The Canadian Code for Volunteer Involvement:

An Audit Tool

Acknowledgments

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Volunteer Canada would like to thank the following group of people for their time and expertise towards the development of this new edition of the Audit Tool:

For further information on this subject or others relating to volunteering and volunteer management, please visit www.volunteer.ca/resource.

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Introduction

The Canadian Code for Volunteer Involvement (the "Code") was first launched by Volunteer Canada as one of the flagship resources developed for the International Year of Volunteers in 2001. The Code was revised in 2006 through a partnership between Volunteer Canada and the Canadian Administrators of Volunteer Resources (CAVR). This document, now called The Canadian Code for Volunteer Involvement: An Audit Tool is adapted from and reflects the revisions in the most recent version of the Code.

In this document, the "Code" always refers to the 2006 edition.

The Code has three important elements that articulate overarching values, guiding principles and organizational standards applicable to volunteer programs in non-profit and voluntary sector organizations.

The values statements in the Code focus on core values that are integral to volunteer programs. They highlight the important role volunteerism and volunteer involvement play in ensuring citizen engagement in society to the benefit of communities. The values statements also recognize the reciprocity of the organization/volunteer relationship.

Organizations can use this Audit Tool to analyze their volunteer program and to identify and prioritize areas for development. In its most formal application, the Audit Tool can be used as part of a process within an organization to formally adopt the Canadian Code for Volunteer Involvement.

Overview: The Canadian Code for Volunteer Involvement

The following pages provide a brief summary of the Code itself. When using this Audit Tool, you will need the full version of the Code.

The Code outlines a framework against which an organization can measure itself. The framework is made up of values, principles and standards. Together these express elements of organizational philosophy and operations with particular reference to volunteer involvement.

In each case (the values, the principles and the standards), the Code presents generic statements, broadly relevant to voluntary organizations in Canada. Some of these statements may need to be adapted by your organization to give more precise meaning. In this way the Code and the Audit Tool should both be useful to all voluntary organizations in Canada.

Values

The four Values for Volunteer Involvement describe what it is about volunteering that is of value to an organization.

VALUES FOR VOLUNTEER INVOLVEMENT

Volunteer involvement is vital to a just and democratic society.
It fosters civic responsibility, participation and interaction.

Volunteer involvement strengthens communities.
It promotes change and development by identifying and responding to community needs.

Volunteer involvement mutually benefits both the volunteer and the organization.
It increases the capacity of organizations to accomplish their goals, and provides volunteers with opportunities to develop and contribute.

Volunteer involvement is based on relationships.
It creates opportunities for voluntary organizations to accomplish goals by engaging and involving volunteers, and it allows volunteers an opportunity to grow and give back to the community in meaningful ways through voluntary organizations.

Guiding Principles

Two Guiding Principles supplement the values statements and further articulate the reciprocal relationship between the organization and the volunteers. The guiding principles ensure that there is commitment and support for the volunteer program from perspectives of both organization and volunteer. This means understanding the role volunteers play in achieving the organization's mission or purpose and it means ensuring that appropriate resources, both human and financial, are in place to support volunteers and the volunteer program.

The guiding principles also recognize that volunteers must make a commitment. Volunteers must act with both responsibility and accountability to the organizations they serve. The guiding principles are designed to provide a framework for volunteer programs.

GUIDING PRINCIPLES FOR VOLUNTEER INVOLVEMENT

Volunteers have rights. Voluntary organizations recognize that volunteers are a vital human resource and will commit to the appropriate infrastructure to support volunteers.
• The organization's practices ensure effective volunteer involvement.
• The organization commits to providing a safe and supportive environment for volunteers.

Volunteers have responsibilities. Volunteers make a commitment and are accountable to the organization.
• Volunteers will act with respect for beneficiaries and community.
• Volunteers will act responsibly and with integrity.

Organizational Standards

The third element of the framework in the Code is a set of twelve organizational standards for the volunteer involvement program. These twelve statements are the core standard practices that any non-profit organization should have in place to enable an effective volunteer program. The organizational standards are high-level standards and the Canadian Code for Volunteer Involvement provides a more detailed approach to each of the standards of practice. Many organizations have used this detailed approach to assess their volunteer involvement programs and their volunteer management practices.

The organizational standards for volunteer involvement largely follow the volunteer management cycle: implementation of appropriate policies and procedures for the volunteer program; volunteer position design; volunteer recruitment and retention strategies; and volunteer recognition. The first organizational standard for volunteer involvement (Mission-based Approach) links back to the values and guiding principles by requiring that the board of directors, leadership volunteers and staff within the organization understand how the volunteer program assists the organization in achieving its mission or purpose and provide appropriate resources to support volunteer involvement. Without that first standard in place, the volunteer program is often perceived as(or functions as) an adjunct to the organization rather than an integral element that supports and enables the delivery of services and the achievement of the organization's mission or purpose.

ORGANIZATIONAL STANDARDS FOR VOLUNTEER INVOLVEMENT

Standard 1: Mission-based Approach

The board of directors, leadership volunteers and staff acknowledge and support the vital role of volunteers in achieving the organization's purpose and mission.

Standard 2: Human Resources

Volunteers are welcomed and treated as valued and integral members of the organization's human resources team. The organization has a planned approach for volunteer involvement that includes linking volunteers to the achievement of the mission, providing the appropriate human and financial resources to support the volunteer program, and establishing policies for effective management.

Standard 3: Program Planning and Policies

Policies and procedures are adopted by the organization to provide a framework that defines and supports the involvement of volunteers.

Standard 4: Program Administration

The organization has a clearly designated individual with appropriate qualifications responsible for the volunteer program.

Standard 5: Volunteer Assignments

Volunteer assignments address the mission or purpose of the organization and involve volunteers in meaningful ways that reflect the abilities, needs and backgrounds of the volunteer and the organization.

Standard 6: Recruitment

Volunteer recruitment incorporates internal and external strategies to reach out and involve a diverse volunteer base.

Standard 7: Screening

A clearly communicated screening process is adopted and consistently applied by the organization.

Standard 8: Orientation and Training

Each volunteer is provided with an orientation to the organization, its policies and practices, including the rights and responsibilities of volunteers. Each volunteer receives training customized to the volunteer assignment and the individual needs of the volunteer.

Standard 9: Supervision

Volunteers receive a level of supervision appropriate to the task and are provided with regular opportunities to give and receive feedback.

Standard 10: Recognition

The contributions of volunteers are consistently acknowledged with formal and informal methods of recognition.

Standard 11: Record Management

Standardized documentation and records management practices are followed and in line with relevant legislation.

Standard 12: Evaluation

The impact and contribution of volunteers and the volunteer program are continually evaluated to ensure the needs of the organization are being met in fulfilling its mandate.

The Canadian Code for Volunteer Involvement: An Audit Tool

This Audit Tool has been developed to help community groups, non-profits and charitable organizations to assess their volunteer involvement practices. It can be used by organizations that have adopted The Canadian Code for Volunteer Involvement, as well as by those that have not.

The Audit Tool is a series of audit sheets. Each one contains a number of questions about a specific area of the Code, against which you can assess your volunteer program and the organization as a whole.

The Audit will provide important information about volunteer involvement and management practices within your organization. It will generate reflection and action to increase the positive impact of your volunteer program on the mission of your organization and on the lives of your volunteers.

The Audit follows the design of thee Code itself. Audit sheets grouped along the three-step process will guide your organization through timely research and relevant discussions with key people.

Step 1: Why does your organization exist?

You will gather basic information about your organization and analyze its mission, with a particular focus on the role of volunteers in achieving that mission. You will compare and contrast the values and principles of your volunteer program against the values statements and guiding principles described in The Canadian Code for Volunteer Involvement. You will explore whether they need to be amended as appropriate to the context of your organization.

Step 2: Who does what in your organization?

You will gather information about the different roles across the organization with respect to management and support of volunteers. You will profile the volunteer program including the number of volunteers and their specific roles within the organization.

Step 3: Involving Volunteers – the Organizational Standards

This step has two options – one which is quite detailed and one which is less so – you can choose one or other or both.
Option 1 is a tool for broadly assessing the extent to which operational elements of the volunteer program, or those related to the program, are in place to meet the Organizational Standards in the Code.
Option 2 makes up the remainder of this document. It is a thorough audit, guiding you through an in-depth review of the operations, policies, procedures and resources used to implement the volunteer program in your organization. You will record innovative approaches that have been developed and challenges that the organization faces when assessing the volunteer program against each of the standards.

Use some or all of these tools in whatever way they make sense in your organization. Some suggestions are given at various points through the Audit.

The final section of the Audit goes beyond the Code itself and helps you examine how a strong volunteer program helps and could help in other aspects of the work of the organization. You will explore how volunteer resources

The Audit Process

management and practices are shared within and beyond your organization.

Step 1: Why does your organization exist?

AUDIT SHEET: VALUES

The mission or purpose of voluntary organizations is the fundamental reason that these organizations exist. Volunteer programs maybe fundamental to this mission or they may be designed primarily to respond to a specific need or service delivery requirement in the organization.

The Canadian Code for Volunteer Involvement articulates core values and guiding principles that are applicable to all volunteer programs regardless of size. This section of the Audit will be most relevant to those organizations whose core mission has some relationship to civic responsibility, participation and/or membership of community.

Other organizations – those whose mission doesn't in principle require volunteering, may also want to reflect on both the values statements and guiding principles.

List the values of your organization. (If there are no documented values, what do you think the organization values most?)

Our Values:

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Do any of these values connect to the Values for Volunteer Involvement in the Code? If so, how?

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Value in the Code	Our Organizational Value	Notes
Volunteer involvement is vital to a just and democratic society: It fosters civic responsibility, participation and interaction		
Volunteer involvement strengthens communities: It promotes change and development by identifying and responding to community needs		
Volunteer involvement mutually benefits both volunteer and organization: It increases capacity of organizations to accomplish goals and it provides volunteers with opportunities to develop and contribute		
Volunteer involvement is based on relationships		

How does / would your organization articulate its philosophy around volunteer involvement?

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AUDIT SHEET: GUIDING PRINCIPLES

The guiding principles in the Code are statements intended to guide decision-making in the crafting of policy and procedures. They begin to outline what an organization's values mean in practice. If your organization has a list of principles, use the audit sheet to see how they compare to those in the Code.

Your organization may not use the term 'Guiding Principles', but there may be other statements or documentation that your organization uses to ensure consistency between operations and the values and mission. Quite often, organizations may not be explicit about principles – they may be entwined with other key statements such as the Vision, Mission or Objectives. If you can't find documented statements of principles, use the chart below to see whether the Code suggests what they might be for your organization.

Another option for using this chart is to consider the 'evidence' that the principle in the Code is relevant to your organization. For example, what evidence is there within the policies and procedures of your volunteer program that might indicate a commitment to a safe and supportive environment for volunteers?

Guiding Principles in the Code	Our organizational principles	Notes
Volunteers have rights. Voluntary organizations recognize that volunteers are a vital human resource and will commit to the appropriate infrastructure to support volunteers.		
The organization's practices ensure effective volunteer involvement.		
The organization commits to providing a safe and supportive environment for volunteers.		
Volunteers have responsibilities. Volunteers make a commitment and are accountable to the organization.		
Volunteers will act with respect for beneficiaries and the community.		
Volunteers will act responsibly and with integrity.		

Summary

Values and Guiding Principles: some things to consider

- Have the board of directors, staff and volunteers discussed the role and effectiveness of the volunteer program in supporting the mission of the organization?
- What are important values for volunteer involvement in the organization?
- If the organization already has values statements in place, are these applied equally to volunteer involvement?
- Where are the gaps in valuing the contributions of volunteers to the organization?
- Are the guiding principles relevant to the organization?
- How does the organization express its support for and expectations from volunteers supporting the organization?

Step 2: Who does what in your organization?

The following grid, based on page 10 of the Code, will help you to identify a clear division of responsibility around the volunteer program. In some cases you may want to add columns (for example to distinguish two groups of volunteers) or rows (for example if the management of volunteers is done by more than one person).

To complete each box, ask your self questions like: What specific tasks do these people (along the top row) undertake that impacts on the area listed down the first column? The grid on page 10 of the Code includes example statements.

	Board Members	Executive Director or Leadership Volunteers	Managers of Volunteer Resources	Other Staff	Other Volunteers
Specific Roles					
Vision, Mission and Strategic Plan					
Governance Policy					
Programs and Operations					
Human Resources Management (Volunteer Involvement)					

Step 3: Involving Volunteers in Voluntary Organizations – The Organizational Standards Checklist

The Code contains twelve organizational standards. Each standard is a key element of an effective volunteer resources program. This section of the Audit contains two options.

Option 1 – an audit sheet that provides a high-level overview of the volunteer program

Option 2 – an in-depth analysis, with one audit sheet for each of the twelve standards

There are several ways to use these options. A few ideas are outlined below, but you should make your own adjustments based on your unique needs. You may also choose to use other tools and methods outside the scope of this tool, such as focus groups, stakeholder analysis, SWOT analysis, etc., to supplement your assessment.

Option 1 only

This will give you a general sense of how your organization measures against the Code. It is probably not detailed enough to identify areas that require change, but maybe sufficient for checking that things are going well or for a quick report on program status to a Committee or to your Board of Directors.

Option 1 with stakeholders

This might encourage your stakeholders to contribute to the identifying areas of your program which might need change.

Option 1 to prioritize Option 2

You might use Option 1 as a first step to identify which of the organizational standards are most important and urgent, followed by the relevant sheets available in Option 2.

Option 2 only

This is the most comprehensive model. In this model, you are committing to a full audit of all aspects of the volunteer program.

OPTION 1: Overview– the Organizational Standards Checklist

AUDIT SHEET: KEY ELEMENTS OF A VOLUNTEER RESOURCES PROGRAM

The following audit sheet is based on the Organizational Standards outlined in the Code and provides a high-level overview of volunteer involvement strategies. As you assess your current volunteer involvement practices, measure these against each of the Standards by determining if you currently have such practices in place or not.

Elements of Volunteer Resources Management	Currently in place to a large degree	Currently in place to some degree	Not currently being done	Not applicable not relevant
Written statement on role of volunteers in supporting or achieving the mission				
Policies and procedures for volunteer program				
A qualified person designated to manage the volunteer program				
A volunteer screening process which is communicated and consistent				
Meaningful volunteer assignments reflecting a variety of opportunities				
Volunteer recruitment and selection reaching out to diverse community sources				
Orientation and training provided for all volunteer positions				

Elements of Volunteer Resources	Currently in place to a large degree	Currently in place to some degree	Not currently being done	Not applicable not relevant
Management				
Appropriate supervision is provided with the ability of the volunteer to give and receive feedback				
Volunteers are welcomed and treated as valuable members of staff				
The contributions of volunteers are regularly acknowledged in formal and informal ways				

Note any innovative approaches developed or challenges faced by your organization related to involving and managing volunteers:

OPTION 2: Involving Volunteers – the Organizational Standards Checklist

This part of the Audit enables a more detailed evaluation and review of each of the 12 organizational standards for the volunteer program. In this section, respondents are again asked to rate the effectiveness of the program on a four-point scale, allowing you to identify strong components for each of the standards and areas where program improvements might be required.

If you are using a 360-degree evaluation approach, you may want to include the questions found in the boxes at the end of each of the rating sections for comments and suggestions from the evaluators. These questions also provide an opportunity for the individual managing the volunteer program to reflect on the innovative approaches or challenges faced by the organization and the volunteer program relative to each standard. This reflection could be used to develop a report on the volunteer management audit and on the volunteer program.

If you completed Option 1 before Option 2, check back to see whether there are differences between them. When you have completed each audit sheet, review the ratings in Option 2 against the more general ratings in Option 1.

Here are some questions to consider:

Which of the twelve organizational standards are strengths for us?

Where are the gaps for the volunteer resources program?

What do we need to do to address the gaps?

What are short, medium and long term issues for the volunteer program?

Once you have completed Step 3 of the Audit, you should have defined the current state of the volunteer program and identified some areas where strategies could be developed to improve the volunteer resources program. In the final section of this guide, there are tools which will assist you with prioritizing your development strategies.

AUDIT SHEET: STANDARD 1 – MISSION-BASED APPROACH

The board of directors, leadership volunteers and staff acknowledge and support the vital role of volunteers in achieving the organization's purpose and mission.

Elements of Volunteer Resources Management	Currently in place to a large degree	Currently in place to some degree	Not currently being done	Not applicable not relevant
The board of directors adopts a statement declaring the vital role of volunteers in achieving the organization's mission.				
The organization's planning process incorporates volunteer involvement.				
The board has approved the overall goals for volunteer involvement.				
A budget is allocated for volunteer involvement.				
Adequate space and equipment are allocated for volunteers to perform their assignments.				
Appropriate insurance is purchased to minimize volunteer liability.				
Volunteer involvement goals are evaluated regularly by the board of directors.				

Please provide comments on innovative approaches or challenges faced by your organization related to the role of volunteers in assisting the organization achieve its mission or purpose:

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AUDIT SHEET: STANDARD 2 – HUMAN RESOURCES

Volunteers are welcomed and treated as valued and integral members of the organization's human resources team. The organization has a planned approach for volunteer involvement that includes linking volunteers to the achievement of the mission, providing the appropriate human and financial resources to support the volunteer program, and establishing policies for effective management.

Elements of Volunteer Resources Management	Currently in place to a large degree	Currently in place to some degree	Not currently being done	Not applicable not relevant
Staff is given training and recognition to work effectively with volunteers.				
Input from volunteers is welcomed and solicited for the organization's planning and evaluation.				
Volunteers are encouraged to grow within the organization				
Volunteers are included as equal members of the team.				

Please provide comments on innovative approaches or challenges faced by your organization related to the way volunteers are welcomed and treated as valued and integral members of the organization's human resources team.

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AUDIT SHEET: STANDARD 3 – PROGRAM PLANNING AND POLICIES

Policies and procedures are adopted by the organization to provide a framework that defines and supports the involvement of volunteers.

Elements of Volunteer Resources Management	Currently in place to a large degree	Currently in place to some degree	Not currently being done	Not applicable not relevant
The organization's planning process incorporates volunteer involvement.				
The board has approved the overall goals for volunteer involvement.				
Governance and operational policies are in place, reviewed regularly and incorporate volunteer involvement practices.				
Policies and procedures are followed consistently and equitably.				
Policies and procedures are consistent with national and provincial Human Rights Codes, the Freedom of Information and Protection of Privacy Act, and provincial employment standards legislation.				

Please provide comments on innovative approaches or challenges faced by your organization in developing and integrating policies and procedures related to involving volunteers in your organization.

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Please provide comments on the role of the manager of volunteers and the innovative approaches or challenges faced by your organization related to involving and managing volunteers.

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AUDIT SHEET: STANDARD 4 – PROGRAM ADMINISTRATION

The organization has a clearly designated individual with appropriate qualifications responsible for the volunteer program.

Elements of Volunteer Resources Management	Currently in place to a large degree	Currently in place to some degree	Not currently being done	Not applicable not relevant
The designated person has an appropriate level of education and experience to manage the volunteer program.				
A written job description for the designated person is developed and reviewed regularly.				
The designated person is a member of the management or administrative team or key leadership volunteer.				
The designated person works collaboratively with staff, the local Volunteer Centre and other organizations to encourage the effectiveness of the volunteer program.				
Professional development opportunities are provided on a regular basis.				
The performance of the designated person is reviewed regularly and includes feedback from both staff and volunteers.				

Please provide comments on innovative approaches or challenges faced by your organization related to the identification of a designated person and systems to support volunteer involvement.

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AUDIT SHEET: STANDARD 5 – VOLUNTEER ASSIGNMENTS

Volunteer assignments address the mission or purpose of the organization and involve volunteers in meaningful ways that reflect the abilities, needs and backgrounds of the volunteer and the organization.

Elements of Volunteer Resources Management	Currently in place to a large degree	Currently in place to some degree	Not currently being done	Not applicable not relevant
Volunteers and staff (and unions) are consulted when developing new assignments.				
Volunteer assignments have written descriptions that include duties, responsibilities, skills needed, time required and benefits.				
Volunteer assignments are developed to reflect the needs of the organization and the needs of volunteers.				
Volunteer assignments are reviewed periodically with staff, volunteers (and unions) to ensure relevance and value.				
Volunteers with special requirements and challenges can become involved with the organization.				
The level of risk is assessed and minimized for all volunteer assignments.				

Some questions to consider about current and new volunteer positions:

- *How does this volunteer position enable the organization to achieve its mission or purpose?*
- *Does this volunteer position provide meaningful activity for the volunteer?*
- *Is this a position which would interest me?*
- *Is this volunteer position supported by staff within the organization?*
- *Does our staff believe in and value the involvement of volunteers in our organization?*

Please provide comments on innovative approaches employed or challenges faced by your organization when developing volunteer assignments and when placing volunteers within your organization.

AUDIT SHEET: STANDARD 6 – RECRUITMENT

Volunteer recruitment incorporates internal and external strategies to reach out to and involve a diverse volunteer base.

Elements of Volunteer Resources Management	Currently in place to a large degree	Currently in place to some degree	Not currently being done	Not applicable not relevant
Recruitment messages are realistic and clear about the volunteer assignment expectations.				
Various techniques are used to recruit volunteers.				
Recruitment messages advise that screening procedures are in place.				
Genuine effort is made to recruit and select volunteers from a broad range of backgrounds and experiences to represent the community served by the organization.				
Selection of volunteers is based on actual requirements and predetermined screening measures.				

Please provide comments on innovative approaches employed or challenges faced by your organization when recruiting volunteers with diverse skills and abilities to your organization.

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AUDIT SHEET: STANDARD 7 – SCREENING

A clearly communicated screening process is adopted and consistently applied by the organization.

Elements of Volunteer Resources Management	Currently in place to a large degree	Currently in place to some degree	Not currently being done	Not applicable not relevant
Screening is considered to be an essential process that continues throughout the volunteer's involvement with the organization.				
Policies relating to screening practices are developed, adopted and clearly communicated to staff and volunteers.				
All volunteer assignments are assessed for level of risk.				
Appropriate screening tools are used according to the level of risk of the assignment.				
Screening practices are delivered consistently with no exceptions made for certain individuals.				

Please provide comments on innovative approaches employed or challenges faced by your organization when developing strategies to screen volunteers.

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AUDIT SHEET: STANDARD 8 – ORIENTATION AND TRAINING

Each volunteer is provided with an orientation to the organization, its policies and procedures, including the rights and responsibilities of volunteers. Each volunteer receives training customized to the volunteer assignment and the

Elements of Volunteer Resources Management	Currently in place to a large degree	Currently in place to some degree	Not currently being done	Not applicable not relevant
Volunteers receive information on the history, mission and structure of the organization.				
Volunteers receive information on the policies and procedures that relate to their assignment.				
Volunteers are given adequate training for performing their assignment without putting themselves or others at risk.				
Volunteers are informed of the boundaries and limits of their assignment.				
Volunteers have ongoing training opportunities to upgrade their skills and to learn of changes in the organization.				

Please provide comments on innovative approaches employed or challenges faced by your organization when orienting and training volunteers.

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AUDIT SHEET: STANDARD 9 – SUPERVISION

Volunteers receive a level of supervision appropriate to the task and are provided with regular opportunities to receive and give feedback.

Elements of Volunteer Resources Management	Currently in place to a large degree	Currently in place to some degree	Not currently being done	Not applicable not relevant
The complexity and risk of each assignment determines the level of supervision.				
Volunteers are assigned and introduced to their supervisors at commencement of their assignment.				
The performance of volunteers is evaluated on a regular basis.				
Random spot checks with volunteers and clients are used to check in on volunteer performance.				
Volunteers are given and encouraged to use mechanisms for providing input to the organization.				
Situations requiring reprimand and dismissal follow policies and procedures fairly and consistently while respecting the safety and dignity of all concerned.				

Please provide comments on innovative approaches employed or challenges faced by your organization when supervising volunteers.

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AUDIT SHEET: STANDARD 10 – RECOGNITION

The contributions of volunteers are regularly acknowledged with formal and informal recognition methods.

Elements of Volunteer Resources Management	Currently in place to a large degree	Currently in place to some degree	Not currently being done	Not applicable not relevant
Senior management publicly acknowledges the efforts of volunteers.				
Formal methods of recognition are delivered consistently.				
Informal methods of recognition are delivered in a timely and appropriate manner.				

Please provide comments on innovative approaches employed or challenges faced by your organization when recognizing volunteers for their contributions to your organization.

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AUDIT SHEET: STANDARD 11 – RECORD MANAGEMENT

Standardized documentation and records management practices are followed and in line with relevant legislation.

Elements of Volunteer Resources Management	Currently in place to a large degree	Currently in place to some degree	Not currently being done	Not applicable not relevant
Records are kept for each volunteer using a confidential, secure system respecting the privacy of personal information.				
Statistical information about the volunteer program is regularly shared with staff and volunteers in the organization.				
With appropriate agreement, testimonials about volunteer involvement are shared within the organization to promote volunteer involvement.				
The organization keeps informed of new legislation, Human Rights Codes and other Relevant guidelines for record management, privacy and confidentiality practices.				

Please provide comments on innovative approaches employed or challenges faced by your organization in keeping records related to the volunteer program.

AUDIT SHEET: STANDARD 12 – EVALUATION

The impact and contribution of involving volunteers and of the volunteer program are continually evaluated to ensure the needs of the organization are being met in fulfilling its mandate.

Elements of Volunteer Resources Management	Currently in place to a large degree	Currently in place to some degree	Not currently being done	Not applicable not relevant
Performance goals are established annually for the volunteer program.				
Achievement of performance goals is assessed on an annual basis.				
Volunteer involvement goals are evaluated regularly by the board of directors.				
Opportunities exist for volunteers to give feedback to the organization about their involvement.				

Please provide comments on innovative approaches employed or challenges faced by your organization when evaluating the volunteer program and volunteer involvement.

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Additional Audit Sheets

The following audit sheets do not relate directly to the Code, but may be of use in your organization and could contribute valuable information to an overall audit.

AUDIT SHEET: FINANCIAL VALUE OF VOLUNTEER CONTRIBUTIONS

If you track the number of volunteers and the number of volunteer hours contributed, you can use this data to estimate the dollar equivalent of the contribution that volunteers have made to the organization. Some organizations go the next level and track all of the other financial donations, special events ticket purchases and in-kind support provided by volunteers to the organization. These financial and in-kind contributions impact the organization either directly or indirectly through financial support or dollars saved on program delivery costs. This table can help you consider some of the contributions and their impact on your organization.

NOTE: In some discussions on this subject, the numbers are sometimes referred to as a measure of 'the' value of volunteers. The total value of volunteers in your organization goes far beyond the simple conversion of volunteer hours into dollar figures as a donation in kind. The last section of the table encourages you to list some of the non-dollar value that your volunteers contribute. You could easily expand on this idea. In particular, because of the nature of what is valuable about volunteers, narrative statements gathered from stakeholders (literally, stories about the work of the organization) are legitimate elements of an audit of the value of volunteer contributions.

Type of Contribution	Number of Volunteers	Estimated/Real $ value
Program Volunteer Hours		
Board Member Hours		
Committee Volunteer Hours		
Total Volunteer Financial		
Donations to Organization		
Total of Volunteer Ticket Purchases for Special Events		
Total In-Kind Support – meeting space, materials, refreshments		
Total Human Resources Support – meeting facilitation, workshop leaders, trainer, etc.		
Other Support (please detail)		
Total Volunteer Contribution as in-kind donation:		
In what other ways do volunteers add value to your organization?		

AUDIT SHEET: EXPENSES OF THE VOLUNTEER PROGRAM

This helps you to get a better understanding of the costs of the volunteer program. It will help you review and consider the size of the volunteer resources budget, and make comparisons to the size of the total budget. The volunteer resources budget should include the appropriate amount of salaries and benefits for all staff supporting the volunteer program. If the manager of volunteers is only working half-time supporting the volunteer program and receives an annual total compensation of $30,000, then you would include $15,000 in the volunteer resources budget line. Other volunteer resources budget items might include administrative costs such as postage, telephone, a portion of rent, computer and web access, volunteer recognition, etc. In many cases, the volunteer resources budget is not maintained as a separate line budget and so you may have to approximate some of the costs associated with the volunteer resources budget. Below is a table to assist you.

Item – Expenses	Organization Budget	Volunteer Resources Budget
Salaries and Benefits		
Rent		
Telephone, Fax, Internet		
Postage		
Printing		
Administrative Supplies		
Technology		
Meetings and Travel		
Professional Development		
Volunteer Recognition		
Other items		
TOTAL Expenses		

Are these figures consistent with the number of volunteers involved in the organization?

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Evaluation

Once the audit is complete, you will need to evaluate the learning. At one level, the process of evaluation is integrated into each of the audit sheets--whereeveryou have checked that an issue is not applicable or not relevant to the volunteer program in your organization. You next need to consider each of the audit sheets and decide their relative importance. In this case, evaluation is part of a prioritizing process.

You can use the same approaches to evaluation as described in the section on The Audit Process:
A one-person evaluation
The 360 degree approach
Focus Groups
Multiple Sources

Learnings about the Audit Process

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Enhancing Volunteer Involvement: Sharing the Outcomes of the Audit

The final section of the audit will help you to consider the steps to be taken once the audit is complete. These include ideas about communicating what has been learned through the audit process and a plan of action based on what you've learned.

This section requires you to consider how knowledge and resources are developed and the degree to which these tools and practices are shared internally and externally. There are four areas of questions related to organizational policies, volunteer program statistics, volunteer resource program materials, and training tools and activities.

After completing this section, you should be able to identify and develop a communications strategy for the volunteer resources program.

Organization Policies – Volunteer Resources

Has the Board of Directors adopted a policy statement about the role of volunteers in achieving the mission or mandate of the organization?

- ☐ Yes, and shared with others in the organization (including national/provincial/local chapters)
- ☐ Yes, but we have not shared it with others in the organization
- ☐ In process of development
- ☐ No
- ☐ Other (please specify) _____

_____

Does the volunteer resources program have a formal (written and circulated) Policies and Procedures Manual that is available to staff and volunteers?

- ☐ Yes, and shared with others in the organization (including national/provincial/local chapters)
- ☐ Yes, but we have not shared it with others in the organization
- ☐ In process of development
- ☐ No
- ☐ Other (please specify) _____

_____

Volunteer Program Statistics

Does the organization collect statistics on the number of volunteers providing services and service hours?

- ☐
- ☐ Yes, and shared with others in the organization (including national/provincial/local chapters)
- ☐ Yes, but we have not shared it with others in the organization
- ☐ In process of development
- ☐ No

_____

Other (please specify)

Are volunteer involvement statistics shared with the senior management and Board of Directors of the organization?

☐

☐ Yes, and shared with others in the organization (including national/provincial/local chapters)

☐ Yes, but we have not shared it with others in the organization

☐ In process of development

☐ No

Other (please specify) _____

Are volunteer involvement statistics disseminated publicly to the community you serve through written reports, newsletters, or annual reports?

☐

☐ Yes, and shared with others in the organization (including national/provincial/local chapters)

☐ Yes, but we have not shared it with others in the organization

☐ In process of development

☐ No

Other (please specify) _____

Volunteer Resource Program Materials

Is information about the primary staff person responsible for volunteers available, including position description, roles, compensation levels, etc.?

☐

☐

☐ Yes, and shared with others in the organization (including national/provincial/local chapters)

☐ Yes, but we have not shared it with others in the organization

☐ In process of development _____

No

Other (please specify) _____

Does the organization have formal volunteer recruitment tools and strategies?

☐

☐

☐ Yes, and shared with others in the organization (including national/provincial/local chapters)

☐ Yes, but we have not shared it with others in the organization

☐ In process of development _____

No

_____

Other (please specify)

☐ **Does the organization have formal tools for screening and placing volunteers?**

☐

☐ Yes, and shared with others in the organization (including national/provincial/local chapters)

☐ Yes, but we have not shared it with others in the organization

☐ In process of development

No

Other (please specify)

☐ **Does the organization have formal tools for orienting and training volunteers?**

☐

☐ Yes and shared with others in the organization (including national/provincial/local chapters)

☐ Yes, but we have not shared it with others in the organization

☐ In process of development

No

Other (please specify)

☐ **Does the organization have formal tools for supervising and evaluating the performance of volunteers?**

☐

☐

☐ Yes, and shared with others in the organization (including national/provincial/local chapters)

☐ Yes, but we have not shared it with others in the organization

In process of development

No

Other (please specify)

☐ **Does the organization have formal tools and/or processes for recognizing the contributions made by**

☐ **volunteers?**

☐

☐ Yes, and shared with others in the organization (including national/provincial/local chapters)

☐ Yes, but we have not shared it with others in the organization

In process of development

No

Other (please specify)

Training Tools and Activities

Please describe the volunteer program management training opportunities at the annual or bi-annual national conference of the association/organization.

_____

_____

_____

Please describe the volunteer program management training opportunities which might occur at the provincial or regional conferences or meetings.

_____

_____

_____

Please describe the volunteer program management training opportunities which might occur at local affiliates.

_____

_____

_____

Please describe any volunteer program management resources or tools which have been developed and shared by a national, provincial or local affiliate.

_____

_____

_____

Please describe any online volunteer program management training which is provided by the national, provincial, or local affiliates.

_____

_____

_____

Communications Planning

Completing the Audit Tool will provide you with some useful and succinct information about the current state of the program and potential activities to further enhance and develop volunteer management practices. It can also provide the background data for developing a communications or positioning tool for enhancing volunteer involvement. To develop an effective communications plan, there are a number of excellent on-line resources to support communications planning.

In general, when planning communications, consider the following steps:

The **first step** in developing a communications plan is clear goals and measurable progress. This step requires that the communications plan or strategy identify clearly what the goals of the communications should be. For many volunteer programs there might be dual strategies of positioning the volunteer program within the organization and using the information in this Audit Tool to attract more volunteers to your program.

The **second step** is to identify who the primary audience of the communication will be and who the secondary audience might be. Audience identification is essential so that the message can be targeted appropriately. Many voluntary sector organizations believe that their audience is the entire community but this often leads to the message being lost because it is not focused and direct.

The **third step** in the communications strategy is to develop a clear, simple and concise message. Developing communication goals and identifying the primary audience should make developing the message easier. The Audit Tool will also provide you with some insight as to the message you wish to promote as strength of the organization.

The **fourth and fifth steps** in the communications plan include planning the communications process and specifying what people should do. Internal stakeholders including staff, board members, volunteers, and clients are often your best communicators but they need the information and appropriate tools to effectively communicate the appropriate message. You might also consider developing training tools for the individuals who have been assigned to carry the message forward. Let them know the action which is needed now.

The **final steps** in the communications plan include actualizing the plan by matching strategy and tactics to your target audience and budgeting for success.

Communications, in order to be effective, requires a planned and thoughtful approach. This resource guide will provide you with specific strategies to develop your message and target your communications.

Conclusion

The Canadian Code for Volunteer Involvement: An Audit Tool is a tool which your organization can use to gain a better understanding about the nature of your volunteer program and identify areas which might be further developed. As a tool, it will provide you with resources and information. However, it is only as effective as the time and effort you put into the audit and in understanding what you have learned.

Effective volunteer involvement and development requires attention not only to the current state of the program but also an awareness of the environmental and demographic trends that impact the organization and the community in which the organization exists. The volunteer program cannot exist in isolation; it is connected to the community through its volunteers and the clients the program is designed to serve.

Individuals involved in volunteer management and development must use creative strategies to continually improve the involvement of volunteers as volunteers are often a critical asset to the organization. Understanding the core elements of the volunteer program through a review of the organizational standards will help to ensure that volunteers are engaged and involved appropriately in achieving the mission and purpose of the organization.

For more information, please contact: Volunteer Canada
1-800-670-0401 or by email at info@volunteer.ca

More Resources

There are a large number of online resources, tools and information to assist with the development of the volunteer program in your organization. These sites also provide links to other volunteer management resources which can be found on the world wide web.

Volunteer Canada – www.volunteer.ca and www.volunteer.ca/resources

The website of Volunteer Canada has a number of downloadable resources for volunteer management programs and a searchable online resource centre. The site also hosts an on-line version of The Canadian Code for Volunteer Involvement.

Canadian Administrators of Volunteer Resources (CAVR) – www.cavr.org

CAVR is a national organization that promotes the professional administration of volunteer resources through established standards of practice, a code of ethics and certification of membership. The website highlights their various programs, services, and resources that support and enhance volunteer resource management in Canada.