# Literacy Yolunteers VALUE ADDED

A PUBLICATION FROM



# Community Literacy of Ontario

# Literacy Volunteers VALUE ADDED Toolkit

#### Literacy Volunteers: Value Added Toolkit

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Community Literacy of Ontario (CLO) is delighted to have produced this toolkit to accompany the Literacy Volunteers: Value Added Research Report. During the extensive research phase of this project, CLO determined that Ontario's community literacy agencies need materials to support them in their role as volunteer managers. The research report clearly showed the value of literacy volunteers, not only from a monetary perspective, but also from the societal value that they provide. It is extremely important that literacy agencies have tools that not only help them to recruit volunteers, but tools that help them to support and maintain volunteers as they are clearly an extremely valuable resource.

It is CLO's sincere hope that Ontario's community literacy agencies will find the material in this kit useful and beneficial as they strive to thrive in their continually changing environment.

CLO would like to thank everyone who helped to make this toolkit a reality.

#### Acknowledgements

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# Introduction

The results are in! Community Literacy of Ontario's (CLO) *Literacy Volunteers: Value Added Final Report* concludes that literacy volunteers donate 66,517 hours of time each month to Ontario's Anglophone community-based literacy agencies. That is equivalent to \$12.5 million in paid work annually!

Community Literacy of Ontario's recent research clearly shows that volunteers truly are an extremely important part of community literacy programs in Ontario. Volunteers bring passion, enthusiasm, commitment, a vast array of skills and knowledge, and an overwhelming desire to make a difference in their communities.

Despite the cause for celebration, CLO has also identified a notable trend. Almost half of Anglophone community literacy agencies reported a decline in the number of volunteers over the past five years. This trend mirrors the national decline of volunteers from 7.5 million in 1997 to 6.5 million in 2000.

More than ever before, literacy agencies need resources to effectively recruit and retain their volunteers. That is the purpose of this toolkit: to provide you with practical resources and tools (both new and updated versions) that will help your agency with its volunteer management needs. More specifically, we have designed the kit to help you:

- ► Plan your volunteer needs strategically now and in the future
- ► Identify the volunteer positions your program will need
- ► Understand what motivates volunteers and how to use that knowledge to recruit and retain volunteers

- ► Recruit volunteers effectively
- ► Manage your volunteer program well so that your volunteers are happy, productive and committed to your program
- ► Make your work a little easier!

#### **Background to the Toolkit**

This toolkit has been developed based on research conducted as part of CLO's "Literacy Volunteers: Value Added" project. Beginning in the fall of 2004, CLO conducted extensive research to examine both the economic and social value that Ontario's literacy volunteers bring to community-based programs throughout the province. The research study examined the roles and needs of literacy volunteers and key issues for agencies and volunteers related to volunteerism, including recruitment and retention issues, motivation factors and support of literacy volunteers.

As part of the research, we surveyed 204 literacy volunteers and 53 agency representatives from across the province. Additionally, CLO facilitated five focus groups with volunteers in Toronto, Hamilton, Sharbot Lake, Sudbury and Barrie. CLO also facilitated an online focus group with practitioners. Finally, we completed an extensive review of literature related to volunteerism in literacy and, more generally, volunteerism in Canada at the beginning of the 21st century.

#### A Snapshot of What CLO's Research Found

#### Ontario's Literacy Volunteer — A Profile

How do you place a value on something that I feel obligated to do?

Literacy Volunteer

From the 204 survey returns, we found that 78% of literacy volunteers in community literacy agencies are women. Additionally, 58% of Ontario's literacy volunteers are over the age of 50, while only 2% are under the age of 21. We also learned that, on average, literacy volunteers have been with their agencies for 3.5 years, and they donate an average of 11 hours monthly to their literacy agencies.



Volunteers themselves place a high value on the sensitivity, patience and understanding they bring to literacy agencies, along with their teaching and communication skills and dependability. Literacy agencies also recognize the diversity of skills and knowledge and the range of social values their volunteers bring to literacy programs.

#### **What Motivates Literacy Volunteers**

I was fulfilling something that needs to be done.

-Literacy Volunteer

We know that the vast majority of all literacy volunteers (91%) decided to volunteer because they wanted (a) an opportunity to make a difference in the life of another person and (b) to improve literacy levels in their communities.

These two motivations were also the top two reasons why volunteers continue their work. When asked why they continue to volunteer, 84% reported, "I feel like I am making a difference in another person's life," and 79% said they feel like they are contributing to increasing the literacy skills in their communities.

#### Time - The Greatest Barrier

There are age-specific, life circumstances [e.g., having children]. Four hours per week can be too much at some times during your life."

Literacy Volunteer

Survey respondents told us that the number one reason for not taking on new or additional volunteer roles was time. In focus groups, literacy volunteers also reported their number one barrier to be time, especially for younger volunteers. This finding is consistent with the results from other recent studies in Canada, particularly for younger adults between the ages of 15 and 34.

#### **How Literacy Volunteers Are Recruited**

Agencies are using a variety of traditional and innovative methods and resources to attract volunteers. Agency respondents reported relying on word of mouth from current and past students or volunteers the most (89%), followed closely by posters/brochures in public places, local articles and advertisements in the newspaper and community activities.

#### **Literacy Volunteers Clearly Satisfied With Their Experiences**

Of the 204 volunteers who completed the survey, 96% reported they were very satisfied, mostly satisfied or satisfied with their experiences.

#### Training — An Important Part of the Volunteer Experience

It is apparent that literacy agencies are providing training opportunities that are valuable to the volunteers. An incredible 92% of volunteers reported being very satisfied, mostly satisfied or satisfied with the training they are receiving. Additionally, 83% of volunteers said they had acquired new skills and knowledge through their volunteer experiences.

Forty percent of volunteers indicated that they would like additional training, and 90% said skills acquisition was very important, quite important or important to them.

#### Staff Support – Key to Retention and Motivation

Agencies recognize the importance of providing excellent staff support to their volunteers. Ninety-two percent of agencies said they use this method to retain volunteers, while 72% of volunteers reported that being supported by staff is a motivator for continuing to donate volunteer time. Staff support was rated third as a motivator for continuing to volunteer, behind making a difference in another person's life and contributing to the literacy skills within the community.

#### **Literacy Volunteers Prefer Informal Recognition**

A thank-you card from my student is nice.

Literacy volunteer

Ninety-four percent of volunteers are satisfied with the recognition they receive. The majority (58%) prefer informal methods, such as thank-you cards and telephone calls, while 24% said they would like to attend recognition events (e.g. such as teas or luncheons). Additionally, 22% said they would like to receive occasional rewards or incentives. Only 7% reported that they would like to be publicly recognized through community events, newspaper articles, etc.

#### **Using this Toolkit**

In designing this toolkit, CLO wanted to make sure that agencies had practical and valuable resources that reflect the literacy field's current volunteer management needs. Using the results from the survey returns, as well as information from the focus group with practitioners and additional research, CLO designed this toolkit to complement and reflect the different stages of the volunteer management cycle. More specifically, we have organized the materials into the following chapters:

- ▶ Planning for Volunteer Management
- ► Understanding Volunteer Motivations
- Marketing
- ► Recruitment
- ► Volunteer Screening
- ► Training
- ► Evaluation
- ► Retention
- ► Recognition

#### **Using the Tools and Case Studies**

Within each section, you will find a brief introduction which includes findings from CLO's research as well as other trends in volunteer research. CLO's extensive experience in project management on behalf of community-based literacy organizations in Ontario has taught us that literacy programs value concrete, practical tools. Throughout the chapters, you will find various tools with examples to assist you. Each chapter contains a case study. The case study is a little unusual in that we've split it into two pieces for each chapter. At the beginning of the chapter, you'll see the first half of the case study. It will describe some challenges our fictitious literacy agency (Literacy Agency ABC) is having around the area of volunteer management being addressed in that chapter. Throughout the chapter, especially when we are discussing

tools, we've tried to incorporate real-life examples that would pertain to Literacy Agency ABC's organization. At the end of each chapter, you'll see the second part of the case study, entitled "Summary of Practical Steps for Improvement." This section contains a summary of the ways in which Literacy Agency ABC has used the information and tools outlined in the chapter to improve its volunteer management practices.

#### **CD-ROM**

CLO has also included a CD-ROM with blank versions of all the tools and resources. You can simply insert the CD into your computer and access the different files. You can then copy and save the files that you want to use.

#### Be as Creative as Possible!

We encourage you to mix and match, adapt and modify the tools and resources to meet your needs. Although we have organized the materials into a logical order with each section building on the previous ones, we have also designed the sections to be useful independently. Therefore, if you feel your agency's recruitment program is working well but you want to improve your volunteer screening, then skip ahead, review the tools and adapt the ones that are most relevant to your program.

#### **Let Us Know What You Think!**

Please email CLO at clo@bellnet.ca to let us know how you used our kit and what sections you found to be most useful. Your comments will help us improve our volunteer management information and resources and will also help CLO continue to contribute to this very important area of resource management.



# Planning for Volunteer Management

Good fortune is what happens when opportunity meets with planning.

—Thomas Alva Edison—

#### Introduction

The 2000 National Survey of Giving, Volunteering and Participating found that 6.5 million Canadians, 15 years of age and older, volunteered over 1 billion hours.

Although there was a decline of 13% in the total number of volunteers from 1997 to 2000, the average volunteer donated 162 hours per year, up from 149 hours in 1997.

Community literacy agencies, like many other voluntarybased organizations in Canada, are facing a very different environment than they were a decade a go. The Canadian Centre for Philanthropy's National Survey of Giving, Volunteering and Participating (2000) showed that the number of people volunteering their time has decreased. A more recent survey of the voluntary sector, Cornerstones of Community: Highlights of the National Survey of Nonprofit and Voluntary Organizations (September 2004), also conducted by the Canadian Centre for Philanthropy and Statistics Canada, found voluntary organizations regularly report difficulty recruiting and retaining volunteers and board members. Even in 1996, however, community literacy agencies recognized they were entering a new era. In CLO's Changing Volunteer Environment research<sup>1</sup>, agency staff members reported they had a greater need for volunteers with specialized skills because of funding cutbacks, and yet they had more difficulty attracting these kinds of volunteers. The agencies also said they had less time available to support volunteers, and the volunteers' interests and expectations were changing.

<sup>1.</sup> See CLO's http://www.nald.ca/PROVINCE/ONT/volman/change/change.htm for more information.

In spite of all the changes, we know from CLO's 2004 Economic Value of Literacy Volunteers survey that approximately half of the community literacy agencies in Ontario have done some planning to meet the changing environment, and even greater numbers of agencies would be doing further planning if time and resources were available.

#### **Planning for Volunteer Management: Making the Case**

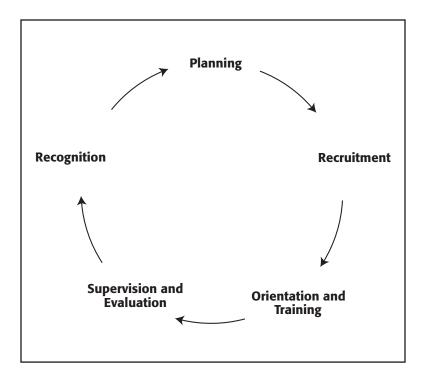
Staff and board members of Literacy Agency ABC were becoming increasingly aware of the changes in the voluntary sector environment. Over the past several years, they had noticed a decline in the number of volunteers. At the same time, staff and volunteers witnessed an increase in demand for volunteer services, particularly in the areas of small group instruction and technological support. As the Chair of the Board said, "It feels like volunteers are trying to do more than ever before."

At the suggestion of the Executive Director, Literacy Agency ABC decided to engage in a strategic planning process as a way to strengthen and focus their volunteer management program. As a result of the strategic planning, staff and board members identified one of their key priorities for the upcoming year to be increasing their small group programs. Their goal was to have two weekly small group programs operational by the same time the following year, one of which would focus solely on employment or workforce outcomes. They also determined that they needed to develop a website to help increase awareness within the community about literacy and about the agency.

#### Why is planning important?

Imagine taking a trip into a foreign land without a roadmap. You would quickly become lost and frustrated. The same thing can happen in an organization. Planning is the roadmap that provides direction for the organization. It allows staff and volunteers to be more focused, efficient and effective. Planning also empowers your organization to find and seize opportunities, think differently about

how to recruit and manage volunteers and to evaluate how successful the agency has been with its volunteer management program.



Volunteer Canada's Volunteer Management Cycle

According to Volunteer Canada, planning is the first—and arguably most important—stage in the volunteer management cycle. Knowing specifically what types of volunteers you need and how your organization will capitalize on their skills will provide direction for the subsequent stages: recruitment; orientation and training; supervision and evaluation; and recognition.

#### How should our organization plan?

Peter Drucker, the famous American management consultant, once said, "Planning is not an event." Instead, he argues, it is a continuous process. Therefore the process of planning needs to be easy to use, flexible, relevant and valuable for the organization. If it is not these things, then likely it will be abandoned for the status quo.

For this reason, CLO has adapted and/or created what we believe to be several valuable—yet simple—planning tools and resources to help you with your volunteer management program.

#### **Step Thinking Strategically**

A volunteer management plan begins with the organization's **strategic and operational planning**. It is much easier to develop a volunteer plan when you know the really important areas your agency needs to address. For example, perhaps you have identified that fundraising is going to be an organizational priority for the upcoming year. Logically, then, your volunteer plan would direct you to look both internally and externally at involving people with fundraising skills who will be able to help your agency focus on this priority. Similarly, if you have identified that you are going to focus on developing a new program over the next two years, then you will want to ensure your volunteer recruitment, training, retention and recognition resources are tied to developing the new program.

At this point some readers may find themselves thinking, "I guess we can't do volunteer management planning because we don't have the time [or money] for strategic planning," or "I guess we can't do volunteer management planning because we don't have a strategic plan." However, even if your organization has not engaged in a formal strategic planning process, that does not mean you cannot *think strategically* about your organization and, therefore, about your volunteer management planning.

CLO designed the first tool in this chapter (Our Agency's Strategic Volunteer Needs Chart) to help you think about your agency's longer-term (*strategic*) goals, shorter-term (*operational*) goals and the strengths and weaknesses of your organization. By starting with this type of thinking, you will then be able to look more critically at your volunteer needs.



#### Instructions:

- Begin by referring to your organization's strategic plan (if one exists) or by brainstorming with other staff, board members, volunteers and students how your organization will look in three to five years. As part of your thinking, try to identify how your programs might change and how the organization might change. It is important to remember that this type of thinking (a visioning exercise) should be optimistic but realistic. In other words, try to answer the question, "If most things go really well over the next three to five years, what programs will our agency be delivering, and what will our staffing/volunteer model look like?"
- Next, using the three- to five-year goals as your roadmap destination, think about what your agency must work on over the next 12 months to bring you closer to the longerterm goals. Again, it is important to think optimistically but realistically.
- Now that you have identified both longer-term (three- to five-year) goals and shorter-term (one-year) goals, think about your agency's current strengths and weaknesses, as they relate to your volunteers.

Following the instructions outlined above, Literacy Agency ABC has identified a need to recruit several new volunteers, with different areas of expertise—specifically, volunteerled small group instructors and a website designer. Staff of Literacy Agency ABC identified their long- and short-term goals relative to these new positions and they have spent time considering their agency's strengths and weaknesses when it comes to recruiting and supporting these new volunteers.

These examples (volunteer-led small group instructor and website designer) will be used to show how volunteer management tools can be used effectively in agency planning.



## **Our Agency's Strategic Volunteer Needs**

Question	Details/ideas	
Strategic Goals: What programs will our agency be delivering in three to five years?	If things go really well over the next three to five years, our agency will be delivering two additional volunteer-led small groups for clients, one of which will focus exclusively on the delivery of employment or workforce skills.	
	We will also increase our community profile by creating and maintaining a website that promotes the good work our organization is doing and raises the awareness of the general public about literacy.	
Operational Goals:  What must our agency work on this year to help us achieve our	Increase our employment/workforce resource library to better support volunteers and literacy learners working towards employment as a goal.	
three- to five-year goals?	➤ Find volunteers who are able and willing to work with more than one client at a time—potentially as many as four or five simultaneously.	
	Increase our organizational knowledge of website design to the point where we can recruit a volunteer website designer who will be a good "fit" for our organization.	
	➤ Look at recruitment—if we don't already have volunteers who will be able to perform these roles, how will we attract them?  We may have to modify our recruitment strategies or develop a new recruitment strategy.	
	Consider the kinds of additional training we'll need to offer to help volunteers who are interested in these kinds of activities do their jobs more effectively.	
	Review the kinds of staff support these volunteers might need that are different from the staff support we provide to one-to- one volunteer tutors.	

strengths and weaknesses as they relate to our three-to five-year goals?  who have indicated they would like to spend more time volunteering on behalf of the organization.  We already have small groups that are operating, led by  who have indicated they who have indicated interest in spending time volunteering organization, only interested in instressmall group.	estion	Details/ideas		
strengths and weaknesses as they relate to our three-to five-year goals?  who have indicated they would like to spend more time volunteering on behalf of the organization.  ▶ We already have small groups that are operating, led by paid staff as opposed to  who have indicated they who have indicated interest in spendi time volunteering organization, only interested in instread group.  The budget is lime to the three words who have indicated they would like to spend more time volunteering organization.	ngths and Weaknesses:	Weaknesses		
<ul> <li>Dur agency has already made good strides towards incorporating a workplace/ employment focus for those learners that identify this as a goal.</li> <li>Dur agency recently completed an organizational communications plan where we looked at how we promote our services. We can</li> <li>The volunteer wh interested in instr small group does have a full unders of the specific ski needed in the wo the terminology the used or how to the these skills effection.</li> <li>We need to increase knowledge of well design to the point</li> </ul>	gths and weaknesses as they e to our three-to five-year s?	<ul> <li>▶ The budget is limited.</li> <li>▶ The volunteer who is interested in instructing a small group doesn't yet have a full understanding of the specific skills needed in the workplace, the terminology that is used or how to teach these skills effectively.</li> <li>▶ We need to increase our knowledge of website design to the point where we can recruit a skilled</li> </ul>		

#### Step 2



#### **Taking Stock**

Now that you have considered your agency's strategic goals and priorities, you can think even more specifically about the volunteer resources your agency will need and then compare those needs with your current capacity. This will help you recognize some of the areas of strength as well as the gaps you may need to address. It will also help you understand the level of commitment your agency may have to make to fill and manage the various positions.

#### Begin with the end in mind.

Stephen Covey

It can be expensive to send volunteers to regional or provincial training events—have you considered online training as a more cost-effective and accessible alternative?

If your staff time is extremely limited and you don't know how you're going to find the time to train your new volunteers to instruct small groups, could you approach another community literacy agency about a potential exchange in services? They could help your volunteers learn how to instruct small groups and you could help them with some aspect of their development.

Are there other literacy groups you know of that are looking to recruit volunteers with similar skills? Could you work with these groups to share ideas and methods?

#### Instructions

- Using the next set of tools in this chapter, you are encouraged to think about where you would like your agency to be after 12 months and the roles volunteers will play within the organization.
- **2** Using the Volunteer Positions List below, identify all the volunteer positions your agency will have if and when you reach your 12-month goals.
- Once you have identified the positions, indicate with a check mark  $(\checkmark)$  whether your agency currently has one or more volunteers in this position or if this will be a new position.

**4** When you have completed this appraisal, you can then use the third tool, the Volunteer Capacity Assessment, to help you evaluate your agency's capacity for each of the current and new volunteer positions. (Please photocopy the page as many times as you need.)

Why consider capacity? Capacity can seem like a rather stiff and formal word to relate to not-for-profits or volunteers. In this sector, we're so accustomed to doing as much as we can for those who require our services, that sometimes we forget to think about the negative outcomes we can be steering towards in our desire to do good work. It can be difficult for literacy programs (or any other not-for-profit) to say "no" when somebody or something requires help. However, it's always important to consider your available resources, especially if you're contemplating a change or something new. You can't build a second storey on a building and expect it to be safe and functional if the foundation of the building is crumbling!

So let's take a moment and look at a Volunteer Capacity Assessment. By using this tool, you'll be asked to consider what kinds of volunteer positions you're considering (current or new) and you'll also be asked to look at rating your organization's capacity. The use of a numerical rating system may seem a bit excessive but sometimes using numbers can provide an organization with a more objective view of whether or not they're really ready to move in a particular direction.

#### **Volunteer Positions List**

Volunteer Positions in 12 months	Current? (✓)	New? (✓)
1. Volunteer-led small group instructor		<b>✓</b>
2. Website designer		1
3.		
4.		
5.		
6.		
7.		
8.		
9.		
10.		

### **Volunteer Capacity Assessment**<sup>2</sup>

Current Volunteer Position:	
Ranking scale: 1 (excellent); 2 (good); 3 (fair); 4 (poor); 5 (crisis)	Ranking (1–5)
1. Our agency has enough volunteers to fill the current position	
2. Our volunteer(s) has/have the required skills for this position	
3. Our volunteer(s) for this position is/are committed to our agency and motivated to do the job	
4. Our volunteer(s) understand the roles and responsibilities for this position	
5. Our agency has an updated position description	
6. Our agency offers effective initial and ongoing training for this position	
7. Our agency offers meaningful volunteer opportunities in this position	
8. Our agency regularly recognizes the volunteer(s)' contributions in this position	
9. Our agency conducts exit interviews with our volunteers	

<sup>2.</sup> This tool is based on CLO's Step 7—Assessing Volunteer Capacity in SmartSteps to Organizational Excellence, Barrie: Community Literacy of Ontario, August 2002.



In looking at a Volunteer Capacity Assessment for a New Volunteer Position, let's use our current example of a Volunteer-Led Small Group Instructor.

New Volunteer Position:	ll Group Instructor	
Ranking scale: 1 (excellent); 2 (good); 3 (fair); 4 (poor); 5 (crisis)		Ranking (1–5) and Rationale
Our agency has enough voluntee position	ers to fill the new	3—we have one but we need two!
Our current volunteer(s) has/have for this new position	ve the required skills	4-more training is required
Our agency has a position descriposition	ption for this new	4—not yet!
Our agency knows where to pote position	entially recruit for this	3—we have some ideas that other volunteers have suggested
Our agency has the necessary resources to effectively recruit competent volunteers for this position		2—we only need to recruit one volunteer and we know that we can work with other literacy agencies to accomplish this goal
Our agency has the necessary re effective initial and ongoing training	•	2—our current small group facilitators can be a resource. We also have skills we can trade with community partners so that this training is affordable
7. Our agency has the necessary re recognize the volunteer(s)' contr position		1 — we have an excellent volunteer recognition program into which we can incorporate this position

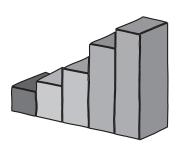


Now let's take a moment to assess another New Volunteer Position. Technology is slowly becoming a more and more integral part of adult literacy programs in Ontario. Now, in addition to teaching adults how to read and write, we have other things to consider while managing programs: purchasing computer hardware and software, updating and maintaining technology, teaching literacy within a technological context, and promoting our organizations through the World Wide Web. Increasingly, organizations are looking for volunteers to set up and maintain their websites. Given this, let's look at assessing a website designer with the Volunteer Capacity Assessment Tool.

New Volunteer Position:	Website Desi	gner
Ranking scale: 1 (excellent); 2 (good); 3 (fair); 4 (poor); 5 (crisis)		Ranking (1–5) and Rationale
Our agency has enough volunteers to fill the new position		4—we're not sure where to start but it's not a "crisis" yet since we do promote our program in other ways
Our current volunteer(s) has/har skills for this new position	ve the required	3—our concern here is that it's hard to know if a volunteer has these skills since we don't have them and it might be difficult to assess in a volunteer—more research will be needed by our agency
Our agency has a position description for this new position		4—not yet!
Our agency knows where to pot for this position	entially recruit	2—we will approach the Publishing Program at our local college
Our agency has the necessary re effectively recruit competent volu position		3—we're not sure if we know exactly what we're looking for—we'll have to upgrade our own knowledge on website design first!
6. Our agency has the necessary reprovide effective initial and ongothis position		4—we cannot offer training in this area—in fact, we'll have to get the volunteer to train one of our staff so that we are not completely reliant upon the volunteer. Otherwise, if the volunteer were to leave, we would not be able to bridge the resulting skills gap
7. Our agency has the necessary re to regularly recognize the volunt contributions for this position		1 — we have an excellent volunteer recognition program into which we can incorporate this position



#### Planning for Volunteer Management: Summary of Practical Steps for Improvement!



As part of their planning process, the Executive Director and Executive Assistant of Literacy Agency ABC used the Volunteer Positions Tool to identify all of the different volunteer positions they expected Literacy Agency ABC to have in 12 months. Of those, four were going to be new positions, including a website designer, a website manager, and two new small group instructors.

They then used the Volunteer Capacity Assessment form to examine each of the current and new volunteer positions they had identified. By looking critically at their own capacity as well as the skills of the current volunteers, they realized several things:

- 1 First, they found that, within their current pool of volunteers, they had enough volunteers with the skills needed for all the positions, except for the website designer and one additional small group instructor.
- 2 They also realized that they needed to spend some additional time upfront developing a more detailed position description for the small group instructors and for providing the initial training for these positions.
- **3** Third, they realized they were going to have to spend some time recruiting for the website designer, preparing a position description, providing an orientation for the new volunteer and ensuring they properly recognized the individual's efforts once the website was designed.
- 4 They also realized that they were going to have to keep organizational capacity in the forefront as they pursued website design and maintenance. They would have to ensure that the technology used to build and maintain the website was fairly mainstream and that a paid staff person had at least a basic understanding of how this technology worked. That way, if the volunteer left the program, they would be able to bridge the gap until a new volunteer could be found.

Using the tools found in this chapter, the staff and Board of Literacy Agency ABC felt prepared to move on to a more formal attempt at "Understanding Volunteer Motivations."



#### **Additional Resources**

The following are resources and tools you might find useful in getting the most out of this section on understanding planning.

Resource	Source	Usefulness	Cost	How to obtain
CLO's "SmartSteps to Organizational Excellence"	Community Literacy Ontario Loose-leaf: 224 pages	Excellent chapter on assessing organizational capacity, including section on volunteers	\$30	Was mailed to all community literacy agencies in 2002 Order by contacting CLO
Literacy Link South Central's "Do Not Inflate Beyond Capacity"	Literacy Link South Central	Excellent guide to responsible growth and stakeholder communication	\$59.95	Literacy Link South Central (519) 681-7307 www.llsc.on.ca
"Strategic Planning for Public and Nonprofit Organizations"	A book by John M. Bryson (ISBN: 0-7879-6755-6) Hardcover: 464 pages	A thorough description of the strategic planning process	\$37.99	Available at most libraries and bookstores
Volunteer Canada website	www.volunteer.ca/resource/eng/	Numerous articles and resources on volunteer planning including 6,000-page toolkit	Free	Internet
(Former) Ontario Ministry of Agriculture, Foods and Rural Affairs website	www.gov.on.ca/omafra/english/ rural/facts/factshts.htm	Various fact sheets for nonprofits including several on strategic planning and volunteer management	Free	Internet
Charity Village website	www.charityvillage.com/cv/ guides/guide1.asp	Various resources on both volunteers and strategic planning for nonprofits	Free	Internet
Ontario Network of the Canada Volunteerism Initiative website	www.volunteer.on.ca/English/ index.cfm?fuseaction=resources. main	Various resources on the management of volunteers, including some to assist with planning	Free	Internet



# Understanding Volunteer Motivations

I became involved in our literacy program because I wanted to give to our community. Volunteering is very rewarding since you are helping to improve others' lives.

—Literacy Volunteer—

#### Introduction

Once you have identified your agency's strategic volunteer needs, it is a good idea to take off your agency hat and think about the issue from the current or prospective volunteers' perspectives. And one of the keys to a successful volunteer management plan relates to understanding what motivates volunteers. Knowing why people become volunteers—and more specifically literacy volunteers—is essential for developing a focused recruitment plan. Equally important, knowing what motivates people to continue volunteering is integral to volunteer recognition and retention. The importance of understanding motivations for recruitment, recognition and retention is addressed throughout the different chapters of this toolkit.

#### **Understanding Volunteer Motivations: Making the Case**

As part of their planning, Literacy Agency ABC staff determined that they needed to better understand what motivated their current volunteer tutors and what might motivate people to volunteer for the new fundraising position they were about to create.

In reviewing what they thought would be ideal profiles for their tutors and for the new fundraiser, they discovered several things:

- 1 First, they learned that the vast majority of the volunteer tutors were women in their 50s and 60s, who were motivated by the desire to help someone in their community.
- 2 They also discovered, however, that some of the younger volunteers helping with events and organizing and developing the agency newsletter were interested in developing new skills which could be used to help them find work. And one volunteer said he had been motivated because his father had literacy issues that he had hidden from the family for 25 years!

#### What CLO's Research Told Us!

Not all volunteers are cut from the same cloth. What motivates a youth to volunteer will likely be very different from what motivates a retired teacher.

Understanding why some people volunteer and others do not is becoming increasingly important. The changes in the voluntary sector require that literacy agencies—like all voluntary based organizations—think differently about who to recruit, and how to reward and retain volunteers. For example, we know from CLO's 2005 survey of volunteers that the majority of literacy volunteers are over the age of 50, while less than 10% are under the age of 30. Knowing this, we would not expect that what motivates a retired teacher to volunteer would be the same as what would motivate a college or university student trying to gain valuable work experience.

#### What motivates literacy volunteers?

The results of CLO's recent survey indicate that current literacy volunteers are primarily motivated by the desire to make a difference in the life of another person and to increase literacy skills in their communities. The following chart shows the variety and importance of different motivations expressed by the 204 volunteers who participated in the survey.

#### **Motivations**

I volunteered because I wanted:	Frequency of response (%)
An opportunity to make a difference in the life of another person	91%
An opportunity to increase literacy skills in my community	72%
A warm and encouraging atmosphere	64%
An opportunity to meet new people/ social interaction	57%
Flexible hours	54%
An opportunity to learn new skills	51%
Training	44%
The opportunity to build my job skills and bolster my resume	23%

Although literacy agencies seem to have a very good overall understanding of the motivations of their volunteers, there was one area in which their perceptions differed from that of the volunteers. Seventy percent of agency representatives said they thought building job skills and bolstering a resume was important to volunteers. However, as the table above indicates, only 23% of volunteers said it was important. Given that the majority of volunteers are over the age of 50, it is not surprising that job skills development would not be as important for them as it would be for younger adults. It is also important to remember that these are the top overall motivators for *current* literacy volunteers in Ontario; new—and particularly younger—volunteers may rank these motivators quite differently.

Overall, the motivators identified by CLO volunteers are similar to those reported by Canadians in the 2000 National Survey of Giving, Volunteering and Participating (NSGVP) conducted for the Canadian Centre for Philanthropy. The top reasons for volunteering, according to the NSGVP were the following:

► To help a cause they believed in

- ► To put their skills and experience to use
- ➤ To support a cause that has directly or indirectly affected them
- ► To explore and develop their strengths
- ► To fulfill religious beliefs
- ➤ To support an organization that a friend or family member also supports
- ➤ To improve employment opportunities (Source: www.nsgvp.org)

#### What prevents people from volunteering?

Similarly, the respondents to CLO's volunteer survey reported the number one reason they could not take on *new* or *additional* roles was because of the lack of time.

When planning a volunteer management program, it is equally important to understand why people do *not* volunteer. Using the results from the National Survey of Giving, Volunteering and Participating, researchers found that the number one barrier is time. Sixty-nine percent of non-volunteers in Canada reported that the lack of extra time was their greatest barrier, and 46% said they were unwilling to provide a year-round commitment. Further analysis of the barriers reveals that younger Canadians are the most likely to report they do not have time. Older adults are more likely to report that health and mobility problems are barriers and older adults are more likely to say that they have already made their contributions to volunteering and do not want to volunteer more. Men, more than women, are more likely to say they don't volunteer because they have no interest.

The overwhelming concern with time, as reported in the NSGVP, is consistent with the results from CLO's research conducted during this project. In five focus groups with literacy volunteers, participants consistently said that time was the greatest barrier to volunteering. Here is what a few of the participants said:

- ► Age-specific life circumstances [are a barrier]. Four hours per week can be too much at some times in your life.
- ► A one-year commitment is sometimes difficult because of other responsibilities. College and university students have a hard time with this commitment of time.



#### How can our agency better understand volunteer motivations and barriers?

To help you better understand your current and prospective volunteers' motivations and barriers, CLO has included two tools. The first is designed to help you think about the different volunteer positions you have and will have, and to answer, "What would motivate someone to volunteer for this position?" The second tool is designed to help you examine barriers that might inhibit someone from volunteering for the different volunteer positions.

#### **Volunteer Motivations**

#### **Instructions:**

- Begin by reviewing the different volunteer positions you expect to have in the next 12 months (based on your agency's strategic thinking).
- For each position, identify a minimum of two **different** types of people who could be ideal volunteers for this position. For example, you might determine that a retired business person or a university student pursuing a degree in Business would be ideal to assist with your fundraising plans.
- Next, consider the different motivations that each ideal volunteer might have. If you are unsure what might motivate a volunteer, ask several of your current volunteers, family members or friends. You might even consider asking a potential volunteer- this would be almost as good as a direct ask!!

It's one thing to informally consider the above three areas—what most agencies neglect to do is to actually write this information down! Writing down this information serves a number of purposes. It helps your volunteer recruitment and management ideas become more formalized and assume a greater role in the strategic planning and management of your organization. It also helps provide continuity in your organization—if one or more key staff were to leave the organization, then this

kind of information can serve as a volunteer management "blueprint" for those who are new to the organization. Finally, by using the tool below to document some of your ideas around volunteer needs, you are helping yourself to stay focused and on track!

# **CLO's Volunteer Motivator Assessment Literacy Agency ABC**

Volunteer Position:	Fundraiser	
Ideal Volunteer "A" Profile (age, experience, skills, knowledge, etc.)	A retired professional fundraiser with lots of experience and contacts in the community that they can use as leverage on behalf of the organization.	
Ideal Volunteer "B" Profile (age, experience, skills, knowledge, etc.)	A new recruit to Literacy Agency ABC—potentially a local college student who is pursuing a Business Marketing Diploma. This individual may not have a lot of experience but would have lots of motivation (to gain new skills and relevant experience) as well as access to current information on the best ways to market social issues and to fundraise.	

Motivator	Ideal Volunteer "A":	Ideal Volunteer "B":
Wants to make a difference	⊴	
Wants to use or develop skills	<b></b>	<b></b>
Knows someone with literacy issues		
Wants a social experience	⊴	
Wants to fulfill philosophical obligations	<b></b>	
Wants to improve job skills		⊴
Wants training		⊴
Other:		

#### **Volunteer Barriers**

When examining the different barriers that might prevent or limit someone from volunteering with your literacy agency, you should consider those barriers that are



associated with your organization and those which are associated with the individual. For example, perhaps you have identified that a high school volunteer would be an ideal volunteer to assist with developing your website, but in examining the barriers, you realize that the agency's hours of operation do not suit a student's schedule. Sometimes you can change this at your agency and sometimes you cannot.

#### Instructions:

- Thinking about the ideal volunteer profiles you have generated, consider both agency and individual barriers that might limit or prevent someone from volunteering with your agency. For example, is there enough information about your agency and/or the importance of literacy in your community to attract the volunteers you are seeking? Similarly, are your hours of operation or the location prohibitive? If you are hoping to recruit a university student, is your organization on a well-established bus route?
- **2** Once you have identified the different barriers, you can then use this information to help inform the rest of your volunteer management planning.

#### **CLO's Potential Barriers to Volunteering Worksheet Literacy Agency ABC**

When using this tool, if you have a person in mind that you would like to have volunteer, consider using just the Y/N column and don't worry about adding any additional "comments." If you don't have a specific person in mind (and therefore don't have the answers), consider using these potential barriers as the basis for discussion when you're trying to establish if a prospective volunteer is going to be a good "fit" for the agency and if your agency is going to be a good "fit" for the volunteer.

Ideal Volunteer "A" Profile: Experienced Fundraiser

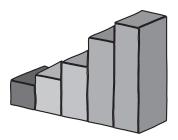
Agency/Environmental Barriers	Y/N	Individual Barriers	Y/N
Lack of community awareness about agency/literacy Comments: There isn't a firm foundation for fundraising in place—Literacy Agency ABC has only been in existence for three years and is only just now starting to raise community awareness.	Y	Work/school schedule Comments: The ideal candidate is retired so this should not be a barrier, provided that the volunteer doesn't spend winters away. This might make it difficult if they're unavailable for months at a time.	
Hours of operation Comments: Literacy Agency ABC is open daily from Monday—Friday and two evenings a week (Tuesday and Thursday).	N	Family schedule Comments: Not an issue as children are grown now.	
Transportation - is your office on a bus route? Comments: Literacy Agency ABC is right downtown so is accessible from all parts of the city.	N	Already volunteering at capacity Comments: This individual is currently tutoring three students. In order to operate in this new capacity, she would need to stop tutoring students directly.	
Staff resources to manage volunteers Comments: Volunteer management is a new area of focus for the agency so more formalized training is needed.	Y	Have never volunteered before and is not familiar with what is expected of a volunteer Comments: Not an issue as she is currently a volunteer with the organization.	
Meaningful opportunities for volunteers Comments: There are many ways in which volunteers could make valuable contributions, depending on staff ability to support the volunteer opportunities.	N	Health issues Comments: No known health issues at this time.	
Flexible schedule Comments: Literacy Agency ABC is accessible in terms of hours, both for the public and for volunteers.	N	Accessibility issues Comments: No need for special accommodations.	
Flexible appointments Comments: As long as the Agency is open, efforts can be made to accommodate the diverse schedules of current and would-be volunteers.	N	Don't have enough info about various opportunities in your agency Comments: This individual is pleased to see the creation of a "new" volunteer opportunity.	
Training Comments: Staff of Literacy Agency ABC have identified lack of training in volunteer management as an issue.	Y		
Other:		Other:	

## Potential Barriers to Volunteering Worksheet

#### Ideal Volunteer "B" Profile: Business or Marketing Student

Agency/Environmental Barriers	Y/N	Individual Barriers		
Lack of community awareness about agency/literacy Comments: There isn't a firm foundation for fundraising in place—Literacy Agency ABC has only been in existence for three years and is only just now starting to raise community awareness.	Y	Work/school schedule Comments: Ideal Volunteer "B" may have some challenges depending on his/her schedule and other "life" commitments.		
Hours of operation Comments: Literacy Agency ABC is open daily from Monday—Friday and two evenings a week (Tuesday and Thursday).	N	Family schedule Comments: Will depend entirely on whether or not the student has a family or other family responsibilities (e.g. eldercare).		
Transportation - is your office on a bus route?  Comments: Literacy Agency ABC is right downtown so is accessible from all parts of the city.	N	Already volunteering at capacity Comments: Literacy Agency ABC would ask if the applicant had any other volunteer commitments. This will help to assess capacity.		
Staff resources to manage volunteers Comments: Volunteer management is a new area of focus for the agency so more formalized training is needed.	Y	Have never volunteered before and is not familiar with what is expected of a volunteer Comments: This will have to be determined on a person-by-person basis. Don't forget to mention what is expected of the volunteer so that both the Agency and the volunteer are clear on roles and responsibilities.		
Meaningful opportunities for volunteers Comments: There are many ways in which volunteers could make valuable contributions, depending on staff ability to support the volunteer opportunities.	N	Health issues Comments: Be careful what you ask!		
Flexible schedule Comments: Literacy Agency ABC is accessible in terms of hours, both for the public and for volunteers.	N	Accessibility issues Comments: Check for any special accommodations that may be needed.		
Flexible appointments Comments: As long as the Agency is open, efforts can be made to accommodate the diverse schedules of current and would-be volunteers.	N	Don't have enough info about various opportunities in your agency Comments: Make sure that potential volunteers are aware of ALL volunteer opportunities for which s/he might be qualified.		
Training Comments: Staff of Literacy Agency ABC have identified lack of training in volunteer management as an issue.	Y			
Other:		Other:		

# **Understanding Volunteer Motivations: Summary of Practical Steps for Improvement!**



As part of their planning, Literacy Agency ABC staff determined that they needed to better understand what motivated their current volunteer tutors and what might motivate people to volunteer for the new fundraising position they were about to create.

In reviewing what they thought would be ideal profiles for their tutors and for the new fundraiser, they discovered several things.

- 1 First, they learned that the vast majority of the volunteer tutors were women in their 50s and 60s, who were motivated by the desire to help someone in their community.
- 2 They also discovered, however, that some of the younger volunteers helping with events and organizing and developing the agency newsletter were interested in developing new skills which could be used to help them find work. And one volunteer said he had been motivated because his father had literacy issues that he had hidden from the family for 25 years!

Using this newfound information, the staff of Literacy Agency ABC did two things. While they really valued their current volunteers, they were concerned that they weren't creating volunteer opportunities that were attractive to other demographics (students or individuals who were working). The staff set aside an afternoon for a Volunteer Recruitment Retreat so they could brainstorm who else they might want to attract to the program in terms of volunteers.

Staff then used the information from the profiles to create several different profiles for the ideal fundraiser. The first was a retired professional with experience and lots of contacts in the community. The good news is that they actually had an individual who fit that description who was already working for the organization tutoring three

individual students! A second profile, which they had not thought of at first, was a student enrolled in the business marketing program at the community college. They thought what she or he might lack in experience would be made up in energy and knowledge from the program.

The staff then considered some of the barriers that might discourage current and to-be-recruited volunteers from meaningful and lasting involvement with the literacy agency. Clearly, one of the greatest barriers for them was the lack of staff knowledge to manage volunteers. As they discussed this with the board members, it was agreed that the staff would need to seek out and take professional development in the area of volunteer management. As time and funding are always concerns, staff were encouraged to look at online courses. In addition, board members suggested that individual staff take advantage of different learning opportunities and then report back to one another to share the learning and raise the overall knowledge of the staff who had responsibilities to support volunteers.

#### **Additional Resources**

The following are resources and tools you might find useful in getting the most out of this section on understanding motivation.

Resource	Source	Usefulness	Cost	How to Obtain
"Volunteer Management: Mobilizing all the Resources of the Community"	A book by Steve McCurley and Rick Lynch Heritage Arts Publishing, 1997	An excellent resource on volunteer management including motivations and barriers	\$12.95	Available at most libraries and book stores
"The Volunteer Recruitment Book"	A book by Susan J. Ellis Also available as an electronic book which can be viewed in pdf file. Published by Energize Online Books, 2002 www.energizeinc.com	A good overview of some key motivations (and a special section on using the Internet as a recruitment tool)	\$18.95	Available at most libraries and book stores
Beyond Recruitment: An Online Workshop about Recruiting and Maintaining Volunteers in the New Environment	Community Literacy of Ontario http://www.nald.ca/FULLTEXT/Clo/cover.htm	A good overview of some of the different motivations volunteers now have	Free	Internet
Literacy Basics website	http://www.nald.ca/literacybasics/	Great self-directed training website	Free	Internet
"The Volunteer Spirit in Canada: Motivations and Barriers" and "Understanding Canadian Volunteers"	http://www.nsgvp.org/	Excellent research tool presents a snapshot of Canadian volunteers including motivations and barriers	Free	Internet



## Marketing

The aim of marketing is to know and understand the customer so well the product or service fits him and sells itself.

—Peter Drucker—

#### Introduction

For some of us, the term "marketing" conjures up images of door-to-door vacuum salespeople, telemarketers calling at supper or advertising agency scandals. In the not-for-profit sector, the image may be one of constant begging for money and resources to keep the agency going. Somehow having a marketing strategy just does not seem to fit within the world of volunteerism and philanthropy. However, developing a marketing plan presents a wonderful opportunity to showcase the purpose and successes of your agency and its volunteers, for a variety of purposes to a variety of audiences. For this reason, this chapter of the toolkit will look at marketing in the broader scope, and not just marketing as it pertains to volunteers.

#### Marketing is concerned with two main objectives:

- 1 knowing what you want to sell or promote; and
- **2** understanding and meeting the needs of those you're trying to sell or promote to.

When looked at in this light, it is easy to see that the basic principles of marketing apply to both the profit and not-for-profit sector.



#### **Marketing: Making the Case**

Like many organizational leaders, the Executive Director of Literacy Agency ABC disliked the whole idea of marketing. For her, it conjured up images of telemarketers and doorto-door sales people in plaid suits. However, she also knew that her organization needed to "sell" their program. Having recently completed a strategic planning session with the board members, the Executive Director determined that they needed to do a better job of promoting the agency to funders, participants and volunteers.

#### What CLO's Research Told Us!

Research conducted by CLO during the past several years verifies that community literacy agencies market to a number of audiences for very different purposes including campaigning for funding, recruiting learners and volunteers and for creating partnerships and relationships with key stakeholders. The majority of marketing activity that occurs is highly visible to other target audiences, which shows the importance of clear marketing messages.

A survey conducted by CLO in January 2003¹ confirmed that on average community literacy agencies receive 25% of their annual operating budgets from sources other than the Ministry of Training, Colleges and Universities. They receive funding from the Federal government, Trillium Foundation, United Way, private foundations and corporations, and from the local community and local business. It is obvious that agencies have had to do some marketing to successfully obtain funding from these alternative sources.

Responses to the January 2003 survey confirmed to CLO that Ontario's community literacy agencies are very busy! They participate in community presentations, community fairs and special events, and promotional events such as open houses, Scrabble tournaments, etc. Agencies also write

<sup>1.</sup> CLO's March 2003 Our Voice Newsletter, www.nald.ca/clo.htm

articles in their local newspapers and submit press releases to the local media. These are all marketing activities!

Community literacy agencies also create and solicit partnerships. The January 2003 survey showed that partnerships exist with local employers, local referral agencies and community service clubs, Ontario Works and other literacy agencies. These partnerships all involve marketing in one form or another.

Responses to CLO's February 2005, Literacy Volunteers: Value Added Survey strongly indicated that Ontario's Anglophone community literacy agencies are currently using a variety of methods to market their programs to volunteers. The breakdown of what method is being used and how frequently is as follows:

- ▶ 89% of respondents rely on word of mouth
- ▶ 83% place posters or brochures in public places
- ▶ 83% put articles or advertisements in local newspapers
- ▶ 81% attend local community activities
- ► 70% host fundraising events
- ▶ 34% put public service announcements on television
- ▶ 32% participate in local mall promotions
- ➤ 28% use public service announcements on local radio stations
- ▶ 38% of respondents used other methods including websites and presentations to a variety of service clubs and associations.

It is obvious from these two survey results that Ontario's community literacy agencies are actively marketing. They are marketing on an ongoing and daily basis to a wide variety of audiences. Looking at marketing in more depth and planning to make marketing activities as effective as possible could be beneficial in terms of time and money.



## Marketing your agency – to volunteers, funders and the community

As we have already mentioned, volunteers and prospective volunteers are only two of the groups of people that you need to think about when considering your agency's overall marketing plan. Funders, other stakeholders, potential learners and the general public are potential audiences to consider when thinking about marketing the value of your agency, its volunteers and the agency's mission. It is extremely important that your agency has a marketing plan in these times of increased competition for resources such as volunteers, funding and political support. You need to be able to communicate why volunteers, funders, learners, your community and key stakeholders should value and support your agency.

There are many different models and resources available on marketing for the not-for-profit sector (please see Additional Resources at the back of this chapter). In this chapter, CLO will examine key elements in developing a marketing plan and offer several tools to help you promote and market your agency and the wonderful work that your volunteers do.

#### **Developing a Marketing Plan**

The following five-step model for developing a marketing plan has been adapted from Community Literacy of Ontario's Learner Recruitment and Retention Toolkit. It can be used to market your agency to your community, stakeholders, funders, potential volunteers and learners. This plan will enable your agency to communicate the important facts about your program to your community, funders and key stakeholders.

#### 

The first two steps in developing a marketing plan should be focused around a review of your agency's overall priorities and needs. For example, do you have a vision for what your agency will be doing in one year or in three to five years? Additionally, have you examined your agency's current situation to better understand what priorities you need to focus on now to bring you closer to that vision? Doing this first will enable you to more easily pinpoint the critical marketing priorities.

#### **Step 2** Identifying Goals and Objectives

Develop your goals and objectives for what you want to market, who you want to market to and how you will do this over the next 12 months. It may be helpful to keep in mind the difference between goals and objectives.

**Goals** should flow from your overall marketing plan. They are general statements that describe what your organization wants to market.

**Objectives** flow from the goals. They are more detailed and reflect specific actions that must be implemented to ensure the goals are realized.

Objectives should be **SMART**:

- ► Strategic
- ► **M**easurable
- ► Action-oriented
- ► Realistic
- ► Targeted (at a market, deadline, location, etc.)

To assist you, CLO has created the following tool.



(**Hint:** you can use this as an extension to the Our Agency's Strategic Volunteer Needs form in the Planning section.)

#### Marketing Planning Form

#### What are the specific **marketing** goals and objectives we need to address this year?

#### **Goal** (example):

To increase community awareness about the program and the importance of improved literacy skills in our community.

#### **Objectives:**

- 1. Host an open house by June 200x and have 50 people attend.
- 2. Update and revise our website by November 200x
- 3. Improve media relations with Community Editor of local newspaper.
- 4. Host/participate in at least one media event by June 200x

#### Goal (example):

To increase the number of partnerships we have with community organizations that have clients for whom literacy is a potential issue so that these organizations can better serve these clients.

#### **Objectives:**

- 1. Identify the full range of community organizations that have clients for whom literacy is a potential issue.
- 2. Host a community forum by April 200x to bring together those organizations that have a stake in literacy.
- 3. Develop a Literacy Awareness workshop that can be delivered to the staff of community organizations to help them recognize when someone is impacted by low literacy skills and help them broach the subject in a positive way.
- 4. Develop a booklet that can accompany the workshop so that each workshop participant (frontline staff of community organizations) gets a copy as a resource.

#### Goal (example):

To increase the number of learners in our program.

#### **Objectives**:

- 1. Identify three potential referral partners (employment agencies, neighbourhood Help Centres, Ontario Works).
- 2. Set up a meeting with a representative from each of these groups by September 200x.
- 3. Review current learners to see how many have been referred from each of these "new" referral partners to establish a baseline.
- 4. Conduct training with frontline staff of the referral partners and evaluate referrals in six months' time to see if they've increased.

Toolkit

#### **Step 3** Developing the Marketing Strategy

Once you have identified your agency's overall priorities and goals and objectives, you can then take that information to start developing your marketing strategy. As you can see from the Marketing Planning Form, priority areas such as learner and volunteer recruitment, fundraising, partnership building, education and awareness both shape and reflect your marketing efforts.

#### Branding – A Consistent and Strategic Reflection of Your Agency

By now you have probably given considerable thought to the different goals and objectives you want to implement. Perhaps you have also identified a number of specific marketing initiatives you would like to tackle to help your agency meet those goals. Before going too much further, however, it is important to consider your agency's overall identity and the messages you will use. This is important for several reasons.

- 1 First, it is important to make sure that the people you are marketing to have an impression of your agency that is consistent with your vision. For example, if you have determined that your agency will become recognized as a key player in addressing literacy issues in your community, will people get that impression from seeing your website, your brochure or your newsletter to volunteers?
- 2 Second, because organizations rely on different media to get their messages across, it is important to make sure that the look and feel of your agency's messages are consistent across all media. If they are not, people may be confused by conflicting or competing messages.
- Third, by having all of your marketing materials focus on your overall marketing goals, your agency will have a more efficient and effective campaign, thereby saving you time and money.

A powerful exercise for assessing your marketing readiness is to consider your agency's *brand*. Although this term is arguably both overused and poorly defined, the concept of an organization's brand is one that goes beyond logos,

brochures, websites and even special events. Your agency's brand is, in short, the overall impression that people have of your organization. It is certainly influenced by the visual elements you use to represent your agency (e.g. your logo), but it is also formed by other factors, including what your learners, volunteers and the general public say and feel when they think about your agency. For example, are you considered accessible? valuable? friendly? professional?

One author<sup>2</sup> suggests there are four branding "markers" to consider when reviewing your organization's brand:

- 1 Reputation (is your agency valued?)
- **2** Esteem (do people have confidence in your agency?)
- **3** Relevance (is there a connection between your mission and the concerns of your target audience?)
- **4** Differentiation (how distinct is your agency from other organizations in the minds of your target audiences?)

A marketing/communications materials audit is a good start to determining how your agency is perceived. It allows you to assemble different organizational materials and assess their relevance to the impression you are trying to convey.

#### **Instructions:**

- 1 Using the Marketing and Communications Audit—Materials Checklist, collect as many of your agency's materials as possible.
- 2 Using the Materials Assessment form, you can evaluate each of the different marketing and communication materials to help ensure that the overall message your agency is presenting is reflective of what is important to your agency and what is important to your target audiences.
- **3** Identify those materials that are in most need of development (if they do not exist) or change (because they do not reflect your priorities or they do not contribute to the image you are trying to create).

<sup>2.</sup> See DK Holland's Anatomy of a Design Brief: http://www.fdncenter.org/pnd/npodesign/npodesign\_print.jhtml?id=62400041

### Marketing and Communication Audit—Materials Checklist<sup>3</sup>

Material	Have this	Need to develop this	Need to update this to better reflect our image	Not relevant to our agency
Value statement				
Mission statement				
Strategic plan				
Business plan				
Annual report				
Orientation manual				
Brochures				
Business cards				
Letterhead				
Flyers				
Posters				
Newsletters				
Website				
Newspaper ads				
Media releases				
Newspaper articles				
E-Bulletin				
Other				

<sup>3.</sup> This Marketing and Communications Audit - Materials Checklist has been adapted from material in Literacy Link South Central's Do Not Inflate Beyond Capacity: A Network's Guide to Responsible Growth and Communication.

### Marketing and Communication Audit — Materials Assessment<sup>4</sup>

Communication Method:	,	L	po	>°C	
How well does this communication method	Poor	Fair	poog	Very	
► reflect our agency's values, vision and mission statement					
► complement other organizational materials					
► clearly describe what our agency does					
➤ convey current information about our agency (including contact information, staff, board members, hours of operation, etc.)					
► use colours and graphics to reflect our agency's desired image					
➤ reproduce in other media (including website, fax, promotional materials, etc.)					
► showcase our literacy agency's strengths					
► fit with the image we want to portray about our agency					
► reflect the use of plain language					
What do we really like about this communication method?					
What could we change to improve this communication method?					

<sup>4.</sup> This Marketing and Communications - Materials Assessment has been adapted from material in Literacy Link South Central's Do Not Inflate Beyond Capacity: A Network's Guide to Responsible Growth and Communication

#### **Identifying Your Target Audiences**

One of the most important elements of your marketing strategy will be defining your target audience(s). In marketing, your target audiences are those people and organizations you are trying to recruit or persuade. For example, if one of your agency's strategic priorities was to recruit new, younger volunteers, you might identify that local college or university students would be your target audience. Similarly, if increasing corporate donations was a strategic priority, you might identify local companies as one of your target audiences.

Using the table below, identify as many target audiences as you can. To help you identify target audiences, reflect on your agency's priorities for the upcoming year.

Once you have identified the priorities, consider both primary and secondary methods you might use to reach each audience. The following table presents several example target audiences and methods for reaching them.

Target Audience	Primary Method of Reaching	Secondary Method of Reaching
Trillium Foundation	Grant application	Phone
Private Foundations	National Guide to Foundations	Internet searches
Library	Direct communication	Regular e-mails and newsletter
Learners	Media	Word of mouth from current students
Community in general	Media	Open house Local fairs
Local businesses	Chamber of Commerce presentation	Phone
Prospective volunteers	Current volunteers	Media
Potential Board members	Nominations Committee	Agency staff connections and experiences
Media	Hosting newsworthy events	Phone

#### **Marketing Budget**

We cannot solve our problems with the same thinking we used when we created them.

-Albert Einstein

At various times during the development of your marketing strategy, you will need to examine your budget. It is ideal to consider it at the very beginning so that you have some indication of the resources at your disposal. After all, there is not much sense in planning to overhaul your website, develop new brochures and produce posters, if you know that you only have \$500 to work with. However, it is equally important to not limit the creative possibilities by focusing on how much money is in the budget. Try thinking of different sources of talent, in-kind resources and funds to assist you with your marketing efforts, for example:

- ► College or university students in a web design, graphic arts or marketing program
- ► Hidden talents and skills of staff and volunteers
- ► Local web-based or print materials that your agency can "piggy-back" on
- ► Key contacts in the media or celebrities associated with your agency who could help deliver your message

It is also beneficial to examine the budget once you have identified different methods for reaching your target audiences. Essentially, at this point you can examine each possibility to see which opportunity will provide you with the greatest bang for your buck.

#### **Action Plan**

Before implementing your marketing plan, you will want to create an action plan that will help guide your tasks. A simple action plan should allow you to focus your attention on the activities that flow logically from the priorities through to the goals and then to the objectives. The action plan should tell you who will do what by when. This may seem like an obvious concept, but having your plan laid out in a practical and logical manner will help everyone involved to stay on task.

### Action Plan

Marketing Goal:					
Marketing Objective:					
Activity/ Task	Expected outcome	By Whom	By When	Complete	
1.					
2.					
3.					
4.					
5.					
6.					

#### Step 4



#### **Just Do It!**

You have planned what you want to achieve and how you will achieve it. Now you need to put aside the time to develop the actual material and implement your plan of action.

It is always useful to look at what other organizations have done. There have been some very successful marketing campaigns in literacy. Now, we understand that these are larger in scale, but they do follow the same principles. We'd like to draw your attention to three specific marketing campaigns that focus on literacy, as well as their messages.

#### **The Ontario Literacy Coalition Social Marketing Campaign:** Take a Step

"The goal of the OLC's 2005 social marketing campaign is to motivate people to take action and to attract learners to literacy programs. The primary target audience will be potential literacy learners who could benefit from upgrading their literacy skills. The secondary audience will be community members at large who may pass on information about literacy programming to potential learners, or who may be interested in volunteering.

As well as stimulating public awareness and action on literacy, the campaign will also help dispel some myths about literacy issues. The OLC is developing one radio and one television public service announcement (PSA) around the theme of 'Take a Step'".

Note: The OLC's "Take a Step" campaign clearly identifies primary and secondary markets and identifies both a goal and some objectives!

#### **ABC CANADA's Family Literacy Day Campaign**

"Created by ABC CANADA Literacy Foundation in 1999, ABC CANADA Family Literacy Day is a national initiative that promotes the importance of reading and learning together as a family. Every year, on January 27, families and communities across Canada celebrate this special day at literacy-themed events coordinated by literacy organizations, schools and libraries. ABC CANADA Family Literacy Day is promoted through a national marketing campaign, with advertising in magazines and newspapers, on TV, radio and the Internet, as well as public relations initiatives, and corporate support from companies like Honda Canada, the Founding Sponsor of ABC CANADA Family Literacy Day."

**Note:** ABC CANADA has definitely identified the purpose of its campaign—to promote the importance of reading and learning together as a family. They have also incorporated a wide variety of marketing strategies and focused not only on *what* they will be promoting, but the "how"!

#### **CanWest Raise-a-Reader Campaign**

"The CanWest Raise-a-Reader Campaign is a year-round initiative with important fundraising events taking place throughout the year in 13 cities across Canada, leading up to CanWest Raise-a-Reader Day.

This national initiative provides financial assistance and resources to family literacy programs and libraries in the regions of all participating CanWest metropolitan newspapers, Global TV and CH stations."

**Note:** CanWest Raise-a-Reader has a large number of partners who are working together towards the same purpose!

These three examples of marketing campaigns are provincial or national in scope. Even though the budgets and the numbers of partners are significant, it's important to remember the best practices that they embody: these campaigns identify target audiences, partnership opportunities, and they also use a variety of marketing approaches to share their messages. These are all things that can be duplicated through local marketing efforts.



#### **Marketing Materials**

CLO has developed a few materials to help you get started: a press release to inform your local community about your agency and to recruit new learners; a fact sheet about your agency and literacy that you could use when trying to solicit funding from your local Kiwanas Club or city council; a sample fact sheet that you could use to help promote the importance and value of literacy volunteers; and a media invitation that you could use to help encourage the media to attend a recognition event that you might host.

#### **Sample Press Release:**

The first tool that you might consider using in your agency is a sample press release. To make the sample press release a bit more practical, the example we'll use is a press release to inform your local community about your agency and to recruit new learners.

#### **Sample Agency Fact Sheet:**

As we demonstrated through the profiling of three successful provincial and national marketing campaigns, it's important to seek out and obtain support from other partners. It's always good to have a fact sheet that speaks to potential partners or funders about your agency. What do you want these groups to know? What is important about your agency that you need to communicate? This kind of fact sheet can be instrumental in helping all of the agency staff speak coherently about the organization. It can also be a good public relations tool to leave behind after you've done a presentation.

Sample sheets follow on the next 4 pages.

#### Sample Press Release

Headline: Literacy Agency ABC is looking to help adults learn to read!

**Body:** On September 8th, 200x Literacy Agency ABC will be hosting a community wide Open House.

Literacy is a skill that helps people to participate more fully in their home lives, their workplaces and their communities. Literacy Agency ABC invites those who are interested in hearing more about literacy work in their community to visit their downtown location between 1:00 pm and 5:00 pm.

"Many people don't realize that the literacy programs we offer are available both during the day and at night and they don't know that they can spend as little as a couple of hours a week upgrading their skills or as many as twenty," says the Executive Director of Literacy Agency ABC.

"I didn't think I'd be able to attend a literacy program because I work shifts," says John Smith, a learner in the program for the past year. "I am able to work around my work and family responsibilities and I'm excited about the progress that I'm making."

It is estimated that 42% of the adult population in Canada does not have the literacy skills necessary to function effectively in everyday life. We live in a society where higher literacy skills are always in demand.

To learn more about Literacy Agency ABC or to get involved in the programs the agency offers, contact 555-1234 or visit us at www.literacyagencyabc.ca.

**Corporate Summary:** Literacy Agency ABC has been a not-for-profit registered charity working to promote literacy in the community and teach adults how to read and write better since 1985. Each year, Literacy Agency ABC touches over 100 adults and their families.

**Contact Information:** For more information, contact Jane Doe, Executive Director of Literacy Agency ABC at 555-1234.

#### Sample Agency Fact Sheet

Literacy Agency ABC Anytown, Anywhere 555-1234

www.literacyagencyabc.ca

Literacy Agency ABC is a community-based literacy program that helps adults to improve their reading, writing and math skills. Our goal is to help adults become more active within their communities, their families and their working lives.

Literacy isn't just about the ability to read, write and use math. Having low literacy skills can have serious implications for our healthcare system, our social support systems and the next generation—our children! Literacy Agency ABC is constantly working not only to increase the literacy skill levels of adults in our community but also to raise awareness about the many ways that literacy, or a lack thereof, impacts our lives. That's why we need the support of community partners and agencies.

According to the most recent Adult Literacy and Life Skills Survey (ALLS)—an international study on literacy—42% of Canadians lack the literacy skills necessary to cope effectively in everyday life. We live in a society where the ability to manipulate information effectively is what helps people be successful. If you don't have strong literacy skills, you cannot maximize the information that is all around us in the information age.

Each year, Literacy Agency ABC serves over 100 adults. These clients come to us for a number of different reasons. Some are looking to get a job or to improve the job that they have. Others are looking to upgrade their skills so they can be successful in a higher academic setting. Still others are hoping to learn new skills so that they can be more independent and feel better about the contribution they can make to their families and to society. We are pleased to be able to help the number of clients that we do but we know we could do a lot more if we had additional resources and community support.

For more information on Literacy Agency ABC or how literacy affects us all, contact the Executive Director at 555-1234 or visit our website at www.literacyagencyabc.ca.

#### Sample Value of Literacy Volunteers Fact Sheet

## Literacy Volunteers in Anytown A \$120,000 Treasure that Keeps on Giving!

## The Economic Value:

- ► Literacy volunteers in Anytown, Ontario provided over 6000 hours of their time to Literacy Agency ABC last year
- ► The economic value of their time is estimated to be \$119,000
- ► The estimated economic value of all literacy volunteers in Ontario is almost \$14 million each year!

#### The Social Value:

## Literacy Agency ABC also benefits from the following social impacts that literacy volunteers bring:

- ► Sensitivity, patience and understanding
- ▶ Teaching experience
- Writing and communication skills
- Commitment and dependability
- ▶ Enthusiasm

#### What Literacy Agency ABC's Volunteers Do:

#### Literacy Agency ABC's volunteers contribute their time in:

- Tutoring
- ▶ Board governance
- ▶ Committee work
- ➤ Office work
- Fundraising
- Special events
- Computer support

#### What Motivates Literacy Volunteers:

## Literacy volunteers in Anytown and the rest of Ontario are motivated by:

- ► An opportunity to make a difference in the life of another person
- ► An opportunity to increase literacy skills in their community
- ► A warm and encouraging atmosphere
- ► An opportunity to meet new people/ social interaction
- ► Flexible hours
- ► An opportunity to learn new skills
- ▶ Training
- ► The opportunity to build their job skills and bolster their resumes

#### Sample Media Invitation

## MEDIA INVITATION OPEN HOUSE TO CELEBRATE THE VALUE OF LITERACY VOLUNTEERS

Literacy volunteers' time worth over \$100,000 every year locally; \$14 million across Ontario

**Anytown, ON, April 18, 200x**—According to a recent report by Community Literacy of Ontario, it is estimated that literacy volunteers in Anytown provide almost \$120,000 in time to help adult learners in our community each year. Across the province of Ontario, this translates into almost \$14 million in volunteer time. To celebrate the economic and social value that volunteers bring, Literacy Agency ABC will be hosting a one-day Open House on Thursday, April 22, 200x, between 9:00 am and 3:30 pm.

**WHAT:** A one-day Open House to celebrate literacy volunteers and to

recognize the economic and social impact they have on our

community.

WHEN: Thursday, April 22, 200x, between 9:00 am and 3:30 pm

Lunch to be served at 11:45 am.

WHERE: 1234 Main Street, Anytown, ON

**WHO:** Literacy Agency ABC is inviting the media to attend the Open

House. Staff, volunteers and adult learners will be there. Special guests will include: Jane Doe, City Mayor, John Doe, professional

hockey player and Martha, 25-year volunteer.

Information:
Name, Title
Organization Name
(xxx)xxx-xxxx
name@place.com

Literacy Agency ABC is a charitable organization in Anytown, Ontario, providing one-to-one and small group instruction to adults who want to improve their reading, writing and math skills.

Toolkit

#### Step **5** Evaluation

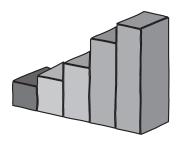
In the literacy field, and most fields within the not-forprofit sector generally, program evaluation has become more important over the past decade. The reasons for its elevated status range from the need for increased accountability with funders and other stakeholders and a desire to improve and compare programs.

Whatever your reason may be for considering an evaluation, its importance and value cannot be overstated. It is possible to evaluate the marketing that you have used without spending a great deal of money.

- 1 Start by ensuring that you build time into the marketing plan for an evaluation.
- **2** Assess your marketing activities/processes for efficiency after they have been implemented:
  - ▶ Did you meet your timelines?
  - ► Was your program within budget?
  - ▶ What were the successes?
  - ► What were the challenges?
- **3** The final step in the evaluation involves looking at how effective was your marketing program?
  - ▶ Did you reach your expected outcomes?
  - ▶ Did you reach as many people as you had expected?
  - ▶ Did your target audiences act the way you wanted them to?

When you have looked at the answers to your evaluation, it should be clear as to whether or not your marketing initiative was successful. The results will help to guide you in your ongoing planning for marketing and communications.

#### **Marketing: Summary of Practical Steps for Improvement**



Starting with a review of their strategic priorities for the upcoming year, the Executive Director used the Marketing Planning Form to identify key marketing goals and objectives. One key goal she identified was the redesign of their website. The board strongly felt the website did not accurately represent the organization or its new strategic direction. They also felt the website could become a valuable tool for recruiting new volunteers, while helping to increase public awareness about the agency.

The Executive Director and Assistant used the Marketing and Communication Audit—Materials Checklist and Materials Assessment forms to gather and examine the current value of a number of different communication materials they had, including their brochure, posters, newsletter and the website.

Recognizing that their primary target audience for volunteer recruitment was going to be younger adults between the ages of 20 and 35, the Executive Director and the Communications Committee broke that target audience down further and brainstormed different ways of reaching them. For example, they identified college and university students as one group they could target through the college, the employment resource centre and even the local pub!

The Executive Director and the Communications Committee members discussed how they could best market the agency by considering the product, place, price, promotion and people from the **perspective of their target audiences** (corporations and students). They brainstormed a number of possible messages and channels that they could use to reach each audience. They then developed a budget and action plan and considered what was feasible and realistic. They agreed that they would focus their attention on redesigning their posters and brochures for the students, and arranging personal visits with local corporations, during which they would present customized packages (which they would do in-house with the help of one of the volunteers). They also agreed to hire a web designer to help update their website by giving it a look that would be more welcoming and meaningful for the younger adults.

#### **Additional Resources**

Resource	Source	Usefulness	Cost	How to obtain
"Learner Recruitment and Retention Toolkit"	Community Literacy of Ontario	Excellent sections on marketing and public relations	\$60.00	Send email (clo@bellnet.ca) or mail request to Community Literacy of Ontario
"Caution: Do Not Inflate Beyond Capacity"	Literacy Link South Central	Good component on communications planning	\$59.95	Available from Literacy Link South Central (519) 681-7307 www.llsc.on.ca
"A Happy Media: Using Public Relations to Meet Your Outreach Needs"	Community Literacy of Ontario	An excellent tool in approaching the topic of media relations using a progressive series of exercises designed to help you clearly identify who it is you are trying to communicate with and how to reach them through the mass media.	Free	Internet: http://www.nald. ca/PROVINCE/ ONT/CLO/ resource/Happy_ M/1.htm
"Strategic Recruiting: Using Creative Communication Principles to Find the People You Need"	Community Literacy of Ontario	A tool that approaches the topic of recruiting from a cyclical communications model. Through a series of exercises, you are able to clearly identify who it is you are trying to recruit and then use that information to structure your recruitment messages.	Free	Internet: http://www.nald. ca/PROVINCE/ ONT/volman/ Recrutin/1.htm
"Building Volunteer Value: A Marketing Based Workbook for Recruitment and Retention"	Capacity Builders at OCSA	Includes numerous resources and is based on a relationship marketing model, which is designed to improve volunteer relationships by considering each volunteer's "needs, wants and differing levels of value to the enterprise."	\$19.99	Available from Capacity Builders http://www. capacitybuilders. ca/publications. htm
"Social Marketing: Improving the Quality of Life, 2nd Edition"	A book by Philip Kotler, Ned Roberto and Nancy Lee	Excellent introduction to social marketing	\$49.95	Available at most libraries and book stores



Resource	Source	Usefulness	Cost	How to obtain
Marketing Your Adult Literacy Program: A How- to Manual	www.nald.ca/ fulltext/ hudson/ market/370_4.pdf	Excellent resources to help you market your literacy program	Free	Internet
Health Canada's Social Marketing Network	www.hc-sc.gc. ca/english/ socialmarketing /index.html	A good introduction to the concept of social marketing	Free	Internet
Ontario Literacy Coalition's Social Marketing Campaign	Ontario Literacy Coalition	A social marketing campaign to help motivate people to take action and to attract learners to literacy programs.	Free	Internet: http://www. on.literacy.ca/ action/step.htm or by requesting from the Ontario Literacy Coalition



## Volunteer Recruitment

At a meeting, two members of the local literacy council were guest speakers. It was an interesting idea and later I stopped at the literacy council and became a volunteer tutor.

—Literacy Volunteer—

#### Introduction

66% of community literacy agencies report a decline in the number of volunteers over the past five years.

In today's environment of increased competition for fewer volunteers, those organizations that have a focused recruitment plan will have a significant advantage. In Statistics Canada's recent (September 2004) *Cornerstones of Community: Highlights of the National Survey of Nonprofit and Voluntary Organizations*, researchers found that the majority of organizations reported "difficulty recruiting the types of volunteers the organization needs." Complementing this finding, the 2000 National Survey of Giving, Volunteering and Participating<sup>1</sup> reported a 13% decline in the number of volunteers from 1997.

#### **Recruitment: Making the Case**

Literacy Agency ABC, like many other literacy agencies in Ontario, was slowly experiencing a decline in volunteers. The Board and staff of Literacy Agency ABC realized that they were going to have to look at recruitment in a much more strategic way if they were going to be able to maintain their services to the community they served. The Executive Director was pretty sure that they weren't being focused enough in their recruitment efforts and she was aware that

<sup>1.</sup> Caring Canadians, Involved Canadians: Highlights from the 2000 National Survey of Giving, Volunteering and Participating. Canadian Centre for Philanthropy, Statistics Canada. 2001. http://www.givingandvolunteering.ca/pdf/n-2000-hr-ca.pdf

the agency didn't seem to attract very many youth (21-30 years of age). She also realized that the organization was using the same annual recruitment methods that they had been using for the past ten years. To her knowledge, there had never been any efforts to evaluate these recruitment methods to see which ones provided the greatest return for the organization's investment of time, energy and financial resources. Finally, the Board recognized that many other not-for-profits were increasingly using the Internet to attract and recruit potential volunteers. They asked the Executive Director and staff to explore ways to maximize the organization's website as a recruitment tool.

#### What CLO's Research Told Us!

Literacy agencies are reporting a decline in the number of volunteers. Community Literacy of Ontario's recent research found that 66% of agencies reported a decline in the number of volunteers over the past five years.

However, the results from CLO's 2005 research also show that literacy agencies are very active in recruitment and use a variety of different methods and resources to recruit volunteers. The following table shows that the four recruitment methods literacy agencies most often rely upon are word of mouth, posters and brochures, local newspapers and community activities.

Recruitment Method Used by Literacy Agencies	Percent of Agencies who use method
Word of mouth from current or past students, volunteers or staff	89%
Posters or brochures in public places	83%
Local newspaper advertisements and articles	83%
Community activities	81%
Direct asks	70%
Fundraising events	64%
Television public service announcements	34%
Local mall promotions	32%
Radio public service announcements	28%

When asked which methods they thought were most effective for recruitment, almost half of the agency representatives surveyed said they thought that word of mouth or asking directly was the most effective method, followed by newspaper articles and/or newspaper advertising.

When literacy volunteers were asked how they found out about the volunteer opportunity, they reported some of the most common ways to be through the local newspaper, word of mouth, being asked directly, or by seeing a poster or brochure in a public place. Some volunteers also indicated that they found out about volunteer opportunities using the Internet, either accessing the agencies' websites directly or through online volunteer sites like Charity Village and the local volunteer centres.

## A recruitment plan seems difficult. Where should our organization start?

The volunteer management cycle consists of:

- ► Planning
- ► Recruitment
- ► Orientation and training
- ► Supervision and evaluation
- ► Recognition

The second step in the volunteer management cycle is recruitment. The success of your recruitment plan will be determined by the focus and clarity of the planning that precedes it. Having a recruitment plan that builds upon your agency's strategic goals will help ensure that all of the resources you invest into this stage are well spent. CLO took a look at developing your agency's strategic goals in the "Planning for Volunteer Management" chapter of this resource.

Before you start implementing your recruitment plan, it is important to make sure you have identified the different elements needed so that when you do start the active



recruiting, the process will be as effective and efficient as possible. To help you prepare, CLO has created the following Recruitment Planning Checklist. This checklist not only encourages your organization to find the volunteers it needs—it also reminds you of other areas you may need to develop in order to support volunteers once they decide to commit to your organization.

#### **Recruitment Planning Checklist**

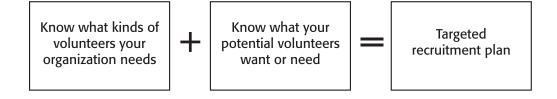
Do we know which specific volunteer positions we need filled?
Do we have an up-to-date position description for each position we need filled?
Do staff know what their roles and responsibilities will be for working with the volunteer(s)?
Have we identified specific skills, knowledge and attitudes required for each volunteer position?
Have we considered more than one ideal type of volunteer for each position?
Have we identified the working environment for each volunteer position, including workspace, hours, equipment/resources needed and staff support?
Do we have an up-to-date volunteer screening process?
Do we have someone ready to interview people for each volunteer position?
Have we prepared specific interview questions for each volunteer position?
Do we have an up-to-date volunteer application form?
Have we prepared an up-to-date orientation and initial training program for each volunteer position?
Do we have any idea where to find volunteers?

#### What's the best way to recruit volunteers?

In today's competitive arena for a limited number of volunteers, literacy agencies must adopt marketing strategies to help them recruit the kinds of volunteers they need.

A successful recruitment strategy has three main parts:

- ➤ Know your agency's needs for volunteers. This information comes from the strategic thinking and planning that directs the organization's overall goals and priorities.
- ► Understand what motivates the right people to volunteer with your organization.
- ► Use this information to develop a targeted recruitment plan that matches your organization's needs with those of the potential volunteer.



#### **Step 1** Writing the Volunteer Position Description

To recruit ideal volunteers, it's important to know what you want them to do within your program. In the chapter - Planning for Volunteer Management - you were encouraged to think strategically about the types of volunteers you needed and your organization's capacity to fill those volunteer positions. Once you have completed that process, the next step is to think more specifically about the requirements, duties and rewards attached to each position. The following worksheet, which we've called

"Get To Know Your Volunteer Position!" helps you to consider each volunteer position that you are trying to fill, using a standard set of criteria. By using this worksheet, you'll have the beginnings of a volunteer job description!

The "Get To Know Your Volunteer Position!" worksheet will help you to reflect on what you already know about the position. It will also encourage you to think about the benefits and rewards that a person would get from volunteering in this way with your organization. If this is a volunteer position that already exists within your agency, consider asking current volunteers for their views on the benefits and rewards!

Position Title	Office Cupport Voluntaer
Position Title  (Give the title as much prestige as possible for recruiting purposes!)	Office Support Volunteer
Reason for the Position (Identify what the job is and why it is necessary within the organization.)	This position has been developed to support the Executive Assistant within Literacy Agency ABC. The Office Support Volunteer will assist the Executive Assistant to do many of the important, day-to-day tasks required in today's office environment.
<b>Position Summary</b> (A brief overview of the position)	The Office Support Volunteer will be an important part of Literacy Agency ABC's team. This volunteer will work directly with the Executive Assistant and indirectly with the Executive Director, Literacy Agency ABC Committees, and volunteer tutors.
Duties and Responsibilities	Duties and responsibilities will include:
(Be as specific as possible.)	Opening and distributing mail
	Filing and maintaining financial documents
	<ul> <li>Providing communications support for the development and ongoing maintenance of agency correspondence</li> </ul>
	➤ Answering the telephone
	<ul> <li>Providing some support for getting ready for Board of Directors meetings</li> </ul>
	► Maintaining Literacy Agency ABC's resource library
	<ul> <li>Working with volunteer tutors to help them find appropriate resources</li> </ul>
Supervisor	Executive Assistant of Literacy Agency ABC
Working Environment (Describe the volunteer's working environment.)	This volunteer will need to be able to work in a fast-paced, busy environment without getting too distracted. This volunteer position is for the main office of Literacy Agency ABC, located in the basement of the Public Library.
<b>Time Commitment</b> (How much time is needed? Try to be flexible and respectful of the volunteer's time.)	Ideally, the Office Support Volunteer will provide volunteer services for 9 hours a week (three mornings from 9:00 am — 12:00 noon). The days per week will depend on the volunteer's availability.
<b>Length of Service Required</b> (Is the position for a specific term?)	This is a one-year term, with the possibility of renewal.
Probationary Period (If one is required.)	There will be a three-month probationary term.
<b>Review Procedures</b> (Will an evaluation will be conducted? By whom?)	Evaluations will be conducted by the Executive Assistant.

<sup>2.</sup> This worksheet is based on CLO's template and sample position descriptions. Please refer to <a href="http://www.nald.ca/province/ont/volman/job/job.htm">http://www.nald.ca/province/ont/volman/job/job.htm</a> for more information and specific position description examples.

Skills, Knowledge and Attitudes (List the skills, knowledge and attitudes your organization needs for this position.)	Skills required for the position include:  Familiarity with handling money  Strong communication skills  Familiarity with MS Word and MS Publisher
	Organizational skills
	➤ Strong interpersonal skills
	Experience in adult literacy
	Previous experience with cataloguing or working in a library will be an asset.
References (Do you need references? What information do you want from them?)	References are not required.
Benefits/Rewards Offered (What is in it for the volunteer?)	Literacy Agency ABC will provide on-site training and will also provide the Office Support Volunteer with additional training opportunities throughout the year.
	The Office Support Volunteer will have the satisfaction of working with volunteer tutors directly to benefit the learning experiences of adult literacy learners.
	There will also be ample opportunity to learn more about Literacy Agency ABC's Board of Directors and various committees.
Training Offered (Describe the orientation and ongoing training available.)	The Executive Assistant of Literacy Agency ABC will provide initial orientation. The Office Support Volunteer will be given the opportunity to participate in on-site training opportunities like volunteer tutor training, clear writing training, and literacy awareness workshops. In time, the Office Support Volunteer may be able to play a larger role in managing the day-to-day finances of the organization and computerized accounting training may be offered.
Other?	

#### Step 2



#### **Different Volunteer Groups Need Different** Messages!

Youth, for the purposes of this manual, refers to the "untapped market" of 21–30 year olds. This group currently comprises only 7% of literacy volunteers and is certainly an underutilized resource!

We can all appreciate the idea that "one size doesn't necessarily fit all." The same concept applies to recruitment. It can be helpful when you're developing a recruitment campaign to think about dividing the market or target audience into smaller categories of people with similar characteristics. For example, if your organization needs to recruit lots of volunteers for community events, you may know that the ideal volunteer could be a youth, a retired business person, a single mother, a busy parent of three, or a high school teacher wanting to improve literacy in his community. You probably also realize that what motivates a retired businessperson to volunteer will likely be different from what motivates a high school or university student.

Recognizing that people are motivated differently before you start a recruitment campaign will help your organization to design messages and use methods of reaching the different audiences that will be meaningful to potential volunteers. You may decide that you want to target youth with a message that highlights resume-building experiences, while the message you use to recruit a retired businessperson might talk about the need to improve literacy skills in the community, and emphasize the social opportunities that can come through volunteering.

Most literacy practitioners have a general idea of the different sub-groups that exist within their volunteer base. However, if you have the time and resources, there could be significant value to further investigating these sub-groups. The three most common ways of examining the sub-groups in your volunteer base are:

- The use of demographics—reviewing your current and potential volunteers in terms of demographics to look at factors such as volunteers':
  - ▶ ages
  - education levels

- ▶ occupations
- ► cultural backgrounds
- ▶ addresses
- ▶ general income levels
- ► marital status

Using demographics is probably the easiest way to divide volunteers into smaller sub-groups for the purpose of developing recruitment messages.

- **2 Motivations**—a closer look at your volunteers may help you to draw conclusions about what various volunteer groups are looking for in a volunteer opportunity.
- **3 Psychographics**—an examination of the personality traits of your volunteer sub-groups. Going to the lengths of using psychographics to examine your volunteers may seem a bit unlikely. However, as attracting volunteers becomes an increasingly competitive business, it is anticipated that more and more not-for-profit organizations will turn to this kind of analysis to develop and refine recruitment messages.



**Hint:** If you live in a college or university town, consider talking to your local academic institutions. The study of psychographics may make for an interesting project for one or more local students!

Current research suggests that reviewing your volunteer base using only demographics is a little limiting. People are complex. Just because two people are of the same age doesn't necessarily mean they will be moved by the same message about volunteering. That's why it's more helpful to look at each of the three methods outlined above, if time and resources allow. If you can't look at all three, consider looking at two of the three in order to develop more accurate profiles of current and potential volunteers.

In the chapter - Understanding Volunteer Motivations - you were encouraged to consider a basic profile of an ideal volunteer, based on a volunteer position you need to fill. If you have already completed this, you have started to divide your potential or current volunteers into sub-groups. Finding additional information to help you understand

your various volunteer sub-groups does not need to be overly time-consuming or expensive. Consider using the following ideas:

- ▶ Review research reports that focus on volunteer subgroups. Many organizations are focusing on developing a better, more comprehensive understanding of volunteer sub-groups. Not-for-profit organizations want to use their volunteer recruitment resources as effectively as they can so more and more research reports are available all the time. Consider having a summer student do an Internet search and compile some of the results for your organization.
- ➤ Conduct interviews with one or two current or prospective volunteers from a sub-group you hope to target. Offer a small gift certificate from a local bookstore for their time—the information you will gain will far outweigh the cost!
- ► Host a focus group with current or potential volunteers from a sub-group you hope to target. Focus groups can take some time to recruit and conduct. If you belong to a volunteer association, perhaps this is the kind of activity that two or three organizations could undertake together and share the results.

Ultimately, the goal of your research should be to help you better understand your volunteer sub-groups (existing and potential) so that you can design meaningful messages using the most effective channels for reaching them.

Let's see how all this theory about understanding your volunteer sub-groups might look in practice! To show how the following tool for documenting information on various groups within your volunteer base can be used, let's assume that Literacy Agency ABC is looking to recruit a Board member from the youth (21-30 years of age) demographic.

# Literacy Agency ABC Volunteer Sub-Group Analysis Worksheet

Volunteer Position:	Board member
Volunteer Sub-group:	Youth (21-30 years of age)
<b>Volunteer Profile Criteria</b>	Details
Demographics (e.g. age, education level, occupation, cultural background, address, income level and marital status)	We are specifically looking to recruit someone who is between the ages of 21-30 to represent this target group on our Board of Directors. As our program is specifically trying to attract youth from the downtown core of the city, we think it would advantageous to recruit a volunteer who lives in this part of the city. Given the demands of being a Director on a not-for-profit board, it's important that this individual be able to read the necessary information (board reports and policies) without assistance.
Motivations (e.g. what will motivate this volunteer sub-group?)	It is likely that a volunteer from this sub-group would be more motivated by the chance to gain new skills than the chance to contribute to a social cause or the opportunity to use existing skills. This kind of volunteer opportunity might appeal to a youth who is hoping to add experience to a resume.
Psychographics (e.g. basic values and beliefs, personality traits, lifestyle habits, and information sources)	In order to attract a volunteer from the youth sub-group, we may need to try some new approaches. Traditionally, we post our need for Board members in the community section of the local paper. We will try posting this opportunity in the two Internet cafes in town as well as at local youth centres and at the local college and university. In addition, in our marketing message to appeal to this group, we will talk more about the opportunity to create change as youth are typically more attracted to opportunities to facilitate change than they are to maintaining the status quo.

### **Developing the Right Message**

Developing the right message to attract volunteers is really important. You can spend a lot of time developing the right messages or you can spend a little bit of time. The most important thing is to make the time count! If you work for a small literacy agency and you don't have a lot of time or resources to spend on developing messages, the most important thing to remember is:

"Remember that volunteers come to you because of something they want—not something you want."

(Source—Literacy Basics website, www.nald.ca/literacybasics)

This may sound very basic but it's true. Too often, literacy programs (and not-for-profits in general) try to recruit volunteers based on the fact that they "need volunteers." The reality is that all not-for-profits which utilize the skills and services of volunteers can make that very same claim. These blanket requests for help tend to blend in with all the other recruiting that is happening in your community. They don't help your organization to stand out from a myriad of other organizations and they don't tell potential volunteers what they might get out of a volunteer opportunity.

Here are some examples of excellent recruitment slogans from actual literacy programs in Ontario:

- ► "A Place to Grow!" (Organization for Literacy Sarnia-Lambton)
- "Our Volunteers Change Lives" (Hamilton Literacy Council)
- ► "Hard work, low pay, and the experience of a lifetime!" (Frontier College's Labourer-Teacher Program)

These above messages or slogans about volunteering are certainly more compelling than "We need you!"



#### **Developing the Right Messages for Specific Volunteer Sub-Groups**

If you've already done some preliminary work developing volunteer recruitment messages, you may want to take message development to another level and get more specific about the volunteer sub-groups you're trying to attract.

Consider the following generic recruitment message:

How would you like to spend your free time helping others to read and write?

How would you like to meet new people and make new friendships while making a difference in your community?

Volunteer positions are now available—call us at...

At first glance, this message might seem as though it would persuade an individual to consider volunteering, and perhaps it would, for a certain segment of the population. For example, we know from the CLO research that literacy volunteers are committed to helping others, are motivated to improve literacy skills in their community and are interested in social opportunities. However, it is also clear by looking at the demographics of current volunteers that these messages do not necessarily appeal universally to volunteers. For example, there are definitely fewer younger adults and men volunteering in literacy throughout Ontario.

If we consider our generic message from the perspective of younger adults, for example, would it be meaningful? According to the Canadian Centre for Philanthropy's 2000 National Survey of Giving, Volunteering and Participating, one of the primary reasons younger adults do not volunteer more is because they feel they do not have enough time. Therefore, the first line in this message would not likely register as being directed at them. Additionally, younger adults often volunteer because their friends do, not because they want to make new friends. Finally, younger adults are often motivated by the chance to develop employment skills that will help them with their job searches.

Given this information, a more specific recruitment message, specifically designed to target youth might look like this:

Are you looking for a chance to build some skills to help you in your career? Do you care about the future and whether or not Ontarians will have the skills they need to live meaningful and fulfilling lives? Literacy Agency ABC is hosting a half-hour discussion on the role that literacy volunteers can play in creating a positive change in their community. Bring a friend and join us! Call ... for details or check us out on the Internet at www...

### **Suggestions for Developing a Volunteer-centred Message**

- 1 Once you have developed a profile for a sub-group of volunteers, you will probably have a better understanding of what is important to that part of the population.

  Knowing their levels of education, how much time they have for volunteering, what would motivate them and what might prevent them from volunteering will give you the information you need to develop focused and meaningful messages.
- 2 A simple way to develop messages is to use a white board or flip chart paper and have members of your organization (and members of the volunteer group you're targeting, if possible) brainstorm possible messages. Try not to restrict the flow of ideas at this point. Often one thought generates another, so allow the creative process to take hold and see where it leads you.
- 3 It is important to make sure that whatever messages you choose are consistent with each other and with your organization's overall message. If they are not, you run the risk of having mixed or—even worse—conflicting messages.

Your organization may be considering creating a number of volunteer messages. Sometimes it can be difficult to be sure you've considered each new message from all the right angles. The ultimate goal is to have each and every recruitment message be successful! Consider using the following Message Development Checklist as a guide when developing new messages or when checking the relevance of messages that your organization currently uses.

# CLO's Message Development Checklist

Volu	inteer Sub-Group:			
₫	Does the message			
	Convey the information important for our organization? (e.g. does it clearly convey that we are recruiting for a particular position?)			
	Portray our organization as a reputable, responsible and progressive organization?			
	Clearly outline the benefits for the prospective volunteers (e.g. answer the question, "What's in it for me?")?			
	Address barriers volunteers may be facing that would inhibit their involvement?			
	Clearly tell volunteers what action we want them to take (e.g. telephone, go to our website, attend an event, etc.)?			
	Reflect a tone and style that is consistent with both our organization and the target audience (e.g. using humour, an emotional appeal, etc.)?			
	Begin with the most important information?			
	Use simple words and sentences?			
	Lend itself well to different communication methods (e.g. website, newspaper, direct contact, radio, etc.)?			
	Provide simple instructions for how to become involved in the organization?			

### Step (3)



### **Select a Variety of Channels and Vehicles**

Community Literacy of Ontario's 2005 research suggests that literacy agencies rely extensively on word of mouth, posters and brochures in public places, advertisements and articles in local newspapers and, increasingly, the Internet.

Once you have identified one or more possible messages that you think will appeal to your audience, you will need to consider different channels and vehicles you could use for reaching your audience. Channels are what you use to deliver your message and include print materials, television, radio, the Internet, telephone, presentations, direct mail and informal networks. Vehicles are the more specific methods such as advertisements or PSAs in the newspaper, brochures, and newsletters.

Knowing which channels to use will be determined largely by the research into your target audience (to find out what sources of information they rely on), your budget and the amount of time you have. However, it is generally recommended that more than one channel be used and that you consider blending different types (e.g. mass media, community presentations or events, and interpersonal communication).

On the next few pages, you will find several resources to help you with word-of-mouth and online recruitment, developing a volunteer position advertisement for print, as well as tracking your results.

#### **Word of Mouth**

Word-of-mouth referral is the oldest form of recruiting and probably the most successful. According to CLO's survey of literacy agencies, 89% of them use this method to recruit volunteers, relying on current or past students, volunteers and staff to help them get new volunteers. Word of mouth relies on people's social networks to inform and persuade others, and it can be a very effective channel for recruiting new volunteers. In today's climate of information and advertising overload, it is not surprising that more and more people are turning to family and friends for ideas and recommendations for how to spend their money and, in the case of volunteers, their time.

Like any other communication channel, however, successful word-of-mouth recruitment should not happen by chance; it should be designed. If you are hoping to recruit volunteers through students, current volunteers or staff, you should not assume your ambassadors automatically know how to recruit effectively. Help your ambassadors to be properly prepared!

#### Successful word-of-mouth recruitment:

- ► Is strategic and proactive—it's designed and not just left to happen purely by chance
- ➤ Involves those people most likely to have the type of volunteers you are looking for as part of their social networks
- ► Includes a clear description of the position being recruited for
- ► Clearly identifies the benefits for potential volunteers
- ► Is more successful if there is an incentive offered to the recruiters!

### **Preparing Your Ambassadors to Recruit!**

It's very important to give your ambassadors some tools they can use to recruit on behalf of your organization in a consistent and effective way. Most word-of-mouth recruitment happens by chance. With a little more support from your agency, it can happen by design and potentially result in better recruitment for your organization. In the next section, we've tried to identify some ways you can support your ambassadors.

#### **Instructions:**

- To begin, we recommend you use the information from the previous exercise or from current information you have and develop a 30-second message that could be handed to an ambassador. You may also want to provide each ambassador with one or more blank sheets so they can slightly modify the message based on their communication style and their knowledge of the potential volunteer. As part of the message, make sure you include:
  - ► A brief description of the position
  - ▶ The benefits for the potential volunteer
  - Simple ways for the potential volunteers to follow up to get more information
- You may also want to consider the information or resources your ambassadors might need to help them with their word-of-mouth recruitment efforts. Not everyone feels confident to make an "ask." Asking others to help or support your organization may not be second nature for some of your ambassadors. Some ambassadors might appreciate help with the correct wording. Others might appreciate having some support documents that they can rely upon or leave with prospective volunteers. The Word-of-Mouth Resource Checklist allows you to identify the supports your ambassadors might need. Then you can determine which supports your organization already has and which supports need to be developed.

# CLO's 30-Second Recruitment Message Script

Youth (21-30 years of age)  Networking Skills development Chance to use existing skills to gain experience  So-second message  We need someone like you tohelp Literacy Agency ABC reach out to other members of the community who need help improving their literacy skills. We're tooking for volunteers that want to build a brighter future for all Ontarians. For more information on the role that volunteers can play in improving literacy in the communities, call 555-1234.  Some of the benefits you can expect to get from volunteering with us are  The chance to develop new skills The chance to apply skills you've already developed to gain work-related experience A sense of contributing to a broader social cause and to your community  Here's what you should do if you want to find out more  Contact Literacy Agency ABC at 555-1234 for more information, or check us out on the well- contact Literacy Agency ABC at 555-1234 for more information, or check us out on the well-	/olunteer Position:	Volunteer Tutor				
Networking  Netwo						
Skills development  Chance to use existing skills to gain experience  Chance to describe the community who need help improving their literacy skills. We're looking for volunteers that want to build a brighter future for all Ontarians. For more information on the role that volunteers can play in improving literacy in the communities, call 555-1234.  Chance of the benefits you can expect to get from volunteering with us are  Chance to develop new skills  Chance to develop new skills  Chance to gain work-related experience  A sense of contributing to a broader social cause and to your community  Chance to use existing skills to gain experience out to other members of the community and the proving their literacy skills. We're looking to the proving their literacy skills. We're looking their literacy skills we're looking their literacy skills we're looking their literacy skills we're looking their literacy skills. We're looking their literacy skills we're looking their literacy sk	Volunteer Sub-Group:	Youth (21-30 years of age)				
The chance to develop new skills  The chance to again work-related experience  The chance to apply skills you've already developed to gain work-related experience  A sense of contributing to a broader social cause and to your community  Here's what you should do if you want to find out more  Contact Literacy Agency ABC reach out to other members of the community of the volunteers had been skills to gain experience and the volunteers can play in improving literacy in the communities, call 555-1234.  Some of the benefits you can expect to get from volunteering with us are  The chance to develop new skills  The chance to apply skills you've already developed to gain work-related experience  A sense of contributing to a broader social cause and to your community  Here's what you should do if you want to find out more  Contact Literacy Agency ABC at 555-1234 for more information, or check us out on the well		► Networking				
We need someone like you tohelp Literacy Agency ABC reach out to other members of the community who need help improving their literacy skills. We're looking for volunteers that want to build a brighter future for all Ontarians. For more information on the role that volunteers can play in improving literacy in the communities, call 555-1234.  Some of the benefits you can expect to get from volunteering with us are  - The chance to develop new skills  - The chance to apply skills you've already developed to gain work-related experience  - A sense of contributing to a broader social cause and to your community	Key benefits for Sub-Group:	► Skills development				
We need someone like you tohelp Literacy Agency ABC reach out to other members of the community who need help improving their literacy skills. We're looking for volunteers that want to build a brighter future for all Ontarians. For more information on the role that volunteers can play in improving literacy in the communities, call 555-1234.  Some of the benefits you can expect to get from volunteering with us are  The chance to develop new skills  The chance to apply skills you've already developed to gain work-related experience  A sense of contributing to a broader social cause and to your community		► Chance to use existing skills to gain experience				
members of the community who need help improving their literacy skills. We're looking for volunteers that want to build a brighter future for all Ontarians. For more information on the role that volunteers can play in improving literacy in the communities, call 555-1234.  Some of the benefits you can expect to get from volunteering with us are  - The chance to develop new skills  - The chance to apply skills you've already developed to gain work-related experience  - A sense of contributing to a broader social cause and to your community  -  -  -  -  -  -  -  -  -  -  -  -  -	30-second message					
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- A sense of contributing to a broader social cause and to your community	<i>,</i>					
Contact Literacy Agency ABC at 555-1234 for more information, or check us out on the web	- A sense of contributing to a broade	er social cause and to your community				
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	Contact Literacy Agency ABC at 555					
	Contact Literacy Agency ABC at 555					

### CLO's Word of Mouth Resource Checklist

The actual tools that you might give your ambassadors will vary somewhat depending on how active your ambassadors are (how formalized the ambassadors program is within your organization). The tools that you want to make available will also vary according to your agency's resources. The following is a list just to get you thinking about some of the ways you can support ambassadors. It's not meant to be exhaustive. Add to it as you further explore recruitment and you get an idea of what works and what doesn't!

Type of Ambassador	Tools Ambassadors Might Need
Literacy Volunteer Ambassador	<ul> <li>30-second message script</li> <li>Basic agency/program information</li> <li>List of recent volunteer appreciation events and recognition efforts</li> <li>Volunteer tutor testimonials</li> <li>Incentives (pens, magnets, etc.)</li> </ul>
Literacy Board Member	<ul> <li>30-second message script</li> <li>Basic agency/program information</li> <li>Information on the type of Board you have (operational/policy)</li> <li>Role and responsibilities of a Board member</li> <li>Expected time commitment</li> <li>Board member testimonials</li> <li>List of current Board members</li> </ul>

## **Develop an Online Recruitment Strategy**

The Internet is becoming an increasingly popular and costeffective tool for recruiting volunteers. The results from the CLO 2005 research found that a significant number of volunteers reported using the Internet to learn about volunteering opportunities. Volunteers found information on potential volunteer opportunities by:

- ► Visiting the literacy agency's site directly
- ► Learning about opportunities through a local volunteer centre site
- ► Checking out provincial or regional sites, such as Charity Village

Ensuring that your literacy agency is benefiting as much as possible from online recruitment doesn't have to be complicated. Depending on your resources, you may decide to simply include an advertisement on another volunteer recruitment site (such as the local volunteer centre). If your agency has its own website, it could be used as an important part of your overall recruitment strategy.

We invite you to use CLO's checklist to make sure your website is helping you as much as possible in your recruitment efforts!

# Recruit to the Max!

### **Internet Checklist**

<b>4</b>	Have we
	Clearly identified what types of volunteers we need?
	Identified the benefits for potential volunteers?
	Included a position description to help potential volunteers understand what is involved?
	Not provided so much information that they feel overwhelmed?
	Included testimonials from other volunteers and learners?
	Provided an application form that can be completed in different ways (online, mail, fax)?
	Regularly checked to make sure our online forms work properly (if appropriate)?
	Ensured the application form is as volunteer-focused as possible (i.e. what is in it for them)?
	Provided easily accessible contact information that can be used for additional information (e.g. e-mail address that is checked regularly, telephone numbers)?
	Ensured there is a mechanism for following up promptly with those using the website to complete and submit an application form?

It's great to see a list of things that should or could be included in a good volunteer recruitment website. Sometimes it helps to see how other agencies have actually put this kind of information together in an instructive and visually appealing way. If you're interested in seeing "volunteer recruitment in action," we invite you to visit the following websites:

Kingston Literacy: www.kingstonliteracy.com

Kingston Literacy has effectively addressed the question "Is this the right volunteer opportunity for you?" This question is asked as soon as you enter the volunteer section of the website. It's a great hook to get someone instantly interested.

Action Read Community Literacy Centre: http://home.golden.net/~actionr

Action Read clearly shows potential volunteers the many and varied ways that they can contribute to the organization. This way, if people decide that tutoring is not for them, they may still be interested in contributing in other ways.

Parkdale Project Read: www.nald.ca/ppr

Parkdale Project Read's website is excellent for volunteer recruitment because they really validate the role of volunteers within their program. They even have a "Learner's Gallery" that shows what students have accomplished thanks to the support of volunteers!

### **Volunteer Recruitment Advertisements**

Community Literacy of Ontario's survey of both agencies and volunteers found that print advertisements in the newspaper are still an important and valuable way to recruit volunteers. With this in mind, we have created a sample volunteer position advertisement targeted at older adults whose motivations closely match those reported by volunteers currently donating their time to community literacy agencies throughout Ontario.



# **25% of Your Community Needs Your Help!**

- ☐ Do you like to read?
- ☐ Want to help others who have difficulty reading and writing?
- ☐ Want to make a difference in your community?
- ☐ Want to meet new people and volunteer in a warm and supportive environment?
- ☐ Want to learn new skills and receive valuable training and skills development opportunities?

If you answered yes to any of these questions, we want to hear from you.

Literacy Agency ABC is a leader in adult literacy, providing tutoring and small group instruction to over 100 adult learners every year.

We currently have several openings for volunteer tutors and small group instructors. Call Jane today at (555) 123-4357 or visit us on the Internet at to learn more.

Literacy Agency ABC is a registered charitable organization and receives funding from the Ontario Ministry of Training, Colleges and Universities.

## **Volunteer Recruitment Tracking**

According to CLO's recent survey, 66% of community literacy agencies track their recruiting efforts. In the focus group with agency representatives, participants said that their agencies use a range of formal and informal methods, including:

- ▶ Questions on volunteer application and screening forms
- ► Questions during the screening sessions
- ► Tracking mechanisms during recruiting blitzes
- ► Discussions in staff meetings
- ► General inquiries with volunteers

I know that half the money I spend on advertising is wasted; the trouble is, I don't know which half.

– John Wanamaker

For those agencies that use a variety of channels for delivering their recruitment message, tracking can be more difficult because it is often a challenge to accurately identify which channel was the most important in persuading the person to inquire about volunteering. For example, when interviewing a new volunteer, you might ask how she heard about your agency. She might say, "Well, I remember seeing that really great article in the newspaper about two months ago where the volunteer was profiled, and then I saw you at the Community Fair last weekend, so I went online and found your website. That's when I decided to call."

Which of these three channels was the most effective in persuading the person to volunteer? Was it the website? But if it had not been for the community event, perhaps the potential volunteer would never have gone to the website. And prior to that, she was inspired by the article in the newspaper.

Tracking and evaluating your recruitment efforts will provide you with both a subjective and objective appreciation for which methods work well and which do not.

We have included two tools that can help with your tracking. The first is a simple monthly log. At the end of each month, you are encouraged to identify the different media, events and interpersonal channels and vehicles that your agency used to recruit new volunteers and the number of volunteers you can attribute to the different methods. After six months, you can then consider which recruitment methods have been the most effective.

# CLO's Recruitment Tracking Log

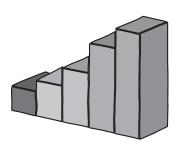
	Number of Volunteers					
Channel/Vehicle	Sept.	Oct.	Nov.	Dec.	Jan.	Feb.
Media						
► PSA—International Literacy Day	3					
➤ 30 second radio spot—International Literacy Day	1					
► Newspaper article — Family Literacy Day					2	1
► ABC Canada TV ads	1	1				
<b>&gt;</b>						
<b>&gt;</b>						
<b>&gt;</b>						
Events						
► Open House — International Literacy Day	2					
Christmas Volunteer Appreciation Party						
► Guest speaker - Rotary			2			
► Mall display — Family Literacy Day					1	
<b>&gt;</b>						
<b>&gt;</b>						
Interpersonal						
➤ Volunteer challenge—ask each volunteer to recruit another volunteer		4	4			
<b>&gt;</b>						
<b>&gt;</b>						
<b>&gt;</b>						
<b>&gt;</b>						
<b>&gt;</b>						

The second tool is designed to help you evaluate both the effectiveness and efficiency of the various recruitment channels and vehicles you have used. Begin by considering how productive each recruitment channel and vehicle was by referring to the number of new recruits in your monthly log.

Next, consider how efficient each was by reviewing the amount of time and money your agency invested into each one. For example, you might find that a volunteer recruitment night was effective because your agency obtained three new volunteers. However, you might also identify that this method demanded significant financial and human resources and was therefore not very efficient.

Using CLO's Recruitment Effectiveness and Efficiency Tool, rate both the effectiveness and the efficiency of each recruitment channel/vehicle using a scale of 1 to 10, where 1 is very poor and 10 is excellent.

## **Recruitment: Summary of Practical Steps for Improvement!**



When Literacy Agency ABC decided to start their volunteer recruitment, they reviewed their needs by using the Recruitment Planning Checklist. They realized that their first objective would be to write or rewrite the volunteer position descriptions for both the tutors and fundraisers as well as for event volunteers. In reviewing the initial position descriptions, they determined that not enough was said about the benefits for the volunteers. In other words, they were not volunteer-centric.

With a solid draft of the revised position descriptions in place, the Executive Director of Literacy Agency ABC turned her attention to segmenting the volunteer market to make sure that both the messages and the channels they would use to recruit new volunteers would be as effective and efficient as possible. She realized that the "one message fits all" method they had used in the past was probably not getting through, particularly to younger adults, one of the key market segments Literacy Agency ABC had

# Recruitment Effectiveness and Efficiency Tool

Channel/Vehicle	Effectiveness (1-10)	Efficiency (1-10)
Media		
► PSA—International Literacy Day	7	8
<b>&gt;</b>		
Events		
► Mall display — Family Literacy Day	5	5
<b>&gt;</b>		
Interpersonal		
► Volunteer Challenge	9	9
<b>&gt;</b>		_
<b>&gt;</b>		
<b>&gt;</b>		
<b>&gt;</b>		

identified for fundraisers and the reading festival planned for the summer. By talking with current volunteers and by looking at a recent report on youth in their community, she felt they had a good understanding of the demographics, behaviour and psychographics of youth in the community. Armed with this information, they used the Message Development Checklist to help them create several possible messages focusing on employment and skills development that they thought would appeal to younger adults.

In considering the different channels to reach younger adults, she first thought about television and radio but quickly realized that there was not enough money in their budget to develop an appropriate ad, and she worried that their usual public service announcements (PSAs) would not yield the desired results. Instead, Literacy Agency ABC decided to focus their energies and resources on working with their current volunteer base to recruit youth. From their research, they knew that younger adults were more likely to volunteer if they were asked and if someone they knew was volunteering. With this in mind, they worked with two current youth volunteers to create a 30-second message script. They also put together an incentive package that could be handed out to youth, one that included a Literacy Agency ABC pen and calendar (which they had made for a previous project). They also decided to review their website to make sure it conveyed a youth-friendly message, particularly the page on volunteerism.

In evaluating the success of their recruitment efforts, they modified the Recruitment Tracking Tool to suit their needs. After six months, they found they had recruited 22 new volunteers, including three new Board members, three volunteers for a Public Relations Committee, an office volunteer, a website designer and thirteen tutors, several of whom were youth (21-30 years of age). By using the Recruitment Effectiveness and Efficiency Tool, they discovered that the Volunteer Challenge was their best recruitment method (a score of 9 for both effectiveness and efficiency).



# **Additional Resources**

Resource	Source	Usefulness	Cost	How to obtain
"Learner Recruitment and Retention Toolkit"	Community Literacy of Ontario	A great resource for general ideas on recruitment and retention	\$65.00	Issued to all community literacy agencies in 2002. Copies available by email request to clo@bellnet.ca
"The Volunteer Recruitment Book"	A book by Susan Ellis (2002)	A good overview of some key motivations (and a special section on using the Internet as a recruitment tool)	\$33.95	Available at most libraries and book stores
Building Volunteer Value: A Marketing Based Workbook for Recruitment and Retention	Capacity Builders at OCSA http://www.capacitybuilders. ca/publications.htm	Includes numerous resources and is based on a relationship marketing model, which is designed to improve volunteer relationships by considering each volunteer's "needs, wants and differing levels of value to the enterprise."	\$19.99	Available from Capacity Builders
"Volunteer Management: Mobilizing all the Resources of the Community"	A book by Steve McCurley and Rick Lynch	An excellent resource on volunteer management including recruitment	\$12.95	Available at most libraries and book stores
"The Tipping Point: How Little Things Can Make A Big Difference"	A book by Malcolm Gladwell	A very good and easy-to- read overview of social networks	\$19.95	Available at most libraries and book stores
ABC's of Recruitment	Community Literacy of Ontario http://www.nald.ca/PROVINCE/ ONT/volman/ABC/abc.htm	A collection of recruitment tips from various literacy agencies	Free	Internet
Literacy Basics Website	Community Literacy of Ontario www.nald.ca/literacybasics	This self-directed website contains excellent material on recruitment	Free	Internet

Resource	Source	Usefulness	Cost	How to obtain
Beyond Recruitment: Recruiting and Maintaining Volunteers	Community Literacy of Ontario http://www.nald.ca/PROVINCE/ ONT/volman/beyond/beyond. htm	Self-guided workbook on recruiting and maintaining volunteers	Free	Internet
Strategic Recruiting: Using Creative Communication Principles to Find the People You Need	Community Literacy of Ontario http://www.nald.ca/PROVINCE/ ONT/volman/Recrutin/1.htm	Workbook uses creating communication principles to find volunteers	Free	Internet
Recruiting Volunteers Factsheet	Ontario Ministry of Agriculture and Food www.gov.on.ca/OMAFRA/english/rural/facts/96-005.htm#intro	Excellent tool for recruiting volunteers	Free	Internet
Ontario Network of the Canada Volunteerism Initiative Website	www.volunteer. on.ca/English/index. cfm?fuseaction=resources.main	Informative section called 'Tools and Research'	Free	Internet
Volunteer Canada Website	www.volunteer.ca	Valuable information on recruitment	Free	Internet
Charity Village website	http://www.charityvillage.ca /cv/research/rvol.html	Numerous resources on volunteer recruitment	Free	Internet
Volunteer Canada	http://www.volunteer. ca/volcan/eng/content/vol- centres/province_results. php?p=11	List of current volunteer centres in Ontario	Free	Internet
Energize website	http://www.energizeinc.com/	A wealth of articles and resources on volunteer recruitment	Free	Internet
TOTAL Non- Profit Resources website	http://www.tnpr.ca/html/ static_shtml/library_intro. shtml	Various resources on recruitment and other topics	Free	Internet
Ontario Ministry of Citizenship and Immigration website	http://www.citizenship.gov. on.ca/english/index.html	Electronic tools and software for voluntary sector including VOIRap, a volunteer recruitment and management software	Free	Internet



# Volunteer Screening

I believe that the program is successful because everyone involved, learners, tutors, and staff all work together to reach the learner's literacy goals. I'm very happy to be part of a program that helps others.

—Literacy Volunteer—

### Introduction

Volunteer screening has become an integral part of volunteer management for many not-for-profit organizations. Although commonly used by organizations working with children, the elderly and other vulnerable segments of the population, many other organizations have come to recognize the importance of volunteer screening for protecting their program participants, staff and other volunteers.

# **Volunteer Screening: Making the Case**

With their recruitment plan nearly complete, the Executive Director of Literacy Agency ABC and the Chair of the Board turned their attention to the topic of screening prospective volunteers.

Recent reports in the media concerning inappropriate volunteer activities with a youth group reinforced the importance of screening and the vulnerability of Literacy Agency ABC's learners. Although the organization had always had an informal process for screening, relying mostly on the volunteer application form and the interview, both the Executive Director and the Chair felt they needed to formalize the process more.



### What CLO's Research Told Us!

Community Literacy of Ontario's recent research found that 98% of community literacy agencies use one or more methods for screening potential volunteers. The table below shows that the two most common methods used by literacy agencies are volunteer interviews and application forms. Clearly written job descriptions and reference checks are also used by the majority of agencies, while only 37% of agencies rely on police checks.

Screening Method	Frequency of response (%)
Volunteer interviews	96%
Volunteer application forms	94%
Clear job descriptions for volunteers	79%
Reference checks	63%
Police record checks	37%
Other	19%

Other screening methods reported by literacy agencies include:

- ► A basic tutor training course
- ► Phone and/or e-mail screening before the interview
- ► An online orientation
- ► A confidentiality commitment form
- ► A risk assessment

# Why is volunteer screening important for literacy agencies?

to protect their students, staff and other volunteers from harm. Additionally, an effective screening process will provide

All programs that rely on volunteers to help them deliver their programs have a moral as well as a legal obligation

Organizations are not obliged to accept everyone who wants to volunteer. However, they are obliged to do everything reasonable to protect those in their care.

-Volunteer Canada, 2001

your agency with a number of recruitment and orientation benefits. A good screening process will:

- ► Allow you and your volunteers to have a high level of confidence in their ability to do their work
- ► Help place volunteers in positions that suit their abilities and interests
- ► Help volunteers understand their rights and responsibilities
- ► Increase the confidence and feelings of safety of students, staff and other volunteers
- ► Increase the perceived professionalism of your organization in the community<sup>1</sup>

## How much screening do we have to do and how do we do it?

The simple answer is more screening is better than less. However, it is important to remember that the screening process should be based on the tasks and positions within your agency, not on individuals who may apply. Screening is foremost concerned with identifying the level of risk associated with the agency positions and then applying the appropriate level of screening. For example, having a volunteer help prepare a monthly newsletter presents much less risk than having a volunteer position that involves oneto-one tutoring offsite away from supervision. Since the offsite tutoring position involves more potential risk, then the screening process developed for this type of position should be more intensive and thorough than the screening

<sup>1.</sup> See Community Literacy of Ontario's Literacy Basics website http://www.nald.ca/literacybasics



process that would be put in place for a volunteer who helps with the monthly newsletter.

Developing a comprehensive screening system begins with examining both the client group your agency serves and the working environment. You may want to start with the following three simple questions:

- ▶ Who in the organization is vulnerable?
- ► What are the personal, situational or environmental risks that make them vulnerable?
- ► How could we make them less vulnerable?

## **Getting Ready to Screen – A Screening Checklist**

Volunteer Canada's 10 Safe Steps:

#### **Before you hire:**

- 1. Determining the risk
- 2. Position design and description
- 3. Recruitment process

#### The hiring process:

- 4. Application form
- 5. Interviews
- 6. Reference checks
- 7. Police record checks

#### Managing the volunteer:

- 8. Orientation and training
- 9. Supervision/evaluation
- 10. Participant follow up

Like many areas of volunteer management, developing a comprehensive screening process may seem more daunting than it really is. As evidenced by the results from CLO's agency survey, many literacy agencies have already incorporated one or more of the key elements in the screening process. Some agencies may find they only need to incorporate certain aspects of the screening process into their practices, based on their perceived level of risk for the different positions.

The following checklist was developed by Volunteer Canada as part of the Safe Steps resource and provides a simple way of making sure you have identified all the sequential tasks associated with creating a thorough screening system for your literacy agency. Have a look; you'll probably find your organization has already completed many of these!



# Screening Checklist<sup>2</sup>

<b></b>	Have we
	Identified the level of risk for each position?
	Determined the appropriate screening measures for the position?
	Ensured our recruitment materials include a positive and confident statement that we will be screening new volunteers?
	Designed interviews based on position descriptions?
	Developed an application form?
	Developed reference check questions based on position descriptions?
	Developed policy around accepting or not accepting volunteers?
	Developed an orientation and training package?
	Developed an orientation and training visual presentation?
	Designed guidelines for supervision?
	Created evaluation forms?
	Developed policies on documentation (e.g. what kind of information is to be kept confidential and what kind of information can be made accessible to staff and volunteers)?
	Developed policies on selection and termination?

<sup>2.</sup> Volunteer Canada, Safe Steps: A Volunteer Screening Process, http://www.volunteer.ca/volunteer/pdf/SafeSteps.pdf

## **Identifying and Assessing the Risks**

As previously mentioned, your agency may determine that certain steps or tasks in the screening process are not necessary because of minimal risks associated with one or more positions. However, each position is different and carries with it a different level of risk. Therefore, it is difficult to know which screening process steps you need to pursue—and which you can skip—until you have identified the possible risks for each position.

It's important to know *what* possible risks you may be dealing with before you move on to assessing those risks. Many agencies probably identify risks in an informal way, but actually putting some of this information down on paper is a good idea. It's the first step in responsible risk management and may be the only step that some smaller organizations can manage, with limited human and financial resources.

Volunteer Canada recommends using a *continuum of risk* (low, medium and high) to help identify the various risks associated with a volunteer position. Volunteer Canada has also identified five key factors to help identify the various risks associated with each position or activity.

- 1 What kind of participant will the volunteer be working with?
- **2** What is the setting in which the volunteer will be working?
- **3** What is the nature of the activity?
- **4** What is the level of supervision while the volunteer is working?
- **5** What is the nature of the relationship between the volunteer and the participant?

# Continuum of Risk<sup>3</sup>

Risk	Low	Medium	High
Participant	► Healthy adult	▶ 15-year-old	► 12-year-old with disability
			➤ senior with health challenges
			► child or baby
Setting	► Meeting room or hall	► Tents or cabins	► Participant's home
	► Offsite public space	<ul><li>Classrooms with doors which have windows</li></ul>	<ul><li>Classrooms with doors without windows</li></ul>
			<ul> <li>Offsite private or home meetings with children and youth</li> </ul>
			► Car
Activity	► Religious literature	► Youth group meeting	► Friendly visiting
	studying  Playing cards		<ul><li>Coaching a traveling sports team</li></ul>
	► Administrative work		► One-to-one instruction
Supervision	► Supervisor always present	► Supervisor occasionally present	Little to no supervision
	➤ Always in large groups	➤ Some documentation of meetings or events	➤ No documentation of meetings or events
	➤ Documentation of meetings		
Nature of	► Short-term	► Personal relationship	▶ One-to-one
relationship	► Non-intense	► Extends over time	relationship
	► Non-intimate		► High level of intimacy and influence

<sup>3.</sup> Volunteer Canada, Safe Steps: A Volunteer Screening Process, http://www.volunteer.ca/volunteer/pdf/SafeSteps.pdf



To demonstrate how this chart could be useful to programs, let's apply it to a potential volunteer situation. Your agency has always had offsite tutors—that is, tutors who go to adult learners' homes to provide tutoring services. You've always believed that this is a positive part of your programming because it enables you to meet client needs. Clients don't have to forego literacy tutoring just because they have difficulty accessing transportation.

However, risk as it relates to not-for-profits has been in the news several times over the past month so you decide to take a look at what kind of risk could be associated with offsite tutoring. You know that many of your offsite "matches" were put in place because clients had medical challenges that made travel difficult.

According to Volunteer Canada's *Continuum of Risk*, this kind of tutoring service actually carries with it a high degree of risk. Let's look at this situation according to each of Volunteer Canada's categories for assessing risk.

#### **Participant:**

The Participant would be categorized as high risk because of the health challenges. What would happen in the event of a medical emergency during an actual tutoring session? It's possible that only the tutor would be there to try and take action. This is quite risky as it puts the tutor in a medical support position as opposed to a teaching or tutoring position.

Setting:

Volunteer Canada would categorize any volunteer activity that takes place in a participant's home as high risk.

**Activity:** 

Again, Volunteer Canada considers one-to-one instruction to be a high-risk volunteer activity.

Supervision:

As there is no form of supervision available if a tutor meets with a student in the student's home, this would also be considered high-risk by Volunteer Canada's standards.

So we can see how an activity like providing tutoring directly at a student's home is actually quite risky from a volunteer management perspective. Many literacy programs

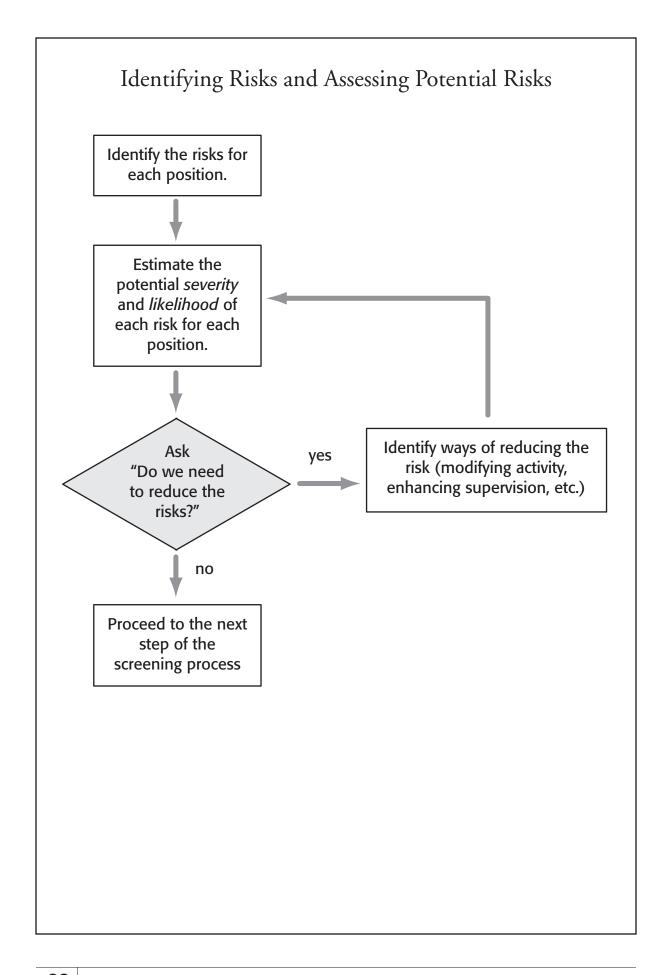
might be uncomfortable developing a policy that states that offsite tutoring is not permitted either because they have always provided this service in the community or because they don't want to restrict services to those who need them. It's up to each agency to decide what to do with this information—the important thing is to identify the potential risks that might be involved in agency operations.

## **Assessing the Likelihood and Severity of the Risks**

For each position, determining what the risks are is only the beginning. Once you have completed that, you might take the next step of identifying the possible consequences, and the likelihood and potential severity of each risk. For example, you might determine for a certain risk that the likelihood of it happening is minimal; however, if it did happen, the consequences could be significant.

The following tools are designed to help you identify the various risks associated with a position and then predict both the likelihood and severity of the risks.

The following diagram created by CLO shows how an organization can progress from identifying risks to assessing potential risks. Again, you might be asking yourself, "Who actually goes to these lengths to assess risks in their program?" The reality is that more and more organizations are using these kinds of tools. They might not be using them with every volunteer position—perhaps only with those that are identified as carrying high degrees of risk. Having this kind of documentation is important though as it can provide tangible proof that your agency has seriously considered the roles that volunteers have in your program. This kind of information can also be invaluable to your organization in showing due diligence and in developing policies.





Once you have assessed each volunteer position for possible risks, you can then see if there are ways to reduce the risks for those positions with a high level of risk before proceeding. By minimizing the risks as much as possible—by changing certain elements of the position before hiring—you could be saving your agency time and resources in subsequent stages of the screening and intake phases.

CLO has provided you with a worksheet that takes the steps in the flow diagram above and helps you to think through those questions for volunteer positions within your agency.

#### Instructions:

- Using the Volunteer Risk Assessment Worksheet on the following page, list the potential risks and the possible consequences associated with each position. Essentially, you are asking yourself, "What are the possible things that could go wrong by employing the wrong volunteer in this position?" (You may want to use Volunteer Canada's five risk factors as a guide to help you identify your agency's particular volunteer risks.)
- 2 Next, estimate the likelihood of each risk occurring, using a scale of 0 to 10, where 0 is non-existent and 10 is certain.
- Then estimate the potential severity of the risk using the same scale, where 0 is not at all serious and 10 is devastating.
- Ask yourself if there are ways in which the risk can be reduced. Sometimes you can identify strategies to reduce risk (strategies for risk management).
- Now that you've assessed the likelihood and the severity of the potential risk, as well as any ways that you can reduce the risk as an organization, you need to ask yourself if you ultimately accept the risk or not!

To help you see how this tool might be used, we've used a real-life example. Literacy Agency ABC is contemplating hiring a volunteer Website Developer.

# Volunteer Risk Assessment Worksheet<sup>4</sup>

**Volunteer Position: Website Developer** 

Risk and Possible Consequences	Likelihood (0-10)	Severity (0-10)	Can the risk be reduced?	Accept the risk?
Lack of control over content	4	6	Write it into the position that the developer does not write content, only uses it to produce the website.	Yes
Developer uses software that s/he owns and does all work from home	8	8	Have Literacy Agency ABC buy the actual software that is required and ask the website developer to use the software in Literacy Agency ABC's office.	Yes
Lack of control over timing—putting up information on time sensitive events	5	6	Job description for website developer will address and make clear Literacy Agency ABC's expectations around "reasonable" time frames	Yes
Risk if volunteer leaves organization and nobody else knows how to maintain or update the website	7	7	At least one staff person from Literacy Agency ABC will take training (formal or mentoring through volunteer) in how to use the software.	Yes

<sup>4.</sup> The Volunteer Risk Assessment Worksheet was adapted from Literacy Link South Central's Risk Assessment module in Caution: **Do Not Inflate Beyond Capacity: A Network's Guide To Responsible Growth and Stakeholder Communication,** 2002.

We can see then that there are a number of risks that could be associated with a volunteer website developer. However, with a little bit of forethought (thanks to using this worksheet!), these risks can be reduced and accommodated.



**Hint:** The use of the Risk Assessment Worksheet does not need to be limited to volunteers. You might consider using this worksheet if your agency is approached about a community partnership or if you are considering the development of a new literacy program!

## **Volunteer Application Forms**

Once you have identified, assessed and reduced (if necessary) the risks associated with each volunteer position, Volunteer Canada recommends developing clear position descriptions. Clearly inform potential volunteers during the recruitment phase that your agency includes a screening system as part of the application process. In the Recruitment chapter of this toolkit, we discussed the importance of position descriptions and, therefore, will not go into further detail here.<sup>5</sup>

The fourth step in good volunteer management, according to Volunteer Canada's 10 Safe Steps, is developing the volunteer application form. The volunteer application form is typically the first concrete screening tool a potential volunteer will encounter. The purpose of the application form is to collect relevant information about a person to help you:

- ▶ assess that person's suitability for the position
- ▶ obtain contact information
- get permission to conduct reference checks (and police checks, if relevant).

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<sup>5.</sup> Additional information on these two steps of Volunteer Canada's Screening Process is available in CLO's A Guide for the Development of Policies & Procedures in Ontario's Community Literacy Agencies, Vol. 2; and Volunteer Canada's Safe Steps.



When designing the application form, you may want to consider the following:

1. Are we asking questions relative to the needs of the position (as outlined in the position description)?
2. Are we more concerned with the individual's educational background and/or experiences, or are we more interested in her/his motivations and attitudes?
3. Are we asking for more information than we really need?
4. Are the questions we have asked consistent with the Ontario Human Rights legislation?
5. Is our application form easy to understand and complete?
6. Can our application form easily be adapted for use on our website?
7. Have we determined how we will use the information for selection purposes?

On the following two pages, we have included a sample application form and reference check form.<sup>6</sup>



**Research Tip:** To view an excellent sample of an online volunteer application form, visit the Literacy Council of South Simcoe's website at <a href="http://www.nald.ca/province/ont/simcoe/vapp.html">http://www.nald.ca/province/ont/simcoe/vapp.html</a>.

Even if you have conducted a strong volunteer screening practice, it's a good idea to ask volunteers to sign a code of conduct policy statement. Ideally, have this statement signed by everyone who conducts business on behalf of your organization, including staff, members of the Board of Directors and learners. A Code of Conduct Policy Statement further outlines the kind of behaviour you expect from people who are connected to your agency. CLO has included a sample for you to review.

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<sup>6.</sup> The sample application form and reference check forms have been adapted from CLO's A Guide for the Development of Policies & Procedures in Ontario's Community Literacy Agencies, Vol. 2

# CLO's Sample Application/Interest Form

Name:						
Address:						
City:						
Province:		Postal Code:				
Phone: (Res.)		Phone: (Bus)				
Fax:	,	E-mail:				
What positions within this organization interest you?						
1.						
2.						
3.						
What skills and experience can you	bring to the organ	nization?				
Why are you interested in this type	of volunteer work	?				
Waling Canditions						
Working Conditions						
Times available:						
Preferred working location (or othe	r special needs or	concerns):				
Previous Volunteer Positions						
Name of organization:	Dates:		Position:			
Tasks and Duties:						
Name of organization:	Dates:		Position:			
Tasks and Duties:						
lasks and Duties.						
Name of organization:	Dates:		Position:			
Tasks and Duties:						
lasks and Duties.						
Other jobs, education, experier	nces (if applicabl	le)				
Where:		When:				
Description:						
Where:		When:				
Description:						
Special Skills:						
How did you hear about our agency?						

# Reference Check Form

I give my permission for (Agency Name) to contact the following people to conduct a reference check about my suitability for the positions identified above. I also give my permission for the agency to conduct a Police Records Check, if such a check is required for this positions in which I have indicated an interest.

Name	Position and Organization	Telephone		
1)				
2)				
3)				
I understand that this information will be kept in confidential files that can only be accessed by the Volunteer Coordinator, the Executive Director and myself.				
		(signature) (print name) (date)		

## Code of Conduct for Staff, Volunteers and Learners of "Literacy Agency ABC"<sup>7</sup>

#### **Expectations of All Literacy Agency ABC Members:**

All members of Literacy Agency ABC are expected to treat each other with courtesy and respect. This respectful behaviour includes:

- ► Treating all information about learners and volunteers with respect for their confidentiality and privacy
- ► Calling each other as soon as possible to cancel or rearrange an appointment
- ► Taking good care of Literacy Agency ABC resource materials, and returning borrowed items in a timely fashion

#### What is not acceptable behaviour?

Staff reserves the right at any time to ask a volunteer or learner to leave the program for any of the following behaviours, which will not be tolerated:

- ▶ Behaviour that indicates impatience or a negative attitude toward learners
- ► Racism, sexual harassment, verbal or physical aggression
- ▶ Betraying the confidentiality and privacy of a learner or volunteer
- ▶ Missing more than two appointments with no prior or follow-up call to explain the reason

#### **Literacy Agency ABC Policy on Harassment**

Literacy Agency ABC recognizes that every person should be free from harassment because of race, ancestry, place of origin, colour, ethnic origin, citizenship, creed, age, record of offences, marital status, sexual orientation, marital status, family status or handicap. Literacy Agency ABC acknowledges its responsibility to do all in its power to support and assist any of its members subjected to such harassment. If any volunteer or learner feels harassed, he or she should report the matter to the Coordinator (or appropriate staff member). Matters that cannot be dealt with satisfactorily will be taken to the Board of Directors.

have read Literacy Agency ABC's Code of Conduct and agree to its terms.			
Signed	Date		
(one copy to be kept by volunteer, staff or learner; and Agency ABC)	other to be kept in his/her file at Literacy		
7 Adapted from People, Words and Change's Code of Conduct.			

<sup>/</sup> Adapted from People, Words and Change's Code of Conduct



#### **Volunteer Interviews**

The fifth step in the Safe Steps screening process—interviewing—is a critical tool agencies can use for assessing the appropriateness of a candidate for a position. Literacy agencies identified this as the number one method used for screening volunteers. Volunteer Canada says, "The interview provides not only an opportunity to talk to the potential volunteer about their background, talents, skills, interest and availability, but also to explore any doubts the organization may have about the suitability of the candidate."

The following checklist<sup>8</sup> may help you prepare for and conduct your volunteer screening interviews.

<b>1</b>	Have we
	Identified who from our organization is to conduct the interview?
	Explained the interview process to the applicant?
	Described the position specifically, using the position description?
	Described the screening procedures of our organization?
	Documented the candidate's responses to the questions and kept them on file?
	Looked for general values or attitudes towards our clients that fit with our organization's values?
	Asked all applicants the same basic questions for consistency?

According to Volunteer Canada, when designing your interview questions, you should encourage responses that allow you to judge the following:

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<sup>8.</sup> Adapted from Government of Canada, CAP Volunteers: A Growing Need, http://www.nfcap.nf.ca/resources/manual.pdf

- ► Relevant work-related experiences
- ► Relevant formal and informal education
- ► Eagerness to work
- ► Ability to work with others
- ► Integrity
- ► Supervision preferences
- ► Initiative and judgement.

The Interview Question and Answer Form on the following page provides you with 10 key questions that candidates should be asked as part of their interview. Of course, you will likely want to add specific questions related to the position, which you would draw from the position description.

#### **Police Record Checks**

Despite the built-in limitations of PRCs, they do serve a purpose, particularly in those cases (high-risk positions) where the organization is committed to a full and complete screening process. The PRC will also signal, in a very public way, that the organization is concerned about the safety of its participants.

-Volunteer Canada, Safe Steps.

According to Volunteer Canada, "Police record checks [PRCs] are probably the most misunderstood element of screening. Too many people believe that doing a PRC means that the person has been screened. Nothing could be further from the truth."

Therefore, although over one-third of community literacy agencies in Ontario are conducting police record checks as part of their screening, it is important to remember that these constitute only one step in the process and should not be used to replace other key steps.

If your organization is considering implementing police record checks as part of your screening process, we encourage you to review Community Literacy of Ontario's A Guide for the Development of Policies & Procedures in Ontario's Community Literacy Agencies, Vol. 2 and Volunteer Canada's Safe Steps at http://www.volunteer.ca/ volunteer/pdf/PoliceRecordChecks.pdf.

# CLO's Volunteer Interview Questions and Answer Form

The following are some standard questions that you can use to interview potential volunteers. Depending on the type of specific volunteer position for which you are interviewing, you may want to add some additional questions that would help you to assess a potential volunteer's supervisory preferences, communication needs, integrity, initiative and judgement.

Qu	estion:	Candidate's Answer:
1.	How did you find out about this volunteer opportunity?	
2.	Have you given your time previously as a volunteer?	
3.	Why do you want to volunteer with our organization?Why do you want to volunteer for this particular position?	
4.	What would you like to get out of the volunteer experience?	
5.	What are your interests?	
6.	What skills, abilities and qualities do you have to contribute to the organization?	
7.	How long do you think you would like to be involved with our program?	
8.	Do you have any special needs?	
9.	Are you prepared to attend training and/or information sessions?	
10.	Are you prepared to undergo screening and/or a background check for our safety, your safety and our clients' safety?	

### Volunteer Screening: Not Just a Matter of Going Through the Motions...

A very important part of volunteer screening is making sure that your program properly supports your volunteers and that you are able to retain volunteers, once you have attracted them to your agency. However, volunteer screening is also about making sure that you don't attract the kinds of volunteers who are not a good fit for your organization. Sometimes, if you are screening properly, you will have to say "no" to a volunteer. This can be very difficult to do, especially if you do not have some very important program supports in place, like policies around Volunteer Screening.

It is usually after a Volunteer Interview that you may get the feeling that a potential volunteer is not appropriate for your agency. This is part of what makes the questions you ask crucial during this phase of the volunteer screening process. Volunteer Canada, in Safe Steps, suggests that you try to ask questions that will tell you something about a potential volunteer's integrity, initiative and judgement. These are, in fact, great bases for interview questions. It's important to keep in mind though, that there are questions that ought NOT to be asked during the volunteer interview process. For an excellent guide on how to ask questions that could be sensitive from a legal perspective, refer to www.volunteer.ca for a great chart.

After the interview, you may decide that a potential volunteer is not appropriate. Before you officially reject a candidate however, there are some guidelines to follow:

"Any time a candidate is denied a position it should be for a legitimate reason which can be supported. For example, your organization has carefully determined what is appropriate or necessary for a certain position and makes decisions on that basis. Here are some basic tests:

- ► Is the requirement made in good faith, i.e. are you requiring a certain qualification because it is really needed in this position or is it to keep certain people out of the organization?
- ► Is the requirement reasonable, e.g. are you asking for 10 years' experience when three will suffice?
- ► Have you made an effort to accommodate, e.g. is it possible to alter the requirements of the position to accommodate someone and, if so, would that compromise the safety and security of the members?"

## What if it's Just a Gut Feeling?

Sometimes you can't find a concrete, tangible reason for not accepting a potential volunteer but your gut or your intuition still says that the potential volunteer would not be a good fit for your organization. What do you do?

We all have feelings like this from time to time. However, the reality is that you must identify a logical, concrete, documented reason for not wanting to accept a volunteer. If you do not, then you risk legal action by the potential volunteer. A couple of strategies that you might consider putting in place are to:

- ► Document! For example, if you feel the applicant is evasive, then document the questions to which a satisfactory answer was not provided.
- ► Have other staff join you in the interview process—this kind of "team" interviewing can help to validate your intuition or put your mind at ease.
- ► Formalize your volunteer screening process. This entire chapter is designed to give you tangible, concrete tools that you can rely upon to make the best decisions possible for your organization and those you have a responsibility to protect.

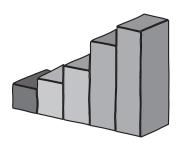
For more information on what to do when volunteers might not be appropriate for your organization, refer to: http://www.sbed.gov.bc.ca/SportBranch/ReportPublications/sportsafe/ss\_volun.htm

## **Developing a Policy around Volunteer Screening**

If you don't already have a policy in place around volunteer screening, consider developing one. For an excellent policy on volunteer screening, refer to the following website: www.kitcheneryouthsoccer.com/leagues/8124/documents/RepApp2006.doc.

You will see how this policy incorporates many of the themes and tools that have been discussed in this chapter. Overall, the impression is one of professionalism, care and concern for the clients served by the organization.

# **Volunteer Screening: Summary of Practical Steps for Improvement!**



Literacy Agency ABC began with a review of the descriptions for the tutoring and website developer positions they planned to recruit for in the fall. After completing a risk assessment for each position, they felt there was minimal risk associated with the website developer position, but they had significant concerns about the tutoring position, particularly concerning the site where the learning took place and the lack of direct supervision. They realized that for 25 years, tutors and the students had been meeting in a variety of different places, including the learners' homes and other non-public places.

To help reduce the risk, they decided they would specify to both the learner and the new volunteer(s) that, for their own safety and security, Literacy Agency ABC would insist that the actual tutoring take place either at the Agency office or at the local library. They also decided to raise the issue of where tutoring takes place at the next board meeting and propose reviewing their screening policies.

Next, using the Screening Checklist, the Executive Director reviewed the different recruitment materials and rewrote several of them to make sure the message about screening was clear. She also revised the general application form for both the tutoring and website developer positions



and created appropriate interview and reference check questions.

When it was time to interview, the Executive Director conducted the interviews, using a standardized set of interview questions. At the end of the process, the Executive Director felt confident she had done as much as she could to reduce the risk of selecting "undesirable" volunteers, while at the same time increasing the agency's and the volunteers' understanding of the volunteers' roles, responsibilities and rights. One of the new volunteers even commented on the professionalism of the entire process and said she felt more confident and safe because of the thorough screening process.



## **Additional Resources**

Resource	Source	Usefulness	Cost	How to obtain
"A Guide for the Development of Policies and Procedures in Ontario's Community Literacy Agencies, Vol. 2"	Community Literacy of Ontario	Includes entire chapter on screening and pamphlets on various screening topics	\$35.00	Available by email/ mail request to CLO: clo@bellnet.ca
"The Screening Handbook: Protecting Clients, Staff and the Community"	The Canadian Association of Volunteer Bureaux and Centres	Provides information on legal and ethical questions regarding screening. It includes step-by-step instructions, sample interview questions, application forms, etc.	\$15.00	Available from Volunteer Canada
"Duty of Care"	A 15-minute video narrated by Al Waxman	Introduction to various screening methods and the importance of screening.	\$15.00	Available from Volunteer Canada
"Beyond Police Checks: The Definitive Volunteer and Employee Screening Guidebook"	Linda Graff and Associates (1999)	A comprehensive how- to manual on screening paid and unpaid staff in positions of trust. Includes tips and resources	\$28.95	Can be ordered directly from Linda Graff's website: http://www.lindagraff.ca/BPCTDVESG.html
"Safe Steps: A Volunteer Screening Process"	Volunteer Canada http://www.volunteer. ca/volcan/eng/content/ screening/screening. php?display=3,2,3	Stresses 10 steps that have become benchmark for screening in Canada	Free	Internet
Literary Basics website	Community Literacy of Ontario www.nald.ca/literacybasics/	Good section on volunteer screening and intake	Free	Internet
Volunteer Canada website	http://www.volunteer. ca/volcan/eng/content/ screening/screening. php?display=3,2,3	Includes pdf files on Safe Steps Also free pamphlet called "Understanding Police Records Checks"	Free	Internet



# Training Volunteers

My daughter, who teaches adult learners, suggested that I might like this type of volunteer work because I'm a retired elementary teacher. I decided to take the training sessions. I'm glad I did. Well organized!

—Literacy Volunteer—

#### Introduction

Volunteers make up a very important part of community-based literacy programs. It's important to adequately prepare volunteers for their roles in Ontario's literacy programs—that is, to train them!

The past several years have shown some significant changes in the ways in which volunteers are sharing their skills with literacy programs. This, in turn, means that a focus on volunteer training is even more essential and the planning that will go into volunteer training will need to be more varied. Because the nature and the effects of these changing roles of volunteers could be a resource in and of itself, we're not going to address that specifically in this chapter. Rather, we have tried to provide a range of tools and resources that will enable literacy practitioners to address each type of volunteer role that they create within their agencies. Preparing for the delivery of volunteer training is essential -- and don't forget that volunteer training isn't limited to volunteer tutors! CLO hopes, in this chapter, to provide practitioners with some research and practical examples of how to use tools related to volunteer training.



#### **Training Volunteers: Making the Case**

After reading CLO's Literacy Volunteers: Value Added research report and learning that 40% of Ontario's volunteers want additional learning opportunities, the Executive Director of Literacy Agency ABC decided to poll her agency's own volunteers to see if they wanted training beyond the basic tutor training already provided by her agency. The results were consistent with CLO's findings: Literacy Agency ABC's volunteers were hungry for more training, particularly around learning disabilities. She also learned that a small group of board and committee members were interested in board development training.

#### What CLO's Research Told Us!

While 92% of volunteers are satisfied with the training that they have received, 40% of literacy volunteers still want additional training to help them in their volunteer capacity.

-CLO 2005

From CLO's recent research, it is clear that initial and ongoing training is very important to literacy volunteers. When asked what additional supports they would like to receive to help them with their volunteer work, 40% said they would like to receive additional training to help them in their volunteer role.

It is also clear from CLO's research that literacy agencies are doing a good job training their volunteers. All but one agency surveyed (98%) said they offered training to their tutors, and 58% reported that they offer training opportunities to volunteers who are not tutors. Volunteers themselves said they are satisfied with the training they do receive. A very significant percentage of volunteers (92%) who reported receiving training are very satisfied, mostly satisfied or satisfied with the training received.

As well as they are already doing, agencies told CLO that they are facing a number of challenges with volunteer training. For example, in a recent focus group held by CLO, literacy practitioners reported the need for cost-effective training, especially for rural communities. When asked what kinds of resources would further benefit volunteer training efforts, survey participants identified a variety, including the following:



- ► Any kind of training that is online
- ► More print and/or web-based materials
- ► More conferences in the literacy field that are available to volunteers
- ► Specific training related to the learners they are working with, especially those with learning disabilities
- ► Training manuals
- ► Additional financial resources to offer training
- ► Resources and opportunities for training for administrative volunteers (not just literacy tutoring)

### More training, please!

With 40% of volunteers saying they would like additional training, literacy agencies need to make ongoing training, as well as orientation training, a central part of their volunteer management plan. Additionally, it is important that agencies have a process for training all volunteers, not just tutors. Board and committee members, administrative volunteers, and special events or episodic volunteers may want and/or need training to help them do their jobs even better. Although many literacy agencies worry that increased training will prove too much of a strain on their limited resources, providing meaningful training opportunities will improve services and volunteer retention efforts. Agencies might consider looking at their current volunteers' other skills—some volunteers may have skills that they could share with other, newer volunteers.

### **Developing a volunteer training plan**

There are four important steps to consider when planning and implementing volunteer training:

- (1) planning,
- (2) designing,
- (3) delivering and
- (4) evaluating.

#### Planning

In planning your volunteer training, you should consider the following questions:

- ➤ What volunteer training should your organization provide to meet your organization's mission and mandate?
- ➤ What training do your volunteers want and need to do their job effectively?

The training that you design and deliver should help your agency reach its mission and goals. For example, in examining your agency's goals, you may have identified the need for additional volunteer training on working with adult learners with learning disabilities, in addition to the ongoing tutor training provided by your organization. As well, you should consider the training needs that volunteers themselves have requested (perhaps during the annual performance appraisal or by reviewing application forms submitted by volunteers). By combining organizational and volunteer training needs you can start to plan for the training to be offered in the upcoming year.

CLO has developed some practitioner training resources that may help you in your planning. For example, Community Literacy of Ontario, in a wide consultation process with the Ontario literacy community, developed a provincial standard for the training of volunteer tutors in 2003. You can view this provincial standard here: www.nald.ca/PROVINCE/ONT/CLO/pratrain/provstan/tutors. htm. To access all our practitioner training research (conducted between 2000 and 2003) please visit our "Skills for the Future" research at: www.nald.ca/PROVINCE/ONT/CLO/pratrain/pt.htm.

#### Designing the training session

Once you have assessed what training should be offered by your organization, the next step is to design a training session, whether for tutors or other volunteers. To help you with designing your training session, CLO has developed some key questions.

# **Designing the Training Checklist Ouestions to Consider**

- ▶ What are the learning outcomes for the training session?
- ► What is the most important material to be covered? What's second, third, fourth, etc.?
- ► How long will the training be?
- ► How many people will we have?
- ▶ What kinds of resources will we need?
- ▶ Do the volunteers need to prepare in advance?
- ▶ What are the learning styles of the volunteers?
- ► What formats will we use for the training (e.g. activities, role-plays, lecturettes, etc.)?
- ➤ Who is going to facilitate the learning, and what is her/his facilitation style (e.g. humorous, serious, interactive, etc.)?
- ▶ What kinds of activities do we want to incorporate?
- ▶ Do we have a theme for the training, and how will we incorporate that into the materials and the day?
- ► How and when will we have volunteers practise what they learn?

#### **Putting the Training Checklist into Action!**

Designing a training session is about more than just hiring a facilitator. The best training seminars are well planned. Most of the information you'll record by using this checklist will be intuitive—things you think about as a natural result of planning for a training session. However, the typical literacy agency is very busy and it's easy to get distracted and not give your full attention to each of these areas. By using this checklist, you can make the planning for training sessions transparent and clear to everyone connected to your agency. If you are new to your position, this checklist can serve as a great guide to help make sure

you've covered all the essential areas for a successful training session.

As we stated in "Making the Case," the Executive Director of Literacy Agency ABC decided it was necessary to provide a volunteer training session on learning disabilities. Let's see how the Training Checklist can be applied to a particular training session—in this case, one specific to learning disabilities.

#### Oelivering the training

Delivering an effective training program that meets the needs of both your agency and your volunteers, and fits within your budget can be difficult. Even if you feel that you fully understand the needs and the possible costs involved, does your agency have the capacity to deliver the training? It's not enough to just know what you need for successful and relevant volunteer training—you also need to know *how* you're going to deliver this training. Matching what volunteers need with what the agency can afford to develop and deliver can be quite a challenge for community-based programs!

When planning volunteer training, community literacy agencies need to spend time considering not only what is going to be provided, but *how* that training ought to be delivered. The "*how*" can be significant!

Here are some key questions you might consider asking, (see page 117) either as staff or as part of a larger strategic planning session:

# Training Checklist

#### **Topic: Learning Disabilities**

<b>Planning Question</b>	Example
► What are the learning outcomes for the training session?	<ul> <li>Knowledge of the main ways that adult learners can be impacted by learning disabilities (e.g. auditory, visual, organizational)</li> </ul>
	<ul> <li>Knowledge of the more common signs that learning disabilities might be present</li> </ul>
	An understanding of how, and under what circumstances, it's appropriate to talk to adult learners about potential learning disabilities
	<ul> <li>Strategies for working with adult learners who might have learning disabilities</li> </ul>
	An ability to differentiate between the primary types of learning disabilities
	➤ An ability to identify when potential learning disabilities might be impacting an adult learner—skills to administer an informal assessment under the guidance of the Volunteer Coordinator
	<ul> <li>Communication skills to talk to adult learners (when appropriate) about potential learning disabilities</li> </ul>
	➤ An ability to identify and deliver strategies for working with adult learners with potential learning disabilities.
► What is the most important material to be	► Identification
covered? What's second, third, fourth, etc.?	<ul><li>Strategies</li><li>Communication</li></ul>
► How long will the training be?	► Six hours
► How many people will we have?	► Limit of 25 people
► What kinds of resources will we need?	<ul> <li>External facilitator—learning disability expert</li> <li>Handouts</li> <li>Lunch</li> </ul>
➤ Do the volunteers need to prepare in advance?	▶ No
► What are the learning styles of the volunteers?	► We know that they are a mix of visual, auditory and kinesthetic learners

# Training Checklist

#### **Topic: Learning Disabilities**

► What formats will we use for the training (e.g., activities, role-plays, lecturettes, etc.)?	<ul> <li>▶ Flipcharts</li> <li>▶ Lecturette</li> <li>▶ Role-plays – communications</li> <li>▶ Guest speakers – learners from LDAssociation</li> </ul>
➤ Who is going to facilitate the learning, and what is her/his facilitation style (e.g., humorous, serious, interactive, etc.)?	► External facilitator — interactive and personal style
► What kinds of activities do we want to incorporate?	<ul> <li>Role-play – how to communicate with a learner with learning disabilities</li> <li>Guest speakers who have been impacted by learning disabilities</li> <li>Case studies – what would you do if an adult learner did X?</li> </ul>
➤ Do we have a theme for the training, and how will we incorporate that into the materials and the day?	<ul> <li>▶ Basic theme is learning disabilities</li> <li>▶ Recommend additional resources</li> </ul>
► How and when will we have volunteers practise what they learn?	► See role-playing exercises

# Delivering the Training—Key Questions

Key Question	Considerations
How much time do we need to deliver the training?	You might need to have fifteen hours (for original tutor training) or you might only need a couple of hours—in which case you might add the training to a volunteer appreciation event.
In what other forms could this training be delivered?	Try to be open to other methods of delivery, like online training or helping volunteers access other community training sessions.
How accessible will this training be for volunteers?	Are you expecting volunteers to travel a considerable distance to attend training? Try to think about access issues like overnight accommodations (conferences) or travel (for sessions that are out of town).
What material and information are we trying to share with volunteers?	The type of information can have a bearing on the training method that you use to share the information. Some material lends itself well to online training and some material (where evaluating body language is important) does not.
Will volunteers need a lot of group interaction or opportunities to share in order to get the most out of the training?	The answer to this question will help you to figure out if distance education or online training will meet the needs of volunteers.
What funds or resources do we have to devote to the training?	This is always an important question as programs have budgetary constraints. If you only have a small amount of funding, consider sending two or three volunteers to a training event and asking them to deliver a session to other agency staff and volunteers.
What, if anything, will make this training more credible?	In some instances, only accredited training will be sufficient—it depends on the training topic to be covered.
Are there any other agencies that might share our training goals? Locally? Regionally? Provincially?	Consider "shared" training opportunities. Many not-for-profits may want to offer training to volunteers on similar topics. Explore being cost-effective. Some interesting community partnerships could emerge this way!
What sources can we find to provide the training?	Finding a topic on which to have a training session is only half the challenge—next you need to find a good facilitator. Try to think about your networking channels for good facilitators or training resources.
How important is it that we have someone provide the training that is external to the organization? Internal?	Sometimes there is more value in having someone "external" deliver a message to volunteers. It can add credibility to the training. At times though, there is more value to having someone internal, or connected to the agency, deliver it.
Have we considered the role(s) that volunteers could assume versus the roles they have assumed in the past?	Some community-based literacy programs are considering having volunteers assist paid instructors in small groups. This is a different role than the 1:1 tutor and would require different training. Perhaps, in this situation, a mentoring training situation would be more appropriate than standard tutor training.
Other?	

In 2000, CLO published Skills for the Future: Phase 1, a research report examining training needs of practitioners and volunteer tutors. The authors found that tutor training provided by the program was the preferred method by volunteers. The table below is reproduced from the report and reveals volunteer tutors' perceptions of the best ways to facilitate tutor training. For more information on CLO's research, please visit our website at: www.nald.ca/PROVINCE/ONT/CLO/pratrain/skills1/cover.htm.

Preferred Method of Learning (Source: CLO, Skills for the Future: Phase 1, 2000)	0/0
Tutor training provided by the program	90%
One-to-one training with an experienced tutor	48%
Regional tutor training	33%
Self-study resources	29%
Blended training (a combination of best practices from community-based and Laubach-based programs)	29%
Classroom courses at an accredited institution	16%
Other	15%
Online learning	14%
Distance education courses through an accredited institution	6%

It's interesting to note that in the survey of "Preferred Method of Learning" for volunteers, 14% cited online learning as a viable way of obtaining new training. Keeping in mind that this survey is now five years old, it's possible that even more people are open to online learning as a training mechanism now! As a literacy program, it's important to remember that there are many ways to provide or make training available to volunteers.

For example, Kingston Literacy offers a blended (a combination of community-based and Laubach approaches) face-to-face training combined with online tutor training. Laubach Literacy Ontario sponsors the Training Post that offers online training modules for tutors. You can visit their site at:

http://www.laubach-on.ca/Trainingpost/index.html. As well, Community Literacy of Ontario has developed a strong reputation in the development and delivery of online training to literacy practitioners. Please also check the "Resources" section for more information on volunteer training.

#### **Best Practice**

CLO has become a recognized leader in facilitated and asynchronous (non-facilitated) online training for literacy practitioners. CLO has delivered over 30 online workshops on a variety of topics from board development to family literacy. For more information on our work in this area, please visit www.nald.ca/PROVINCE/ONT/CLO/elearn/elearn.htm.

CLO's most recent online learning initiative is Literacy Basics (www.nald.ca/literacybasics) a "free, self-directed online training website for Ontario literacy practitioners." According to the site introduction, "Literacy Basics removes many of the barriers to training faced by literacy practitioners. It reduces travel time, travel costs, and scheduling conflicts. It also minimizes the lack of local availability and the lack of time to attend training in more traditional settings."

It's easy to see why online learning has become increasingly popular as a method of delivering and accessing training!

While Literacy Basics was designed for practitioners, it will also be valuable to volunteers as well. The modules available on Literacy Basics are:

- ► Volunteer Management
- ► Initial and Ongoing Assessment
- ► Instructional Strategies
- Exit & Follow-up

#### 4 Evaluating the Training

Evaluation is a broad term—you can evaluate practically anything if you want to! As literacy program staff, you are asked to constantly evaluate your activities. The point of this evaluative activity is to engage in a continuous improvement process, whether you're examining your learner recruitment, learning activities, follow-up strategies or your financial and human resource management.

Volunteer programming is also an area of delivery that benefits from evaluation and continuous improvement. It's possible (and desirable) to evaluate individual training sessions that you provide for volunteers. We'll talk more about that later in the evaluation chapter. It's also possible (and a good use of organizational time) to take the time to consider whether or not your organizational volunteer training is effective. How you evaluate this "bigger picture" or snapshot of your organization's approach to volunteer training, and the outcomes that result from it, will be up to you. You might ask these questions of staff or you might ask your Board to consider these questions during a strategic planning session. If you have a Volunteer Committee, you might ask those individuals to look at the following suggested evaluation questions. The most important thing is to take some time to ask some questions. You might be surprised at the kinds of answers you will receive and the quality of thought that has gone into the responses.

**Remember!** Make evaluation achievable. If you've never asked yourselves organizational evaluation questions around volunteer training, maybe you can start with just one question, instead of a whole list. Or maybe you can consult with just one group, perhaps staff, instead of seeking input from a variety of organizational stakeholders.

# Evaluating Volunteer Training: The Organizational Perspective

Questions	Points to Consider
How much did our     organization spend this year     on volunteer training?	<ul> <li>Actual financial expenses</li> <li>In-kind expenses (staff time)</li> <li>How do these amounts compare to past years, if information is available?</li> <li>Did you budget for these amounts or did they come as a surprise?</li> </ul>
2. What were the organizational benefits from the training?	Was there an:  Increase in knowledge?  Increase in volunteer comfort level?  Effort to do pre- and post-tests to quantify learning?  Increase in organizational profile or credibility?
3. What is better about our organization as a result of the volunteer training?	<ul> <li>Our Board is more informed and able to guide the organization</li> <li>Our administrative volunteers can more effectively use their time</li> <li>Morale is higher</li> <li>Retention is improved</li> <li>Recruitment is up</li> </ul>
4. What range of volunteers within the organization did we offer the training to?	<ul> <li>Many agencies only think of their volunteer tutors when they think of volunteer training—did you expand your agency's definition or perception of volunteer training?</li> <li>Have you begun to implement a volunteer training culture?</li> </ul>
5. Were your volunteer training efforts cohesive as opposed to being conducted in isolation?	<ul> <li>Did you:</li> <li>Ask each kind of volunteer if they wanted or needed training?</li> <li>Offer training to each kind of volunteer you have?</li> <li>Evaluate the effectiveness of individual training sessions?</li> <li>Try to figure out the cost of NOT offering training, if it's not within the budget or if you had to prioritize?</li> <li>Tie the training that was offered to both individual volunteer needs AND organizational needs?</li> </ul>
6. Is volunteer training a well-documented process and product within your organization?	<ul> <li>Have you:</li> <li>Dedicated at least one staff person to documenting the processes and products of volunteer training?</li> <li>Demonstrated the link between the individual training events you offer and your organizational goals?</li> <li>Developed policies around volunteer training?</li> <li>Remembered to document all the positive outcomes of volunteer training as well as challenges and areas for improvement, for future reference?</li> </ul>

These are just a few of the questions you may choose to ask of your staff and Board in order to determine the effectiveness of your overall volunteer training efforts.

### **Evaluating Volunteer Responses**

Now that we've taken a look at how you might potentially evaluate the effectiveness of your organizational volunteer training, let's take a look at evaluating individual training sessions. It is more common for agencies to evaluate individual training sessions. The evaluation of individual training sessions is important, especially if it's the type of training that you may offer more than once, like volunteer tutor training.

Of course, it's not enough to just collect volunteer evaluation forms. It's important to analyze them to see what they're telling you about volunteer satisfaction with training opportunities that have been offered. In order to get the responses that yield the kinds of information you're seeking, you need to ask the right questions. When developing an evaluation form for individual events, there are a few important considerations. Although the evaluation is the last piece of the training design, you will benefit most by thinking about evaluation early in your event planning.

Key questions to think about include:

- ► Why do we want to evaluate?
- ► What do we want to evaluate?
- ► What type of data do we need? (e.g. Do we need to know how many people thought it was excellent, very good, fair, etc.? Do we need to know what they liked and what they did not like?)
- ► How are we going to use the information? (e.g. for evaluating the quality, for improving the workshop for the future, etc.)
- ► How much time will they need to complete the evaluation?
- ► Are we going to keep the evaluation anonymous?



► Will we want to follow up with the participants in the future? (e.g. Will we ask volunteer tutors how useful they found the training after they have tutored for several months?)

Generally, evaluation tools should help you determine the value/quality of the following:

- **☑** The content
- ☑ The organization of the content
- ☑ The presentation of the content (including use of audiovisual resources or technology, if online)
- ☑ The facilitator's methods and style
- ☑ The facility/learning environment (technology, if online)
- ☑ The length of the session
- **☑** What was learned
- ✓ Areas for further training

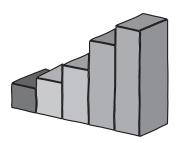
Obviously, when you offer a training session to volunteers, it's possible that you'll receive a wide variety of opinions on the training that has been provided. It's important that agency staff be able to sift through the information that will be obtained directly from volunteers and that they be able to tease out information that will inform future planning sessions.

If you're new to analyzing volunteer feedback, here are some things you might want to consider:

# Analyzing Volunteer Feedback

Ask your volunteers	In their responses, look for
What did you think of the content?	<ul> <li>Did it meet their needs?</li> <li>Were they satisfied?</li> <li>Can they think of ways to apply the information?</li> <li>Do they need follow-up training?</li> </ul>
How would you rate the way the material was organized?	<ul> <li>Did volunteers feel there was a good flow to the information?</li> <li>Were there assumptions made about the level of knowledge that volunteers had of the topic?</li> </ul>
How did you like the presentation of the content?	<ul> <li>Was it interactive enough?</li> <li>Were a variety of presentation methods used?</li> <li>What was the facilitative style and did it seem to resonate or work for volunteers?</li> <li>Was there too much information? Too little?</li> <li>Was the delivery method appropriate (i.e. online training)?</li> </ul>
What did you think of the facilitator's style?	➤ Did it appeal to all types of learning styles?
What did you learn from the session?	<ul> <li>Are volunteers better able to do their jobs?</li> <li>Was the information that was offered relevant?</li> <li>Was there any unexpected learning?</li> <li>What three things did volunteers learn?</li> </ul>
How was the learning environment?	<ul><li>Was it inviting?</li><li>Did it encourage interaction and sharing?</li><li>Was it comfortable?</li></ul>

# **Training Volunteers: Summary of Practical Steps for Improvement!**



Recognizing the importance of training opportunities for volunteer retention as well as program and organizational development, the Executive Director recommended to the board that Literacy Agency ABC host a one-day training session later in the year on learning disabilities. One of the board members, who also worked with Ontario Works, suggested including Ontario Works staff as well, which would help offset some of the costs and provide a better "community" learning opportunity.

The Executive Director created a draft set of learning outcomes for the learning disabilities training session that would provide increased skills and knowledge for the volunteers in a way that was meaningful for the volunteers and valuable for Literacy Agency ABC's goals.

The Executive Director determined that Literacy Agency ABC would host a full-day session, but that they would hire a facilitator with expertise in learning disabilities. Additionally, she agreed with the board member's idea to invite Ontario Works staff to the training session (this helped them to recover most of Literacy Agency ABC's costs!).

Over the course of the next three months, the Executive Director and the facilitator for the learning disability training communicated by phone and e-mail to confirm the learning outcomes, the training agenda and the evaluation process.

A successful one-day session on learning disabilities was held for 20 tutors, Literacy Agency ABC staff and 5 Ontario Works staff people. Further, several board and committee members and the Executive Director agreed to work through CLO's online workbook on "Board/Staff Relations and Responsibilities" (www.nald.ca/PROVINCE/ONT/CLO/resource/resource.htm) in order to enhance their knowledge in this area.

The Board and staff of Literacy Agency ABC also incorporated volunteer training into their annual strategic planning session. The Executive Director compiled the necessary information for the Board to consider. Both the Board and staff were surprised at the level of organizational resources being devoted to volunteer training. They were also pleasantly surprised at the value they could see as a result of the training. They decided to put two or three additional evaluative mechanisms in place to record the benefits they could "see" through interaction with volunteers.

Reviewing their volunteer training processes enabled the staff and Board of Literacy Agency ABC to see how much more valuable and meaningful their training opportunities could become with a more structured and planned approach!



## **Additional Resources**

Resource	Source	Usefulness	Cost	How to obtain
Handbook For Literacy Tutors	Ottawa Community Coalition for Literacy	A comprehensive resource on tutor training	\$39.95	Can be ordered through Grass Roots Press: www. literacyservices.com
Literacy Volunteer Resources	Ottawa Community Coalition for Literacy	A thorough package of interactive and varied activities to train literacy volunteers	\$64.95	Can be ordered through Grass Roots Press: www. literacyservices.com
Board Basics for Volunteers Manual	United Way of Canada	Includes a great section on developing a training session	Free	Available through most United Way offices
Literacy Basics website	Community Literacy of Ontario www.nald.ca/literacybasics/	Great self-directed training tools	Free	Internet
Skills for the Future: Practitioner Training Strategy—Phases 1, 2, 3	Community Literacy of Ontario www.nald.ca/PROVINCE/ ONT/CLO/pratrain/pt.htm	Multi-year CLO project to survey and determine methods of training	Free	Internet
Online Training Modules	Laubach Literacy of Ontario www.laubach-on.ca/ Trainingpost/index.html	Excellent series of online training modules for volunteer tutors and literacy trainers	Free	Internet
AlphaPlus Centre website	AlphaPlus Centre www.alphaplus.ca	A leading knowledge- based portal for resources, standards and use of technology in adult basic education	Free	Internet
National Adult Literacy Database website	National Adult Literacy Database www.nald.ca	Excellent site for variety of literacy resources	Free	Internet
United Way Canada website	United Way Canada www.boarddevelopment.org	One of best sources of information on board training	Free	Internet
Grassroots Press bookstore	Grassroots Press	Excellent source for tutor training material	Individual prices per selection	Can be ordered from: http://www. literacyservices.com/ TUTORTRAIN.HTM
Laubach Literacy Canada bookstore	Laubach Literacy Canada	Excellent source for teaching resources	Individual prices per selection	Can be ordered via internet: http://www.laubach.ca/store/html/order.htm



# **Evaluation**

I believe I am doing something worthwhile, and I am learning at the same time as I tutor, and I enjoy very much the response I get from my student.

—Literacy Volunteer—

#### Introduction

Evaluating services can often be one of the most challenging areas for literacy programs to address. Generally speaking, paid staff can be easily intimidated by evaluation. This is part of the reason why practitioners are especially reluctant to apply the principles of evaluation to volunteers—are we asking too much of volunteers? Isn't it enough that they volunteer their time and their energy?

Realistically, evaluation is a great tool to enhance your program. It's a chance to celebrate what's working well as well as what needs to potentially be improved. It is informative for the program but it can also be very informative for volunteers. Evaluation, if approached properly, can also help volunteers take even more pride n their work.

In this chapter, we'll explore the benefits and the tools that literacy programs could use to evaluate volunteers individually and collectively, in order to benefit the program and in order to demonstrate good volunteer management.

### **Evaluation: Making the Case**

Eight months after revising their screening and intake procedures, Literacy Agency ABC began its first, revised wave of volunteer performance appraisals. The Executive Director realized that they needed to have a more formalized and standardized process for appraisals. Initially, the Board of Literacy Agency ABC was concerned about the amount of time it would take to implement a good evaluation process. However, the Executive Director reminded the Board that it was important to move in this direction, even if it meant they could only put one or two practices in place per year. Only by formally looking at evaluation, on whatever scale the agency could afford, could the agency be reassured that they were doing everything in their power to improve the organization, especially with respect to volunteer management.

#### What CLO's Research Told Us!

Performance appraisals for volunteers are important. They provide the volunteer with acknowledgement and appreciation for their work.

–CLO, Our Voice,November 2003

In the recent research by Community Literacy of Ontario, 58% of agencies reported conducting some form of volunteer performance appraisal. However, for many not-for-profit organizations—and literacy agencies are probably no exception—volunteer performance evaluations or appraisals are something to avoid. As McCurley and Lynch note, "The prospect of conducting an evaluation of a volunteer is not commonly one that is looked forward to with great enthusiasm by most volunteer coordinators, or by staff who work with volunteers."

Part of the reason for avoiding volunteer evaluations is based on the assumption that volunteers will negatively perceive the evaluation as a "test," one in which they will be criticized for things they are doing or not doing. However, as McCurley and Lynch argue, "Evaluation is not something to be avoided, especially if you realize that it can actually be a very positive management device." As a program staff person, you will have considerable control over "setting the scene" for conducting the interviews. Although evaluation doesn't have to be a negative experience and it can yield some very positive

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<sup>1.</sup> Steve McCurley and Rick Lynch, Volunteer Management: Mobilizing all the Resources of the Community, 1996.

<sup>2.</sup> Ibid.

information, it's human nature to look at evaluation as some kind of a test. Pay attention to how you refer to your evaluation processes and try and be sensitive to how your volunteers are feeling. The last thing you want is for them to feel as though they are being judged. It's a good idea to try and begin the volunteer evaluation process with some very positive, but sincere, comments on the contribution that the individual volunteer has made. This also helps to identify the "uniqueness" of the volunteer—a great way to encourage volunteer retention!

### Why Are Volunteer Performance Appraisals Important?

A periodic volunteer evaluation can help shape the overall performance of the volunteer, but it cannot and should not replace the day-to-day on-site coaching and supervision that must occur.

-McCurley and Lynch, 1996

There are many good reasons for conducting volunteer performance appraisals, including:

➤ Most volunteers want to know how well they are doing so they can feel they are doing the best job possible. Feedback given through a performance assessment can help them see where they are strong and where they could improve.

#### Performance appraisals:

- ► Tell your volunteers you care about the quality of their work
- ► Help the organization ensure it reaches its goals by obtaining valuable information from one of the organization's key stakeholder groups
- ➤ Send a clear message to staff and other volunteers that volunteer work is an integral element of the organization and needs to be taken seriously
- ➤ Provide staff with an opportunity to confirm the motivations and interests of the volunteers and the opportunity to shift the volunteer to a different position that better suits their needs and interests, if necessary
- ► Help you identify individual as well as organization-wide areas for improvement, including training, scheduling, additional staff support, etc.
- ► Identify retention issues/opportunities



Remember that all the information that you gather from conducting a Volunteer Performance Appraisal will only be useful to you as an agency if you try to collate it, synthesize it, and learn from it! You're not only assessing individual volunteer performance, but you're also collecting information on how to improve organizational performance.

# Performance Appraisals Seem Complicated – How Do We Fit Them In?

about!

A performance appraisal need not be difficult or onerous. In fact, for volunteers as well as staff, the simpler the process, the better.

However, the process does need to be taken seriously by the organization, otherwise the perception by all involved will be that it is merely a token gesture. It's also important that evaluation (and the integral role that evaluation plays in every aspect of your organization) be reflected in your agency's communication pieces. Volunteers should not be surprised to learn that they will be asked to participate in a self-evaluation process as part of their commitment to their agency.

Perhaps most important, the appraisals must reflect

the expectations of the organization and the interests of the volunteer as laid out in the position description. A well-defined position description will include clear responsibilities and expectations, providing both the volunteer and the agency with some objective criteria upon which the appraisal can be based. Without a solid

position description and clear expectations, it will be very difficult for both the volunteer and the agency to feel that the appraisal is of value. As well, it's only proper to evaluate someone based on clear and transparent criteria. It's not fair to evaluate someone based on criteria they didn't know

Additionally, the appraisals need to be conducted regularly, ideally once a year. This annual review can serve two

Lousy job descriptions produce really lousy evaluation sessions.

-McCurley and Lynch, 1996.



Volunteer performance assessments are also known as performance appraisals, progress evaluations, and work appraisals, as well as other terms. For consistency and to ensure their perceived importance, you should use the same terminology that you use for paid staff's performance evaluation.

-McCurley and Lynch, 1996.

purposes. If the Board has already engaged in strategic planning and identified ways in which the organization can be more volunteer-driven or responsive, then the annual volunteer performance appraisal is a great time to ask questions. For example, if a literacy agency identifies that it must devote more time to fundraising, then a legitimate question to ask of all volunteers might be "Do you have any skills and/or interests that could assist the organization next year with its fundraising efforts?" Alternatively, if volunteer performance appraisals are conducted prior to the Board's annual strategic planning session, then the collated results of the appraisals can be used to inform the strategic planning process. Where appropriate, the results from the performance appraisals should be reviewed to determine if there are actions that the agency should be following up on. Finding out what additional supports volunteers needs and then not working to provide those supports is worse than not asking them at all.

## **CLO's 6-S Performance Appraisal Process**

The easiest method for conducting the evaluation session is to follow the RAP method:

- Review the past
- Analyze the present
- Plan the future

-McCurley and Lynch, 1996.

When it is time to conduct the volunteer performance appraisal, you will want to ensure your process follows CLO's 6S method:

**Strategic** ......the process and the questions reflect your agency's strategic direction

Systematic .... all volunteers receive a performance appraisal

**Scheduled**.....at least once a year, and probably two or three times during their first year

**Standardized** .. using the same method and basic process for each volunteer for fairness and efficiency

**Specific**.....each volunteer's job description is evaluated based on the expectations in his/her position description.

Self-directed each volunteer will have an opportunity to evaluate his or her own performance

#### **Instructions:**

- 1 Using the Volunteer Performance Appraisal Checklist on the following page, identify and plan for the various steps prior to, during and after the meeting with each volunteer.
- Give each volunteer the Volunteer Performance Appraisal form or your own agency's form and allow sufficient time (approximately one week) for the volunteer to complete his or her own evaluation prior to the appraisal. Ideally this review will happen face to face, but depending on individual circumstances this review can take place by telephone or e-mail.
- 3 Prior to your meeting with each volunteer, you should also complete a performance appraisal for the volunteer. Your questions should mirror those that the volunteer will be asked to complete using the Volunteer Performance Appraisal form. You can use the same basic questions that are outlined in the Volunteer Performance Appraisal form as a guide.
- As soon after the performance appraisal meeting as possible, make sure that the volunteer receives a copy of the performance appraisal summary and that one is kept in his/ her file. In the rare event that staff needs to ask a volunteer to leave the program, it is wise to have the appraisal form on file as documentation of how the volunteer's performance was not satisfactory.

**Note:** Volunteer Performance Appraisals can be very positive communication tools to help you with motivating and retaining volunteers. However, they can also be useful if you need to ask a volunteer to leave the program. In many cases, the way you treat volunteers should be the same way you treat paid staff. Documentation is essential if you reach the unfortunate point where you need to dismiss a volunteer.

## CLO's Volunteer Performance Appraisal Checklist

Prior	Prior to the Meeting			
	Have the volunteer complete his or her own copy of the self-evaluation questionnaire, ensuring that it reflects the position description.			
	Ensure that you are prepared by reviewing the volunteer's position description and previous evaluations.			
Durin	g the Meeting			
	Provide positive feedback on the volunteer's performance.			
	Review the expectations and responsibilities in the position description.			
	Have the volunteer discuss his/her self-evaluation results.			
	Discuss any barriers that inhibited the volunteer's ability to reach his/her performance outcomes.			
	Provide the volunteer with an honest verbal appraisal of his or her performance.			
	Discuss future plans, including enhanced support, training and resources you will provide to the volunteer based on the evaluation.			
	Arrange for the volunteer to receive positive feedback from the learner, if appropriate.			
After	the Meeting			
	Prepare a brief written report of the meeting, including any action steps agreed to by you and the volunteer.			
	Provide a copy of the report to the volunteer and include one in his or her file.			

# Volunteer Performance Appraisal

Part 1 of 4

Name:	
Date:	
Volunteer Position:	
The following are the ke	ey duties in my position description:
1	
2	
3	
5	
Do you feel that you position description?	have been reasonably able to fulfill the duties outlined in your  Yes No
If no, please discuss the	e reasons why you feel you have not been able to.
·	
If ves. what accomplish	ments are you most proud of?
Do you fool that seem	
	have been provided with enough information and resources to uties in your position description? ☐ Yes ☐ No

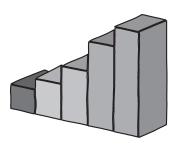
If no, please list the resources that would help you.
If yes, what information and resources were most helpful?
Do you feel that we, the literacy agency, have provided you with sufficient training?
Yes No
If no, please tell us what kind of training you feel you need.
If yes, what training was most beneficial?
Please describe your best experience while volunteering with the literacy agency.
rieuse describe your best experience while volunteering with the interacy agency.

Please describe your worst experience while volunteering with the literacy agency.				
Please identify how satisfied you are with your volunteer experience.				
Very satisfied Satisfied Somewhat satisfied Not at all satisfied Not sure				
Are there other areas within the literacy agency that you might like to volunteer? ☐ Yes ☐ No				
If yes, please tell us the areas in which you might like to volunteer.				
How do you feel about the time that you commit to our agency?  ☐ Is it too much? ☐ Too little?				
<b>Do we utilize your skills properly?</b> □ Yes □ No				
Are there ways the literacy agency can better support you as a volunteer? ☐ Yes ☐ No				
If yes, please tell us some of the ways we could support you better.				

What else do you think it is important that we should know?			
Service and a Community			
Supervisor's Comments:			
Volunteer Supervisor Signature Print Name	Date		
Volunteer Signature Print Name	Date		



## **Evaluation: Summary of Practical Steps for Improvement!**



Initially, at Literacy Agency ABC, there was some trepidation on the part of several volunteers to commit to the appraisal process. One said she was concerned that the evaluation simply represented more work for her, while two others asked if they had done something wrong. By talking with all volunteers individually several weeks before the appraisals began, the Executive Director was able to address their concerns and tell the volunteers how their feedback would be used to make sure the agency was responsive to the needs of the volunteers.

The Executive Director distributed copies of the Volunteer Performance Appraisal form to all volunteers. During each volunteer's performance appraisal, she reiterated the importance of the evaluation for the agency and for the volunteer. By highlighting specific examples of each volunteer's valuable contributions at the beginning of the meeting, the Executive Director was able to make each one feel comfortable and reassured. Additionally, by paying close attention to and recording their comments, she was able to conclude each appraisal by discussing additional support and training needs. The Executive Director summarized the volunteer performance appraisal feedback, making note of trends that she thought the organization needed to address and information that the Board might find useful in its next strategic planning session.

Through the process, she also identified that the agency needed to offer a workshop on learning disabilities. When she scheduled the workshop for November and informed all volunteers, several people commented on the value of the performance appraisal and said they felt more connected with the agency than they had in quite some time.



## **Additional Resources**

Resource	Source	Usefulness	Cost	How to obtain
"Volunteer Management: Mobilizing all the Resources of the Community"	A book by Steve McCurley and Rick Lynch (1996)	Includes a chapter on volunteer performance evaluations, including recommendations for how to terminate a volunteer	\$25.00 (U.S.)	Available at most libraries and some book stores
"Standards for Practitioner Training"	Community Literacy of Ontario http://www.nald.ca/PROVINCE/ONT/CLO/ pratrain/pt.htm	Valuable information and resources on volunteer performance evaluations	Free	Internet
Literacy Basics website	Community Literacy of Ontario www.nald.ca/literacybasics	Excellent information on volunteer evaluation and exit  Good sources for evaluating volunteer performance	Free	Internet
CLO website	Community Literacy of Ontario www.nald.ca/PROVINCE/ONT/CLO/ pratrain/provstan/tutors.htm	CLO's Provincial Standard for the Training of Volunteer Tutors addresses ongoing support and evaluation of volunteer tutors	Free	Internet
OurVoice Newsletter — November 2003	Community Literacy of Ontario www.nald.ca/PROVINCE/ONT/CLO/ NEWSLET/nov03/1.htm	This edition of CLO's OurVoice newsletter looks at evaluation for volunteers in addition to board evaluation	Free	Internet
National Parks Services website	www.nps.gov/volunteer/ReviewsH.pdf	Provides a very good overview of the different elements of the volunteer performance review process and includes several tools and resources that could be easily adapted	Free	Internet
Court Appointed Special Advocates website	www.casanet.org/program-management/ volunteer-manage/casaeval.htm	Good example of volunteer evaluation form, an agency form and volunteer self-evaluation form	Free	Internet



## Volunteer Retention

Recruiting is a solution to the problem of not having enough volunteers; retention is a way to avoid the problem altogether.

-Steve McCurley and Rick Lynch -

#### Introduction

We can't run our program without them [volunteers].

-Literacy practitioner

For community literacy agencies, volunteer retention is a critical element of working with volunteers. Committed tutors, board members and, in some cases, administrative support are essential to the success of Ontario's community literacy agencies.

## **Retention: Making the Case**

After more than five years, one of Literacy Agency ABC's top tutors announced she was resigning her position. Although her reason for leaving was related to her paid work, the announcement prompted the Executive Director and the Board of Directors to think more about the agency's volunteer retention strengths and weaknesses. Literacy Agency ABC staff and the Board had prided themselves on an excellent volunteer retention history and had placed great emphasis on supporting their volunteers.

### What CLO's Research Told Us!

Based on the results from CLO's recent research, literacy agencies value their volunteers and understand the importance of retention. On average, literacy volunteers have been donating their time for 3.5 years. When asked to report how satisfied they have been with their volunteer experience, 54% of volunteers reported they were very



satisfied, while 33% reported being mostly satisfied, and 9% reported being satisfied. Seventy-three percent reported they planned to volunteer the same amount in the future as they are currently, and 17% indicated they planned to volunteer more, while only 3% said they were planning to volunteer less.

Community Literacy of Ontario's research also showed that literacy volunteers continue to volunteer largely for the same reasons they started. The table below shows that 84% of volunteers continue because they feel that they are making a difference in someone's life, while 79% said they feel that they are increasing literacy skills in their communities.

Motivations for continuing to volunteer	Frequency of response (%)
I feel that I am making a difference in another person's life.	84%
I feel that I am contributing to increasing literacy skills in my community.	79%
I feel supported by program staff.	72%
I enjoy the challenge offered by my volunteer work.	68%
I enjoy the warm and encouraging atmosphere.	66%
I enjoy the social interaction.	64%
I am growing personally.	55%
I enjoy the flexible hours.	54%
I am learning new skills.	42%
I know someone affected by literacy challenges.	42%
I enjoy the training I receive.	33%
I am learning job-related skills.	18%
Other	8%
I am mandated to do community service.	3%

Literacy volunteers also identified the supports they receive that help them with their volunteer work:

- ► Open communication with staff
- ► Information, tools and resources
- ► Supervision and support
- ► Clear policies and position descriptions
- ► Orientation and training

According to literacy agencies, their retention methods are thorough and varied. The table below highlights the top retention methods as reported by agency staff. Ongoing support from staff, interaction with other volunteers, and training and skills development are well-used methods by many of the agencies throughout Ontario.

Method	Frequency of response (%)
Offer ongoing support from agency staff	92%
Provide opportunities to meet with other volunteers	81%
Offer training to strengthen skills	79%
Hold regular meetings in person/over the phone	74%
Provide opportunities to learn new skills	68%
Offer new opportunities/tasks to challenge and encourage growth	53%
Provide employment experience	49%
Survey their needs	49%
Assess and review their performance with them	42%

# If Our Retention Efforts Are So Good, We Don't Need to Worry...Do We?

Research by CLO shows that literacy volunteers are clearly loyal to their agencies. Not only have they volunteered an average of 3.5 years so far, according to agencies these literacy volunteers are also on average donating an incredible 11 hours per month.



One quarter of Ontario residents (25% or 2.4 million people) volunteered through a charitable or nonprofit organization, according to the 2000 National Survey of Giving, Volunteering and Participating. This is a decrease from 32% in 1997.

However, Ontario volunteers contributed more time, on average, in 2000, giving 165 hours of their time, an increase of 13% from the 1997 average of 146 hours.

NSGVP 2000 – Volunteering in Canada Fact Sheet

However, agencies cannot afford to be complacent. With a decline in the total number of volunteers in Ontario and an increase in the number of hours each volunteer is giving, there exists a significant risk for volunteer burnout.

At the same time that there is a decline in the number of volunteers, there has been an increase in the number of voluntary organizations in Ontario, resulting in increased competition for fewer volunteers. It is interesting to note that CLO's 2005 survey of volunteers indicated that 56% of literacy volunteers also volunteer with other organizations.

Additionally, many of the original and continuing motivators for literacy volunteers could be satisfied by other agencies, and if their experiences are not continually rewarding, volunteers will find alternatives that are. The survey results from CLO's research found that, for literacy volunteers, the consistent motivators for initially volunteering and for continuing to volunteer are:

- 1 An opportunity to make a difference in the life of another person
- **2** An opportunity to increase literacy skills in their communities
- **3** A warm and encouraging atmosphere

## So What are the Best Ways to Keep Volunteers?

The volunteer management cycle consists of five stages: planning, recruitment, orientation and training, supervision and evaluation, and recognition. If your agency has been successful with the other stages of the volunteer management cycle, you will find it will be less effort to retain volunteers. In other words, high rates of volunteer retention are directly related to how well you plan for, recruit, orient and train, evaluate and recognize your volunteers.



Satisfaction with organizational performance was the strongest predictor of volunteer commitment.

> —Canadian Centre for Philanthropy, 2002

- ▶ 90% of literacy volunteers said learning new skills was either very important, quite important or important to them
- ▶ 92% of literacy volunteers said they are either very satisfied, mostly satisfied or satisfied with the training they receive

-CLO Volunteer Survey, 2005

#### **Planning**

Successful retention begins with planning. As we discussed in the Planning for Volunteer Management Chapter, knowing what your agency's key needs are enables you to identify your specific volunteer needs and therefore refine current volunteer positions and/or create new ones. This type of planning will in turn help ensure that all volunteer positions (new and old) offer valuable and meaningful experiences for your volunteers. A study for the Canadian Centre for Philanthropy found that the greatest predictor of volunteer commitment was the volunteer's level of satisfaction with the organization's overall performance, which is a direct result of good planning. This just makes sense. Even though a volunteer may only be involved in one aspect of your agency's operations, it can be surprisingly clear when an organization is running well (planning is an integral part of organizational operations and change) and when it is not! Don't forget to share the successes of your organization with your volunteers. It will help them to be proud of their association with you.

#### Recruitment

As we illustrated in the Recruitment Chapter, a critical part of any successful recruitment plan is carefully developing the position description. However, the position description is also an important tool for volunteer retention. A clear description will help volunteers to effectively understand their roles and responsibilities and the training, resources and support available to them. All of these things contribute to volunteer satisfaction and commitment.

### **Orientation and Training**

Providing volunteers with a thorough orientation and regular and adequate training will also help retain volunteers. Having the knowledge and skills necessary to effectively complete their work raises volunteer confidence and is a key reason why many volunteers continue to volunteer. Community Literacy of Ontario's recent research clearly indicated that training is important to literacy volunteers.



Another way of providing orientation and training is through staff support. For literacy volunteers in Ontario, staff support is one of the number one reasons why they continue to volunteer with their agencies. Another is open communication with staff.

#### **Evaluation**

As discussed in the Evaluation Chapter, the volunteer performance appraisal should be designed, in part, to help staff better understand and support their volunteers.

The evaluation also provides a valuable opportunity to identify new or additional roles that volunteers may want to pursue. This is particularly important for those volunteers who may have indicated they were only interested in volunteering for a short period of time. With the right support and opportunities, some of these volunteers may be encouraged to extend their involvement. For example, when asked if they would be willing to assume new or additional roles within their literacy agency, 42% of volunteers said yes! CLO's survey results also identified the following top six new roles as being of further interest to volunteers:

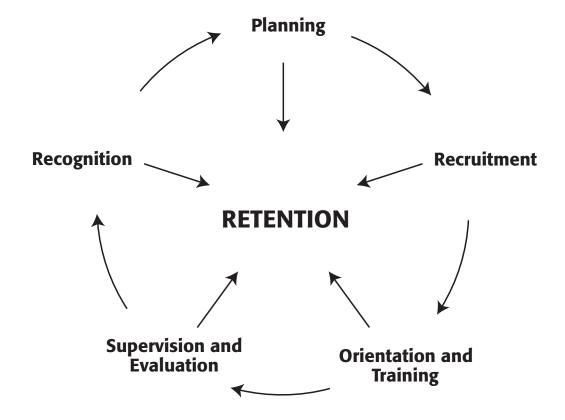
- 1. Additional tutoring/instruction
- 2. Office/administration
- 3. Events
- 4. Board or committee work
- 5. Fundraising
- 6. Computer teaching

#### Recognition

Volunteer recognition is perhaps the most obvious link to retention. If you recognize the work they do—even with the most simple of methods—your volunteers will feel appreciated and be more likely to continue donating their time. From CLO's research, it is very clear that literacy agencies do a wonderful job of recognizing volunteers.

- ➤ 89% of literacy volunteers feel their skills and time are being used well.
  - -CLO Volunteer Survey, 2005





### **Start with a Retention Audit**

A simple way to gauge how well your agency is doing with volunteer retention is to conduct a simple audit using CLO's R5 Volunteer Scorecard (developed for the International Year of Volunteers).

#### **Instructions:**

- 1 Using the table below, assess how well your agency is currently doing in each of the five key retention areas.
- **2** Assign a score from 1 to 5 for each retention category using the scale provided.
- **3** Total your score. If you scored 18 or more, your agency is doing very well at retention. If you scored between 13 and 17, your agency is probably doing well, but has some areas for improvement. If you scored 12 or below, you may want to examine your retention practices closely to see where you can improve.



### CLO's R5 Volunteer Scorecard

1	2	3	4	5
Poor	Fair	Good	Very Good	Excellent

Volunteers need	How well do we provide our volunteers with	Score
1. Resources	Adequate resources to do their jobs?	
2. Rewarding opportunities	Opportunities that match their original motivations for volunteering?	
3. Responsibility	Enough responsibility? (The first six months with an organization are the most critical for retaining volunteers. It is important to provide opportunities that allow responsibility without giving volunteers cause for fearing burnout.)	
4. Recreation	Fun opportunities to meet other volunteers? (Many volunteers have reported that one of the main reasons they stay with an organization is because of opportunities to meet with other volunteers, e.g. workshops, idea sharing, etc.).	
5. Recognition	Recognition in a way that is appropriate and meaningful?	
	TOTAL	

While it will certainly be helpful to have the Executive Director or Volunteer Coordinator fill out this Scorecard on behalf of your agency, try not to limit its use! Remember that different staff may have different opinions on how well the agency is doing in each of these areas. If you have more than one staff, ask each person who would have an opinion to fill the Scorecard out. Use a staff meeting to discuss responses.

It's also important to keep in mind that this Scorecard represents the agency's perception of how well they're doing in retaining volunteers. As we have seen from some of the other CLO research, sometimes what the agency believes is



happening around trends in volunteerism is different from what volunteers will say is happening. Other tools will be presented during this chapter that will help literacy agencies to get the volunteer perspective—an important part of the volunteer management pie!

## **Satisfaction Survey**

If you want to know what consumers want, ask. The trick, of course, is knowing what questions to ask. And knowing how to listen to the answers.

-Faith Popcorn

Like all evaluations, evaluating your volunteer management practices requires you to sometimes pause, take stock and evaluate what is working and what is not. The volunteer satisfaction survey is a useful tool for helping your agency achieve this. Unlike the individual performance appraisal, which is focused on the individual volunteers, the volunteer satisfaction survey allows you to identify both individual and aggregate volunteer needs and concerns. Having this information will help you strengthen your volunteer retention efforts.

Sometimes the information from the volunteer satisfaction survey will influence your agency's planning. For example, perhaps your agency has determined that one of its priorities for the upcoming year will be to upgrade your volunteer training, and you decide to survey the volunteers to find out what training has worked and what has not.

To use another example, if in surveying your volunteers you discovered that a significant number of them were feeling a bit frustrated because the agency had limited resources for tutors to draw upon when designing lesson plans for learners, your agency might decide to make this a strategic priority to address in the upcoming year.

You can use the following sample survey developed by CLO to help create a volunteer satisfaction survey that meets your own agency's needs.



(These Instructions are for the 3-part *Sample Volunteer Satisfaction Survey.*)

#### **Instructions**

- 1 Ensure the questions you ask are related to the specific volunteerism issues you want to know more about in your agency.
- **2** Eliminate any unnecessary questions. For example, if you do not intend to make changes to your training program, you may decide to avoid questions about this topic.
- **3** Design the survey so that is as easy to complete as possible. Where possible, use closed questions (tick boxes, scales, yes/no, etc.), and only use open questions for important issues and areas needing further explanation.
- **4** Guarantee confidentiality but provide an opportunity for the volunteers to self-identify if desired for follow-up purposes.

## **Exit Survey**

No matter how good your volunteer program is, there will be instances when volunteers leave. New jobs, a move to a different town, changes in family situations, illness -- the list of reasons for leaving is endless. Regardless of why they leave, it is possible to use a volunteer's exit from your program as an opportunity to learn more about what works and what does not work within your organization.

Often, upon leaving, volunteers will be more comfortable disclosing how they truly feel about certain aspects of their position and the organization. The information you get from an exit questionnaire may give you valuable insight into how to improve your volunteer management practices in the future. It is important to keep in mind that the information you get from one volunteer will not always be a reason for making significant changes. However, one comment from one volunteer COULD be very significant.

CLO has included the following sample Exit Questionnaire (after the Satisfaction Survey) that you can use to learn from those volunteers leaving your agency.

# CLO's Sample Volunteer Satisfaction Survey

Part 1 of 3

What volunteer role(s) do you have with the agency?				
1. Overall, how so	tisfied are you w	ith your volu	unteer experience?	
Very satisfied	Mostly satisfied ☐	Satisfied	Somewhat satisfied	Very unsatisfied
2. What do you li	ke the most abou	t your positi	ion(s)?	
3. What do you like				
4. What resources	s do you use to he	elp you in yo	our position(s)?	

currently have? ☐ Yes ☐ No
If yes, please list them
1
2
3
6. How supportive are staff in helping you do your volunteer work?
Very supportive Mostly supportive Supportive Somewhat supportive Very unsupportive
7. Prior to starting, did you receive enough orientation? ☐ Yes ☐ No
If no, please tell us how the orientation could be improved.
1
2
3.
3
3
3
3
3
3
8. Have you received training to help you carry out your volunteer responsibilities?
8. Have you received training to help you carry out your volunteer responsibilities?  Yes No  If you answered yes, how satisfied are you with the amount of training you have received?
8. Have you received training to help you carry out your volunteer responsibilities?  Yes No  If you answered yes, how satisfied are you with the amount of training you have received?
8. Have you received training to help you carry out your volunteer responsibilities?  Yes No  If you answered yes, how satisfied are you with the amount of training you have received?

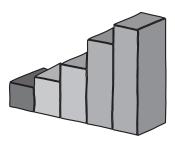
9. What is the most rewarding experience y	ou have had volunteering with us?			
10. What would make your experience more	rewarding?			
11. Do you feel you are adequately recognize volunteer work? ☐ Yes ☐ No	ed by the literacy agency for your			
If no, how would you like to be recognized?				
Thank you for completing this questionnaire. Your continued support and feedback are extremely important to us!				
If you would be willing to discuss your answers with please complete the following:	n a staff member in a follow-up meeting,			
Name:	Telephone number:			

## Volunteer Exit Questionnaire1

What volunteer role(s) did you have with the agency?
How long did you volunteer with us?
<ul> <li>1. Please tell us why you are leaving (check all that apply)</li> <li>Volunteer job completed</li> <li>Moving</li> <li>Need a change</li> <li>Didn't like the job I was given</li> <li>Didn't feel welcome</li> <li>Didn't feel my skills were well utilized</li> <li>Other time constraints</li> <li>Didn't get enough support</li> <li>Didn't get enough training</li> <li>Other</li> </ul>
2. Please tell us what you liked most about volunteering with us.
3. What suggestions would you make to improve our volunteer program?
4. Overall, how satisfied are you with your volunteer experience?  Very satisfied Mostly satisfied Satisfied Somewhat satisfied Very unsatisfied

<sup>1.</sup> This questionnaire is adapted from Community Access Program's "CAP Volunteers: A Growing Need" by Jean M Carter (http://www.nfcap.nf.ca/resources/manual.pdf)

## Volunteer Retention: Summary of Practical Steps for Improvement!



The Executive Director decided to begin the retention review process by asking a departing tutor to complete the Volunteer Exit Questionnaire. In a follow-up exit interview, the Executive Director learned from the tutor that she and some of the other volunteers were frustrated with the limited resources for tutoring their learners. Armed with this new information, the Executive Director decided to ask all volunteers to complete the Volunteer Satisfaction Survey, which she had modified by adding several questions. At the same time, she and the Chair of the Board completed the CLO R5 Volunteer Scorecard. The Executive Director and the Chair felt confident that their retention processes were quite strong in every area except for "Resources." Literacy Agency ABC had been in business for over ten years but the resource library had not been significantly updated since it was created. In addition, there had been numerous changes to the literacy program over the years and the resource library had not quite kept pace with these changes (i.e. had not moved towards employment-related learning).

Literacy Agency ABC surveyed 25 volunteers, including 17 tutors, and discovered that the words of the volunteer who had left rang true. A significant number of the tutors expressed their frustration and concern over the limited resources available for working with their learners. Recognizing this could become a serious issue for both learners and volunteer retention, the Board decided to add this to their list of strategic priorities for the upcoming year. They determined that one of their actions would be to make sure tutors (and all other volunteers) knew of the existing resources Literacy Agency ABC owned, as well as the various resources available through AlphaPlus and online through the National Adult Literacy Database, and other online sources. Literacy Agency ABC also committed \$1500 to updating its resource library in the coming year as part of the strategic planning process.



## **Additional Resources**

Resource	Source	Usefulness	Cost	How to obtain
"Learner Recruitment and Retention"	Community Literacy of Ontario	A wealth of excellent information on retention	\$65.00	Available by sending email/mail request to CLO: clo@bellnet.ca
"Volunteer Recruiting and Retention: A Marketing Approach, 2nd Edition"	A book by Nancy Macduff (1996)	A step-by-step approach for recruiting and retention of volunteers	\$37.00	Available at many libraries and some bookstores
Literacy Basics website http://www.nald.ca/literacybasics/		Good section on retention	Free	Internet
Volunteer Calgary website	http://www.volunteercalgary.ab.ca/ ResourceCentre/resources/retention. html	Links to various books and articles on volunteer retention	Free	Internet
Charity Village Volunteer Recruitment, Relations and Management	http://www.charityvillage.com/ cv/ research/rvol.html	Provides updated articles on various topics including retention	Free	Internet



# Volunteer Recognition

The person I tutor thanks me after every session, and that is all I need.

—CLO focus group participant—

#### Introduction

The Canadian Centre for Philanthropy's National Survey of Giving, Volunteering and Participating found that the number of volunteers in Canada had declined from 7.5 million in 1997 to 6.5 million in 2000. Community Literacy of Ontario's recent research found similar results. Almost half of the literacy agencies surveyed reported having fewer volunteers than they did five years ago.

## **Volunteer Recognition: Making the Case**

For years, Literacy Agency ABC had been doing an excellent job of recognizing their volunteers. In fact, many long-term volunteers had commented on the genuine recognition they received, through staff support, informal thanks and the occasional social event. However, the Executive Director had noticed a slightly alarming trend: Literacy Agency ABC was experiencing a slight "volunteer drain." The agency had fewer volunteers in 2004 than they had in 2003, in spite of their excellent volunteer recognition efforts. The staff and Board of Directors of Literacy Agency ABC decided to review their recognition efforts to see if any improvements could be made.

## There's More to Volunteer Recognition than Meets the Eye!

Volunteer recognition is about much more than just giving every volunteer who has been connected to your agency a volunteer pin during your annual volunteer recognition event. There is considerable overlap in volunteer management between motivating volunteers, recognizing volunteers and retaining volunteers. People are attracted to volunteer work for a variety of reasons. These reasons need to be acknowledged in an organization's recognition practices. If they are acknowledged effectively, the agency has a reasonable chance of retaining good volunteers because those volunteers will feel as though their needs have been met.

Studies suggest that volunteers are looking for many different kinds of things through volunteer activities. Perhaps most importantly, volunteers are looking for opportunities to increase their self-esteem: volunteers want to feel good about the time they are devoting to your cause. In particular, you need to remember that your volunteers want to feel a connection to your organization. It's important to almost everyone to have their individuality recognized – those things that they specifically have to contribute. Finally, volunteers generally need to feel that the work they are doing is important and valuable.

These guidelines may seem like common sense. However, if you look a bit more closely at each area, you may see ways in which you can improve your agency's recognition efforts. While most volunteers will thrive if you respect their need to feel connected, their individuality, and their desire to feel effective, it's your role as an agency to figure out how best to accomplish that for each of your very different and unique volunteers. One approach to volunteer recognition is unlikely to meet the needs of all your volunteers. In fact, it's more likely that a single approach to volunteer recognition will actually discourage and demotivate some of your volunteers! This is what makes volunteer recognition so important to an agency.



- The findings from CLO's recent research highlights the importance of providing meaningful volunteer recognition.
- 83% of literacy agencies in Ontario use informal recognition methods, including notes and phone calls.
- 75% host luncheons and/or other public recognition events
- 62% provide rewards or incentives
- ► 47% promote their volunteers' achievements through the local media

Volunteer recognition is more than the sum of its parts – the individual volunteers. By that we mean that appropriate and timely volunteer recognition does a lot more than make individual volunteers feel valued. Good volunteer recognition practices contribute to:

- ➤ Productivity volunteers feel good when they feel productive and the organization for which they're volunteering benefits tremendously from the enthusiasm and skills that volunteers bring to their work
- ► Retention volunteers whose individual needs are identified and addressed are more likely to stay with your organization
- ► Morale volunteers don't just do more when there are good recognition practices in place they do it with a better sense of spirit and of belonging¹

#### What CLO's Research Told Us!

Community Literacy of Ontario's survey of agencies found that all literacy agencies recognize their volunteers using both informal and formal methods. Based on the survey returns and the results from the focus group with agency representatives, agencies recognize literacy volunteers by:

- ► Recognizing volunteers via Ministry of Citizenship awards http://www.citizenship.gov.on.ca/english/citdiv/honours/ index.html
- ► Giving volunteer gifts during Volunteer Appreciation Week
- ► Nominating volunteers for special community recognition
- ► Having a literacy class do volunteer recognition projects
- ► Posting volunteer achievements/recognition on the agency's web site
- ► Giving fruit baskets at Christmas to long-term volunteers
- ► Planting a perennial garden in honour of long-term (5+ years) volunteers
- ► Writing letters of reference

<sup>1.</sup> Connors, Tracy Daniel, Ed., Volunteer Management Handbook. John Wiley and Sons Inc., 1995.

- Submitting reports to teacher education institutions upon request
- ► Recognizing volunteers at Annual General Meetings
- ► Hosting special volunteer-only speaker events
- Sending cards in cases of illness or death in a volunteer's family
- ► Acknowledging volunteer recognition in annual report
- ► Including volunteers in staff activities and meetings
- ► Hosting luncheons for volunteers
- ► Remembering and acknowledging volunteers' birthdays
- ► Giving certificates for Tim Horton's
- ► Preparing special letters and cards from volunteers' own learners saying why they appreciate the volunteers - It's good practice for learners in editing and writing, and it's great recognition for volunteers
- ► Creating an anthology honouring volunteers, featuring tutor and learner-written stories

### CLO's survey showed that:

- ➤ 58% of volunteers prefer informal recognition
- ► 24% like formal recognition events
- 22% appreciate occasional rewards or incentives
- 7% like public recognition

According to the volunteers, they value the recognition they receive from their agencies. Over 94% of literacy volunteers said they received some kind of recognition, and 89% reported that the recognition they were receiving was adequate, suggesting a high degree of satisfaction with the recognition they receive.

The survey also asked volunteers to identify the ways in which they like to be recognized. It is clear from their responses that informal recognition is the most preferred method. This might include thank-you cards, phone calls, etc. Only 24% said they would like to attend recognition events such as teas or luncheons. Still fewer said they would like to receive occasional rewards or incentives, and only 7% reported that they would like to be publicly recognized (through community events, newspaper articles, etc.).

In the volunteer survey and focus groups, volunteers also identified specific ways they would like to be recognized. The following list highlights some of those methods.

# **Volunteer Recognition Methods – As Reported by Literacy Volunteers**

- Letters of reference for employment purposes
- ► Opportunities for training/learning
- ► Thank-you cards from students
- ► An annual Christmas party, or another social event which gives the volunteers and students a chance to get together outside the classroom
- ► Recognition from outside the [literacy] council
- ► Tutor-of-the-year awards
- ► Small gifts handmade by students or board members
- ► Chocolate!

# We Already Do a Good Job of Volunteer Recognition. How Can We Improve?

It is clear from CLO's recent research that most community literacy agencies throughout Ontario recognize their volunteers. The resources in this chapter are designed to help literacy agency staff tweak, refresh and affirm what they are doing.

To begin, you can use the simple checklist below to assess your current volunteer recognition practices.

## **CLO's Current Volunteer Recognition Assessment Form**

<b>4</b>	Do we
	Have a policy that addresses volunteer recognition?
	Have a process for volunteer recognition?
	Review our recognition practices each year?
	Identify each volunteer's recognition preferences as part of the intake process?
	Tailor our recognition practices to the motivations and interests of each volunteer?
	Ask volunteers if they are satisfied with the recognition they receive (e.g. as part of the performance review)?
	Make a point of budgeting annually for volunteer recognition?
	Other?



## **Recognition and Volunteer Motivation Mix**

Make sure your recognition methods are consistent with each volunteer's original and ongoing motivations. Consider which motivator best suits each volunteer.

Motivator	Try recognizing this type of volunteer by:			
Praise	► Singling out these volunteers for their accomplishments			
	<ul> <li>Offering them public recognition in a newsletter or at an event</li> </ul>			
Affiliation	► Providing opportunities for them to get together			
	► Giving them T-shirts or name badges			
Accomplishments	<ul> <li>Creating opportunities for these volunteers to see concrete evidence of their work</li> </ul>			
	► Providing certificates of accomplishment			
Power and Influence	► Giving them positions in which they can make decisions			
	► Giving them a title or a chance to be a guest speaker			

## **Informal Recognition is Highly Valued**

Given the significant number of literacy volunteers who value and prefer informal gestures of recognition, CLO has created a list of recognition ideas you may want to try:

- ► Send thank-you notes to volunteers
- ► Send a copy to their family
- ► For young people, send a note to their parents
- ► Give tokens of appreciation (pins, mugs, etc.)
- ► Have a display board in the office highlighting volunteer accomplishments
- ► Have photos of volunteers displayed
- ► Send birthday cards
- ► Offer social opportunities (pot luck dinners, etc.)
- ► Hold a fun workshop for volunteers (True Colours, crafts, etc.)

- ► Donate a book to the public library with the volunteer's name inscribed in it
- ► Send a tea bag and permission to NOT attend a formal event but to instead put their feet up and relax at home!

For more ideas, see CLO's Volunteer Recognition Tips and Ideas From Ontario Community Literacy Agencies at http://www.nald.ca/PROVINCE/ONT/volman/iyv/iyv2.htm#4

#### **Best Practice**

If you are looking for an inexpensive and fun way to recognize your volunteers, Literacy Plus (Renfrew County Community Upgrading Program) may provide some inspiration! Literacy Plus developed a "Literacy Volunteer Thank You Kit". The kit contains a thank-you card with a verse about the various items contained in the kit:

- ► An agency pen: "Our volunteers have made their mark"
- ► **Chocolate eggs:** "Your support is eggzactly what our learners need to reach their goals"
- ▶ **Note cards:** "Your contribution is noteworthy"
- ► **Ruler:** "Your value is beyond measure"
- ► **Elastic:** "We appreciate your flexibility"
- ► **Lifesavers:** "You are truly a lifesaver!"

## **Formal Recognition is Important Too**

Although the majority of literacy volunteers say they prefer more informal recognition methods, many appreciate more formal recognition methods.

For some, an award or public recognition is important, while for others, being invited to a special event is of value. Others will cherish mementos of their contribution, whether the memento is a gift, a plaque, a certificate or a trophy.

#### **Awards**

The Ontario Volunteer Service Awards are a way for the government to recognize volunteers for their contributions. Youth volunteers are recognized for two or more years of service, while adults are recognized for five or more years of service. The awards are free, and the only selection criterion is that the board chair signs off on the years of service contributed by each volunteer. Please visit the website of the Ministry of Citizenship and Immigration for more information: http://www.citizenship.gov.on.ca/english/citdiv/honours/index.html.

#### **Volunteer Appreciation Items**

Volunteer Canada's "Marketplace" has some interesting and cost-effective volunteer appreciation items. For more information, click on www.volunteer.ca/marketplace.

Local retailers, such as trophy and awards shops, may also carry volunteer appreciation items. If you prefer to order online, you can also find some great volunteer recognition gifts at Cabam: www.cabam.ca. You can also check with your local volunteer centre to see who they recommend as a local supplier of volunteer appreciation items.

#### **Special Events**

Some volunteers appreciate being invited to a special banquet, a volunteer luncheon or a tea. Organizing an event that is partially or entirely devoted to volunteers requires good planning, human and financial resources and a commitment to seeing the event through to successful completion.

To assist your agency with its event planning, we have included the following Volunteer Event Planning Checklist. Depending on the size of your event, you may find that certain items in the checklist apply, while others do not.

#### Proceed With Caution!

It is essential that you know whether your volunteers would want to be invited to and recognized at a special event. Many do not want this kind of public recognition, and they could feel uncomfortable or be embarrassed by it.

<b>4</b>	16 to 20 Weeks Ahead
	Decide who is going to oversee the organization of the event — usually a chairperson
	2. Identify and recruit others who will assist
	3. Bring together the team and brainstorm the five Ws:
	a. <b>What</b> do you want to have happen at the event? (Consider how this could further your agency's strategic goals as well as recognize the contribution of your volunteers.)
	<ul> <li>When do you want to hold the event? (If necessary, consider rain dates and other events that might conflict with yours.)</li> </ul>
	c. <b>Where</b> will you hold the event? (Consider seating, parking, accessibility for people with disabilities and special transportation needs.)
	<ul> <li>d. Who should attend the event? (Besides the volunteers to be recognized, consider whether public officials, the media or out-of-town people need to be invited.)</li> </ul>
	e. <b>Who</b> will be on the different committees? (If appropriate, committees may be necessary for Awards and Prizes, Entertainment and Publicity, Exhibits and Information, Food and Decorations, and Invitations and Hospitality.)
	f. <b>How</b> much money do you need to host the event? Can you get items donated?
۵	g. <b>How</b> long should the event last?
	h. Will you need any special events permits?
<b></b>	8 to 12 Weeks Ahead
	Chairperson's Checklist
	Recruit an honorary chair to help publicize and draw people to your event. Local celebrities or media personalities are good choices.
	Meet with committee heads regularly, offer help when needed, and monitor progress with tasks.
	Identify potential partners and local celebrities with help from the honorary chair.
	Invitations and Hospitality Committee's Checklist
	Decide whether you are going to use flyers, signs, or other notices; work with the Publicity Committee. Post flyers 4 to 6 weeks before the event.
	Invite local celebrities and volunteers.
	Estimate how many people will be attending and tell the Food Committee.
	Ensure you have adequate parking, handicapped access, restrooms and a secure place for coats (don't forget hangers).
	Have on hand a first aid kit, fire extinguisher, a cellular phone (or access to a phone), and emergency phone numbers.
	Make name tags and site maps for all workers. Make name tags for the volunteers to be honoured.
٥	Let the Decorations Committee know how many tables are needed for registration.
۵	Recruit greeters and runners for last-minute needs. Designate greeters to accompany celebrity guests.
٥	Determine what special gifts/awards will be required to recognize volunteers.
	Determine who will recognize volunteers.

<sup>2.</sup> adapted from the National Crime Prevention Council's All Purpose Event Planning Checklist, http://www.ncpc.org/ncpc/?pg=2088-2262

<b>4</b>	8 to 12 Weeks Ahead (continued)
	Entertainment & Publicity Committee's Checklist
	Plan activities and entertainment. Arrange for stage, sound, and audio visual equipment as required.
<u> </u>	Reproduce informative "take one" brochures and bookmarks.
	Develop a media contacts list. Call radio and television stations and newspapers to introduce yourself and the
	event.
	Prepare a press release to send out one week before the event. Put together an information kit for the media that includes a press release, fliers, bookmarks and brochures, list of sponsors and participating celebrities.
	Recruit a volunteer photographer to take pictures at event.
	Be available on the day of the event to meet and greet press representatives and answer questions.
	Prepare a script for the chairperson or the local celebrity to use to honour volunteers.
	Food & Decorations Committee's Checklist
	Decide what decorations you will have and where they go.
	Map where exhibits, food, entertainment, registration, etc. will be set up. Pay attention to the location of electrical outlets.
	Make promotional signs, directional signs, and posters.
	Decide whether you are going to serve refreshments. If you don't want to provide refreshments, you could invite local restaurants to sell food.
	Arrange for all required tables, chairs, napkins, cups, plates, and utensils for food, hospitality, exhibitors, and awards.
	Recruit volunteers for pre-event set-up and post-event clean-up.
Ø	1 Week Ahead
	Send press release to radio, television and print media. Call key press contacts to confirm coverage.
	Purchase non-perishable food, utensils, etc.
	Confirm all deliveries and pick-ups.
Ø	1 Day Ahead
	Pick up orders and arrange deliveries as appropriate.
	Test audio visual and sound equipment.
	Set up tables and decorate if possible –set up head table, if required.
	Purchase all perishable food items and/or ensure that all food is prepared.
	Do a final review to make sure all checklist items are completed.
Ø	The Big Day!
	Install or complete decorations.
	Set up tables, stage and audio-visual equipment.
	Ensure that first aid kit, fire extinguishers, phone and emergency phone numbers are readily accessible but out of the way.
	Ensure that greeters, helpers and runners are on-site, briefed and ready to go.
	Assemble all materials for activities.
	Thank all donors, workers, partners and celebrities at the event.
Ø	After the Event
	Clean up and return all borrowed equipment and supplies.
	Send thank-you notes to all who worked on the event.
	Make notes for next year's event. Jot down suggestions of things to do differently and things that went well.
	Meet with committee chairpersons for a post-event evaluation.



## **Public Recognition**

In developing a media kit for Volunteer Week, Volunteer Canada recommends including the following:

- a news release or media advisory
- □ backgrounder on the week
- ☐ fact sheet about key volunteerism statistics with a focus on local information
- highlights of the key trends and issues in volunteerism
- biographies of volunteers you are honoring
- suggestions for stories (tip sheet)
- photographs of volunteers in action that relate to your news release or proposed feature (5x7 or 8x10 black and white glossies with a brief caption taped to the back)
- list of key sources on volunteerism that you could make available for interviews on short notice
- backgrounder of your organization and its activities
- your business card

Depending on your organization's connection with the local media, it may be relatively easy to have regular or occasional volunteer recognition stories profiled in the newspaper, on the radio or even on the local television station. Utilizing local media can be a great way to recognize your volunteers. Taking the time to arrange the inclusion of recognition stories tells the community at large how much you both value and depend upon volunteers. National Volunteer Week (held in April of each year) and International Literacy Day (September 8) provide great opportunities for volunteer recognition. Local media often want to know what events you have planned for these occasions.

The following Media Relations Preparation Checklist and sample media release were originally created for CLO as part of a media relations workshop and International Year of Volunteers materials. You can use this list each time you do media relations to ensure you do not miss any critical steps. Keep in mind that you may need to shuffle the order or do things simultaneously, depending on the time available to you. You don't want to lose out on opportunities to get the media interested in your organization and your volunteers so it's best to be prepared! Successful volunteer recognition stories will likely result in increased attention in, and volunteerism for your organization. At a time when competition for volunteers is increasing and volunteers are decreasing in number, public exposure becomes very important.



## **CLO's Media Relations Preparation Checklist**

<b>1</b>	Task
	Review communications objectives to ensure 'fit.'
	Pinpoint your audience.
	Select media to target – radio? Local TV?
	Update media database.
	Outline measurable objectives.
	Write out 5Ws – who, what, when, why, where?
	Determine key messages.
	Write and format the press release according to specifications by your local media.
	E-mail, fax or mail it out.
	Follow up only as appropriate.
	Assemble and train spokespeople.
	Plan for on-site media handling.
	Prepare in case they don't show.
	Photographs
	Complete final press release.
	Evaluate coverage.
	CELEBRATE!

## CLO's Sample Media Release

(Print on organization letterhead)

FOR IMMEDIATE RELEASE Media Contact: Name, Title

Organization Name (xxx)xxx-xxxx name@place.com

## (YOUR ORGANIZATION NAME) CELEBRATES NATIONAL VOLUNTEER WEEK BY RECOGNIZING KEY VOLUNTEERS

CITY NAME, ON, Month xx, 200x – (*Profile of an actual student in your program:*) Two years ago, Martha celebrated her 60th birthday by deciding to learn to read. All her life she had struggled with everyday tasks like buying groceries. She relied on strangers to help her read food labels. She often worried that she might take the wrong medicine or get on the wrong bus. In February, Martha graduated from her local literacy program.

(*Introduce volunteers:*) Thanks to volunteers like John Doe and Mary Somebody (replace with real volunteer names and profiles), volunteers who have donated hundreds of hours of their time, learners like Martha have the opportunity to improve their literacy and numeracy skills.

(Comments from Executive Director or Board Chair:) Jane Leader marvels at the contributions John and Mary have made. "John has been with Literacy Agency ABC for five years now. During that time, he has tutored 11 learners, helped out with numerous fundraisers and fixed our computers too many times for me to remember! As a board member for two years, Mary has been instrumental in helping us develop new policies and organize our reading festival. Without John, Mary and our other 37 volunteers, we quite simply would not exist."

(Quote from volunteer:) "The reward of being a literacy volunteer is to see the light of comprehension break through and watch the students take off on their own," said John. "Wow! What a rush!"

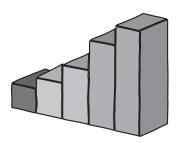
(2nd quote from a volunteer:) Mary agrees. "Being a literacy volunteer is a two-way street," she said. "You get back every bit as much as you give and possibly more. It is so gratifying to see a student develop self-esteem and the strong desire to learn. The need is there – if only more people would realize it!"

(Summary statement about your agency) Literacy Agency ABC has been helping adults in Somewhere learn to read for more than 25 years. In that time, more than 1000 learners have come through our doors, and at least 400 volunteers have helped those learners to change their lives.

(Insert your organization's **boilerplate** here – standard information that may include a mission statement, brief history or the market you serve.)



# **Volunteer Recognition: Summary of Practical Steps for Improvement!**



Literacy Agency ABC staff decided to examine more closely their volunteers' interests and recognition preferences. In addition to building a question about recognition preferences into their performance appraisals, the Executive Director contacted each volunteer, either by phone or in person. She explained that Literacy Agency ABC was looking at how they recognize their volunteers and asked them a simple question: "As a volunteer, how would you like to be recognized for your efforts?" Although many initially said they did not need or want any recognition, the Executive Director explained that some form of recognition was important to Literacy Agency ABC. She also used the results from the CLO research to give each person examples of what other volunteers had said were meaningful recognition efforts.

Like the CLO research, she found that approximately half of the volunteers were only interested in more informal recognition ideas (including thank-you cards, continued staff support, special notes from learners, etc.). She also found that, of this group, many were very uncomfortable with the idea of formal recognition and did not want to be publicly acknowledged at all. Interestingly, she found that among the others, a significant number of younger volunteers were interested in public recognition, a letter of reference or a certificate that they could include as part of their employment portfolio. Only a few indicated they were interested in any form of volunteer appreciation items. Finally, she identified three volunteers who were interested in creating a volunteer recognition committee.

After reviewing and recording the recognition interests and preferences for each volunteer (and including them in the volunteer's file), the Executive Director compared the results with other strategic priorities for the upcoming year. Staff and the board agreed to continue the practice of recognizing all volunteers at the Annual General Meeting by reading out their names. However, for those volunteers

receiving special rewards (including one for 15 years of service), they consulted with each volunteer prior to the event to gauge the individual's comfort level with the public attention.

Because of the amount of effort to organize the AGM, staff used the Event Planning Checklist to help with the planning and found the process to be more thorough and efficient than in previous years. Additionally, for the first time, the media was invited – partly as a way to publicly recognize the volunteers.

For those volunteers who expressed a preference for informal recognition, the volunteer recognition committee researched and brainstormed new and innovative ways to say thanks, based on individual motivations, interests and personalities.



## **Additional Resources**

Resource	Source	Usefulness	Cost	How to obtain
"Volunteer Management: Mobilizing all the Resources of the Community"	A book by Steve McCurley and Rick Lynch (1996)	An excellent resource on volunteer management with a chapter devoted to recognition and retention	\$25.00 (U.S.)	Available at most libraries and book stores
"Beyond Banquets, Plaques and Pins: Creative Ways to Recognize Volunteers and Staff"	laques and Pins: reative Ways D Recognize Columteers and  A book by Sue Vineyard (1989)  Of Other Principles of Columns (1989)		\$9.95	Available at many libraries, but may be difficult to purchase because it is out of print.
Media Relations information  ABC CANADA  www.abc-canada.org/public_awareness/ special_events.asp		Valuable information about media relations (particularly around event planning)		
Literacy Basics website	· · · · · · · · · · · · · · · · · · ·		Free	Internet
Volunteer Recognition Tips	http://www.nald.ca/PROVINCE/ONT/		Free	Internet
Volunteer Charity Channel website resources http://charitychannel.com/		Articles and resources on volunteer recognition	Free	Internet
Appreciation items and gifts			Items range in price	Internet
Volunteer recognition resources	Energize Inc.'s website http://www.energizeinc.com/art.html	Online bookstore contains a number of resources on volunteer recognition	Items range in price	Internet



Resource	Source	Usefulness	Cost	How to obtain
Media relations information	Volunteer Canada website http://www.volunteer.ca/volcan/eng /content/nvw/promote-stories.php; http://www.volunteer.ca/volcan/ eng/content/vol-management/rec- guidelines.php?display=4,0	Very good media relations information and resources	Free	Internet
Appreciation items	Volunteer Canada website http://www2.clicshop.com/stores/ volcan1/	Online store offers some appreciation items. Also contains some very good media relations information and resources.	Free	Internet