropriate for more complex work. Options include:

- **'Shadowing'** – A new volunteer observes a staff member or another volunteer in their tasks, but does not actively participate.
- A **'Buddy System'** – A new volunteer first works with a staff member or volunteer, supporting their work, while the experienced person answers questions and makes suggestions.
- A **'Dress Rehearsal'** – A staff member or volunteer works one-on-one or with small groups of new volunteers, demonstrating the work and practicing in a controlled environment, without the presence of the organization's beneficiaries. This is particularly useful for higher-risk situations, when training skilled volunteers to give workshops, lead group sessions, or teach.

All training programs need to cover the following:

How to do the work: Explain in detail, and demonstrate the steps involved in the task – this will take up most of the training. Instructions that are seemingly simple like “paint the classroom” need elaboration: With what tools? What part of the wall? How many coats? Should the floor and furniture be covered for protection? How should the project be cleaned up?

What not to do: Are there certain things volunteers should not do, or are not allowed to do? Training should make a volunteer's (and the organization's) limits very, very clear. For example, is it appropriate for volunteers to take pictures at the project?

What to do if something goes wrong: Your orientation program should include this information, but a reminder is helpful. What should a volunteer do if a problem occurs (like a disagreement between beneficiaries, a miscommunication, bullying, or broken equipment)? Who do they contact? Is there a first aid kit? What should they do in an emergency (like a fire or injury)?

3) Evaluation and Follow-Up

Evaluation is a very important last step in your training program – this step allows your organization to identify how well volunteers have understood the training, to identify gaps in understanding, and to give feedback. Some possibilities for evaluation include:

- **Concept-Checking Questions.** Ask new volunteers a series of questions to review what has been taught. “Where will you pour the cement?” “What will you tell clients?” “Which Vitamins will be explored in this nutrition workshop and why?”
- **Peer-Teaching.** Have new volunteers explain to each other, or to project staff, how to do the task they were trained for. For example, if you've provided training on how to run an activity for children, have the volunteer explain the information back to you.
- **Demonstration.** Have volunteers demonstrate what they have learned under observation.

Remember that although you may have a clear idea about how you want the work to be done, this will not be obvious to the volunteer. Especially when a language barrier or cultural difference is involved, training needs to be clear, thorough, and have some form of evaluation to ensure that the volunteer has understood.

6: Volunteer Supervision

“Volunteers don’t need supervision – they can manage themselves.” This is one of the biggest and most damaging myths concerning volunteer management. Ongoing supervision is critical to ensuring your volunteers succeed in their work, and that your project benefits from their support.

Consistent volunteer supervision has several benefits. Supervision:

- Helps identify problems experienced by the volunteers or those around them
- Aids motivation by giving a sense of importance to the volunteer work
- Lets volunteers know they are supported and appreciated
- Is an opportunity to give volunteers positive and constructive feedback
- Is an opportunity for volunteers to give feedback and express concerns

That said, supervising volunteers comes with a specific set of challenges:

- Volunteers often work part-time or with an inconsistent schedule.
- Time for supervision can be difficult to arrange.
- Some volunteers work at a distance from the organization and supervisor.
- Unlike paid staff, volunteers may leave if they dislike their supervisor.

It is important to explain your organization’s supervision system to volunteers before they start their work, and to indicate by whom they will be supervised. This can be done in the Personal or Written Component of the orientation program, as discussed in Chapter 4.

Supervision Strategies

There are many different strategies associated with volunteer supervision. Your organization’s supervision strategy will depend on many factors, including:

- The person responsible for volunteers and how much time they have available to supervise
- The number of volunteers involved
- Where the volunteers are working – whether they are working at one or more location
- The volunteers’ schedules
- The job(s) volunteers perform – whether they are complex or simple, independent or in groups, high or low risk. ***Supervision is one of the key risk-avoidance and minimization strategies; the higher the risk involved in a task, the higher the level of supervision needed.*

Several different strategies can be used, depending on the above factors. The following are some suggestions for thorough volunteer supervision. Consider each one and decide which option(s) are the most appropriate for your organization.

- a. Personal appointments – Supervision can be achieved through one-on-one appointments arranged either by the volunteer or the supervisor. This is an excellent strategy for volunteers in roles with higher associated risks and more responsibility, as personal meetings allow all critical issues to be addressed. Appointments can be made as frequently as necessary, but an added element of importance is added if formal appointments are scheduled regularly.
- b. “Volunteer Hours” – Arrange for regular hours when volunteers can meet the supervisor on their own initiative, like on Friday mornings or daily after work hours. This strategy demonstrates that the supervisor is open and approachable. However, because volunteers must take the initiative for the meetings, this strategy is best for simple and low-risk tasks.
- c. Regular group meetings – Meetings with groups of volunteers provide a time- and cost-effective way to provide supervision, especially when many volunteers are involved. Group meetings can provide opportunities for volunteers to share their experiences, build a sense of team spirit, and learn from other volunteers’ experiences. On the down side, volunteers may be less likely to

share concerns or problems in a group setting, so arranging a more personal meeting may also be necessary.

- d. Informal observance – This less formal option involves the supervisor physically being present and observing the volunteers while they perform their tasks. This can be done in three forms:
General observance – A team member is generally present during project activities
Informal observance – A team member visits a volunteer during their work
Overt observance – A team member officially observes a workshop or activity run by a volunteer
This option is a good way of evaluating the quality and style of a volunteer's work. Please note, however, that in the case of overt observance, volunteers may feel nervous, scrutinized, or micromanaged, so this should be kept to a minimum.
- e. Reports by volunteers – Volunteers can be asked to fill out regular reports about their work. These reports can cover the tasks they performed, their objectives and outcomes, problems that arose, changes they feel are necessary, or anything else that you would like volunteers to communicate. Not only is this an effective way to keep track of volunteers' actions, this process allows for volunteer to give feedback to the organization. Strategies vary, and reports can be given in the form of a weekly journal or through a structured form.
- f. Regular evaluations by supervisors – Evaluations are an important element of the supervision process, as well as the motivation and retention process. They can be done orally or written; more on the evaluation process will be discussed in Part 9. Evaluations can be as frequent as necessary, but should be provided early in the volunteer commitment to allow volunteers to make necessary changes to their behavior or performance.

Consider each of these strategies and decide which option(s) are best suited to the volunteer positions, capacity, and resources of your organization.

Leading a Supervision Session

The following are suggested questions to help lead any volunteer supervision session. They can be incorporated into any of the above strategies.

- What did you do today/this week/this session?
- Who did you work with?
- What was the purpose of your tasks?
- Did you achieve that objective? Why or why not?
- What were the secondary benefits of this activity, aside from the primary objective?
- What worked well and what needs to be changed?
- What resources did you use, and what could have made your work easier?
- Was the training you received adequate for the position/activity?
- Would you recommend running this activity again?
- Are any follow-up activities necessary?
- What upcoming activities or responsibilities are planned, or have you planned for yourself?
- What assistance do you need from the organization to run these activities?

**Volunteer follow-up is a critical part of the supervision process. By checking in regularly with volunteers about their general feelings about the project, and by providing them with an opportunity to give you feedback, volunteers will feel more valued, motivated, supported – and thus more committed to your organization.

7: Recruitment, Marketing and Communications

What is marketing? Why is it important for NGOs? How does it relate to communication?

Often when we think of “marketing,” we think of selling something. But marketing is much more than that. Whenever you make connections with a person or a group of people outside your own organization, it can be considered a type of marketing.

Marketing ranges from improving client service to promotions; from putting up posters, to including your logo in a document; and can also include volunteer recruitment. It includes everything that contributes to your organization’s image, which, when carefully and effectively developed, can assist in earning the confidence of your beneficiaries, local partners and donors. Effective marketing and communication can also assist your organization’s ability to attract new donors and thus new funding, therefore better serving your beneficiaries and advancing your mission. Ultimately, it can improve the overall sustainability of your organization.

The art of successful communications depends on the interpersonal and leadership skills of the project manager. Is the project manager capable of successfully communicating the vision of your organization? Is your message clearly and logically organized? How high is the quality of written communications? How interesting are verbal communications?

The success of your organization’s communications will depend on the planning and execution of the marketing and communications strategy.

A Communications Strategy: How to make a communications plan.

A communications plan is a strategic roadmap that provides direction concerning the way that your organization will develop its image, create demand for its services, engage the thoughts and interest of your audience, and open up new possibilities for future action.

The communications plan or strategy defines what your organization wants to accomplish through your communication, as well as what you need to do to achieve those goals. Just like in any planning process, begin the communications plan’s design with some basic questions:

- What do we want to communicate? (your message)
- Why do we want to communicate with our audience? (your purpose)
- Whom do we want to communicate it? (your audience)
- Who will communicate the message (your messengers)
- How do we want to communicate it? (the method)
- How frequently do we want to communicate it? (frequency)

The answers to these questions form the foundation of your communications action plan. Once you have developed this base, your organization needs to develop effective materials, disseminate the message, evaluate your efforts, and make adjustments as needed.

Use the following table to formulate and structure your communication plan. The first row is an example of a basic plan for recruiting volunteers in Quetzaltenango.

Communications Message	Purpose	Audience	Messengers	Method	Frequency
<i>Recruitment campaign</i>	<i>Recruit volunteers for a new project</i>	<i>Potential Volunteers (Spanish students in Xela)</i>	<i>Volunteer Coordinator</i>	<i>Flyers (distributed in Spanish schools)</i>	<i>Bi-monthly</i>

Among the kinds of communication that may be useful for your organization are:

- A newsletter to donors, stakeholders, and ex-volunteers (see Chapter 13)
- A report for your funders
- A press release regarding an activity you have planned
- An update on Facebook of your organizations photos
- An invitation to participate in an event
- A board of directors meeting to update them on your latest activities

It is necessary to revise your communications plan frequently to review the activities and to analyze whether the different strategies have achieved their objectives – and whether a new plan needs to be designed.

Marketing and Volunteer Recruitment

One of the biggest challenges of working with volunteers is getting enough of the right volunteers with the right skills. High volunteer turn-over is a challenge for any organization, as is the simple fact that not all volunteers will meet your organization’s needs. A recruitment strategy is fundamental to addressing these issues.

Review: Why do you want volunteers?

Identifying your motives for hosting volunteers can help provide structure for your recruitment plan. Before determining how you will recruit volunteers, answer the following questions.

- Why should we involve volunteers?
- How can volunteer contributions further our mission and goals?
- What can the organization gain from involving volunteers?
- What specific project needs could be met by volunteers?

Review: Who are we looking to recruit?

For maximum success, volunteer requirement needs to be targeted at the right demographic. See Chapter 2 for more information, as this section will help you identify the following:

- Which tasks are appropriate for volunteers?
- What are the volunteer position(s)’ primary tasks?
- What kind of volunteers do we want?
- What experience, abilities and skills are needed for each of those positions?
- Do we prefer to work with local or foreign volunteers? Does it matter?

Based on the answers to the above questions, is your organization looking for general volunteers (for positions that don’t need specific skills) or professional volunteers (for positions that require training and expertise)? Is your organization looking for local volunteers or international volunteers? The answers to these questions will have a big impact on your recruitment strategy.

Your Recruitment Message

Before further exploring how to recruit volunteers, your organization needs a recruitment message. This message is representative of your organization, and should answer the general question – “Why should I, the volunteer, give my time to your organization?”

This brief message should answer the following questions:

- What social need or problem does your organization work to address?

- How can volunteering with your organization meet this need or solve this problem?
- What does the voluntary work consist of?
- How can the experience benefit the volunteer (Spanish practice, make a difference, cultural immersion, learn new skills)
- How can the volunteer find out more?

As explained by Peter Hammond from Samaritans, a UK-based NGO, organizations who want to work with volunteers “need to remember that they are selling a product, an experience, a sense of meaning and that people will shop around until they get the product that fits their agenda.” This is as true here in Guatemala as anywhere else, so particular attention needs to be put into creating a compelling, convincing, and enticing recruitment message.

Creating a versatile job profile

As discussed in Chapter 2, the creation of a versatile and interesting volunteer position can greatly help with recruitment. Your organization can publish these volunteer positions on volunteering websites, email them to interested volunteers, or feature them on your own website. The position profile should contain all the relevant information regarding the job, including:

- Job Title
- Description of the organization
- Short description of the objectives of the particular job
- Schedule, including minimum amount of hours per week
- Minimum time commitment
- Requirements
- Benefits for the volunteer
- Supervision, and whether the volunteer will work alone or in a team
- Relevant contract information
- Address of the organization and instructions on how to get there

Publicity for Recruiting Volunteers

Depending on the kinds of volunteers your organization wants to recruit – whether they are general or professional volunteers – there are a wide range of basic techniques can be used.

- a. Networks and personal communication – Many volunteers are recruited via word of mouth, whether that is through existing volunteers, staff, beneficiaries, family members, supporters, and others. Therefore, it is very important that your entire team and those working with you are aware that you are looking for volunteer support. Brainstorm with your team members to identify all of the networks your organization already has.

Share your recruitment message and your need for volunteers in person, through email, or through the phone or social networking sites. Networking is particularly important for finding local volunteers. You can establish relationships with local community groups, schools or universities who may consistently provide volunteers to your organization.

- b. Targeted recruitment for professional volunteers – Make contact with local business that work in fields that you would like to recruit from, or with universities that teach relevant subjects. Make sure you have designed a good job profile so it will be obvious to them what how volunteering with your organization will be advantageous to their employees or students.
- c. Group Presentations – Identify venues where groups of potential volunteers that suit your ideal volunteer profile are likely to be (for example, for foreign volunteers concentrate on Spanish schools, hostels, and central cafés; for local volunteers talk to schools and universities). Approach the venue about making a group presentation about your organization, its work and challenges, and its volunteering needs. Not only is this a great way to raise community

awareness about your project, it's also a great way to spread your recruitment message.

- d. Public Relations and the Media – Organizations can take advantage of the public media – radio, newspapers, magazines, and television – to increase public awareness of their issues while also spreading their volunteer recruitment message. Send the appropriate media source a well-written press release regarding what you are looking for.

For local Guatemalan projects, the *EntreMundos* magazine is a great place to start. Not only does it feature a section for “Volunteer Opportunities” that is read by prospective volunteers throughout the Guatemalan highlands, but part of the magazine’s mission is to raise awareness and give local organizations a voice about their work and needs. The editor can be contacted at revista@entremundos.org.

- e. Guidebooks – Volunteering is a major attraction for many travelers, and organizations often receive volunteers through a recommendation from various guidebooks. To be listed, your organization can contact the writers directly to (very briefly) explain your work and volunteer needs. Some appropriate guidebooks include:

Lonely Planet	website: http://www.lonelyplanet.com/contact/business_listing/new email: viajeros@geoplaneta.es
Rough Guide	website: http://www.roughguides.com/website/aboutus/ContactUs/Default.aspx email: mail@roughguides.com
Moon Guide	website: http://www.moon.com/contact email: feedback@moon.com .
Fodor’s	website: http://www.fodors.com/contact-us/

- f. The Internet – There are many websites that allow organizations to advertise their volunteer positions for free. The following websites are some of the more popular ones:

English	Spanish
http://www.idealists.org/	http://es.idealists.org/
http://www.goabroad.com/volunteer-abroad	
http://healthcarevolunteer.com/organizations/	
http://www.volunteersouthamerica.net/	
http://www.freevolunteering.net/	
	http://www.losviajeros.com/

- g. Printed Materials – Your recruitment message can be shared through various printed materials, like flyers, posters, brochures/pamphlets, and newsletters.

Whatever the message, keep printed materials simple and clear, as well as attractive and eye-catching. Put them up where your prospective volunteers may see them – in universities, hostels, restaurants and cafés, tour operators, and especially Spanish schools. (There is a list of Spanish schools in Xela on *EntreMundos*’ website, at <http://www.entremundos.org/en/schools.html>).

Tips for effective printed materials:

- Content: Keep your Recruitment Message as simple as possible, and make sure to include contact details (email, phone, and website).
- Less is more: Use as few words as possible to draw attention; long paragraphs will not be read.
- Images: Whether a photo or hand-drawn illustration, images help draw attention to your flyer. That said, make sure the images are directly related to your project and the volunteer work, as having no image is better than an unrelated one.
- Leave as much space as possible; crammed and overcrowded materials are hard to read.

- Fonts: Avoid decorative fonts, many different fonts, or caps lock - these are hard to read. Also, use bold instead of italicized or underlined fonts for emphasis.
- Use font sizes 40-60pt for headlines; avoid fonts below 20pt for text areas on posters and 14pt for text areas on brochures and flyers.
- Use colour to draw attention, whether you print your materials on coloured paper, colour the advertisements by hand, or print them in coloured ink.

8: Screening Potential Volunteers

One of the myths concerning volunteer management is that “all interested volunteers are a constructive addition to your organization.” However, would you allow just anyone to be part of your organization’s staff and to affect its activities? Rather, it is likely that you have a selection process for staff members, and it is also important that you have a selection process in place for volunteers.

Why is a screening process important?

Volunteer screening:

- Ensures that your organization selects the correct person for the volunteer position (that they meet the requirements)
- Helps your organization understand the expectations, motivations, and goals of the volunteer – and helps decide whether they match those of the organization.
- Provides a level of protection for your organization
- Gives the volunteer the impression that this is professional program and that you take volunteer recruitment seriously.

There are many different ways that your organization can screen volunteers, including:

- An application form
- An interview process
- A reference letter
- A reference check

If your organization has the time and resources, and/or the volunteer positions at your organization involve a high level of risk, it is highly advisable that your screening process involve all of the aforementioned strategies.

Application Forms

Volunteer application forms can vary depending on the priorities of each organization and what they want to know about prospective volunteers. If your organization has a website, it can be useful to include the application form on the website so that interested volunteers can fill it in before making initial contact.

The next page features an example of an application form for a general volunteer program.

Volunteer Application Form

Date _____
Volunteer Position _____
Name _____
Address (home country) _____
Address (Guatemala) _____
Cell phone number _____ E-mail _____
Nationality _____ Passport Number _____

Education

Highest level of education and details _____
Language(s) spoken _____
Level(s) of language(s) spoken _____

Current work information and position _____

Other information

Skills, interests etc. _____

Memberships in groups/societies etc. _____

Describe your past volunteer experience (when, where, etc.)

What experiences have you had that make you prepared to work in _____ (Describe the field, ie. Domestic violence, work with youth, work with disabled individuals, etc.)

Why do you want to volunteer with our organization?

Do you have a criminal record?

References: Please write the names of two people that know you well and who can speak on behalf of your skills, character, and your readiness to work as a volunteer. Include at least one previous or current employer.

Name Relation to applicant Contact information

1.

2.

Please read before signing:

I understand that this form is an application for a volunteer position, and that it does not represent a commitment to work for the organization. Through my signature below, I state that the information provided in this form is the truth and I am prepared to provide more personal information during the screening process, as necessary.

Name _____

Signature _____ Date _____

Interviews

Interviews provide an opportunity to evaluate the applicant and how well they meet the organization's requirements on a much deeper level than through an application form.

Interview questions will depend on the specific position. Questions can be related to past experiences, opinions, the applicant's character, as well as other subjects. Plan your questions beforehand to ensure that the interview appears professional and well-organized. Some examples include:

- Why do you want to be a volunteer in this organization?
- Have you ever done this type of volunteer work before?
- What kind of work/study do you do?
- What did you like least about your last job?
- How would a friend describe you?
- What do you personally hope to gain from your volunteer experience?

1. References: Letters and Checks

Many organizations wisely require that all volunteers provide an official background check; this is not so easy in Guatemala. There are some organizations here in Guatemala that only accept volunteers applying from overseas, and require that they provide a background check before arriving in the country. Unfortunately, this is not such a practical option for organizations looking to accept volunteers who are already in the country, especially as the process can be lengthy.

Here are some alternatives:

- a. Personal identification or passport – Request a copy of a passport or official identification from all volunteers. If a volunteer refuses to provide the information, this is a real red flag, and organizations should not work with any volunteer that refuses to do so.
- b. Reference letters – Organizations can require that volunteers provide a letter of reference from a past employer or someone who knows them well. Note that a letter from a volunteer's Spanish school should not fill this role, as Spanish schools will not know their students beyond the short time they have studied at the school.
- c. A referral form – Foreign volunteers' references may not be able to provide a letter in Spanish. An alternative is that your organization could make a basic questionnaire in English (while not 100% accurate, <http://www.translate.google.com> does a decent job) and have references tick boxes and sign their consent at the bottom. For example:

Volunteer Referral Form

Volunteer's name / nombre del voluntario interesado: _____

Organization / nombre de la organización: _____

Volunteer position / puesto voluntario: _____

I know **volunteer's name** closely enough to judge their readiness and ability to volunteer (Yo conozco a nombre del voluntario lo suficientemente para juzgar a su disposición y capacidad de hacer trabajo voluntario).

Yes No

I would recommend **volunteer's name** as a positive addition to your organization (Yo le recomendaría como una adición positiva a su organización).

Yes No

I have concerns about **volunteer's name's** potential performance in your organization (Tengo dudas sobre el rendimiento potencial de nombre del voluntario en su organización).

Yes No

Referee's Name / Nombre de la persona que da la referencia: _____

Relationship to **volunteer's name** / Relación al voluntario: _____

Referee's Signature / Firma de la persona que da la referencia: _____ Date / Fecha: _____

9. Motivation and Recognition

The key to retaining volunteers is making sure that their needs and expectations are met through their volunteer experience. In other words, if the volunteers enjoy their work, they will continue to dedicate their time to the organization. When volunteers throughout the program enjoy their work, this creates a positive, enthusiastic work environment, which in itself encourages all volunteers to continue their work.

Motivating Volunteers

Volunteer motivation is the essence of volunteer retention and volunteer performance. Volunteer motivation is about creating a volunteer experience that allows an individual to meet their motivations in ways that are both satisfying to the individual volunteer, and productive and meaningful for the organization. Well-motivated volunteers are not only more likely to continue volunteering, but they are likely to do so at a higher performance level.

Each volunteer has different expectations and goals, and by recognizing the motivations of each volunteer, you can ensure that the volunteer is satisfied by their experience.

Review: What motivates people to volunteer?

As discussed in the Introduction, volunteers' motivations for dedicating their time vary, and fall into two main categories.

- 1) Ideological, ethical and moral reasons – volunteers want to:
 - Work for positive social change
 - Share their skills, abilities and knowledge to contribute to a social cause
 - Give something back to society, rather than only receive

- 2) Personal reasons – volunteers work to:
 - Get gratification and satisfaction from helping others
 - Learn and acquire work experience and new skills
 - Add something new to their CV
 - Learn and/or improve their Spanish
 - Have an opportunity to interact with a different culture
 - Have an alternative experience to standard trips
 - Make new friends, as well as personal and professional networks

It is important that your organization plan several strategies to motivate volunteers, as volunteer motivation is connected with the planning of an effective volunteer program, and is linked with good supervision and support (see Chapter 6). Volunteer Centres Ireland suggests the following strategies for motivating volunteers:

- Give praise and positive feedback for completed tasks or a job well done.
- Vary duties where possible and appropriate.
- Respond to requests for help or assistance as quickly as possible.
- Resolve problems swiftly and efficiently in a proactive manner.
- Ensure volunteers are not overloaded or take on too much.
- Support and supervise all volunteers (see Chapter 6).
- Involve volunteers in staff meetings and events and add them to staff mailing lists.
- Include volunteers in the planning process for projects and program associated with their role.
- Demonstrate how their role has impacted your organization.
- Provide opportunities to learn more about the organization through work shadowing, attendance at meetings, conferences, training etc.

Volunteer Recognition

Volunteer recognition is closely related to volunteer motivation. That is to say, thanks and acknowledgement of volunteers' work, whether through informal or formal means, can play an important role in helping your volunteers stay motivated.

Informal Recognition

The most effective volunteer recognition occurs through daily interactions, when team members of an organization express sincere appreciation and thanks for the volunteer's work. Informal recognition practices include:

- Saying a sincere "thank you"
- Giving volunteers positive feedback - telling them when they have done a good job
- Writing short thank you notes for the volunteers
- Involving volunteers in decisions that affect them
- Asking about the volunteers' families and show an interest in their "outside" life
- Making sure that volunteers receive the same respect and treatment given to team members
- Allowing volunteers to increase their skills by attending training
- Recommending the volunteer for promotion to a position with more responsibility

Formal Recognition

Formal recognition strategies offer can provide special recognition for volunteers and can also serve as an incentive for strong volunteer performance. Some examples include:

- A volunteer 'identity' - Give volunteers an official role title (see Chapter 2).
- Uniforms - Give volunteers T-shirts, name badges, or another formal symbol of their role.
- Service gifts or certificates - Recognize longer-term volunteers' efforts by awarding small gifts that commemorate longevity. This can be done informally or at an official event.
- Publicize volunteer efforts - Ask a local newspaper or magazine to feature an article about one of your volunteers who has an interesting background, reason for volunteering, or other newsworthy characteristics.
- Promote volunteers' work in your communications - Include information about the importance and extent of your volunteers' work in newsletters, annual reports, or other communications made by your organization.
- 'Volunteer of the Month' - Highlight a volunteer whose performance has exceeded through a ceremony, a thank you card, or through communications, as discussed above. The *EntreMundos* bilingual magazine provides spaces for two 'Volunteers of the Month' every edition for organizations in Guatemala. To nominate a volunteer from your organization, contact volunteering@entremundos.org.
- Social events - Celebrate the volunteers' work through events to show your appreciation. These events can include anything from going out for a drink, having lunch, holding a themed event, or going to a film.

Although formal recognition may bring more attention to volunteers' work, informal recognition is can be done on a day-to-day basis to convey a constant sense of appreciation and belonging to the volunteer. This can be more effectively conveyed by the thousands of small interactions that compose daily life than by an annual event.

10: Incident Responses: Problem Solving

An "incident" is any unforeseen problem that occurs during the operation of your project. Incidents may be problems caused directly by the behavior of the volunteers or members of the team, or may be caused by external factors – for example, a landslide that prevents your organization from reaching the community where you work.

Regardless of the thoroughness of your Risk Analysis and your orientation, training and supervision strategies, there will always be unforeseen events when working with volunteers.

Therefore, an incident response plan is essential to:

- Protect the reputation and property of your organization
- Identify the resources that your organization has available for responding to incidents
- Ensure consistency in your responses to incidents
- Avoid reoccurrence of the same incidents and problems in the future

Before the response: Preparation and Detection

Refer to Chapter 4, which deals with the Risk Analysis and strategies to prevent and minimize those risks. These issues are fundamental to the overall success of your volunteer program and provide an important foundation for the response to any incident.

As in the case of the Risk Analysis, it is important to identify the responsible actors when designing an incident response plan.

- Who is responsible for volunteers and for their supervision?
- Who is responsible for risk management, incidents, and problems?
- Who should be contacted and informed in the event of an incident?

Aside from above: *How will your organization detect an incident? How will you become aware of problems when they arise?*

Frequent supervision and regular communication with volunteers, team members, and beneficiaries, are the best ways to detect incidents. Communication and supervision makes it easier to detect and deal with incidents in an effective and efficient way.

For more information on supervision, review Chapter 6.

Responding to an Incident

Once you have planned ways that your organization can prepare and detect incidents, the actual incident response involves 4 important steps.

1) Identify the Incident. Once an incident has been detected, identify:

- What exactly happened?
- Which people and/or what equipment was involved?
- Who was the source of the information about the incident, and is it necessary to consult other people or witnesses to verify their account of the event?

*** The latter is important to ensure that individuals are not unjustly accused.*

2) The Cause. In considering the incident, it is important to identify *how*, or *why* it happened.

- Who was involved and what were their roles in the incident?
- Was there anything that should have happened to prevent the incident, but did not happen?
- Is there anything that was missing from your risk minimization strategy?

3) **The Effect.** By identifying the effects or consequences of an incident, you can also identify the appropriate response.

- What are the effects or consequences of the incident?
- As explored in the Risk Analysis (Chapter 2), Will this incident poses problems for people, property, the reputation of your project, or the volunteer?
- Are there other ways in which this incident affects your organization?
- How severe of a problem is this incident?

4) **The Action.** Once you have considered the above three points - the details of the incident, its causes and its effects, identify the response and the specific actions that will be taken:

- What kind of response would be appropriate for this specific incident?
- What actions should take and who will be involved?
- Is the volunteer should be involved in such action?
- Do they need to notify legal authorities?

*** All illegal activities (theft, assault, etc.) must be reported to the police – failing to do so, not only says a lot about the ethics and transparency of your organization, but can also expose your organization to future legal repercussions.*

- Who else needs to be informed about the incident? (Possibilities include: your organization's management, team members, other volunteers, beneficiaries, donors, etc.)

*** Depending on the severity of the incident, it may be best to inform everyone involved, to ensure that the message is controlled and to prevent incorrect or exaggerated rumors from spreading.*

Future Prevention and Avoidance

Once you have solved the problem, it is important that your organization develop a plan to prevent and avoid similar incidents in the future.

- What policies need to be changed or added to prevent the incident in the future?
- How can orientation and/or training strategies be improved?
- What other monitoring strategies could be implemented?
- What other changes need to made to the project or volunteer program?

11. Firing a Volunteer

One of the myths about volunteer management is it that ‘volunteers work for free and therefore can’t be fired,’ but this is not the case.

Firing a volunteer is a nightmare situation for any volunteer manager, and many volunteer managers will delay or avoid this situation completely, regardless of how problematic the volunteer is. In some volunteer programs, there is a focus on the benefits of volunteering so they see volunteers as ‘clients’ and it is difficult to justify firing them.

By avoiding the dismissal of a troublesome volunteer, your organization conveys that there is really no ‘wrong’ way to do volunteer work, giving the impression that work done by volunteers in your organization is irrelevant and meaningless. Further, your organization will have to continue working with the problematic volunteer who may eventually damage your project or reputation.

When designing your volunteer program, it is important to include a discussion about how and under what circumstances a volunteer should be fired. These procedures should also be included in your volunteer policies

Alternatives to firing a volunteer

As suggested by Steve McCurley’s article “How to Fire a Volunteer and Live to Tell About It,” firing a volunteer is a true sign that volunteer management has failed. It means that the job design was faulty, that the screening process was inadequate, or that training and supervision did not operate properly. Having to fire a volunteer is just as much a reflection of the organization as it is of the volunteer’s work.

Before your organization fires a volunteer, consider the following approaches as they may be more appropriate:

- **Re-Consider.** Meet with the volunteer in a one-on-one setting and candidly ask the volunteer if they are facing any serious challenges, whether in the organization or in their personal life, that may be affecting their performance. If possible, ask if there is anything that can be done on behalf of the organization to improve the situation.
- **Re-Train.** The volunteer may not understand the rules of the organization, or that they have to be followed. Further, the problem may be a lack of knowledge or understanding, rather than a motivation problem. Re-train the volunteer and see if their work improves.
- **Re-Supervise.** The volunteer may not have received sufficient guidance in their work, or may feel unsupported. Talk with the volunteer about different supervision strategies that could encourage and support their work.
- **Re-Assign.** For whatever reason, the volunteer may not excel in their current position. Transfer the volunteer to a new position and see if there is a change in their performance. This may even mean referring the volunteer to a new department or to another organization entirely.

All of these alternatives are easier to implement than firing a volunteer, and recognize that there are many reasons why a volunteer may be struggling in your organization. We strongly encourage that you consider each alternatives before firing a volunteer.

A Firing System

It helps to have in place a system for dealing with volunteer dismissals, in case your organization encounters a situation in which none of the above alternatives is an option. As recommended by Steve McCurley of World Volunteer Web, the following 3-step system is a suggestion for how the volunteer manager can make and justify the decision to dismiss a volunteer.

1. Forewarning/Notice

The system's first step is the development of clear policies and information about the potential for firing volunteers. This can include:

- Official policies regarding volunteer/personnel issues; it is especially important to have clear policies related to the suspension and termination of volunteers.
- A volunteer job description that explains the job requirements, and has some measurable objectives for determining whether the work was accomplished (see Chapter 2).

2. Investigation/Determination

A volunteer should never be dismissed 'on the spot,' regardless of the seriousness of the transgression, and this step involves an evaluation of the situation. It is advisable that the coordinator establish a process for reviewing volunteers' behavior and for recording problems. Further, it is wise to require 'proof' that the volunteer did something wrong, like a testimony from other volunteers or staff.

3. Implementation

This final step requires that the volunteer coordinator enforce the system. The rules must be applied equally and fairly to all volunteers, appropriate penalties must be given and, if possible, a review process should be implemented so that the decision does not look like a personal one.

Tips for the Firing Meeting

If you decide that there is no other alternative than to fire a volunteer, someone has to communicate the decision to the volunteer. Here are some tips that may help this process:

- Privacy. Hold the meeting in a private setting to respect and preserve the dignity of the volunteer, as well as your own.
- Make it quick. Be clear and direct with the volunteer, and make sure that they have understood that this is a final decision.
- Prepare. Practice the exact words you will use to tell the volunteer, and make sure that they are final and that the message is clear. Do not back down to seem like a 'nice' person; all negotiating and discussion with the volunteer should have already happened through the Firing System.
- Announce, don't argue. The purpose of the meeting is not to re-discuss and re-argue the decision (which should have happened, if appropriate, in the Firing System) – it is only to communicate to the volunteer that they are being dismissed from the organization. Also, do not argue to avoid putting your foot in your mouth and regretting it later.
- Follow-up. Follow-up with a letter reasserting the decision and informing the volunteer of any departure details (i.e. returning keys, a uniform, etc.). Make sure you also follow-up with the appropriate individuals like staff and beneficiaries, to inform them of the change. There is no need to explain the reasons behind the organization's decision.

12: Closure and Feedback

Many organizations end the volunteer management process once they have trained and have begun to supervise their volunteers. However, it is vital to the success of the volunteer program that you continue the process until the volunteer has finished working for the organization.

When a volunteer decides to leave your organization for whatever reason, it is important that your organization be aware of the answers to each of the following questions:

- Why has the volunteer decided to leave the organization?
- What was the volunteer's impression of the organization and their experience as a volunteer?
- Would they have worked longer with your organization if circumstances had been different?
- Would the volunteer like to stay in contact with the organization?

Through a closure process – involving some form of exit interview and a thank you – your organization can receive valuable feedback and suggestions from the volunteer, and can also help make the volunteer feel satisfied and appreciated.

The Exit Interview

It is important to have a system to collect information from departing volunteers, as this can greatly help in future improvements to your volunteer program. There are two primary ways to conduct an exit interview – through a written form or through a verbal interview. Some organizations choose to use both strategies.

- a. A Written Form – A standardized form allows volunteers to put more thought into their answers than they may in a spontaneous interview. Further, forms can be filed away and volunteers' comments can be used for future reference. An example of an Exit Interview Form can be found on the next page.
- b. A Verbal Interview – Making time for a verbal exit interview shows the volunteers that their work was highly valued by your organization and that their feedback matters. Interviews it also allow volunteers to express comments in a more personal way.

Regardless of which (or both) options your organization uses, standardize the questions that you will ask volunteers to make sure that this process is executed in an organized fashion.

Thank Your Volunteers

Finish the exit interview by sincerely thanking the volunteer for their contribution as well as for their comments and suggestions.

Further, depending on your resources and the amount of time the volunteer has dedicated to your organization, you may want to thank them in a more formal way, whether through a certificate, a letter of reference, a small gift, or any other creative idea that you may have. See Chapter 9 on Motivation and Recognition for more information on this point.

Act

Finally, if the volunteer has raised any concerns or problems that can be resolved, it is important to do so. If the problem is urgent, follow Incident Response Plan in Chapter 10. If the problem is less urgent, include it in your future Risk Analysis and potentially in changes to your organizations policies (see Chapter 3).

Volunteer Program Exit Interview Form

Volunteer's name:

Position:

Volunteer's supervisor:

Start and end date of volunteer commitment:

Today's date:

We thank you for your contribution to our organization and value your comments. We are always looking to improve our volunteer program and your experience as a volunteer can help us to that end. Please answer the following questions as truthfully as possible.

Mark an 'x' or clearly write your answer in the given spaces.

1) Why have you decided to end your work as a volunteer? Indicate your response with an 'X'.

To travel / To relocate

There was a difference between the advertised position and the reality of the volunteer work

The quality of supervision and support

A lack of opportunity for professional development

The working schedule

A lack of recognition for my volunteer work

Personal and/or medical issues

The working environment

Other:

2) What did you like most about your volunteer work?

3) Did the work involved in the volunteer position correspond with that you had expected? YES () NO ()
Please explain.

4) Did you feel that you received sufficient preparation and orientation for your work?

5) Did you receive sufficient supervision and support during your work?

6) Did our policies and procedures help or impede you in your work? Please explain.

7) In what ways do you suggest that we could improve our volunteer program?

8) Would you recommend our program to other volunteers? YES () NO ()

9) Other comments:

10) Would you like to stay in contact with our organization and receive updates via email? YES () NO ()

If yes, please provide your email address: _____

We are very thankful for your support to our organization. Thank you and please stay in touch!

13. Maintaining Contact with Volunteers

The relationship with a volunteer does not have to end once they have left your organization, and it is in your project's best interest that you maintain this contact. By staying in touch with former volunteers, your organization can thank them and further recognize them for their work, can keep them informed about the changes and goals in your organization, and can ensure that former volunteers continue to feel connected with your organization.

Further, your organization can directly benefit from maintaining contact with former volunteers:

- Volunteer recruitment – Former volunteers may decide to return to your organization, or they may recommend the experience to family, friends, or other suitable people who are looking for a volunteer opportunity.
- Representation – Former volunteers can act as representatives for your organization overseas or elsewhere in Guatemala, and can help to raise awareness about your cause with other NGOs, community groups, or even with funders interested in supporting your work.
- Networking – Former volunteers can also help create networks between your organization and others with similar values and goals, as well as networks with potential funders.
- Fundraising – Many studies show that people are more likely to donate money to causes with which they feel a personal connection. While it is unadvisable to ask volunteers for money while they are at your project, many volunteers take up a projects' cause upon returning home.

How to Keep in Touch

Today, the internet offers the best options for maintaining contact with volunteers – not only does it overcome physical boundaries, but also allows you to reach a wide audience quickly. Therefore, as discussed in Chapter 12, it is important to ask volunteers whether they would like to stay in contact with your organization, and to ensure that you get their full name and email address – and double-check that it's legible!

Once you have the email contacts, put them to good use. The most efficient way to stay in contact with former volunteers is through a regular newsletter or through social media websites like Facebook or Twitter. Blogs can also be used to this end, although they often take more time and resources, so the following will focus on the two other previously mentioned options.

Volunteers are not the only individuals who may be interested in receiving a newsletter or updates about your project via social media. Visitors to your project, donors, friends of the project, and any others interested in receiving updates should also be asked for their contact information.

General Tips

- Length – Prioritize your information. Keep newsletters to a maximum of 2 *pages*, with information sections of no more than 100-150 *words*. Social media postings are even shorter, and should be no longer than 50 *words*. Your readers may only glance at it, so you want to ensure that they see the most important information.
- Frequency – Newsletters are most effective if sent every 3 or 4 months. Information can be shared with much more frequency via social networks, as many as several times per week, but be sure to limit these updates to when your organization has new and interesting information – otherwise your audience may lose interest.
- Variation – Choose several of the different strategies listed below to keep your newsletter and social media interesting. You may choose different options for different newsletters – for example, a “Flashbacks” section would be good if you are celebrating an anniversary and a Client Spotlight if you have a current success story.
- Images – For newsletters as well as social media, draw attention by selecting images and graphs. Remember to include a short caption explaining the image and its relevance.

- Language – If your audience is bilingual and you have team members that can write fluently in two languages, then your organization can share bilingual information. That said, if you don't have the capacity or time for the bilingual format, it's best to pick your organization's strongest language – grammar mistakes don't represent your organization very well!

Some Final Pointers on Newsletters

- Standard Layout – Although your content may vary from issue to issue, establish a basic, standard layout: a standard background, the layout of images, text, your logo, and your contact information, etc, so that future newsletters are easier to design.
- Font – Use a simple font like Arial or Franklin Gothic, as these are easier to read.
- Format – Regardless of the program you use to make your newsletter, convert it to PDF format before sending it to increase its professional appearance. Websites that convert documents to PDF include www.doc2pdf.net and <http://www.zamzar.com/>.

Content

The content of your communications will depend on the following factors:

- What does your organization do? (your mission and vision)
- What are you trying to accomplish by sharing the information? **Examples can include volunteer recruitment, networking, raising awareness about your cause, volunteer recognition, fundraising, etc.
- Who will be receiving the information? Who is our audience?

Once you have identified your newsletter's audience and purpose, choose among the following options for content layout to fulfill your objectives. For a 2-page newsletter, you will likely only be able to pick about 4-7 of the following content options. For social media websites, you should only use one of these options per update.

- A. Updates and news** can be of interest to your audience, and help keep your newsletters and social media presence up-to-date and relevant.
- Organizational updates – What new and exciting things have happened since the last newsletter? News can include new achievements, new projects, new team members, and events like celebrations and holidays.
 - News updates – Current events or any relevant changes of laws related to your organizations' work could be of interest to your readers and could help emphasize the importance of your organizations' work.
- B. In-depth information** keeps your audience informed about your activities, and can also serve as an educational tool to call attention to your cause. In-depth information can also increase your recipients' understanding of the needs of your organization.
- Editorials – Share your opinions through brief editorials on an issue related to your project.
 - Articles – Feature articles about your organization, or about other related issues, either written by your staff or found in the local news.
 - Expert interviews – Interview an expert or staff member about your project's cause.
 - Highlight a challenge – Feature the answer to the question “What is the biggest challenge currently faced by (your project)?”
- C. Highlights** are short pieces of information that are particularly important or eye-catching for readers. These are great to draw attention to specific successes or needs of your project, or to specific facts you'd like to emphasize.
- Top 5 – A 'Top 5' list can help articulate your points clearly, like the “Top 5 Challenges of the Nutrition Project” or “Top 5 Success Stories of 2011”.

- Statistics that are relevant to your cause or project are a way to represent successes, or to show the challenges that you face. These statistics are particularly effective when shown visually, like through graphs.
- Photos – Photos are a very important way to grab readers’ attention, and a well-chosen photo with a caption can go a long way. Identify the message that you want to send through your photos, and pick them carefully.
- Upcoming events – Mention any important upcoming events. If your audience is overseas and won’t be able to attend, the date and a brief explanation is sufficient, but if you are contacting a local audience, make sure to give the date, time, contact information, location, as well as the explanation.

D. Spotlights draw attention to success stories. They can both provide recognition and thanks to volunteers or donors that are already involved, and provide inspiration to others to get involved as well.

- Volunteer – Newsletters or social media are a great way to thank and provide recognition to volunteers. A ‘thank you’ to all volunteers listing them by name, or a highlighted “Volunteer of the Month” with a photo an explanation can serve as positive motivation.
- Donors – Inform your supporters when foundations, businesses, or individuals make a significant donation. Thank the donor and explain how that money will further your mission.
- Clients/Beneficiaries – Share an inspirational success story about one of your organization’s beneficiaries – for example, announcing that a student has graduated high school, or that a family has a new home. A small photo and biographical information is a great way to do this.

E. Testimonials allow other people to sing the praises of your project, giving added credibility to its importance.

- Volunteers – Ask a volunteer to answer a specific question that will highlight positive elements of your project, like “Why do you love volunteering for (organization name)?”
- Donors – Ask a long-term or particularly generous donor to respond to a statement like “Why I believe in giving to (your organization).”
- Clients/Beneficiaries – Ask one of your clients or beneficiaries to respond to a statement, like “How (your organization) has changed my life,” or “How (your project) has improved conditions for the next generation.”

F. Showcase your progress – There are various ways to show the progress that your project has made which can emphasize your good work and the reasons that you need continued support.

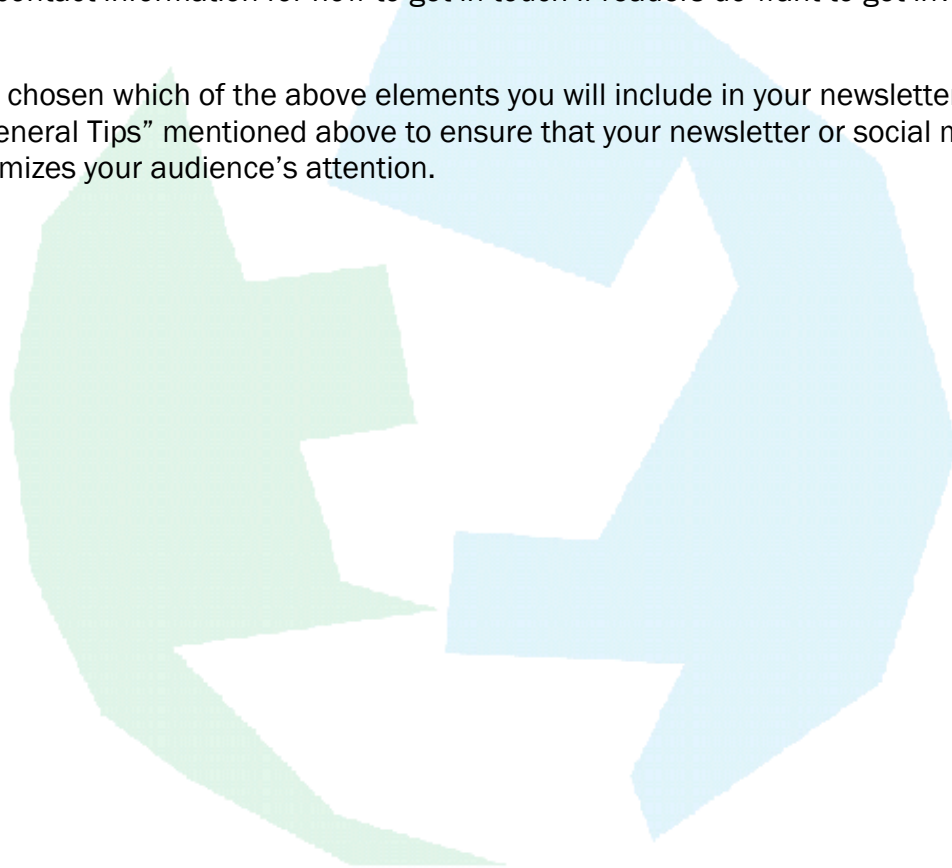
- Flashbacks – An old photo and caption can show the progress your organization has made – whether a photo of the community, beneficiaries, team or construction projects. This is great if your organization is celebrating a milestone like 10 or 15 years, or a special occasion like International Women’s Day.
- Before and After – Successes – Transformation stories are inspirational and help to show concrete successes of your projects. Describe one of your beneficiaries and what their life was like before and after they worked with your organization, or show an area before and after a construction project.
- Before and After – Needs – A “before and after” representation of a change in your community – like a natural disaster or a change in laws that affect your project –speaks volumes about why you need continued support. This can be articulated through words, but is more effective through photos.

G. Call to Action – Newsletters and social media should be used to directly inform your readers and former volunteers about how they can stay involved with your organization.

- Volunteer invitation – Make a short statement inviting your audience to volunteer and for your former volunteers to return.

- How to get involved – Explain different ways that readers can help your project – whether by spreading the word about your project, purchasing organic produce in their home country, or by writing to their local government about issues that concern your cause. Be specific and clear about the action you need.
- A Project “Wish-List” – Provide a short list of the items your project needs to continue succeeding in its work, an explanation of the need, and the rough cost of those items. Remember that if you ask for too many things, you may turn off your audience.
- A Specific Fundraising Target – Express a monetary target that your organization is trying to reach, and explain its importance for your organization’s work – for example, to build a house for a beneficiary, to provide scholarships for 10 children, or to open a library. An image works particularly well for this, like a thermometer showing how much money has been raised.
- Contact Information – Regardless of whether of these options you choose, include the relevant contact information for how to get in touch if readers do want to get involved.

Once you have chosen which of the above elements you will include in your newsletter, please refer to the “General Tips” mentioned above to ensure that your newsletter or social media presence maximizes your audience’s attention.

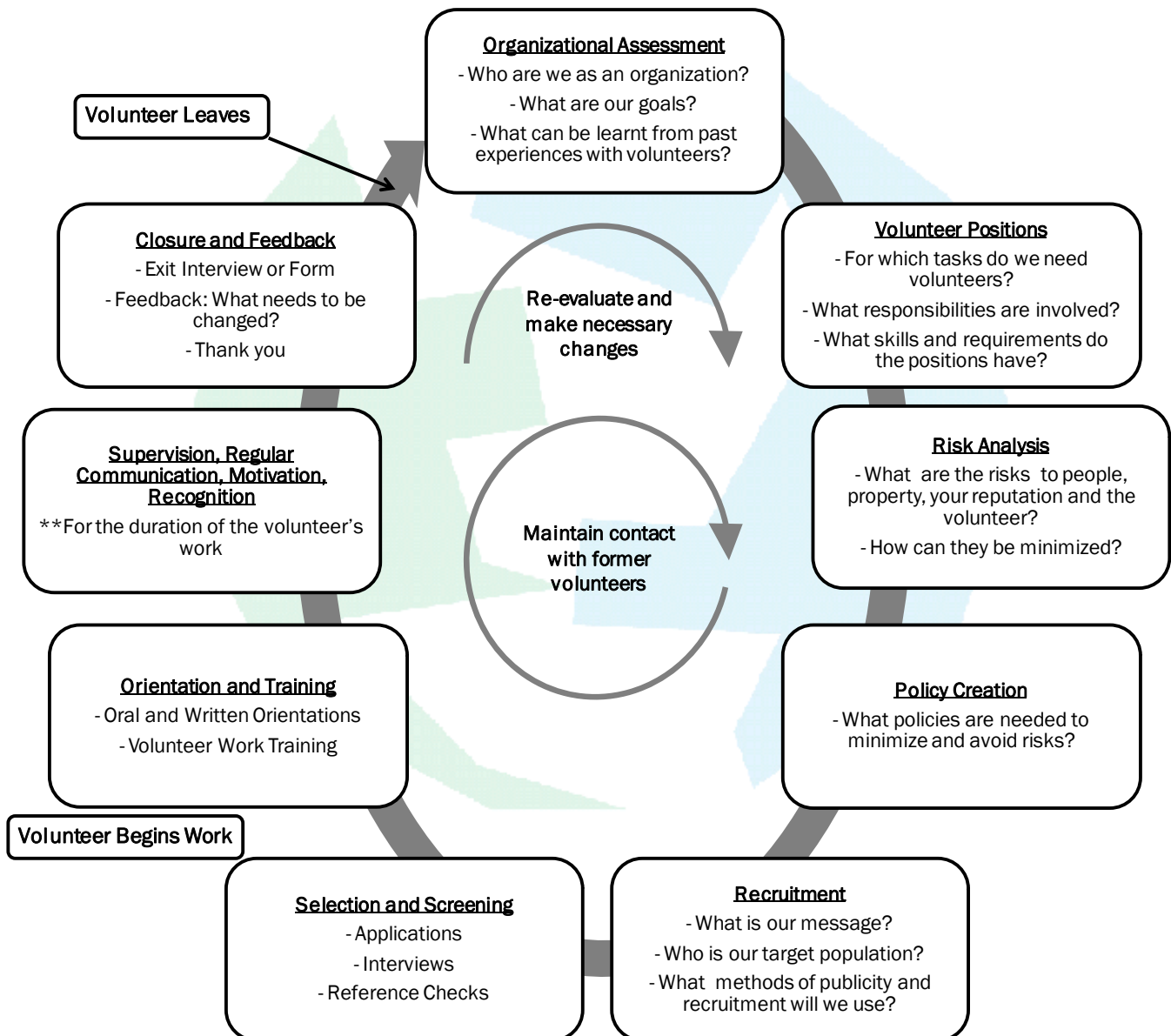


14. Summary

This manual has thoroughly explored all elements involved in successful Volunteer Management. As seen, many of these aspects are interrelated, and a successful volunteer program would not be complete without each of them.

This handbook has presented the different elements of volunteer management in the order in which they need to be developed, in preparation for receiving volunteers. In practice, however, the volunteer management process is a cycle:

The Volunteer Management Cycle



A well-run volunteer program involves all stages of this cycle on a constant basis. If more than one volunteer is involved, an organization may find itself at different stages in this cycle at the same time. One thing, however, needs to stay constant for the success of your organization's volunteer program: that you are regularly re-evaluating, updating, and altering all elements of the program as necessary, and particularly in response to your experiences with volunteers.

For More Information

This concludes EntreMundos' Handbook on Best Practices in Volunteer Management.

For more information on EntreMundos' various volunteer services in Guatemala, or to register your organization among our network of host organizations, please contact EntreMundos' Volunteer Programs Coordinator at volunteering@entremundos.org.

For further resources on volunteer management, please see the Works Cited below.

For all other inquiries about EntreMundos' activities, please feel free to contact the EntreMundos team at mail@entremundo.org or (502)-7761-2179.

Finally, thank you for your interest in EntreMundos' Volunteer Program and Capacity Building Program, we wish you much success in your work.



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