ESSENTIALS OF
VOLUNTEER MANAGEMENT
STUDY
NOTES

Volunteering
NEW ZEALAND

Study Notes

Section 1: Understanding Volunteering

- Volunteering has strong roots in both Maori and European societies.

- A volunteer is 'someone whose work is willingly done, without reward, for the common good'.

- Volunteering serves an important function across New Zealand society.

- Voluntary labour and non-profit organisations are important to the New Zealand economy.

- New Zealand volunteers contribute millions of hours labour each year to various causes.

- New Zealand has one of the largest non-for profit sections in the world.

- Volunteers possess a vast range of skills and experiences.

- People may be motivated to volunteer for achievement, power, and/or affiliation.

- Understanding the motivation behind volunteering helps managers find and supervise the right roles for volunteers.

- It is useful to carry out research to find out the factors that motivate your volunteers.

- People look to gain different kinds of value from volunteering.

- Volunteers are demotivated when they feel poorly managed, under valued or exploited.

- Volunteers appreciate being well organised and managed.

Section 2: The Volunteer Manager

- Organisations must ensure that volunteers' experiences are as positive as possible.

- Negative experiences by volunteers will reflect poorly on the organisation.

- Volunteer managers require a wide range of key competencies and skills.

- Volunteer managers undertake a number of different roles and tasks as part of their jobs.

- Volunteer managers usually recruit volunteers, and provide them with support and supervision.

- Volunteer managers usually also undertake a range of administrative tasks.

- The role of managing volunteers and volunteer programmes in an organisation can present a number of difficulties.

- Volunteer managers need to be clear about their roles and responsibilities.

- In New Zealand volunteer management is increasingly becoming formalised as an academic and professional discipline.

- There are several organisations in New Zealand with useful resources and training programmes for Volunteer managers.

- The basic processes of volunteer management are recruitment, training, supporting and training volunteers.

- Volunteer managers need to be highly organised, knowledgeable, people-centred and communicative.

- Effective volunteer managers ensure that they are well-informed, and know how to handle volunteers fairly.

- The human aspect of volunteer management can be hugely rewarding.

- It is important for volunteer managers to focus on optimising staff-volunteer relationships.

- Volunteer managers should take their time to develop and grow in their roles.

- Although volunteer managers will undertake a range of different tasks in their role, they should not overstretch themselves.

- New volunteer managers should focus on becoming socially skilled.

- An excellent book focused on New Zealand volunteering is Mary Woods' Volunteers: A guide for volunteers and their organisations.

Section 3: Before You Start — Legislation

- Several pieces of government legislation relate to volunteers.

- The Privacy Act requires organisations to safeguard and not misuse the information that they hold about volunteers.

- Technically, volunteers are not covered as 'employees' under the Employment Relations Act.

- However, the concept of 'being a good employer' means that organisations may wish to extend the principles of the law to volunteers.

- The Human Rights Act protects volunteers from unlawful discrimination.

- The Occupational Health and Safety (OHS) Act makes employers responsible for volunteer's wellbeing at work.

- ACC considers accidental injuries sustained during voluntary work as 'non-work injuries'.

- Volunteer drivers of non-exempt passenger services must hold a P-endorsement.

Section 4: Planning paperwork before recruitment

- To prepare for volunteers, organisations should have effective recruitment, training and management policies and processes in place.

- It is important to designate a volunteer coordinator/manager.

- A volunteer policy states the rationale for involving volunteers in the organisation, and acts as a reference point.

- A Code of Ethics states the broader philosophic and ethical position of the organisation's volunteers.

- Rights and responsibilities documents specifically state the commitments that the organisation and volunteers have towards each other.

- Information packs are useful for informing prospective volunteers about the organisation, how they can get involved, and the recruitment processes they may follow.

- Application forms are an important first step for gaining information about volunteers and assessing their suitability for volunteer roles.

- Problems associated with unclear roles and expectations can be addressed using volunteer agreements and assignment descriptions.

- Volunteer agreements help to broadly clarify volunteers roles and outline best practices.

- Volunteer assignment descriptions specifically state the general rights and responsibilities of the volunteer.

- Alternatively, a generic job description can help to outline the general goals, philosophy, scope, and practice principles of the volunteer's activities.

- Organisations need to have clear procedures for managing the use of volunteers within the organisation.

- In some cases volunteers may be covered under an organisation's risk insurance policy.

- It is important for organisations to reimburse any out of pocket expenses incurred by volunteers.

Section 5: Recruiting volunteers

- There are a variety of ways to recruit volunteers.

- General recruitment methods communicate general information about volunteering assignments to the wider public.

- Targeted recruitment methods communicate specific information about volunteering.

- Using personal contacts can be a very effective method for recruiting volunteers.

- External organisations may also be contracted to recruit volunteers.

- Often the best recruitment drives use a combination of approaches applied in a purposeful and planned way.

- It is essential that advertisements for attracting volunteers have a carefully designed and effective recruitment message.

- Marketing and sales strategies are excellent methods for communicating with and attracting potential volunteers.

- A marketing approach can help organisations better understand the marketplace for volunteers, and subsequently refine their volunteer recruitment processes.

- Organisations may benefit by recruiting a diverse range of volunteers.

- Organisations should evaluate the degree to which their volunteer programmes are responsive to and inclusive of diversity.

- External businesses may be motivated to take part in others' volunteer programmes for social responsibility, or for employee development.

- Corporate volunteering, while well-intended, can be problematic for the organisation.

- Volunteer employment agreements do not always need to be highly formal and complex.

- Careful time management helps to ensure that volunteer managers have enough time to provide the support that volunteers need.

- Organisations must adhere to the Human Rights Act when recruiting volunteers.

Section 6: Interviewing and screening applicants

- Selection and appointment processes help to identify the best applicants for volunteering positions.

- Interviews help to further determine the 'fit' of potential volunteers with the organisation and the role.

- Interviews need to be well prepared and organised.

- Interviews need to be designed so as to elicit the information about the applicant that the organisation needs.

- Interview questions need to be carefully designed and appropriate.

- Behaviour based interviews consist of open ended questions that help provide an understanding of people's skills and experiences in the past.

- An interview schedule helps to analyse interviewees' responses to questions, and to identify critical skills.

- Screening and vetting processes help to identify and filter out unsuitable applicants.

- Referee checks provide an external opinion on the suitability of a volunteer for an assignment.

- Vetting and criminal checks are used to identify whether applicants have a criminal history.

- Group screening exercises can enable volunteers to demonstrate their skills and abilities.

- Group screening processes, if expertly run, can save time as well as being very productive.

- Questions designed to find out why applicants want to volunteer can be illuminating for the interviewer, and motivating for the interviewee.

Section 7: Orientation

- Orientation and induction involve welcoming and initiating new people into the organisation.

- Orientation needs to cover the organisation's policies, procedures and structures.

- Orientation should also provide practical advice that helps volunteers operate within the work environment.

- Sometimes even small practical tips can be highly valuable.

- An important purpose of orientation is to make volunteers feel welcome.

Section 8: Training

- Training benefits both the volunteer and the organisation.

- Training is not a one-off event, but consists of prior training, basic initial training, and ongoing training.

- Prior training or knowledge may be a prerequisite for some voluntary positions, but remember that expectations should be realistic.

- Basic initial training follows orientation, and covers essential skills and knowledge.

- Ongoing training focuses on progressively developing volunteers' abilities and skills.

- It is important to know the processes involved in developing and establishing a volunteer training programme.

- Volunteer assignment descriptions are a good guide for determining volunteers' required competencies and subsequent training needs.

- It may be possible to contract external training providers.

- Preparing a draft training programme and budget are core planning tasks.

- It is useful to evaluate training programmes following their completion to ensure that they have met the needs of the learners

- Volunteers' performance often depends on how well they are selected, inducted into the organisation, and trained.

Section 9: Understanding teams

- Effective team managers will understand the dynamics of their team.

- There is a difference between a group and a team.

- Members of a group will interact, identify a common purpose, and perceive themselves as a group.

- A team is a group with a defined task.

- Members of a team also depend on each others' efforts, are willing to work together, and are purposefully selected.

- There can be two types of teams — hierarchical and expert — each of which is useful for undertaking different types of tasks.

- Hierarchical teams have a recognised leader, a clear chain of command, and may have hierarchical sub-groups.

- Most work teams are hierarchical.

- Expert teams have expert members, minimal hierarchy, and a team co-ordinator rather than a leader.

- Many committees and special project groups are expert teams.

- A team leader's job is to ensure that a team is a cohesive and effective whole.

- Team membership has many potential personal benefits.

- Team membership may also have a number of drawbacks.

- Every group develops its own sets of standards, both explicit and implicit.

- A team's standards can be both positive and negative.

- Team leaders may need to act to modify existing standards or set new ones.

- Team leaders need to consider the purpose of implementing a change of standards, and the possible effects of the change.

- Team leaders may encounter resistance or apprehension to new standards.

- A team's morale relates to its enthusiasm, confidence and loyalty towards its function and/or tasks.

- Some factors or events will have a positive influence team morale, and some a negative influence.

- Team leaders must carefully manage factors which influence team morale.

- Team atmosphere relates to the general feeling and mood of the team environment.

- A team's atmosphere is closely linked to its morale.

- Team atmosphere is heavily influenced by the atmosphere in the wider organisation.

- Team leaders have the greatest influence within the team.

- The attitudes and behaviour of managers will influence behaviour and morale across the organisation.

- Team atmosphere is not necessarily influenced by the kind of work being undertaken.

- Teams go through different phases as they mature: forming, storming, norming and performing.

Section 10: Managing an effective team

- Team effectiveness depends on five key variables.

- A team's morale is closely related to its effectiveness.

- Clear, consistent and well communicated objectives are important factors for team direction and progress.

- A team's objectives may change over time.

- Team leaders must maintain a focus on the team's tasks.

- Focussing on tasks helps to enhance team unity, stability, morale and performance.

- Leaders that know and understand their teams can derive many benefits.

- Effective communication consists of finding ways to be understood, and being receptive to others who are communicating to you.

- Effective communication is a skill that needs to be developed over time.

- Effective communication plays an important role in many team and work processes.

- Team briefings are an effective way for managers and teams to interact and communicate.

- To be constructive, team briefings need to be carefully and tactfully managed.

- Listening is an essential but often forgotten communication skill.

- There are a variety of alternative methods for managers to communicate effectively with their teams.

- Team unity relates to the cohesiveness of its members.

- Team unity is strongest in teams with a shared history and identity, loyalty, and in teams which operate effectively together.

- United teams also tend to be more efficient.

- Team unity may also present problems, particularly for those external or new to the group, and those trying to effect change.

- Team unity may be increased by strengthening the team's identity, encouraging cooperation, and discouraging team fragmentation.

- Team leaders drive team performance by allocating and co-ordinating work, communicating objectives, and providing direction, support, encouragement.

- Ongoing management of volunteers involves supervision, training, and managing performance.

- When managing teams, it is important to understand individual's personalities.

- Social Styles categorises peoples personalities according to one of four social behavioural types.

- Driver personalities are assertive, ambitious and goal-focused.

- Expressive personalities are highly enthusiastic, sociable and communicative.

- Amiable personalities are friendly, sensitive, easy going and quiet.

- Analytical personalities are rational, organised, and focused on details and facts.

- All volunteers require some degree of supervisory oversight — either administrative, clinical, or group/peer supervision.

- Administrative supervision involves overseeing the practical aspects of volunteers' work.

- Clinical supervision provides psychological and moral support to employees involved in stressful work.

- Group/peer supervision relates to self-managing groups where individuals are able to evaluate and support each other.

- Group feedback sessions may be constructive ways to create a learning environment and share knowledge.

- Sudden unexpected events may create the need for ad hoc supervision, or on the spot intervention.

- Supervision therefore involves supporting volunteers' particular work needs and maintaining performance.

Section 11: Managing volunteers' performance

- Managing performance involves evaluating and appraising volunteers' work, as well as providing guidance and support.

- Managing performance focuses on developing volunteers and enhancing their performance, as well as their job satisfaction.

- Performance appraisals involve evaluating and reviewing volunteers' performance, and setting new performance goals.

- Performance appraisals should provide both positive and negative feedback.

- Performance goals should be specific, measurable, agreed, realistic and time-framed (SMART).

- Performance appraisal discussions provide a formal setting for problems to be raised and performance goals to be set.

- Appraisals should be interactive and developmental.

- Performance appraisal systems should be the same for both volunteers and paid staff.

- Appraisal interviews should be carefully designed and organised.

- It is often useful to evaluate specific areas of a volunteer's performance using a grading chart.

- Raising performance issues requires careful planning and a tactful approach.

- Appraisal discussions also require the right environment, discussion of clearly defined problems and the volunteer's involvement.

- Regular and immediate feedback, and group appraisal may be effective ways to raise performance issues.

- Another approach to performance appraisal are satisfaction surveys, which enable volunteers to grade their own performance and job satisfaction.

- Performance coaching involves collaboration to improve a volunteer's performance.

- The volunteer agreement and the volunteer assignment description can provide the bottom line when dealing with performance and discipline problems.

- Volunteers like to feel valued, empowered and rewarded by the organisation.

- Retaining volunteers often depends upon the support they receive.

- Volunteer support programmes recognise, support and reward volunteers.

- Recognition and rewards need to be appropriate to the situation, organisation and volunteer.

- There are numerous ways to recognise and reward volunteers.

- It is important to reimburse volunteers for expenses they incur.

- Organisations need a policy on expense reimbursement.

- Conflict management skills are essential when working with volunteers.

- Conflict in social and work situations is common. It may exist between anyone and may arise for numerous reasons.

- Conflict management strategies can help to minimise the scale and scope of potential conflict.

- Conflict resolution involves identifying and understanding problems, evaluating possible solutions, and implementing them.

- It is important to address and resolve challenging and destructive behaviour.

- It is important for volunteer managers to negotiate effective change in challenging behaviour.

- There may be alternatives to dismissing a volunteer.

- Volunteers may end their involvement with an organisation for a number of reasons.

- Exit interviews may be useful for ascertaining why volunteers are ending their involvement.

- Volunteer managers need support as well.

- Volunteer managers need to be aware of conflict between paid staff and volunteers, and take steps to minimise and resolve this.

- Volunteer performance problems need to be addressed promptly.

Section 12: Volunteers and fundraising events

- Fundraising with volunteers requires careful planning and organisation.

- Fundraising events require very similar management processes to those used for volunteer recruitment.

- The use of databases can make coordinating volunteers a lot easier and more effective.

- Fundraising events involving external organisations may be successful if the external party can assume responsibility for and 'ownership' of the event.

- Allowing volunteers to assume ownership of fundraising events can also be highly successful, providing they receive the support they need.

- Collaborating with external organisations in fundraising events may be successful if the event is well managed.

- When undertaking a fundraising event it is important to identify the different stakeholders and their needs.

- It is important to work closely with stakeholders during the planning of a fundraising event.

- Successful event planning requires effective administration and people-management processes.

- Event Managers need to know how to deal effectively with problems when they arise.

- The quality and detail of planning for an event will directly affect the likelihood of its success.

- Event managers need to be competent administrators, and have excellent leadership and communication skills.

- New volunteer managers need to be aware that the role can be highly stressful, but also rewarding.

- Retail volunteers are a significant volunteer group.

- Retail volunteers tend to be older, interested in social aspects of the role, or those who are involved because they are required to.

- Recruiting retail volunteers also requires careful recruiting processes.

- Retail volunteers also require job training and performance management.

FAQ

- Volunteer managers should pay close attention to how their roles are defined by their job descriptions.

- Volunteer management is both people-centred and detail-centred.

- During screening it can be useful to ask volunteers why they want to volunteer and what they expect to gain.

- Disengaging volunteers from roles they do not quite 'fit' does not necessarily mean that they are not suitable for other roles within the organisation.

- Volunteers may underperform for various reasons and will therefore need to be dealt with differently.

- Ultimately when resolving conflict, the interests of the organisation need to be the bottom line.

Personal insight interviews

- Learning about the experiences of others is very important for Volunteer Managers' own professional development.