

Volunteer Management Manual

Part 1: Theoretical Component

Establishing Your Volunteer Programme

*introducing the
Basic Principles of Managing Volunteers*

Part 2: Practical Component

Tools for Managing Volunteers

*to aid the
Day-to-Day Management of Volunteers*



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Volunteer Management Manual

Part 1: Theoretical Component

Establishing Your Volunteer Programme



*A Manual Introducing the
Basic Principles of Managing Volunteers*

Objective

The objective of the, “Establishing Your Volunteer Programme” manual is to provide basic principles of effective volunteer management to the Volunteer Manager. In order to perform the responsibilities of managing the volunteer programme, the Volunteer Manager needs to be aware of the following basic principles:

- a) planning the volunteer programme**
- b) recruiting volunteers**
- c) orientating volunteers**
- d) providing ongoing management to volunteers**
- e) finalising a volunteer assignment**
- f) maintaining relations with former volunteers**

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A) Introduction

I. Start by Recruiting the “Right” Volunteers

If you want to utilise the involvement of volunteers in your organisation, begin by asking, “Why does our organisation need volunteers?” What can volunteers contribute to your organisation to help you work towards your goals? Volunteers, like paid staff, are a human resource to help your organisation meet its mission.

Clarifying the organisation’s need for volunteers is the first step to utilising volunteers. You should have a clear and narrow focus for how you want to involve volunteers in your organisation. Then, you can make a list of *volunteer roles* to guide you in your recruitment. Once you have identified volunteer roles for your organisation, you can be targeted in your recruitment – recruiting people to fill only those volunteer roles identified as needed within the organisation.

Recruiting the “right” volunteers into the “right” volunteer roles is a key component of ensuring you utilise volunteers in your organisation. Other key components include planning your volunteer programme and creating a healthy climate for involving volunteers so that they can make an effective contribution once they are recruited.

II. A Healthy Climate for Involving Volunteers

Assume that you have recruited the “right” volunteer; now what can you do to ensure the success of this volunteer’s placement? In order to make an effective contribution to the organisation, volunteers need a healthy climate in which to work. A healthy climate is one that allows, supports, and motivates volunteers to make an effective contribution to the organisation.

The following are steps to creating a healthy climate for volunteer involvement:

- 1) **Involve all staff in the planning and ongoing evaluation of your volunteer programme.** This helps to create an environment in which staff are supportive of volunteer involvement. By having input into it, staff should feel a sense of ownership of the volunteer programme.
- 2) **When planning the volunteer programme, take an approach that volunteers play a role in helping the organisation work towards its mission and goals.** It is important that staff recognise the importance of volunteer contributions specifically towards the organisation’s goals. Again, this ensures that staff facilitate the involvement of volunteers.
- 3) **Inform staff about their role in working with volunteers.** All staff play a part, whether directly or indirectly, in managing volunteers. Whether you are the Volunteer Manager, or a staff member working with a volunteer on a project, or a staff member who has only indirect involvement with volunteers, you need to have a clear understanding of how you are expected to interact with volunteers.

- 4) **Foster healthy interpersonal relationships amongst staff and volunteers.** Research studies have shown that interpersonal relationships are a critical component of how work gets done. Take the time to get to know your volunteers on a personal or informal level. Make the time to organise social activities so that staff and volunteers can get to know each other outside of the office.
- 5) **Involve volunteers in organisational planning and decision-making.** As with managing any staff, when you involve people in planning and decision-making, they will feel a greater sense of ownership in, and have greater motivation for, working to implement the plans they have been involved in making.
- 6) **Plan your volunteer programme.** This is a fundamental step that can help you put in place all the structures and systems necessary to make your volunteer programme a successful one. When you take the time to plan your volunteer programme, you will later enjoy the benefits of it operating smoothly.

III. The Importance of Planning

As with the implementation of any programme, planning is the key to an effective volunteer programme that operates smoothly. In order to effectively involve volunteers in your organisation, you need to be prepared for them. So, plan and establish your volunteer programme before you begin recruiting. And, plan each volunteer role before recruiting someone to perform the role.

Plan the recruitment of volunteers

- Be targeted in how you recruit volunteers. Identify the organisation's needs then plan the best way to find volunteers to meet these needs.
- Develop a system to screen and select the "right" volunteers.
 - Plan who will be involved in screening applications.
 - Plan how you will screen for appropriate applicants.
 - Plan how you will accept or refuse applications.
- Develop documents and promotional material needed to recruit volunteers.
- You should always be ready (with standard documents in place) for volunteer enquiries.

Plan the orientation of volunteers

- Identify all areas that are important to include in a volunteer's orientation. The orientation is an important time that shapes the volunteer's assignment. It is important that they are briefed on all areas of their assignment.

- Develop a system that ensures all volunteers receive a thorough orientation.
 - Plan who will provide the volunteer's orientation.
 - Plan what will be included in the orientation.
 - Plan how each element of the orientation will be provided.
- Develop standard documents and tools needed to perform the orientation.

3) Plan the ongoing management of volunteers

- Establish procedures for managing volunteers.
 - Outline all steps needed to manage volunteers.
 - Delegate responsibility for the steps of managing volunteers.
 - Plan who will be responsible for monitoring and ensuring the volunteer's satisfaction.
 - Plan avenues of support for the volunteer.
- Develop standard documents and tools needed to provide ongoing management.

B) Planning

I. Planning Your Volunteer Programme

In order for your volunteer programme to operate smoothly and effectively you need to plan all aspects of managing your volunteers. Below are some important planning steps required:

- 1) Identify volunteer roles you need in your organisation.** Involve all staff to review why you need volunteers and in what capacity you need them. Make a list of the different volunteer roles needed. Try to make the description of each volunteer role as clear and specific as possible.
- 2) Develop a Volunteer Calendar.** While discussing the volunteers you need, mark when you will need them on a Volunteer Calendar (an example can be found at: *Volunteer Needs Calendar.doc*). This will help you to monitor the volunteer involvement in your organisation – who they are, how many there are, and when they are needed. Furthermore, this calendar will be a tool to help you recruit adequate volunteers in a timely manner. It will help you to plan and prepare for assignments prior to recruiting people to fill the volunteer roles.
- 3) Determine the rights and responsibilities of both the volunteer and the organisation.** Often, failure in both staff and volunteer management arises due to lack of clarity in the communication of expectations. Involve all staff and volunteers in deciding on the organisation's expectations of its volunteers. Also, discuss the expectations that volunteers should have of the organisation. Document your decisions outlining the rights and responsibilities of the volunteer and of the organisation. Then, ensure that all staff and volunteers are given a copy of this document and understand their rights and responsibilities.
- 4) Delegate responsibility for volunteer management.** Ideally, one person will be responsible for overseeing all aspects of the volunteer programme: the Volunteer Manager. This person will be a key link between the volunteer and other staff in the organisation. Not only will they ensure the volunteer receives adequate support and guidance, but s/he will also be responsible for ensuring staff are effectively involved in the volunteer programme. The Volunteer Manager can do this by (a) keeping staff informed of volunteer activities, and (b) requesting staff to provide support to volunteers when needed.
- 5) Develop a "Pre-Recruitment Checklist."** Develop a checklist to ensure that you are prepared for each volunteer **before they arrive**. All aspects of a volunteer assignment needs to be planned before you recruit someone to fill the position. Not only do you need to plan the tasks of the volunteer, but you must also plan the support and guidance the volunteer will need to perform their role.

C) Recruiting

I. Screening and Selecting Volunteers

If you want to utilise volunteers to help your organisation work towards its goals, you need to recruit volunteers that will work well in your organisation and who will also be able to effectively perform identified volunteer roles. In order to “match” volunteers to your organisation and volunteer roles, you need to screen for suitable applicants. The steps of screening for suitable volunteers are outlined below:

- 1) **Have tools in place to recruit volunteers.** You will need to have promotional activities and materials in place to recruit volunteers. You could invite staff to a session to brainstorm your organisation’s strategy for recruiting volunteers. This strategy would outline the avenues through which you can recruit volunteers and the steps you need to take to utilise these avenues. For example, in your brainstorm session, you might identify the opportunity to include a Volunteer Section on your website. You can then discuss the steps you will need to take to do this. Ensure that all promotional activities and materials tell interested volunteers how to contact you for more information.
- 2) **Always be ready to recruit volunteers.** By creating the following standard documents you can respond to volunteer information requests in a timely and thorough way:
 - **Organisational information** – introduce the organisation’s mission, goals, programmes, and projects
 - **Volunteer information** – outline what is involved and what can be expected when people volunteer with your organisation
 - **Volunteer application form** – for interested people to apply for a volunteer position.

If a person is applying for a specific volunteer role, you can also send them a Position Description. You cannot create a standard Position Description, as each one needs to be specific to a particular volunteer role. However you can use an existing template for writing Position Descriptions (an example can be found at: **Volunteer Position Description.doc**). The template will enable you to write the Position Description not only quickly but also thoroughly.

- 3) **Self-screening.** Providing interested volunteers with information about your organisation and its volunteer opportunities is an important step of self-screening. When the volunteer reads through the information, she/he begins to think more carefully about what is involved in being a volunteer with your organisation. With this information, he/she is better informed to decide whether they are suitable to volunteer with your organisation and, if a Position Description is sent, for a particular volunteer role.
- 4) **Screening Applications.** The process of completing and submitting an Application Form is also an important step of self-screening. The volunteer needs to take their interest seriously to follow through with this step. Developing the Application Form (an example can be found at: Volunteer Application Form.doc) takes careful thought and planning; the form should cover all areas of information

you would like to know regarding the applicant's suitability to (a) volunteer with your organisation, and (b) carry out a specific volunteer role.

Someone in the organisation needs to read applications to screen for suitable applicants. This person will ideally be the Volunteer Manager who will be aware of the organisation's volunteer needs. She/he will be able to match potential volunteers with the organisation's identified volunteer roles. Applicants will be screened for their suitability to:

- work in your organisation – in your work environment, with your staff, in your organisational culture, etc
- perform a specific volunteer role (to match the organisation's identified need) – the expected tasks and responsibilities, desired personal qualities of a volunteer in this role, etc

Screening applications will involve deciding whether each applicant is suitable or not. You will need to be ready to refuse unsuitable applicants (preferably refer them to other organisations or volunteer agencies for other opportunities). You will also need to be ready to inform applicants if you are interested in their application.

- 5) Further Screening.** If possible, arrange to conduct an "interview" in person. However, there are situations in which this is impossible such as when recruiting foreign volunteers. When it is not possible to meet someone in person, it is important that you try to find out as much information as you can through other forms of communication such as email, internet chat, or phone calls. Your communication, even when through these other channels, should cover areas that you would normally cover in a face-to-face interview.

The information you want to find out from further screening will depend on the volunteer role you are recruiting for. However, again, you can develop a template or checklist that ensures you cover areas important to check when recruiting people - regardless of the specific volunteer role. Your template should include questions to ask all applicants, but should also leave room to develop questions for a specific volunteer role. Again, you need to have someone, ideally the Volunteer Manager, skilled to screen applicants for their suitability to work in your organisation and to perform a specific volunteer role.

After further screening of the interested volunteer, you again need to decide on each applicant's suitability to (a) work in your organisation, and (b) perform a specific volunteer role. You will need to be ready to either refuse unsuitable applicants or accept suitable ones.

**Make the most of volunteers in your organisation;
invest the time to recruit the "right" volunteers**

II. Promotional Material

- 1) **Recognise the contribution of volunteers and at the same time recruit new ones.** Recognising the work of volunteers simultaneously helps you to recruit new people. Furthermore, being selective about the volunteer experiences you promote helps you to screen for only those volunteers you want to attract to your organisation. For example, if you want to attract highly skilled and experienced volunteers then you should promote stories about volunteers in your organisation who were very experienced and skilled. On the other hand, if you want young, energetic volunteers just out of school then you should promote stories about these kinds of volunteers who've been involved in your organisation.

- 2) **Recognise the work of your volunteers whenever you have the opportunity.**

Opportunities include:

- web site
- newsletters
- Annual Report
- brochures
- events that have involved the work of volunteers

- 3) **Be equipped to recognise and promote volunteers at any opportunity.**

- **When volunteers leave** - ask them to write about their overall volunteering experience.
- **When a project that a volunteer has been working on comes to fruition** - ask the volunteer to write about their work in the project. This is a good idea especially when a volunteer has been involved in a project from it's start to it's finish, or when the project has a final product or outcome (for example a fundraising event or a training session).
- **When volunteers are "in action"** - take photos.

- 4) **When you are developing promotional material:**

- ask volunteers to contribute. You can ask volunteers to make a direct contribution; for example through articles to your newsletters, Annual Report, and web site.
- involve volunteers in the planning of promotional material so as to get a volunteer's perspective.
- ask staff to write about the assistance they've received from volunteers.
- ask recipients of service, whether a partner, staff or children whom the volunteer has worked with, to write about the service they've received.
- include articles from volunteers.
- include photos of volunteers.

D) Orientation

I. The Two Parts of Orientation:

1. a period of time to prepare volunteers for their placement before they actually begin volunteering.
2. a period of time in the first days of a volunteer's placement to help them "settle in" or "orientate" themselves, physically and mentally, with the organisation and their volunteer role.

II. The Importance of Orientation

The process of orientation is an important time in a volunteer's placement as it sets a foundation for the rest of their placement. If the orientation is effective, it will steer the volunteer to a successful volunteer assignment – both in terms of their work performance and their social adjustment to working in your organisation.

A key component of a successful volunteer placement lies in communicating clear expectations between the volunteer and the organisation. Use the orientation process to clarify expectations between your organisation and the volunteer. Minimise the potential for problems arising later in the volunteer's placement by clarifying important issues at the beginning.

III. Addressing Volunteers' Questions

What are you doing to orientate your volunteers in their role and expectations?

As a manager of volunteers, you will often be managing short-term, episodic volunteers. You have only a short time to cultivate this relationship so be sure to address the many questions that volunteers have as they prepare for and adjust into their volunteer placement.

Consider questions from a volunteer's perspective, such as:

1) What is the organisation like?

- Work environment
- Staff relations
- Organisational culture

2) What will I be doing?

- Volunteer tasks
- Her/his role in the organisation, with other staff, with partner organisations

3) What is Vietnam like?

- Cultural differences
- Lifestyle in Vietnam
- Accommodation
- Transportation
- Clothing

**The big question volunteers have is,
"What expectations will people have of me?"**

E) Ongoing Management

- I. **Delegating to Volunteers.** Effective delegation is not always as simple as it appears. Entrusting a role or task to another person requires that adequate information be imparted. Without adequate information about their task and role, volunteers will resort to making assumptions that may not be accurate.

Delegating is most effective when volunteers are clear about their responsibilities and there is a high level of communication. Volunteers need to be instructed. Furthermore, **check they have understood the instructions.**

- II. **Supporting Volunteers.** Create opportunities for volunteers to seek support – to ask questions and to clarify tasks. This is particularly important for new volunteers. Consider ways to support those volunteers whose activities take them off-site. **Support systems need to be:**

- a) **Accessible.** Support systems must be available at appropriate times and places. Establish systems that volunteers are able to use.
- b) **Flexible.** Support systems should not be too rigid. They need to be adaptable to accommodate the needs of individuals.
- c) **Appropriate.** Support systems must be related to the work volunteers are being asked to do.

- III. **Recognising Volunteers.** Volunteers, to gain satisfaction from their placement and to remain motivated, need to feel they are making an important and needed contribution to the organisation. Recognition communicates to volunteers that their contribution is appreciated. Recognition needs to be specific and timely to the volunteer's contribution.

- Learn what motivates each volunteer and if possible make your recognition specific to each individual.
- Give volunteers tasks which take into consideration their skills, experience, and interests. Furthermore, decide on the volunteer's tasks in cooperation with them so they have ownership of their tasks and so they choose tasks they will be motivated and able to perform.
- Provide specific orientation and training to volunteers to equip them to perform their role well.
- Invite volunteers to participate in decision making and planning.
- Give volunteers prompt, objective, and specific feedback.
- Ask volunteers for their (objective and specific) feedback.
- Inform volunteers of the results of the programmes they are contributing to.
- Never forget the power of a simple thank you – whether written or verbal. Thank volunteers genuinely and appropriately.

IV. Involving Volunteers

- Invite volunteers to participate in organisational planning and decision-making. Also remember to ask the opinion of volunteers, especially when within their area of specialisation or interest, with day-to-day decisions.
- Delegate not only tasks, but also responsibilities to volunteers. Delegating an appropriate level of responsibility to a volunteer will reflect their value and place within the work team.
- Get to know your volunteers on a personal level and invite them to social activities with other staff.
- Develop work teams in which staff and volunteers work in cooperation.

F) End of Volunteer Assignment

- I. **Reflecting on the Volunteer's Assignment.** At the end of a volunteer's assignment it is important to reflect on the assignment both from the organisation's perspective as well as from the volunteer's.

The end of a volunteer assignment is a time to:

- 1) **review the management of volunteers.** Ask the volunteer to reflect on the management support they received throughout their assignment. Use the volunteer's ideas and suggested changes to continue to improve your volunteer programme. Ask the volunteer, "**How can we improve our management of volunteers?**"
- 2) **review the volunteer's assignment** – both objectively, in terms of their tasks, as well as personally. This is the time to give an overall evaluation of the volunteer's contribution - provide feedback that covers the whole scope of their volunteer assignment from beginning to end. Both the volunteer and the Volunteer Manager should take the time to resolve all aspects of the volunteer's assignment. Ask the volunteer to delegate any of their unfinished tasks or other tasks they feel the organisation should do.
- 3) **update the volunteer programme** – based on the evaluation and recommendations of the volunteer at the end of their assignment. Ask him/her to update volunteer information documents and to recommend changes for volunteer management procedures.
- 4) **determine how the volunteer wants to continue their involvement with the organisation.** If the volunteer is satisfied with their placement, it is likely that they will want to maintain some level of involvement with the organisation – whether it's as passive as receiving newsletters or active such as introducing future volunteers or donors.

- II. **Exit Form and Interview.** Develop an Exit Form to give to volunteers at the end of their assignment (an example can be found at: *Volunteer Exit Form.doc*). This form should ask questions to aid in their evaluation of their assignment. Take this opportunity to ask important questions about all aspects of the volunteer programme.

Once the volunteer has been able to take the time to thoughtfully complete the Exit Form, he/she should then meet with the Volunteer Manager to discuss their thoughts in more detail and on a more personal level. In preparation of this step (the Exit Interview) the Volunteer Manager should consider all aspects that need to be resolved with the volunteer before they complete their assignment.

G) Maintaining Contact with Former Volunteers.

I. Reasons to Maintain the Relationship

If you maintain a positive relationship with former volunteers, they can potentially:

- a) build your PR networks - by introducing new contacts, volunteers, and donors.
- b) continue their own involvement with your organisation – through volunteering again in the future, becoming donors, and informing their contacts about the work of your organisation.

II. Steps to Maintain the Relationship

The level at which you maintain a relationship with former volunteers varies from one volunteer to the next. In a volunteer's Exit Interview, ask her/him how they want to continue their involvement with the organisation. The Volunteer Manager is then responsible to ensure that level of interaction is maintained with the former volunteer. Of course this relationship is two-way and also depends on the volunteer's efforts to remain involved after their assignment.

Steps to maintain relationships with former volunteers (keeping in mind that each volunteer is different) include:

- a) including her/him on your contact database so that he/she receives information updates and can be contacted at any time.
- b) send her/him your newsletters and Annual Reports – again so that he/she is reminded and remains aware of the organisation's work.
- c) provide her/him with tasks (whether large or small depends on what they want) to keep them actively involved.
- d) invite her/him to future activities, whether formal or social, organised by your organisation or staff.
- e) include stories about her/him in promotional materials such as the web site.

H) Conclusion

Volunteers are a human resource to help your organisation work towards its mission. In order to utilise them as an important resource, you need to invest time initially to plan your volunteer programme. A thoroughly planned volunteer programme is the foundation to a programme which operates smoothly and effectively.

Once the volunteer programme is operating, it then needs to be monitored and updated. This requires someone with the time, skills, and personality to perform the role of Volunteer Manager – to manage the programme in its entirety.

Volunteers are also people and need to be treated as individuals. So your volunteer programme, as structured as it should be, should also allow flexibility to accommodate the different needs of volunteers.

Volunteer Management Manual

Part 2: Practical Component

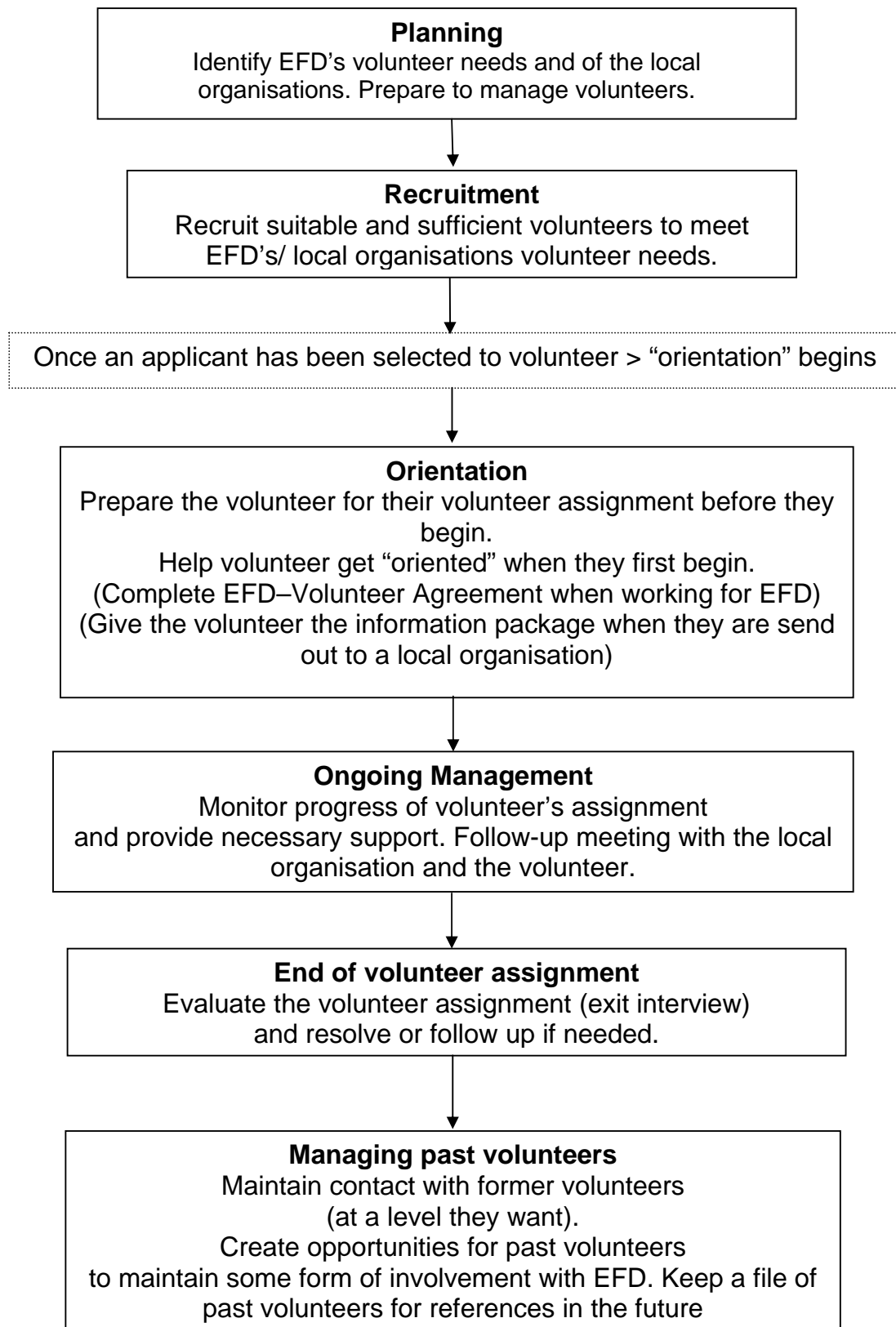
Tools for Managing Volunteers



*A Manual to Aid the
Day-to-Day Management of Volunteers*

Planning

Volunteer Management Overview



Planning

Sample Calendar: Volunteer Needs

When identifying volunteer needs note (a) the volunteer role/task; and (b) time required

	Vol Need #1	Vol Need #2	Vol Need #3	Vol Need #4
January				
February				
March				
April				
May				
June				

July				
August				
September				
October				
November				
December				

Vol Need #1

Vol Need #2

Vol Need #3

Vol Need #4

Planning

Rights and Responsibilities of a Volunteer

[Insert name of organisation] commits itself to ensuring that its volunteers receive the following rights.

Volunteers have the right to:

- be assigned a role that takes into account the volunteer's preferences, personal qualities, skills and experience, and education and employment backgrounds
- be given a *Position Description* that outlines, in a precise and clear manner, the tasks and responsibilities the volunteer will be expected to carry out
- refuse requests for unexpected and/or unsuitable tasks
- know why they are suitable or unsuitable to perform a particular task
- over time, revise their tasks and responsibilities in cooperation with **[insert name of organisation]** staff
- be kept informed about **[insert name of organisation]** – its people, policies, and programmes
- be informed of opportunities to take part in **[insert name of organisation]** decision-making
- be informed of or have input into decisions that directly or indirectly affect the volunteer's role
- know who they are accountable to and to whom they should report
- have clearly defined channels of communication with the Volunteer Manager and other co-workers
- receive ongoing, relevant support and supervision – the level of which will be agreed upon when forming the *Volunteer Agreement*
- be treated as a co-worker and recognised as a valued team member
- work in an environment conducive to performing their role and tasks
- be reimbursed, with prior approval, for out-of-pocket expenses

Volunteers are entitled to certain rights; they also have to fulfill certain responsibilities.

Volunteers are responsible to:

- ensure their needs and motives for volunteering are consistent with **[insert name of organisation]** expectations and requirements of their volunteering role
- learn about **[insert name of organisation]** *Mission, Philosophy, and Principles* before committing to become a volunteer
- thoughtfully consider the proposed *Position Description* before committing to the volunteer position
- aim to provide a high level of service to **[insert name of organisation]** and its clients
- work autonomously - often with little supervision to make their own decisions
- work as a team member - with a high involvement in group decision-making
- listen to objective feedback
- accept support and supervision in performing their role
- request support, usually from the Volunteer Manager, when needed
- be reliable and prompt to committed working times
- inform, in a timely manner, the staff or clients of **[insert name of organisation]** if they are unable to attend a work commitment
- participate in the processes of planning and feedback relevant to their role including attending work reviews

- give at least one week's notice before taking leave
- give notice, one month in advance if possible, before ending their volunteer assignment with [insert name of organisation]

Rights and Responsibilities of [insert name of organisation]

It is important that [insert name of organisation] recognises the rights of its volunteers; it is equally important that volunteers recognise the rights of [insert name of organisation].

[insert name of organisation] has the right to:

- decide, in co-operation with the volunteer, the role and tasks of the volunteer based on the principle that each volunteer's role should advance [insert name of organisation] objectives
- receive the expected commitment from a volunteer as agreed in the *Volunteer Commitment Form*
- expect the volunteer to behave in accordance with their outlined Position Description and responsibilities
- expect the volunteer to maintain a professional level of service to [insert name of organisation] clients
- expect the volunteer to communicate openly and clearly
- expect the volunteer to be reliable and prompt to committed working times
- give feedback to a volunteer, in an objective manner, regarding the volunteer's service
- terminate an agreement with a volunteer if their level of service is inadequate
- check the skills of volunteers prior to assigning tasks

[insert name of organisation] has the right to have certain expectations of its volunteers; it must also adhere to certain responsibilities.

[insert name of organisation] is responsible to:

- communicate clear expectations to the volunteer
- plan the volunteer programme before recruiting the volunteer
- recruit, screen, and select an appropriate volunteer for a specific role
- provide the volunteer with a *Position Description* that outlines their role and tasks in a precise and clear manner
- inform the volunteer about [insert name of organisation] – its people, policies, and programmes
- orientate the volunteer by informing them of [insert name of organisation] *Mission, Philosophy, Principles*, and organisational practices
- provide open and clear channels of communication to the volunteer
- monitor the work performance of the volunteer and provide appropriate feedback
- provide ongoing feedback, support, and supervision to the volunteer
- recognise the volunteer, both formally and informally, for their effort and service
- treat the volunteer as a co-worker and recognise their contributions as a valued team member

Planning

Pre-recruitment Checklist

Planning

- ☐ Identify volunteer roles needed
- ☐ Identify when volunteers are needed to perform specific roles (see *Volunteer Needs Calendar.doc*)
- ☐ Determine which staff are responsible for the different volunteer management tasks/responsibilities (delegating Volunteer Management Responsibilities)

To consider before recruiting volunteers

- ☐ Do we have a good idea of what kind of volunteer we are looking for?
- ☐ Have we consulted with the staff who will be working with this volunteer?
- ☐ Are the staff clear on what their role will be in working with the volunteer?
- ☐ Is a complete and accurate job description written for this position?
 - ☐ Does the Position Description clearly identify the qualifications needed?
 - ☐ Does the Position Description outline both the purpose and the nature of the work to be done?
- ☐ Do we have enough work for the volunteer to do?
- ☐ Do we have the office space and facilities/materials for the volunteer to perform their work?
- ☐ Do we have a plan for orientating and training the volunteer?
- ☐ Are we prepared to provide ongoing support and supervision to the volunteer?
- ☐ Do we have someone to interview or double check the suitability of the volunteer?
- ☐ Have we determined the types of questions and screening procedures to select a suitable volunteer?
- ☐ Do we have a good idea of what kind of volunteer we are NOT looking for?
- ☐ Do we know how we will compare candidates?
- ☐ Do we know what we will do with unsuitable candidates?

Planning**Volunteer Management Responsibilities**

Task	Responsible Person (VM or VC – if applies)
Planning	
Update volunteer roles	
Identify volunteer needs (when volunteers are needed for specific tasks)	
Ensure standard volunteer documents are updated	
Ensure standard volunteer management procedures are followed	
Recruitment	
Submit applications to volunteer referral/sending agencies	
Correspond with the applicant	
Screen the applicant to select an appropriate volunteer	
Check skills of applicant	
Contact applicant to accept or refuse (usually refer rejected applicants)	
Maintain communication with volunteer referral agencies	
Orientation	
Correspond with volunteer - providing preparatory assistance s/he requires	
Send all relevant information to volunteer	
Ensure volunteer is ready for his/her first day	
Provide on-site orientation	
Form agreement with volunteer about his/her tasks, commitment, and expectations	
Ongoing	
Report on volunteer activities at monthly meetings	
Regularly monitor progress of volunteer in an informal way	
Perform formal work reviews with volunteer	
Ensure each volunteer is involved in the organisation and informed of his/her opportunities to take part in decision-making	
Gauge satisfaction of each volunteer	
Ensure each volunteer's voice is heard and his/her concerns addressed	
Approve volunteer's expenses	
Reimburse volunteer's expenses	
End of volunteer assignment	
Request volunteer to complete Exit Questionnaire and conduct interview	
Address any issues that come from the volunteer questionnaire/interview	
Meet to evaluate volunteer performance and assess follow up needed	
Organise "thank you" present and social activity to farewell volunteer	
Write reference/recommendation letter for volunteer	
Ask volunteer to update volunteer documents	
Managing past volunteers	
Maintain contact, as volunteer desires, with former volunteer	
Ensure former volunteers receive newsletters etc	
Involve former volunteers by giving them tasks to do from their home country	

Recruitment

Recruitment Checklist

VM = Volunteer Manager

VC = Volunteer Coordinator (if applicable)

Recruiting Volunteers through Web Site and Email Contact

- ☐ VM checks emails daily for volunteer interest
- ☐ VM emails the following to interested volunteers:
 - ☐ Volunteer Information
 - ☐ Rights and Responsibilities
 - ☐ Position Description or list of proposed tasks
 - ☐ Volunteer Application Form
- ☐ VM corresponds with applicants and answers any questions
- ☐ VM receives Volunteer Application Form from volunteer
- ☐ VM and VC review applicants in order to:
 - ☐ match to your organisation's volunteer needs
 - ☐ select volunteers with specific skills
- ☐ VM and VC reject unsuitable applicants or contact suitable applicants for further screening
- ☐ VM double checks the volunteer's skills by requesting the volunteer to provide extra information or to perform a task to demonstrate specific skills
- ☐ VM sends the Belbin Inventory Questionnaire to volunteers to complete (if available)
- ☐ VM and VC meet to review the applicant's suitability based on the completed Belbin Questionnaire and skills checked
- ☐ VM informs applicants whether they are successful or not (if not, then they are usually referred to local partner organisations or other NGOs)

Recruiting Volunteers through Volunteer Referral Agencies

- ☐ VM/VC submits an application for a volunteer through a Volunteer Referral Agency
- ☐ VM/VC follows up the application for a volunteer until the agency refers a volunteer to your organisation
- ☐ VM corresponds with applicants and answers any questions
- ☐ VM and VC review applicants in order to:
 - ☐ match to your organisation's volunteer needs
 - ☐ select volunteers with specific skills
- ☐ VM double checks the volunteer's skills by requesting the volunteer to provide extra information or to perform a task to demonstrate specific skills
- ☐ VM sends the Belbin Inventory Questionnaire to volunteers to complete (if available)
- ☐ VM and VC meet to review the applicant's suitability based on the completed Belbin Questionnaire and skills checked
- ☐ VM rejects unsuitable volunteers or accepts suitable volunteers

In the process of recruiting volunteers, it is important to stay in regular and prompt contact. Reply to messages straight away – even if it is to say that you cannot answer their questions today, but will email them at a later time.

Recruitment

Template: Volunteer Position Description

Name of Volunteer Position _____

It is important that the expected tasks of a volunteer are clearly communicated between the volunteer and staff.

The volunteer will perform the following tasks:

- _____
- _____
- _____
- _____
- _____
- _____
- _____

As well as the tasks a volunteer is expected to perform, it is important that the volunteer has the right skills and qualities to fulfill their expected roles

The volunteer will display the following skills and qualities:

- identify qualities specific to volunteer's role
- identify qualities that all volunteers should possess eg. patience, flexibility, open communication skills, etc.
- _____
- _____
- _____
- _____
- _____
- _____

It is important that volunteers have a clear picture in their mind of how they can perform their volunteer role successfully.

Positive and achievable outcomes of a volunteer performing this position include:

- _____
- _____
- _____
- _____

Volunteers need to know they are making an important contribution.

The volunteer will make an important contribution to the organisation (its staff and target groups) in the following way(s):

- _____
- _____
- _____

It is important that volunteers receive any needed orientation or training to successfully perform their role.

The volunteer will receive the following orientation/training:

- standard orientation
- preparation for specific volunteer role
- _____
- _____
- _____

In order to ensure that volunteers are progressing well and receiving support during the course of their work it is important that someone monitors the volunteer's work and provides the volunteer with feedback.

Who will be monitoring the volunteer's work and giving them feedback?

- Identify relevant co-workers and supervisor/manager
- Volunteer Manager

Volunteers need to be clear about whom they are responsible to and who they can approach in order to clarify their volunteer tasks.

Who will the volunteer report to and who can he/she approach for guidance?

- Identify direct reporting relationships with Manager/Supervisor, etc
- Volunteer Manager for general support and guidance
- Volunteer Coordinator to review tasks (if applicable)
- Identify relevant co-workers for programme- or project-specific information

This template should be completed by the Volunteer Manager and Volunteer Coordinator (if applicable) in planning the recruitment of a volunteer for a specific role. The document will then be updated when the volunteer begins their assignment and their role is discussed in more detail (and the terms agreed upon).

Recruitment

Sample Document: Volunteer Tasks Outline

Please note: the following document has been provided purely as a guide and can be manipulated and changed in any way in order to meet the needs of your organisation.

Assignment Details for [insert name]	Org. Name	Partner Name	Priority
Evaluations & Monitoring			
▪ Monitoring...			
▪ Evaluating...			
▪ Assisting in...			
Public Relations			
1.1. Promotional material			
▪ Editing newsletters...			
▪ Editing annual report...			
▪ Managing and updating Web site...			
▪ Improving the range of promotional material...			
▪ Participating in meetings...			
Human Resources management			
1.2. Staff			
▪ Improving the motivation of the staff...			
1.3. Volunteers			
▪ Recruiting new volunteers...			
▪ Motivating volunteers...			
▪ Monitor the activities of the volunteers...			
▪ Volunteer management...			
▪ Improving the existing Volunteer Information Package...			
▪ Editing a list of tasks that volunteers can execute...			
Fund-raising & Income generating activities			
1.4. Performances			
▪ Finding sponsors and selling tickets...			
▪ Assisting in promotion of...			
▪ Helping to organise...			
▪ Helping to create...			
▪ Providing ideas for...			
▪ Helping to improve...			
▪ Developing & implementing...			
▪ Promoting...			
▪ Expanding...			
▪ Maintaining...			
▪ Promotion and management of...			
Training (coaching on-the-job training / training course)			
▪ Fundraising & public relation training			
▪ Computer skills			
▪ Communication skills			
▪ Newsletter management			
▪ Database management			
▪ Volunteer management			
▪ Volunteers' training			
Administration			
▪ Editing...			
▪ Improving...			

Recruitment

Email Template: Reply to Applicant

Dear [applicant's name]

Thank you for your interest in finding out more about volunteering with [insert name of organisation].

Attached is a document to inform you about what is involved in volunteering for [insert name of organisation]. We also recommend that you, if you haven't already done so, have a look at our web site: [insert web site address].

At the end of the attached document is an Application Form that we would like you to complete and return to us if you are, after having learnt more about [insert name of organisation], still interested in volunteering.

Please let me know if you have any other questions.

Warm regards,
[insert name]
Volunteer Manager

Volunteer Information

The information contained in this document is very important for the prospective volunteer. This information helps them make informed decision as to whether they believe they are suitable to volunteer with your organisation and continue with the application process. This document provides valuable information about the organisation, gives practical tips on living and working in Vietnam and it also answers many questions that are frequently asked by the prospective volunteer.

The following Table of Contents has been provided purely as an example to illustrate the types of information which may be included in such a document. Your own Volunteer Information document may be based on the same information or on entirely different information depending on what you think is important to your organisation and to prospective volunteers. If you require further detail on what may be included in this document please do not hesitate to contact EFD for a copy of our "Volunteer Information" document.

Example Preamble:

This information is designed to provide you with an outline of what is involved when you volunteer with [insert name of organisation].

Contents

Background to [Insert name of organisation] as an Organisation	
[Insert name of organisation] Mission.....	2
[Insert name of organisation] Philosophy	2
[Insert name of organisation] Principles	2
[Insert name of organisation] Programmes	2
Contact Details	3
Staff	3
Working with Partners	
[Insert name of organisation] Roles.....	4
Volunteer Roles.....	4
Introducing Partners.....	5
[Insert name of Partner - if Applicable]	5
[Insert name of Partner - if Applicable]	5
Contacting Partners.....	6
Volunteering with [insert name of organisation]	
[Insert name of organisation] Volunteers.....	6
What to expect as a Volunteer	6
Cultural Differences	7
Expect Challenges.....	7
Work Environment	7
Working independently and in Teams	8
Your role as a Volunteer.....	8
Frequently Asked Questions (FAQs)	
[Insert name of organisation] Dress Standards	9
Transport/Living Costs/Health Issues/Visas	9
Time Commitment	10
Materials to Bring (Wish List)	10
Training Materials.....	11
[Insert name of organisation] Commitment to Volunteers	
Volunteer Management.....	11
Volunteer Stories/Impressions	11

Recruitment

Volunteer Application Form

Before applying to volunteer with [\[insert name of organisation\]](#) we recommend that you find out more about [\[insert name of organisation\]](#) as an organisation. Please read our Volunteer Information and look at our web site: [\[insert website address – if applicable\]](#)

Volunteer Application Form

Name: _____

Nationality: _____

Details in Home Country

Home address: _____

Tel/Fax: _____

Details in Ho Chi Minh City

Contact address: _____

Tel/Fax: _____

Email: _____

Date of birth: _____

Health (list any major problems): _____

Are you applying to volunteer with [\[insert name of organisation\]](#) for the first time?

- ☐ Yes
- ☐ No > how have you been involved as a volunteer with [\[insert name of organisation\]](#) in the past?

How did you find out about volunteering with [\[insert name of organisation\]](#)?

- ☐ Website
- ☐ On the internet
- ☐ From a friend
- ☐ Lonely Planet Guide
- ☐ A volunteer referral agency > please name:
- ☐ Other:

Please provide details of past employment (include your CV if you wish to detail more than 2 positions)

Position 1

Name of organisation: _____

Position: _____

Period of employment: _____

Duties: _____

Position 2

Name of organisation: _____

Position: _____

Period of employment: _____

Duties: _____

Please provide details of studies you have undertaken – note qualifications and grade achieved

Secondary: _____

Post Secondary (Tertiary): _____

Please provide details of any volunteer experience

Organisation: _____

Position: _____

Period of volunteering: _____

Volunteer tasks: _____

Accomplishments: _____

List languages that you have studied and your fluency level:

Note any other relevant courses (eg WinWord, TEFOL courses) or qualifications received:

What travel experience do you have (if any)?

What hobbies and interests do you have?

How would you describe yourself?

As discussed in the *Volunteer Information* we need to be selective in matching interested volunteers to identified volunteer roles.

Please read the list of volunteer roles below and mark any fields that you are specialised or interested in. For each field of interest you mark, please rate your level of confidence to take part in decision-making or offer advice.

High = very confident; Medium = moderately confident and would like to be involved;

Low = lacking confidence, but would still like some involvement

As an example: For [\[insert name of partner organisation\]](#)

Provide training, guidance, and system development about:	Confidence level
Participatory planning (planning projects using participatory tools)	
Project and programme management (helping management staff of partners with their overall management of programmes and projects)	
Monitoring (helping management to monitor projects/programmes)	
Evaluation (helping management to evaluate projects/programmes)	
Problem-solving (in relation to managing projects/programmes)	
Fundraising & PR	
Personnel management	
Volunteer management	
Child participation	
Social work with street children	
English language teaching	
Organisational management (tools to manage an organisation eg strategy development)	

As an example: For [insert name of organisation]

Provide training, guidance, and system development about:	Confidence level
Participatory planning (planning projects using participatory tools)	
Project and programme management (helping staff with the overall management of programmes and projects)	
Monitoring (helping project officers to monitor projects)	
Evaluation (helping project officers to evaluate projects)	
Problem-solving (to help staff with problem solving within [insert name of organisation] and to help Project Officers to aid partner staff in problem solving)	
Fundraising and PR	
Personnel Management	
Volunteer Management	
Organisational Management (tools to help staff manage [insert name of organisation] as an organisation, eg strategy development)	

Operational tasks (you will implement these tasks yourself)	Confidence level
Fundraising and PR	
Translations	
Editing	
Office management	
Strategic planning	
Programme needs assessment (researching any project development needs in our different programmes)	
Research for programme implementation (sometimes we will assist with research needs that arise to assist the work of our partners)	
Training needs identification (identifying training needs of local staff)	

Please note any skills, experience, or qualities you possess that would equip you and make you suitable for the volunteer roles you have identified with [insert name of organisation] (include any experience you have had working with non government organisations).

Why do you want to volunteer with [insert name of organisation]?

Please indicate the timeframe that you could commit to volunteering with [insert name of organisation]. Please read the Volunteer Information to find out about the time commitment we expect.

Predicted start date: _____

Predicted finish date: _____

Hours per week: _____

Please provide two references, excluding relations or friends and including at least one employment-related reference, whom we can contact to verify your application.

1. Name: _____

Relationship to you (employer, priest etc): _____

Address: _____

Email: _____

Contact phone/fax: _____

2. Name: _____

Relationship to you (employer, priest etc): _____

Address: _____

Email: _____

Contact phone/fax: _____

Thank you for your volunteer application.

[insert name of organisation] Volunteer Manager will contact you to let you know if your application is successful.

If you have any questions about volunteering with [insert name of organisation] then please contact the Volunteer Manager [insert name of Volunteer Manager] at the contact details below.

[insert contact details of organisation]

Address:

Tel:

Fax:

Email:

Web site address:

Recruitment

Sample Document: Email to Accept Volunteer Application

Dear [insert name]

After further review of your volunteer application, we would like to offer you a volunteer position with [insert name of organisation]. In particular, we would like you to take on the volunteer role of [insert volunteer role] from [insert start date] to [insert end date].

As Volunteer Manager, I will be in contact with you to provide you with information to prepare you for your volunteer assignment. Similarly, please feel free to ask me any questions to help with your preparations.

I will be in contact with you soon, but please email me any questions in the meantime.

Warm Regards,

[insert name]

Volunteer Manager

Recruiting

Sample Document: Email to Turn Down Volunteer Application

Dear [insert name],

Thank you for your application for a volunteer position with [insert name of organisation]. Unfortunately we will not be able to offer you a volunteer placement with [insert name of organisation] at this time. We have had many excellent applications for volunteer positions this year. *“However, as we are a small organisation (with limited resources and office space) we need to be careful in selecting only a small number of applicants with the specific skills to perform our volunteer needs that have been identified”...* [insert appropriate reason for turning down volunteer applicant]

If you are still interested in volunteering in Vietnam then I recommend emailing the NGO (Non Government Organisations) Resource Centre at ngoctr@netnam.org.vn. They email a weekly news message to organisations (especially other NGO's and charities) around Vietnam. Sometimes they place messages for people interested in doing volunteer work.

Thanks again for your interest in [insert name of organisation]. If you are going to be in Ho Chi Minh City, then please feel free to visit us (our address is at the end of the message). Also let me know if you are interested in receiving our newsletters and Annual Report.

Kind regards and all the best for your future travels,

[insert name]
Volunteer Manager

Orientation

Orientation Checklist

Prior to "start day"

Volunteer Manager (VM) corresponds with volunteer, ensuring they receive adequate preparation support, until they begin their assignment

Email the following documents:

- ☐ Annual Report
- ☐ Current newsletter (or other promotional material)
- ☐ Organisational chart
- ☐ Partner chart (if appropriate)
- ☐ Description of organisation's role
- ☐ Email basic Position Description outlining
 - ☐ tasks and responsibilities
 - ☐ expected time commitment
 - ☐ description of work team
- ☐ Relevant programme strategies and any other documents relevant to their specific volunteer position
- ☐ When the volunteer is expected to perform a particular role with a partner, then send specific information about the role they will play with the partner
- ☐ If needed (and if possible), provide information about and assistance with visas and accommodation
- ☐ If the volunteer is coming to Vietnam for the first time and has no-one to meet them at the airport, email the volunteer to ask if they would like a staff member to meet them
- ☐ Send the volunteer a checklist to go through before leaving for Vietnam or, if already in-country, before volunteering with your organisation

First days of volunteering

VM meets the volunteer on his/her first day to begin his/her orientation:

- ☐ Check accommodation arrangements are suitable
- ☐ Check transportation arrangements are suitable
- ☐ Check their general “settling in” to Vietnam is going well
- ☐ Give volunteer the In-country Information
- ☐ Check they have the following documents (the VM has already emailed some):
 - ☐ Annual Report
 - ☐ Current and recent newsletters (if available)
 - ☐ Current brochures (or other promotional material) of your organisation and its partners (if appropriate)
 - ☐ Proposed Position Description (with tasks and time commitment)
 - ☐ Rights & Responsibilities document
 - ☐ Relevant strategies
 - ☐ Other relevant documents specific to position

The rest of the orientation will be scheduled between the volunteer and VM

A workplace orientation

- ☐ Office layout - available table/work space, where to store files/folders, etc
- ☐ Computers – saving files, back ups and maintenance
- ☐ E-mail – checking, sending, receiving messages
- ☐ Internet – correct use according to your organisation's procedures
- ☐ Other office equipment - phone, fax, photocopier, printer, etc
- ☐ Library – catalogue, lending resources
- ☐ Internal communication - whiteboard, pigeon holes, circulation sheets, etc.
- ☐ Where to find administrative forms such as circulation sheets, etc.
- ☐ Office supplies – where to find basic supplies and who to ask if more are needed
- ☐ Restroom – location
- ☐ Give volunteer an office key (if appropriate)

Introductions

- ☐ VM introduces volunteer to other staff members
- ☐ VM organises for volunteer to visit partners and meet key staff (if appropriate)

Discussion about your organisation which may include:

- ☐ Presentation detailing your organisation's role, mission, vision, etc.
- ☐ Analysis of the organisation/partner chart and allocating staff to their appropriate positions on the chart/s
- ☐ Discussion of the organisational strategies
- ☐ Identification of all staff duties and responsibilities
- ☐ Any other important information that may be appropriate

VM and volunteer have a discussion that includes the following:

- ☐ Explain to the volunteer that at the beginning of a volunteer assignment it is difficult to see clearly what his/her role will be, a feeling which is to be expected, and therefore should not worry about this too much. S/he will learn with time.
- ☐ Explain to the volunteer that s/he will play a big role in determining the extent of his/her volunteer contribution
- ☐ Explain to the volunteer that they will need to be prepared to take initiative to say or do something when they're not happy, don't have enough work to do, etc
- ☐ Discuss the volunteer's predicted involvement in decision-making
 - ☐ Specialists should feel confident in giving advice or making decisions in their field
 - ☐ Expect high involvement – also depends on assignment, staff they will be working with, etc
 - ☐ Volunteers can give an external viewpoint – that is another reason s/he will often be asked questions that s/he may not seem knowledgeable in, but it is still valuable to get her/his ideas on the topic
 - ☐ Explain to the volunteer that they can seek external advice if needed when the knowledge is not available within your organisation
 - ☐ Explain what role they will take in discussions and decision-making with the staff they will be working closest with
 - ☐ Indicate if the staff that they will be working with are new or experienced
- ☐ Clarify the roles of the VM and the Volunteer Coordinator (VC) – if appropriate
 - ☐ Provide the volunteer with a written document which clarifies the roles
 - ☐ Outline when the volunteer should go to whom. Give examples to clarify.

The volunteer and the VM discuss issues and come to agreement before signing the Volunteer Agreement Form

- ☐ The volunteer and the VM decide on the tasks the volunteer will commit to
- ☐ Agree on the volunteer's time commitment
- ☐ Agree on the rights and responsibilities of the volunteer and your organisation
- ☐ Set fixed times to conduct work reviews. The frequency for work reviews will vary depending on the length of the volunteer assignment, volunteer tasks, and other factors relating to the volunteer and your organisation
- ☐ Request that the volunteer approach the VM if they feel the need to review their work before the set time the work review is scheduled
- ☐ Assign volunteers small tasks to begin with, especially those tasks which facilitate learning about the organisation/their assignment. Good examples include editing documents, translations, and taking minutes of any meetings they may attend.
- ☐ Explain to the volunteer that while your organisation establishes limits, volunteers themselves determine how they work within these limits (if appropriate)

In-country Volunteer Information

In- country information is very important for the new volunteer as it provides valuable information about the organisation in which they will be working and also gives practical tips on living and working in Vietnam. It answers many questions that are frequently asked by the new volunteer.

The following Table of Contents has been provided purely as an example to illustrate the types of information which may be included in such a document. Your own In-country Information document may be based on the same information or on entirely different information depending on what you think is important to your organisation and to your volunteers. If you require further detail on what may be included in this document please do not hesitate to contact EFD for a copy of our "In-country Volunteer Information" document.

Example Preamble:

There are many living adjustments to adapt to when you first arrive in Ho Chi Minh City and begin your volunteer assignment with [insert name of organisation]. This document has been created with the objective to assist you in adapting to these changes and to help make the most of your volunteer assignment in Vietnam. We hope that reading this document will help you to orientate yourself with [insert name of organisation] in Ho Chi Minh City.

Contents

Background to [Insert name of organisation] as an Organisation	
[Insert name of organisation] Mission.....	2
[Insert name of organisation] Philosophy	2
[Insert name of organisation] Principles	2
[Insert name of organisation] Programmes	2
Contact Details	2
Staff	2
[Insert name of organisation] Workplace	
The Office	2
Computers.....	3
Printer	3
Communication	3
Library	3
Stationery	4
Work-related costs	4
Working with Partners	
[Insert name of organisation] Roles.....	4
Volunteer Roles.....	4
Introducing Partners.....	5
[Insert name of Partner - if Applicable]	5
[Insert name of Partner - if Applicable]	5
Contacting Partners.....	6
Living and Working in Vietnam	
Tips for Your First Days.....	6
Cultural Differences.....	7
Work Environment.....	7
Outside of the Office.....	8
Next Steps	
Your Contribution to [insert name of organisation]	9
Steps from Here	9

Orientation

Volunteer Agreement

The purpose of this form is to clarify the expectations of both the volunteer and the organisation regarding the volunteer's commitment to their volunteer placement. It also clarifies the organisation's commitment to managing the volunteer. The form is to be completed jointly by the volunteer (after the initial introduction) and the Volunteer Manager/Coordinator.

The volunteer must be given the form in advance so that they may complete sections A to E prior to a meeting with the Volunteer Manager/Coordinator. The meeting will involve a detailed discussion of the volunteer's tasks and time commitment resulting in a completed Volunteer Agreement.

A. Please provide your current contact details

Name:

Nationality:

Home address:

Tel/Fax:

Contact address in Ho Chi Minh City:

Tel/Fax:

Email:

Date of birth:

Health (note any major problems, allergies, or other concerns):

Blood group (if known):

B. Please provide contact details of your next of kin or someone we can contact in an urgent situation

Name:

Relation to you (eg father, partner):

Nationality:

Contact address:

Tel/Fax:

Email:

C. Volunteer's strengths and weaknesses

Please list your strengths and weaknesses to aid in identifying suitable work tasks.

Strengths	Weaknesses

D. Work environment and interpersonal relationships

Please describe what you consider as an effective work environment, and effective interpersonal relationships with colleagues.

E. Learning Objectives

Please identify areas that you are interested in learning more about during your volunteer assignment.

F. Volunteer's Time Commitment

In performing the tasks (outlined over the page) I will commit to working:

_____ hrs/week _____ days/week Days: _____
 _____ hrs/month _____ days/month

From (start date): _____ to (forecasted end date): _____

G. Involvement in Decision-making

For each task you commit to (over page), please consider your level of involvement – high, medium, or low – in decision-making.

H. Volunteer's Commitment to tasks

Tasks	Input into decision-making
To update volunteering information package	High

I. Indemnity of [insert name of organisation]

The undersigned volunteer agrees that under no circumstances will [insert name of organisation] take any responsibility for any damage caused to or by the volunteer at any time.

J. Volunteer Agreement

Both the volunteer and the Volunteer Manager/Coordinator should read the *Rights and Responsibilities* document before forming a commitment below.

As a volunteer I will commit to:

- respecting the *Rights and Responsibilities* of both [insert name of organisation] and myself
- performing, as best he/she can, the tasks outlined above
- the time commitment outlined above
- discussing any changes to my commitment with the Volunteer Manager/Coordinator
- attending regular work reviews (as noted below)

Signature: _____ **Date:** _____

[insert name of organisation] will commit to:

- respecting the *Rights and Responsibilities* of both the volunteer and [insert name of organisation]
- providing a Volunteer Manager who will ensure the volunteer receives necessary support and to whom the volunteer can approach for support.
- providing regular work reviews

Date of first review: _____

Predicted regularity of reviews: _____

Signature: _____ **Date:** _____

Ongoing Management

Checklist

Volunteer Manager to check once a month

- ☐ Remind volunteers to approach you if they have any questions or need any help with their volunteer work (tell them who to approach for different types of support)
- ☐ Volunteer Manager must make time to speak to the volunteer at regular intervals to monitor the progress of his/her assignment, give the him/her feedback, and gauge if s/he is happy and if s/he requires any support.
- ☐ Speak to the volunteer after their first week/session/task
 - ☐ does s/he need any extra support?
- ☐ Give regular (monthly/ two-monthly/three-monthly) information eg. newsletters
- ☐ Perform formal work performance reviews at regular intervals. Every three months is suggested for long-term (one year or more) volunteers, however this timeframe is flexible and should be adapted according to the length of assignment and the volunteer's support needs based on their particular assignment).
- ☐ Inform the volunteer about opportunities to take part in discussions, problem-solving, and decision making in his/her area of specialisation or interest or in areas that directly or indirectly affect his/her assignment.
- ☐ Inform the volunteer of activities s/he can participate in (eg. sports days)
- ☐ Invite the volunteer to social events with other staff, children, and volunteers
- ☐ See document: *Motivating Volunteers.doc* for ways to keep volunteers motivated

Ongoing Management

Motivating Volunteers

Be organised for volunteers

- Determine a specific work plan in collaboration with the volunteer
- Tell volunteers why the specific work they are doing is important (put it in it's wider context)
- Be prepared for the volunteer before they arrive- prepare their tasks, work plan and have some expectations of how they will volunteer
- Provide the basic materials and information they need to perform their tasks

Allow volunteers to develop

- Open formal training sessions for Project staff to the volunteer
- Develop the volunteer's job and responsibilities over time
- Allow flexibility for the volunteer to develop his/her ability over time

Involve volunteers

- Provide volunteers with the opportunity to contribute their ideas
- Listen to volunteers
- Involve volunteers in meetings and other decision making forums
- Encourage volunteers to express their ideas
- Ensure equality amongst staff and volunteers (both are treated with the same levels of respect)
- Learn the aims and motivations of the volunteers you have
- Show interest in how your volunteer is getting on
- Create teambuilding opportunities with volunteers and paid staff
- Organise informal gatherings

Monitor the progress of volunteers

- Provide volunteers with feedback on any work that they have completed
- Arrange a time to hold meetings with the volunteer (every fortnight) to discuss how they are finding the tasks
- Ensure the volunteer always has work to do (not too little and not too much)
- Perform a mid-term evaluation to assess the volunteer's progress
- Hold a final evaluation to see the accomplishments of the volunteer, what there is still left to do, and to assess the entire 'volunteer management' system

Recognise the contributions of volunteers

- Take time to recognise, praise and acknowledge volunteer efforts
- Reward volunteers for the work they have done by presenting a certificate or a token of appreciation
- Promote the results of the volunteer's work (correctly attributing the results to the volunteer)

Smile ... Laugh ... Have fun ... Be friendly!

Ongoing Management

Volunteer Appraisal Form

Name of Volunteer: _____

Period Covered: _____

Position: _____

Date of Evaluation: _____

Identified goals of Volunteer at

[insert name of organisation]:

Not
Met
1

2

Satisfactory

3

4

Superior

5

Comments

1

2

3

4

5

1

2

3

4

5

1

2

3

4

5

Work Relationships:

Needs
Improvement

1

2

Satisfactory

3

4

Excellent

5

Comments

Relations with other volunteers & staff

Relations with partner organisations (if applicable)

Ability to work in teams

Ability to work independently

1

2

3

4

5

1

2

3

4

5

1

2

3

4

5

Summary/General Comments:

End of Assignment

Exit Form for Volunteers

I. Recruitment process

1) Please tick the box corresponding with the statement that best reflects your view

When I was being recruited:

- ☐ [insert name of organisation] expectations of me as a volunteer were very clear
- ☐ [insert name of organisation] expectations of me as a volunteer were clear
- ☐ [insert name of organisation] communicated sufficient information for me to be prepared for my volunteer work
- ☐ [insert name of organisation] expectations of me as a volunteer were unclear
- ☐ [insert name of organisation] expectations of me as a volunteer were very unclear

2) Please tick the box corresponding to information you received when being recruited

- ☐ Volunteering information (a document with information about the organisation and what is involved in volunteering with [insert name of organisation])
- ☐ Volunteer questionnaire
- ☐ Proposed tasks/ Position Description
- ☐ [insert name of organisation] web site address

Please list any other information you received when being recruited

3) Is there any additional information that would have been helpful or important to receive before arriving in HCMC to prepare you for what lay ahead?

4) Note any information that may have led you to hold different expectations of your volunteer assignment than what you actually experienced when you commenced working with [insert name of organisation]

5) I have attached the volunteer information file - please make any changes or suggestions so as to keep this document updated.

II. Ongoing management of volunteers

1) Please tick the box corresponding with the statement that best reflects your view

- ☐ I received support, guidance, and direction throughout my time of volunteering
- ☐ I received support, guidance, and direction when needed
- ☐ I received adequate support, guidance, and direction to perform my work
- ☐ I did not receive support, guidance, and direction when needed
- ☐ I never received support, guidance, nor direction throughout my time of volunteering

2) How much of your work do you think was conducted with other staff (in groups, teams, etc)
_____ %

3) How much of your work do you think was conducted individually
_____ %

- 4) Please allocate percentages to team- and individual-based work to reflect how you would have **preferred** to work
Team work: _____% Individual work: _____%
- 5) Please rate your level of satisfaction regarding your assigned tasks and responsibilities
☐ very high ☐ high ☐ medium ☐ low ☐ very low
- 6) Please rate how you perceive [insert name of organisation] level of satisfaction regarding your performed tasks and responsibilities
☐ very high ☐ high ☐ medium ☐ low ☐ very low
- 7) Please rate the level of your work load
☐ too high ☐ high, but manageable ☐ manageable ☐ low, but still satisfying ☐ too low
- 8) Please rate your level of involvement in decision-making and problem-solving in the organisation
☐ very high ☐ high ☐ medium ☐ low ☐ very low
- 9) Please rate your level of **satisfaction** regarding your level of involvement in decision-making and problem-solving in the organisation
☐ very high ☐ high ☐ medium ☐ low ☐ very low

III. Feedback and Follow up

- 1) Please list any of your tasks that need to be delegated to other staff for follow up

- 2) What did you enjoy most from your volunteering experience?

- 3) What did you find most difficult or challenging?
- 4) Please give any suggestions or ideas for future volunteers to aid them in their volunteer experience.

- 5) Please give any suggestions or ideas to [insert name of organisation] to help us improve our involvement of volunteers in the organisation?

- 6) Please give any other general comments

Checklist

- ☐ Complete this Exit Form

- ❑ Remove personal computer files and save other documents in appropriate folders
- ❑ File hard copy work documents in appropriate place
- ❑ Read volunteering information and make any changes
- ❑ Delegate tasks and roles (to be followed up) to relevant staff
- ❑ Return office key

End of Assignment

Guidelines for Managing Former Volunteers

1. In your Exit Interview, determine how the volunteer wants to maintain their involvement with your organisation.
2. Include her/him on your contact database so that he/she receives information updates and can be contacted at any time.
3. Send her/him your newsletters and Annual Reports – again so that he/she is reminded and remains aware of the organisation's work.
4. Provide her/him with tasks (whether large or small depends on what they want) to keep them actively involved. This could just be a case of asking him/her for advice when making a decision.
5. Invite her/him to future activities, whether formal or social, organised by your organisation or staff.
6. Include stories about her/him in promotional materials such as the web site.

Glossary: English/ Vietnamese

Bản chú giải: Tiếng Anh/ Tiếng Việt

Volunteer Management Terms

Thuật Ngữ Quản Lý Tình Nguyện Viên

- **Accept:** chấp nhận
- **Applicant:** người xin làm Tình Nguyện Viên
- **Application form:** đơn xin làm Tình Nguyện Viên
- **Correspond:** giao thiệp, trao đổi bằng thư từ
- **CV/resume:** sơ yếu lý lịch
- **Experience:** kinh nghiệm
- **Orientation:** sự hướng dẫn, sự định hướng
- **Ongoing management:** quá trình quản lý diễn ra liên tục
- **Past/former volunteers:** những Tình Nguyện Viên cũ
- **Personal qualities:** những năng lực, những đức tính cá nhân
- **Procedure:** phương thức, thủ tục
- **Provide assistance:** cung cấp sự trợ giúp
- **Recruitment:** việc tuyển dụng
- **Refuse:** từ chối
- **Resume/CV:** sơ yếu lý lịch
- **Screening:** xem xét lý lịch
- **Select:** lựa chọn
- **Skills:** những kỹ năng
- **Tasks:** nhiệm vụ công việc
- **Volunteer assignment:** sự giao việc cho Tình Nguyện Viên
- **Volunteer sending agency:** cơ quan gửi Tình Nguyện Viên

Please continue to build this list as you come across English terms that need Vietnamese translations