A Sound Investment:
The Value of Adding Volunteer Resources Management to your Philanthropic Portfolio
Acknowledgments

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Since it was founded in 1907, UPS has built a legacy as a caring and responsible corporate citizen. Whether through The UPS Foundation, volunteerism or involvement with the United Way, UPS supports programs that focus on today’s important issues, including human welfare, education and community needs. UPS has a long history of assisting organizations and people in need—in communities right across Canada. UPS is the world’s largest package delivery company, a global leader in supply chain services that offers an extensive range of options for synchronizing the movement of goods, information and funds. Employing more than 6,800 people in Canada and 357,000 worldwide, UPS delivers to every address in Canada and the United States, and operates in more than 200 countries and territories around the world.

The UPS commitment to volunteerism

Giving back to the community is part of the UPS culture and its corporate commitment to supporting volunteerism among all UPS employees. Volunteerism is an integral part of the UPS philanthropic program. It reflects the pride that UPS employees feel while contributing in a meaningful way to their communities.

Volunteer Canada

Volunteer Canada is the voice for volunteerism in Canada. Since 1977, Volunteer Canada has been committed to supporting volunteerism and civic participation through ongoing programs and special projects. National in scope, Volunteer Canada’s board members, partners and members represent hundreds of different communities across Canada. Please visit www.volunteer.ca for more information.

Canadian Administrators of Volunteer Resources (CAVR)

Canadian Administrators of Volunteer Resources is the only national, professional association that offers ongoing certification in the field of volunteer resources management in Canada. The mission of the CAVR is to provide and maintain a national association that promotes the professional administration of volunteer resources, certification of membership, continuing education standards, and collaboration with provincial, national and international organizations. Please visit www.cavr.org for more information.
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Dear colleague:

We all recognize the good that one individual can do for another person, a family or a community when he or she makes the effort to volunteer. It is just as important to recognize that developing the necessary skill-sets in volunteers, ensuring proper planning and providing strong support are crucial elements to truly harnessing the full potential of volunteers.

For UPS, providing reliable and value-added service to customers all comes down to effective human resource management. UPS is a company of more than 357,000 employees worldwide, but it is not necessarily the size of the employee base that contributes to its business success. It’s about having the right tools, training and systems in place to empower UPS employees to provide the best customer service.

This principle of effective human resource management is just as relevant to the philanthropic efforts of any organization. Deploying large numbers of volunteers does not necessarily translate into success for the voluntary organization or the community. Successful results are achieved when an organization is able to support, mobilize and manage its volunteer resources for the greatest possible impact on a problem or need.

We challenge you to consider allocating some of your resources to maximize your company’s voluntary efforts. We all need to develop a common understanding of what it takes to engage and properly manage volunteers. Together with Volunteer Canada and the Canadian Administrators of Volunteer Resources (CAVR), UPS is pleased to present this resource, not only to educate you on the importance of managing volunteers effectively, but to provide you with an assessment tool and additional resources to build your capacity in this area.

Our request is simple – please read on and consider the impact your company and/or foundation can have in maximizing your contribution to your community. It’s worth the effort!

Sincerely,

Glenn Rice, President
UPS Canada

Marlene Deboisbriand, President
Volunteer Canada

Bernard Cyr, President
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What is volunteer resources management and why is it critical?

Volunteering and civic participation are the means through which Canadians contribute to building and maintaining a healthy, caring society. People from all age groups, backgrounds and sectors across the country lend their expertise, energy and time to help make Canada one of the best places in the world to live. Whether an individual is formally volunteering with an organization or informally lending a helping hand to a neighbour or person in need, these combined acts are a powerful force that help shape a sense of who we are as Canadians.

Volunteers are fundamental resources for the voluntary sector. The investment of human capital fuels much of the infrastructure that keeps voluntary sector organizations open and ready for business. Volunteering is also one of Canada's most accessible and effective ways for its citizens to contribute to a civil society. And yet, obtaining adequate resources to provide the necessary infrastructure to support the management of volunteers is a significant challenge for the sector.

Consider the resources a voluntary sector organization usually has to support its mission—money, space, employees, in-kind donations/gifts, equipment and technology. Individuals with specialized skills generally manage each of these resources, and their expertise is considered during strategic planning.

The same should be true of an organization’s volunteer resources. Unfortunately, this is usually not the case. In reality, few funders allocate financial resources to support volunteers and thus few voluntary organizations designate full-time staff to support the volunteers who work for them.

There are many reasons why people stop volunteering. Some are tangible and can be easily identified. However, there is a realization within the voluntary sector that many of the reasons that people stop volunteering— or don’t volunteer at all—have to do with the lack of structure within an organization to support volunteers. As organizations are called upon to provide more and better quality services, they have the opportunity to engage volunteers now more than ever before. To optimize investment of volunteer time and build capacity within the sector, voluntary organizations must involve and manage volunteers more appropriately and effectively.

As investors in the voluntary sector, grant makers and businesses must ask themselves the following questions:

*How can we support and build capacity within the voluntary sector?*

*How can we better position and leverage the dollars and efforts we are already investing in the voluntary sector?*

*How can we share some of our best practices across the sector?*

*How can we support more efficient and effective resource allocations?*

A critical and often overlooked response to these questions is to build greater capacity by supporting the infrastructure that sustains volunteering.
What does this guide offer?

The purpose of A Sound Investment: The Value of Adding Volunteer Resources Management to your Philanthropic Portfolio is to inform and encourage funders to support good volunteer resources management. Building on a resource published by the Association for Volunteer Administration, The Points of Light Foundation and The UPS Foundation, businesses, foundations and managers of volunteer resources were engaged to collectively explore the importance of supporting volunteer management within a Canadian context. This resource aims to encourage foundations and businesses to learn more about the importance of investment in, and support of, the infrastructure that sustains effective volunteering so that current grants are further leveraged.

Specifically, this guide provides:

- key elements that contribute to effective volunteer management;
- examples of businesses and foundations that invest in voluntary sector organizations and volunteer infrastructure;
- suggested strategies to support quality volunteer involvement and volunteer resources management;
- standards from the Canadian Code for Volunteer Involvement that help in the assessment of an organization’s capacity for volunteer engagement;
- Internet resources and references for further information.

Please note that there is a glossary of terms included at the back of this resource to ensure an understanding of terminology.
Why this resource and why now?

The landscape of the voluntary sector in Canada is evolving at a rapid pace. Not only is the work of the sector becoming more recognized, the necessary human resources are being re-evaluated, and thoughtful consideration is being given to the necessary competencies around leadership. This is extended to the role of the manager of volunteer resources. Consider the following areas of skill and knowledge that leaders in the voluntary sector use:

Vision and alliances:
Leaders envision improved lives in the community and in the world. Their knowledge and skills help them to make alliances with other groups and organizations to achieve the voluntary sector’s highest hopes, including peace, freedom, human rights, justice, and an end to poverty and discrimination.

Strategies and resource management:
The skills and knowledge that leaders have in this area allow for strong, ethical management in the day-to-day operations of their organizations.

Relationships:
Leaders must be able to work well with people inside and outside their organizations. They do this by building relationships. This involves empowering others and helping people to work together.

Complexity:
Leaders must be able to deal with a complex world and one that changes quickly. Turmoil exists on all levels and can be social, political, organizational and institutional.

These skills are essential when hiring managers of volunteer resources. If voluntary organizations require this level of expertise to effectively engage a large portion of their human resources – volunteers – then appropriate resources need to be in place to ensure that effective leadership for a volunteer contingent can be sought out and supported.

Source:
Key elements of effective volunteer management

Voluntary sector organizations engage volunteers in a variety of functions. These organizations benefit profoundly when volunteers are engaged and enjoy success in their work. In turn, effective volunteer involvement yields benefits that extend beyond individual organizations—to the volunteers themselves, and the people and communities they serve.

Six key elements of effective volunteer resource management in voluntary sector organizations emerged from the research that was used in the development of this guide:

1. **Effective volunteer resource management leverages and improves grant making and corporate community involvement.**
   - When engaged effectively, volunteers augment an organization’s financial and in-kind resources, producing greater value for each dollar invested. When engaged ineffectively, they are a drain on an organization’s capacity.
   - Volunteers can provide new or expanded services to increase the return on investment and add significant value to the objectives of a grant.
   - Citizen engagement can be a key indicator of the health of both the voluntary sector and individual organizations. Knowing what to look for when assessing how an organization manages its volunteer resources provides grant makers and businesses with an observation and decision-making tool.

2. **Effective volunteer resource management supports business objectives.**
   - Supporting the effective management of volunteers can help a company leverage and align its community relations, public affairs and financial contributions to establish or reinforce a brand identity, company loyalty and community goodwill.

3. **Effective volunteer resource management strengthens the sector by increasing capacity to deliver services.**
   - Employer-supported volunteer initiatives build morale and loyalty, as well as provide opportunities for employees to share and develop their skills and expertise.
   - Effectively designed volunteer opportunities enhance an organization’s reputation in the community.
   - Volunteers are not “free.” The investment of volunteer time and energy, combined with an organization’s investment in a volunteer resources manager, enhances service delivery.
   - Increasing the diversity of volunteers and how they volunteer provides organizations with increased access to a broader range of perspectives, skills and resources.
   - Thorough risk management and screening is essential in the practice of sound volunteer resource management.

4. **Effective volunteer resource management requires organizational and community infrastructure.**
   - The organization’s board, executive staff and funders must consider the support of the volunteer infrastructure to be as important as any other organizational resource.
   - It is critical that senior management has knowledge of volunteer resource management practices and demonstrates this understanding by committing to securing sufficient resources to support volunteers.
• The ability to engage and retain increasingly diverse volunteers requires highly competent management.

• Organizations need to assess what effective volunteer involvement means – or could mean—for the organization and provide the infrastructure, resources and staff to support it.

• A ‘one-size-fits-all’ approach to supporting effective volunteering is not likely to succeed. Setting, location and activity affect the various structures required for citizen engagement within communities, voluntary organizations, foundations and businesses.

5. Effective volunteer resource management requires training and development.

• Corporate and community volunteers who understand how to work with a voluntary sector organization and what to expect in return are more willing to share their expertise and time.

• Training assists board members – many of whom are corporate and philanthropic leaders – and executive staff to understand that engaged volunteers can increase an organization’s service and fundraising capacity. When board members understand their roles, they can be more productive in serving the organization.

6. Effective volunteer resource management contributes to building a civil society.

• Grant makers and businesses can meet their community involvement goals by supporting the structures and systems that enable more effective volunteering.

• When people know how to support their community, when it is easy for them to get involved, and when their experience is meaningful, they are more likely to continue volunteering.

“Like employees in any corporation, volunteers who are well trained, adequately supported and well directed with ethical and established management practices are the ones whose contributions are the most sustained and effective. Volunteer resources management is a key component to successful organizations striving to make a difference in their communities.”

Sue Woods, Past President
Association for Volunteer Administration
Retired Manager of Volunteers – Calgary, Alberta

Volunteers are more likely to be donors than are non-volunteers – 91% of volunteers make charitable donations, compared to 73% of non-volunteers.

Source:
2000 National Survey of Giving, Volunteering and Participating
Active investors in volunteer resources management

Increasingly, professionals in organizations of all types and sizes understand the value of effective volunteer resource management. The following examples demonstrate some of the exciting ways in which a number of foundations and businesses are investing in volunteer resource management:

Foundations

The J.W. McConnell Family Foundation

The mission statement that guides the McConnell Foundation “To enhance the ability of Canadians to understand, adapt, and respond creatively to the underlying forces which are transforming Canadian society and the world” is not only powerful but passionate as well. The work that the Foundation embarks on does not address the status quo – it seeks partners who are committed to finding, innovative solutions to community issues. This is evident in all aspects of the Foundation, from responsive grants to the many programs they develop and operate. It is also extended to the way in which voluntary organizations engage people. Although their funding is primarily directed at national organizations, they challenge their partners to explore the potential to achieve their mandate in new ways. They understand that volunteerism and the effective management of volunteers are the cornerstones of voluntary organizations and are driven to ensure that the way in which people are engaged in the voluntary sector is thoughtful, dynamic and strategic.

The Muttart Foundation

The Muttart Foundation believes that the support of an organization as a whole, rather than the support of a specific program or service, increases the organization’s overall effectiveness. The ‘Healthy Charities’ program aims to help charities in their current operations and in future endeavours. The Foundation’s commitment to long-term impact in the community is demonstrated through its investment in professional positions, including volunteer resource managers. The role of the volunteer resource manager is a professional position that facilitates the growth of a charity. The Foundation recognizes that as charities rely on the involvement of volunteers more than ever, it is important that the proper infrastructure be in place to sustain these individuals in their work.

The Ontario Trillium Foundation

Based in Ontario, the Ontario Trillium Foundation (OTF) serves as a catalyst enabling individuals to work together to enhance the quality of life in their communities. The Foundation’s mission is to build healthy and vibrant communities throughout Ontario by strengthening the capacity of the voluntary sector through investments in community-based initiatives. In both urban and rural communities, OTF supports volunteerism by investing in the infrastructure necessary to engage and retain volunteers. The Foundation recognizes the tremendous value and vitality that volunteers bring to community projects and supports and strengthens this contribution through its granting programs in four key sectors: Arts and Culture, Environment, Social and Human Services, and Sports and Recreation.

The $100 million allocated annually to volunteer-based projects not only increases the level of volunteer involvement, it also reaches out to diverse communities and fosters civic engagement from all members of society.

Wild Rose Foundation

The Wild Rose Foundation in Alberta is an example of how the infrastructure of civic engagement is important in both urban and rural settings. Working in collaboration with the voluntary sector, the Foundation takes a strategic, proactive approach to determine how to effectively support the sector as a whole. With an understanding that volunteers aren’t ‘free’, the Foundation responds to the need for funding volunteerism and volunteer resource management through a series of innovative initiatives.
An annual provincial conference for volunteers from across the province, the provision of high-level training and the availability of funding for volunteer resource management positions illustrate the Foundation’s dedication to the sector. Not only committed to work in this area, a passion for strengthening the sector is a common thread among the board, staff and volunteers.

The UPS Foundation

For many individuals, the will to help is tremendous, but the ability to help is hampered or inhibited by a lack of knowledge about where, when and how their talents can be deployed in service to others. Similarly, for thousands of nonprofit organizations, finding, recruiting, and training volunteers is a tremendous challenge. Effective volunteerism is one area where The UPS Foundation makes a lasting, positive impact by supporting initiatives that help nonprofit groups recruit volunteers, and make those individuals the kind of leaders who can further a philanthropic mission.

Since 1998, The UPS Foundation has contributed over $10 million US to initiatives that enhance the capacity of nonprofit organizations to not only meet demand for their services, but strengthen their ability to expand and fulfill their missions. Effective volunteers must have more than the will to help. They require the tools and training to become effective leaders. The UPS Foundation’s goal is to create a culture of volunteerism and civic engagement around the world.

Corporations

Enbridge

Since 2001, Enbridge has provided funding support to volunteer programs at the Stollery Children’s Hospital Foundation in Edmonton; Junior Achievement of Northern & Southern Alberta - primarily in Edmonton and Calgary; The Calgary Zoo; and Fort Calgary. Enbridge has also provided funding support to Volunteer Calgary by way of training scholarships to non-profit organizations throughout Calgary. Similarly in Eastern Canada, Enbridge has funded Youth Volunteer Programs in Mississauga as well as the Sick Children’s Hospital of Toronto. The volunteer ethic is embedded in the corporate responsibility value at Enbridge. They encourage employee volunteerism either through corporately supported initiatives or through employees’ own personal efforts in helping to strengthen the quality of life within their own communities.

Many non-profit organizations would not exist without the support of community volunteers, and yet, resources to support the recruitment, training, retention and recognition plans are oftentimes scarce. Enbridge believes that this Community Investment strategy provides a value-added opportunity to enable non-profit organizations to further strengthen their internal capacity and long-term sustainability.

The Co-operators

Co-operator employees work hard to make a difference in their communities—and it shows. Their dedication is demonstrated by those who work in the corporate offices and by Co-operator agents in close to 400 communities across Canada. Not only does the company encourage and support community involvement through volunteering by mobilizing their employees, it also has policies in place to support individual volunteer initiatives. It is because of this unwavering commitment to building community that The Co-operators recognizes and values the importance of well-organized volunteer programs. The success of their employee-supported initiatives relies heavily on the strength of volunteer programs in the voluntary sector.
"Engaging volunteers and utilizing their energy is the primary responsibility of the volunteer manager. Their role is vital. It is important they get the resources they need to do their jobs well."

Sue Tomney, Director
Communications & External Affairs
TransAlta

For an additional resource on the sound practices of volunteer management, please refer to the Standards of Practice outlined by the Canadian Administrators of Volunteer Resources. These standards influenced the design of the Canadian Code for Volunteer Involvement (CCVI) and continue to encourage professionalism and quality measures amongst managers of volunteers. Please visit http://www.cavr.org/index1.html for more information.

Most nonprofit and voluntary organizations identify human capital – staff and volunteers – as their greatest resource.

Source: The Capacity to Serve, Canadian Centre for Philanthropy 2003

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**Investors Group**

Investors Group has a long history of improving the quality of life in the communities where its consultants and clients live and work. Through the Investors Group Community Investment Program, and in partnership with the company’s consultants and employees, Investors Group contributes financial resources and substantial volunteer support to organizations and projects across Canada. Volunteerism is encouraged and rewarded through a Community Service Support Program and Matching Gift Program. These programs enable Investors Group consultants, employees, retirees and immediate families to apply for grants that can benefit charitable organizations they are involved with or support. In addition, Investors Group celebrates and recognizes the importance of volunteerism by sponsoring National Volunteer Week, an annual event that encourages community involvement throughout Canada.

**Business Objects**

Business Objects is a software company that has grown from a small independent startup to a team of 4,000 employees worldwide. Accompanying their growth and success is a commitment to introducing their employees (whose average age is 30) to, and supporting them in, community endeavors. Business Objects has built their community investment activities to empower their employees own way of giving while driving the company’s community strategies at the same time. A well-developed and thoughtful four-step process to employee volunteerism (awareness, education, experience and active involvement) is just an example of how they live their philosophy.

Business Objects has also worked to creatively engage with the community. A full-time staff was hired to develop a program to match employees in skilled placements with voluntary organizations. While this idea had great potential, the true success came in what they learned – both about the community and the company. A refreshed understanding of what it takes to place skilled employees in the community led to a renewed commitment to build capacity in the voluntary sector.
Taking action

In spite of these and other examples, volunteer resource management still suffers from persistent lack of funds because of budget constraints, competing demands, and limited understanding and information on the costs and benefits of supporting volunteering.

As the increased need for the services provided by the Canadian voluntary sector becomes more apparent, an obvious solution to meet the demand is to engage more volunteers and maximize their contributions. This requires competent management of volunteers and adequate investment by funders.

It is vital that all stakeholders commit to working together to increase awareness and support for volunteer resources management. In turn, the voluntary sector needs to continue to develop better ways of assessing and reporting on the impact of volunteer service, utilizing approaches that do not impose additional barriers to volunteers or to managers of volunteers.

In 2001, Volunteer Canada introduced the Canadian Code for Volunteer Involvement (CCVI), based on the understanding that volunteers and the voluntary sector play a vital role in Canadian society. There had never been a clear articulation of the important values and benefits received from volunteer involvement—and the CCVI provides a much-needed framework for organizations to initiate discussion on the vital role volunteers play in helping to achieve their mission.

The Canadian Code for Volunteer Involvement is designed as a tool to support organizations as they align their work with their mission and vision. The values, guiding principles and organizational standards outlined in the Code empower organizations to make decisions on how people will be involved as volunteers. Funders have the opportunity to use the Code as an assessment tool, as well as to encourage voluntary organizations to adopt and implement the CCVI.

Assessment Tools

The tools on the following pages are provided to assist with collaboratively assessing the overall capacity of an organization to support volunteering. They are intended to encourage discussion between grant makers, the leaders of voluntary organizations and the managers of their volunteer resource programs.

Volunteer Canada encourages all volunteer-involving groups to work with and adopt the Canadian Code for Volunteer Involvement. Not only does the Code provide organizations with a framework for their volunteer-involvement efforts; it heightens the profile of their programs and lends credibility to their sound volunteer management practices.

Marlene Deboisbriand, President
Volunteer Canada
Strategies and best practices checklist

Support for volunteer resource management can take many forms, depending on the structure and culture of the voluntary organization. Use this checklist as a benchmark tool or as a springboard for ideas on how to ensure effective volunteering within an organization or a community.

For grant makers:

- Articulate values and beliefs about volunteerism in your organization’s mission statement and other written materials.
- Inform grant seekers that evidence of a strong volunteer component, when appropriate, will be considered favorably in grant proposals.
- Request basic information in funding applications about a grant seeker’s volunteer program and how volunteers will be involved in the project.
- Discuss who will be supporting volunteers and meet with appropriate staff during site visits.
- Welcome a budget line item to fund a manager of volunteer resources and basic set up costs for the position.
- Ask for feedback in written reports or evaluations on the successes and challenges of involving volunteers.
- Encourage grant makers’ staff to volunteer in community-based organizations so that they have intimate knowledge of what it takes to make volunteering successful.
- Take advantage of the expertise available from Volunteer Canada, Canadian Administrators of Volunteer Resources (CAVR), the network of volunteer centres, workplace volunteer councils, local divisions of the United Way, nonprofit management assistance programs, and local professional associations for managers of volunteers, to support volunteering and volunteer resource management in your community.
- Share information on volunteer management programs funded or consider collaborations with other grant makers in the community to leverage support and services for local voluntary organizations.
- Review organizations and projects currently funded. Ensure the staff who support these projects have strong competencies in volunteer management.
- Ensure that transparency around volunteer engagement deficits will also be considered if solutions are part of the proposal.

Research, training and recognition

- Facilitate or convene discussion in the community on voluntary sector and volunteer management principles and best practices.
- Involve grantees in the development of measures to assess the impact of investment in volunteering. Share these measures with colleagues.
- Sponsor a survey or case study on current management practices and/or challenges in management of volunteers among voluntary organizations.
- Create innovation awards for managers of volunteer resources who demonstrate unique approaches that address challenges in creative ways.
- Support existing professional development, training and networking opportunities for managers of volunteer resources. Provide full or partial scholarships to enable those managers to participate.
- Partner with other grant makers/businesses to pool financial resources and offer professional development opportunities for managers of volunteer resources.
• Invite managers of volunteer resources to attend in-house training programs or conferences at no or minimal cost.
• Partner with academic institutions to improve their curriculum on voluntary sector management and corporate philanthropy.
• Provide grants to local libraries and volunteer centres to build their volunteer management collections.

**Employee involvement/volunteer programs**

• Assign a manager to be responsible and accountable for employee volunteers.
• Walk the talk. Senior managers led by the CEO demonstrate a commitment to employer-supported volunteer initiatives.
• Involve employees in determining the types of organizations and issues they would like to volunteer for or contribute to.
• Provide constructive feedback about employees’ experiences to the organization’s manager of volunteer resources.
• Make management accountable for supporting volunteerism as part of their business or community relations objectives.
• Provide adequate resources to support employee volunteer initiatives.

67% of Canada’s 6.5 million volunteers are employed.

On average, volunteers who received employer support contributed more hours to more organizations than did volunteers who did not receive such support.

87% of companies encourage employees to volunteer in the community

Source:
2000 National Survey on Giving, Volunteering and Participating
Standards from the Canadian Code for Volunteer Involvement to assess organizational capacity

Based on the Canadian Code for Volunteer Involvement, the questions below may be used to assess an organization’s overall capacity to manage volunteer resources and vol-unteer-based projects. Grant makers can learn much of this information by talking with the executive director and other project staff, including the manager of volunteer resources. The responses should provide an overview of an organization’s capacity and readiness to engage volunteers and other community resources effectively.

Asking the right questions can help in three ways:

1. **Grant makers have specific information to use in deciding whether a request is viable and worthwhile.**
2. **Grant seekers respond by assessing how their organization or program measures up to a set of recognized standards for volunteer involvement.**
3. **Grant makers and grant seekers can initiate dialogue that plants the seeds for improved relationship building and volunteer management.**

**Acknowledgment and support from the board of directors and senior management**

- Has the board of directors adopted a statement declaring the vital role of volunteers in achieving the organization’s mission?
- Does the organization’s planning process incorporate volunteers and the concept of volunteer involvement?
- Has the board approved the overall goals for volunteer involvement?
- Is there a budget allocated for volunteer involvement?
- Is there adequate space and equipment allocated for volunteers and volunteer management staff to perform their assignments?
- Does the organization have proper insurance to minimize volunteer liability?
- Is volunteer involvement evaluated regularly?

**Infrastructure**

- Are governance and operational policies in place for both the volunteer program and the organization as a whole? Are they reviewed regularly with input from board, staff and volunteers?
- Are there standardized administrative procedures and records management practices? Does the volunteer department or program utilize them?
• Are policies and procedures communicated and accessible to all staff and volunteers?
• Are policies and procedures followed consistently and equitably?
• Are policies and procedures consistent with national and provincial Human Rights Codes, The Freedom of Information and Protection of Privacy Act, and provincial employment standards legislation?

The manager of volunteers

• Does the person designated to work with volunteers have the appropriate education, experience and professional credentials to manage the volunteer program?
• Is there a current written job description for the designated person? Is it reviewed regularly?
• Is the designated person a member of the management team?
• Does the designated person work collaboratively with staff and the local volunteer centre to encourage the effectiveness of the volunteer program?
• Are professional development opportunities provided on a regular basis?
• Is the performance of the designated person reviewed regularly? Does the review include feedback from staff and volunteers?

Screening

• Is screening considered to be an essential process that continues throughout the volunteer’s involvement with the organization?
• Are all volunteer assignments assessed for a level of risk?
• Are screening measures used according to the level of risk of the assignment?
• Are all volunteers required to complete an application form, provide references and attend an interview?
• Are screening procedures delivered consistently, with no exceptions made for certain individuals or positions?

Volunteer assignments

• Are volunteers and staff consulted when developing new assignments?
• Do volunteer assignments have written descriptions that include duties, responsibilities, skills needed, time required and benefits?
• Are volunteer assignments developed to reflect the requirement to deliver the mission of the organization and the needs of the volunteers?
• Are volunteer assignments reviewed periodically with staff and volunteers to ensure relevance and value?
• Are volunteers with special assignments or challenges invited to be involved with the organization?
• Are the levels of risk assessed and minimized for all volunteer assignments?

**Recruitment and selection**

• Are recruitment messages realistic and clear about the volunteer assignment and expectations?
• Does the organization use various techniques to recruit volunteers?
• Do recruitment messages advise that screening procedures are in place?
• Is genuine effort made to recruit and select volunteers from a broad range of backgrounds and experiences to represent the community served by the organization?
• Is the selection of volunteers based on actual requirements and pre-determined screening measures?

**Orientation and training**

• Do volunteers receive information on the history, mission and structure of the organization?
• Do volunteers receive information on the policies and procedures that relate to their assignment?
• Are volunteers given adequate training for performing their assignments without putting themselves or others at risk?
• Are volunteers informed of the boundaries and limits of their assignment?
• Do volunteers have ongoing training opportunities to upgrade their skills and to learn of changes in the organization?

**Supervision and feedback**

• Does the complexity and risk of each assignment determine the level of supervision?
• Are volunteers assigned and introduced to their supervisors at the start of their assignments?
• Are volunteers evaluated on a regular basis?
• Are random spot checks with volunteers and clients used to evaluate volunteer performance?
• Are volunteers made aware of and encouraged to use mechanisms for providing input to the organization?
• Are records kept for each volunteer using a confidential, secure system?
• Are situations requiring reprimand and dismissal following policies and procedures fairly and consistently, while respecting the safety and dignity of all concerned?
**Human resources**

- Is staff given training and recognition for working effectively with volunteers?
- Is input from volunteers welcomed? Is it solicited for the organization’s planning and evaluation process?
- Are volunteers encouraged to grow within the organization?
- Are volunteers included as equal members of the team?

**Recognition**

- Does senior management publicly acknowledge the efforts of volunteers?
- Are formal methods of recognition delivered consistently?
- Are informal methods of recognition delivered in a timely and appropriate manner?
### Elements of volunteer resources management

Grant seekers are invited to use this assessment to determine the infrastructure that supports an organization’s volunteer efforts.

<table>
<thead>
<tr>
<th>Elements of Volunteer Resources Management</th>
<th>Currently in place to a large degree</th>
<th>Currently in place to some degree</th>
<th>Not currently being done</th>
<th>Not applicable not relevant</th>
</tr>
</thead>
<tbody>
<tr>
<td>Written statement on role of volunteers in supporting or achieving the mission</td>
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<tr>
<td>Policies and procedures for volunteering program</td>
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<tr>
<td>A qualified person designated to manage the volunteer program</td>
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<tr>
<td>A volunteer screening process which is communicated and consistent</td>
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<tr>
<td>Meaningful volunteer assignments reflecting a variety of opportunities</td>
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<tr>
<td>Volunteer recruitment and selection reaching out to diverse community sources</td>
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<tr>
<td>Orientation and training provide for all volunteer positions</td>
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<tr>
<td>Appropriate supervision is provided with the ability of the volunteer to give and receive feedback</td>
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<tr>
<td>Volunteers are welcomed and treated as valuable members of staff</td>
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<tr>
<td>The contributions of volunteers are regularly acknowledged in formal and informal ways.</td>
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</tbody>
</table>
Conclusion

The importance of volunteers and their contribution to the quality of life of Canadians cannot be overstated. Volunteers make up a powerful force—one with the potential to make the world a better place by creating healthier, happier and more robust communities. Engaging people in worthwhile efforts and reaching out to those in need is a win-win situation with positive outcomes for all involved—individuals, organizations, communities, businesses and governments.

Underlying the vast power of this incredible resource of human capital is the need to manage it in order to harness it effectively, foster and stimulate its growth, and maximize its full potential. As needs increase and organizations are stretched in their provision of service, more volunteers are needed to help fill the gaps. It is critical that this force be managed effectively and positively so that these volunteer experiences will be good, volunteers stay longer and contribute more, and so that others will be inspired to join them.

This resource is crucial step in the right direction. It aims to inform on the importance of volunteer resources management and its benefits, to provide tools that can be used in the assessment of organizational capacity, and to encourage more education and inquiry to support sound infrastructure development in volunteer resource management.

Apart from funding an actual volunteer management position, here are some suggestions as to how you, as a funder, can support volunteer resources management:

• Support research and evaluation of the return on investment in volunteerism. Consider partnering with higher education and policy research centres, as well as leadership voluntary organizations.
• Develop a financial and programmatic analysis of the average cost to recruit, train, manage and recognize volunteers in the organization.
• Build in additional resources to grants that will support and assist organizations with the adoption and implementation of the Canadian Code for Volunteer Involvement.
• Compile information about businesses that integrate their volunteer activities with other community affairs and business initiatives. Organize the information by industry and size or other categories to help organizations easily find applicable examples. Disseminate the information as widely as possible.
Resources

Association for Volunteer Administration
www.AVAintl.org

Business for Social Responsibility
www.bsr.org

Canadian Administrators of Volunteer Resources
www.cavr.org

Canadian Centre for Philanthropy
www.ccp.ca

The Centre for Corporate Citizenship at Boston College
www.bc.edu/centers/ccc

Charity Village
www.charityvillage.com

Community Foundations of Canada
www.community-fdn.ca

CIVICUS
www.civicus.org

Energize Inc.
www.energizeinc.com

Points of Light Foundation
www.pointsoflight.org

United Way of Canada
www.unitedway.ca

Volunteer Canada
www.volunteer.ca

Voluntary Sector Initiatives
http://www.vsi-isbc.ca/

The UPS Foundation
www.community-ups.com
Glossary

**Canadian Code for Volunteer Involvement**
The Canadian Code for Volunteer Involvement provides voluntary and not-for-profit organizations with a philosophical framework for involving volunteers at the governance, leadership and direct service levels.

**Capacity**
The human and financial resources, technology, skills, knowledge and understanding required to permit organizations to do their work and fulfil what is expected of them by stakeholders.

**Civil society**
A civil society is one that sustains and enhances the capacity of all its members to build a caring and mutually responsible society. It means that citizens – individual, corporate and government- assume joint responsibility for promoting economic, social and environmental well-being.

**Employer-supported volunteer initiatives**
Employer-supported volunteer initiatives are initiatives through which businesses enable their employees to donate skills and volunteer time. It can take many shapes and forms with varying levels of employer support.

**Local professional organizations**
A network of managers of volunteers that meet on a regular basis in their own communities to educate, offer support and provide a forum for the exchange ideas.

**Managers of volunteers**
Canadian Administrators of Volunteer Resources definition:
An Administrator of Volunteer Resources is a professional who applies the best practices in volunteer management in compliance with nationally accepted standards to identify, strengthen and effectively maximize voluntary involvement for the purpose of improving the quality of life of individuals and of communities.

\(^1\)The term administrator is used in a generic way to represent all other titles used in the voluntary sector (director, coordinator, manager, leader, etc). Throughout this manual, we use the term “Manager of Volunteers”.

**Network of volunteer centres**
Volunteer centres are non-profit organizations or groups dedicated to fostering and developing volunteerism in the community as a whole. While other organizations contribute to sustaining our national heritage of volunteering through their

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*Canadian Code for Volunteer Involvement*
*Capacity*
*Civil society*
*Employer-supported volunteer initiatives*
*Local professional organizations*
*Managers of volunteers*
*Network of volunteer centres*
*Voluntarism*
*Voluntary organization*
*Volunteering*
*Volunteerism*
*Volunteer Resources Management*
*Workplace volunteer councils*
programs and outreach, volunteer centres serve the broadest membership: including volunteers and organizations/volunteer-involving organizations. Volunteer Centres reach across the non-profit and public sectors to include organizations working in human and social services, health care, education, the arts and recreation—regardless of funding sources.

Voluntarism
Refers to the spirit or ideology of voluntary activity, and may or may not always involve volunteers.

Voluntary organization
An organization whose work depends on serving a public benefit; on volunteers at least for its governance; on some financial support from individuals and on limited direct influence by governments, other than in relation to any tax benefits accruing to the organization.

Volunteering
The most fundamental act of citizenship and philanthropy in our society. It is the offering of time, energy and skills of one’s own free will.

Volunteerism
Refers to the contribution of time, resources, energy, and/or without monetary compensation.

Volunteer Resources Management
Voluntary organizations work to achieve goals such as alleviating poverty, protecting the environment, providing recreation and sports opportunities for youth, counselling the vulnerable and comforting others through tough times. Whether formal and structured or informal and grassroots, individuals come together to work towards achieving the purpose or mission of the organization or cause they believe in. Volunteer Resource Management is the practice and profession of those who lead these teams of individuals (volunteers) to support and enhance core programs and services.

Workplace volunteer councils
Networks of businesses that come together to explore better ways to respond to the needs of the community by creating opportunities for businesses and nonprofit organizations to work together.
Volunteer Canada is a national leader with a mission to promote volunteerism in Canada. Working with community organizations, Volunteer Centres, businesses, charities, governments and municipalities across the country, Volunteer Canada recognizes and promotes the role of volunteers, provides leadership to the Volunteer Centre movement, enhances the capacity of organizations to involve volunteers, and furthers the national dialogue on citizen engagement and civil society.