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02 PLANNING

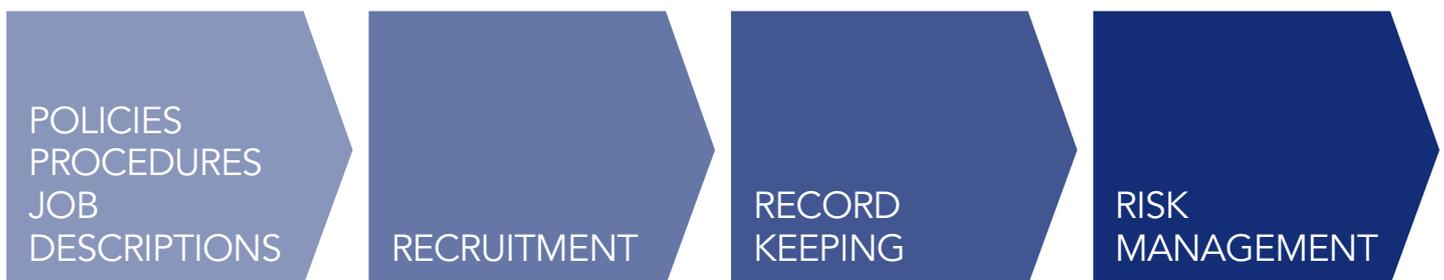
a. Write policies and procedures, and job descriptions

Policies and procedures

A volunteer handbook is a communication tool between the VHO and its volunteers, and helps ensure a common understanding of policies and procedures among all volunteers.

A well-written handbook introduces the VHO to volunteers and helps them fit in. It gives volunteers a sense of security that your organisation is as committed to them as to your paid staff, establishes clear understanding of expectations and is a point of reference when there are disputes or misunderstandings. It can also serve as a risk management tool.

PLANNING STAGE: ELEMENTS



WRITING POLICIES AND PROCEDURES FOR VOLUNTEERS

1. Review your employee handbook to see if there are any policies and procedures that you can adopt for your volunteers
2. Write policies and procedures for your volunteers, especially in basic areas such as:
 - Recruitment process – creation of positions, recruitment drive, screening and interviewing, selection, confirmation, etc.
 - Terms of appointment – required service hours, probation, termination, training and development, core competencies required, skills and knowledge expansion, targets and expectations, etc.
 - Orientation programme – introduction to your organisation’s structure and culture, acceptable code of conduct and behaviour, job description etc.
 - Retention process – motivation, recognition, handling conflicts and grievances, etc.
 - Operations – getting around, use of forms, record keeping, use of facilities and equipment, safety instructions, etc.

SAMPLE GUIDE TO VOLUNTEER POLICIES AND PROCEDURES MANUAL / HANDBOOK

1	Organisation overview
1.1	Introduction/welcome
1.2	Brief history of the organisation
1.3	Organisational charts / line of authority
1.4	Staff directory and contact details of key staff
1.5	Mission and vision
1.6	Overview of services
1.7	Profile of clients/beneficiaries
1.8	Source of funding and budget

2	About volunteering
2.1	Role of volunteers in the organisation
2.2	Programmes, services and volunteer opportunities
2.3	Getting started
2.4	Job descriptions
2.5	Roles and responsibilities

3	Policies and procedures
3.1	Do's and don'ts ¹
3.2	Code of ethics and conduct
3.3	Management practices
3.4	Performance expectations
3.5	Disciplinary actions
3.6	Dismissal

4	Appraisal and review
4.1	Performance appraisals and reviews

5	Feedback, grievances
5.1	Feedback channels
5.2	Grievance channels

6	Volunteer benefits
6.1	Resource support
6.2	Recognition and appreciation schemes
6.3	Training and development plans
6.4	Claims
6.5	Risk protection
6.6	Volunteers' rights and liabilities

7	Other information
7.1	Annual calendar of events involving and/or of interest to volunteers
7.2	Annual calendar of training opportunities involving and/or of interest to volunteers
7.3	Guidelines for usage of general resources eg. meeting room, computer, printer, copier, fax, internet and phone, vehicle, etc.
7.4	Guidelines for event planning and execution eg. budgeting, obtaining approval, advertising, etc.
7.5	Essential contact numbers eg. Civil Defence, help hotline, etc.

Adapted from Workshop on Volunteer Management System reference materials by Winnie Tang, 2001

1 Include matters such as attendance requirements, procedures for impending absence, confidentiality, record keeping on clients, dress code, reimbursement on expenses, transport, resignation procedure, etc.

Where there are many volunteer programmes and assignments running concurrently, some VHOs prepare a job-specific handbook for volunteers. For example, Singapore Indian Development Association (SINDA) runs numerous island-wide programmes including home reading, tutoring, mentoring, library helpdesks and reading centres. While general policies may be similar for all programmes, the procedures for each job can be quite different. Thus, SINDA has a separate handbook for volunteers of its reading programme, reading centres and library helpdesks.

Once the handbook has been developed, circulate them to your volunteers and paid staff. Ignoring these policies and procedures will soon render them invalid. Some VHOs even obtain a signed receipt from each volunteer acknowledging receipt of the handbook and as confirmation that the recipient has read, understood and agreed to follow its policies and procedures.

“Writing a volunteer handbook is not a one-off effort. The handbook is useful only if it contains current information.”

Job descriptions

Job descriptions increase VHOs' ability to manage volunteers and their roles. Benefits of job descriptions include:

- Allow VHOs to structure their volunteer jobs to ensure that essential activities, duties and responsibilities are adequately covered
- Help formulate skill sets and behavioural requirements for each role
- Serve as a basis for volunteer recruitment
- Help place volunteers in suitable assignments
- Clarify VHO's expectations of volunteers
- Give volunteers a clear description of their roles
- Give a basis for orientating new employees, and for their learning and development
- Reduce arbitrary interpretation of roles and responsibilities by volunteers, VHOs and volunteer coordinators
- Help programme staff to understand their roles in relation to those of volunteers
- Act as a reference point in issues involving discipline or disputes
- Offer neutral and objective reference points for appraisals and performance reviews of volunteers

Job descriptions help you to place the right person in the right place for the right reason. It also promotes continuity if volunteers leave, and can reduce liability for your organisation by clearly spelling out to volunteers what they are authorised to do.

SAMPLE JOB DESCRIPTIONS ELEMENTS

1	Job Title A brief indication of what the job is about	7	Time period Duration and frequency, or one-off volunteer project
2	Department Where the job is created	8	Reporting relationships Who the volunteer is accountable to, who the volunteer is responsible for, the job's network of internal (eg. departments or staff within the VHO) and external stakeholders (eg. VHO's clientele and supporters)
3	Key objective / contribution What is required of the job and how the job contributes to the organisation as a whole	9	Performance review and appraisal Reviews and appraises performance of your volunteer against a competency benchmark, targets and outcomes achieved, assignments completed, etc.
4	Key standards Spells out the specific targets and outcomes for the job	10	Training and planned progression Identifies the strengths and weaknesses of your volunteer and contains recommendations on equipping and developing the necessary skills for job enlargement / enrichment
5	Core competencies, requirements Skills, talents, attitude, character required for the job	11	Reporting and support structure Spells out accountability and the available support given to the job, eg. who does the volunteer report to?
6	Responsibilities, assignments Recommendations on assignments to carry out to achieve the key objective and performance standards. Main responsibilities - both routine and non-routine (eg. daily/weekly/yearly tasks, meetings to attend, key events or activities)		

For each volunteer assignment created, a job description should be written and updated regularly according to your organisation's strategies and plans.

SAMPLE VOLUNTEER JOB DESCRIPTION TEMPLATE

1. **Position Title:**
2. **Description of Project / Purpose of Assignment:** *(Give potential and limits)*
3. **Outline of Volunteer's Responsibilities or List of Tasks:** *(How will you and the volunteer know that the job is being done well or that the project is successful?)*
4. **Training and Support Plan:** *(How will the volunteer be prepared for the work and oriented to the agency? Who will supervise/be the contact point?)*
5. **Reporting:** *(What reports will be expected, in what form and how often?)*
6. **Time Commitment:** *(Minimum hours per week/month? On any special schedule? For what duration of time?)*
7. **Qualifications Needed:**
8. **Benefits:** *(What the volunteer gets in exchange of service, (tangibles and intangibles))*

SAMPLE JOB DESCRIPTIONS

ASIAN WOMEN'S WELFARE ASSOCIATION

Job Title	Volunteer for Special Programmes (Outings & Special Occasions)
Purpose	Assist teachers in the execution of special programmes for the children
Responsibilities	Assist teachers in whatever needs to be done for the smooth running of the special programme (eg. overseeing, feeding, pushing a wheelchair, etc.)
Commitment	At least one school term (10 weeks)
Trial Period	2 special programmes ("Preliminary Placement")
Day/Time	Usually weekdays; during office hours
Commencement	The next upcoming special programme
Frequency	As and when special programmes arise
Skills & Qualifications	Ability to help, as well as readiness to make a commitment
Training Provided	On-the-job, with additional in-house and external training courses
Benefits	Immense satisfaction. Free visits to places of educational interest

Interested? Please see the Volunteer Coordinator immediately or call 6285 2515

Asian Women's Welfare Association

TOUCH COMMUNITY SERVICES

Roles and Responsibilities of Children's Club Volunteers

- Be committed to help out in the club for 3 hours per week, arriving at least 15 minutes before club time and staying another 30 to 45 minutes for debrief.
- Will be assigned to take care of a group of children during club meetings. Be a role model, teacher, friend, parent and counsellor to the children under your care. Will refer difficult children and problem cases to your club leader and be responsible for children under your charge:
 - Call them when they are absent
 - Visit them when they are sick
 - Visit them or call them
 - Celebrate their birthday
- Be involved in home visitation with your club leader.
- Be involved in the monthly/bi-monthly meeting with your club leader for feedback and planning of the following month's programme.
- Be available to meet club leader for any important meetings.
- Willing to take up any additional responsibility (that is within your capacity) as assigned by your club leader.
- Abide by the Code of Ethics for Volunteers and Staff.
- Be committed to serve during the commitment period. In the event of sickness, emergencies with any other unforeseen circumstances, you will seek to notify your club leader at the earliest possible time.

TOUCH Community Services

b. Plan recruitment, develop action plans for short-term assignments

Volunteers have a choice whether to volunteer and where. They have alternatives, even from activities outside of volunteering, such as their jobs, families and leisure. With intense competition for individuals' time, VHOs need to be resourceful to attract volunteers.

Recruitment

Recruiting, screening, interviewing, placing, orientating, training, recognising and motivating them are important steps to achieving and maintaining effective volunteer support for your organisation.

The suggestions and samples below are just that: suggestions and samples. Do adapt from them based on your organisational needs. For example, the amount and type of information you seek from potential volunteers, and extent of screening, depends on type of volunteer and work you require these volunteers to do. The practice applicable for an usher who works for one event is different from that of a regular befriender or a committee / board member.

Plan and recruit carefully. The recruitment process does not end with interested volunteers responding to your organisation. Work out your recruitment strategies and tactics to attract right-fit volunteers. If you start your volunteers off right from the start, you may not have to do too many volunteer recruitment drives in future.

SAMPLE RECRUITMENT PROCEDURES

1

Plan recruitment strategies and tactics – know the types and numbers of volunteers needed and where to locate suitably qualified potential volunteers. Develop recruitment techniques – appeal to potential volunteers with a targeted message about your cause, what potential volunteers can do about it, and what's in it for the potential volunteers. Study your current group of volunteers and tailor a special message to appeal to other similar groups

2

Get your message across eg. through:

- Informal one-to-one talks
- Small group gatherings and arrangements with unions, professional associations and companies
- Road shows and special events with speeches and presentations
- Special letters, brochures, newsletters, advertisements, web page. Find a sponsor to boost your recruitment budget so that you can produce quality brochures, advertisements, etc.
- Media coverage

3

Once you have the attention of your potential volunteers, connect with them immediately, agree on the next step and follow up accordingly

4

Manage on-going recruitment efforts – keep in regular contact with potential sources of volunteers, constantly profile your recruitment efforts, and enlist the help of your existing volunteers to recruit new volunteers by their testimonies

SAMPLE VOLUNTEER RECRUITMENT CHECKLIST

PROCESS	CHECKLIST ITEMS
1 Identify volunteer needs	<input type="checkbox"/> Volunteer needs analysis and findings <input type="checkbox"/> Job descriptions
2 Form a recruitment committee	<input type="checkbox"/> Who to staff the committee <input type="checkbox"/> Function of the committee
3 Develop recruitment plan	<input type="checkbox"/> How to recruit - what approach <input type="checkbox"/> Who to recruit <input type="checkbox"/> Where to recruit <input type="checkbox"/> Publicity strategies to use <input type="checkbox"/> Duration of campaign, timeline <input type="checkbox"/> Budget
4 Implement recruitment plan	<input type="checkbox"/> Publicity <input type="checkbox"/> Interview, screen, place and orient volunteers based on pre-established procedures and policies
5 Evaluate recruitment plan	<input type="checkbox"/> Review results <input type="checkbox"/> Suggestions for subsequent campaigns

Caution: Ask for help but please do not plead as you would want volunteers who want to be there to serve and not otherwise.

SHORT-TERM ASSIGNMENTS

The above sample volunteer job description gives volunteers an idea of what their work involves and is more suitable for long-term volunteers. More volunteers are opting for short-term or project-based volunteer assignments. For project-based volunteers, it may be more useful to develop appropriate action plans to accomplish given projects within specific timelines and with resources given.

These action plans should give your volunteers an idea of the task commitment and desired outcomes required of them. Action plans help to monitor the progress of your volunteers and hence can increase your efficiency and effectiveness in managing and controlling your budget and operations.

SAMPLE COMPONENTS OF AN ACTION PLAN FOR AD HOC PROJECTS

	ITEMS	PURPOSE		ITEMS	PURPOSE
1	Project name	Gives an identity to the project	6	Budget	Provides a resource indication and support to all the action steps (eg. the benchmark for justifiable spending at each step)
2	Purpose	Gives a brief description of what the project is about	7	Accountability	Delegates relevant authority and corresponding responsibility to all involved in the project. All parties involved must understand and accept the parts they have to play and there must be one person with overall accountability for the project, coordinating all efforts to pull it together
3	Goals	Sets standards and outcomes to be achieved. These must be measurable at the completion of the project	8	Achievements	Checks off action steps completed. Also highlights performance variations and adjustments
4	Action steps	Lists out sequentially all the action steps needed to complete the project and achieve the goals set			
5	Schedule	Provides a timeline to all the action steps (eg. which steps must be completed by when)			

EXAMPLE OF VHO RECRUITMENT OF VOLUNTEERS USING EXISTING RESOURCES

The Singapore Indian Development Association (SINDA) is a self-help group formed in 1991 to address the educational and socio-economic issues facing the Indian community in Singapore. The management of SINDA makes a conscious attempt to include volunteer involvement in all of SINDA's programmes and SINDA's processes have been re-engineered to make it a volunteer-friendly organisation. It has worked out a comprehensive plan to recruit, train, motivate and retain volunteers. Since 1997, SINDA's volunteer strength has grown from 200 in 1997 to 3100 in 2002. The volunteers are from different ethnic and age groups .

Internally, recognising the effectiveness of the word-of-mouth approach in recruiting volunteers, SINDA treats every person as a potential volunteer. As such, SINDA's staff actively recruits among everyone they come across – be they beneficiaries, resource persons, or participants in events organised by SINDA. SINDA also encourages its existing volunteers to bring their family members and friends along to volunteer.

One of SINDA's most successful mechanisms is through the SINDA newsletters, *SINDA @ Work* and *SINDA News*, which are sent to all Indian households. Tapping on this available channel to publicise volunteer needs, volunteer stories and contributions are featured and readers are encouraged to sign up. SINDA also makes it easier for interested volunteers to sign up by enclosing a postage paid volunteer form. An average of 100 interested volunteers respond to SINDA's call for volunteers in every issue.

Externally, SINDA works closely with the media and other partners to recruit volunteers. Using the radio as a communications channel, SINDA initiated a live volunteer call-in segment on the radio programme, *Thil Thil Manathil*, where enquiries on SINDA's programmes are answered, volunteers share their experiences on air and appeals for volunteers are made. SINDA also enlists the help of other organisations such as the Singapore Reading and Literacy Society to publicise SINDA's volunteer requirements in their newsletters.

SINDA makes use of information technology to reach out to volunteers. With the support of some telecommunication companies, SINDA sent volunteer appeal messages. SINDA makes a conscious effort to maintain an email database of volunteers, supporters and others that the staff have come into contact with, and sends email appeals regularly to those in the database to help spread the message. Details of volunteer programmes are also posted on the SINDA's website and an e-registration form is available for online registration. On average, SINDA receives about two online registrations every day. SINDA also uses the websites of related agencies such as the National Volunteer Centre (as it then was) and the National Council of Social Service to recruit volunteers.

c. Record keeping

A good database on your programmes and your volunteers will help you recruit, develop and assess your volunteers, match volunteers to organisational needs and in budget submissions, to name a few examples. A database may have various broad categories. Type of information would vary with type of volunteers, eg. ad hoc or long-term, and type of skills eg. generalist or specialist.



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SAMPLE DATABASE CATEGORIES

CATEGORIES	USEFUL INFORMATION
1 Volunteer personal particulars	<ul style="list-style-type: none"> Name Gender Marital Status Age Nationality NRIC/Passport Number Contact Information: Address/ Telephone Numbers/Email Current Occupation Company Contact Person, in case of emergency Telephone Number Date joined Date left
2 Work assignments	<ul style="list-style-type: none"> Date of assignments Job descriptions Attendance / Time log sheets
3 Training	<ul style="list-style-type: none"> Courses attended
4 Appraisals and reviews	<ul style="list-style-type: none"> All appraisal and review forms including future development
5 Awards and recognition	<ul style="list-style-type: none"> Awards received Awards nominated for Awards that can be nominated for
6 Others	

Attendance and/or time log sheet is used to record man-hours for service rendered by volunteers. Such a tally of volunteer hours serves as the primary indicator of the contribution of volunteers to an organisation. A log sheet, on the other hand, serves to record the number of contacts a volunteer has with the client.

SAMPLE ATTENDANCE / TIME LOG SHEET

Name of volunteer:				
Work assignment:				
Date	Time In	Time Out	No. of Hours	Comments
Total Number of Hours completed:				

Adapt the attendance/time log sheet to monitor the progress of the volunteers depending on the nature of your programme, for example, a volunteer-client contact report if it is a befriending programme or a class academic progress chart if it is a tuition programme.

Knowing how many and which volunteers serve on a given day or a given month through attendance/time log sheets gives you management information to help in programme scheduling, planning and eventually reviewing and appraising the performance of the volunteers.

d. Risk management

Volunteers give you their time and talent, creating much value in the process. However, there may also be certain risks, such as accidents.

Sample risk exposures management

- Adequate insurance coverage for your volunteers (public liability, workmen's compensation, etc.)
- Good risk management practices (careful screening and cross referencing, cautious placement, clear job descriptions and authorisation levels, orientation, training, supervision, dismissal, etc.)

Risks can be managed. Get started in learning how to manage risks systematically for your volunteer programmes. Click [here](#) to download a copy of a *Risk Management* primer.