



Volunteer Management Audit:

The Canadian Code for Volunteer Involvement

Volunteer Canada gratefully acknowledges the author, Liz Weaver, for her work on *Volunteer Management Audit: The Canadian Code*.

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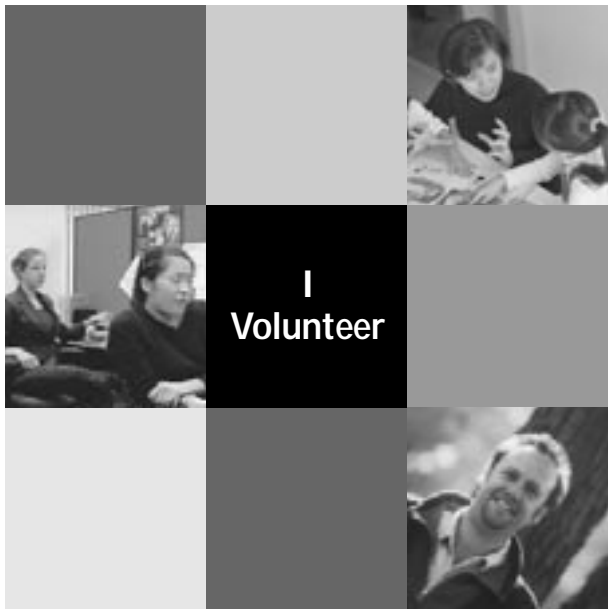
VOLUNTEER
BÉNÉVOLES
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Canada

Table of Contents

1. Overview: The Canadian Code for Volunteer Involvement	3
Guiding Principles for Volunteer Involvement	4
Organization Standards for Volunteer Involvement	6
2. Volunteer Management Audit: The Canadian Code for Volunteer Involvement	9
3. Completing the Volunteer Management Audit	11
4. Interpreting the Sections	13
Section 1: Organization Profile	13
<i>Valuing of Volunteer Contribution to the Organization</i>	14
<i>Estimating the Expenses</i>	16
Section 2: Volunteer Resources Program Profile	17
<i>Staffing Information</i>	17
<i>Volunteer Program Profile</i>	18
Section 3: Canadian Code for Volunteer Involvement – Values and Guiding Principles	22
Section 4: Key Elements of a Volunteer Resources Program	25
<i>Additional Evaluation</i>	25
Section 5: Organization Standards Checklist	27
Section 6: Resources/Knowledge Transfer	38
1. <i>Organizational Policies – Volunteer Resources</i>	39
2. <i>Volunteer Resources Program Statistics</i>	39
3. <i>Volunteer Resources Program Materials</i>	39
4. <i>Training Activities</i>	40
5. Developing Strategies to Enhance your Volunteer Program	41
Communication Tools	41
Evaluation Tools	42
General Guidelines for Report Preparation	43
Sections of the Evaluation Report	44
Strategy Tools	45
6. Electronic Volunteer Management Resources	47
7. Final Thoughts	49



1. Overview: The Canadian Code for Volunteer Involvement

As part of the resources developed for the International Year of Volunteers – 2001, Volunteer Canada developed and launched the *Canadian Code for Volunteer Involvement*. The *Canadian Code for Volunteer Involvement* has three important elements and articulates overarching values, guiding principles and organization standards applicable to volunteer programs in non-profit and voluntary sector organizations.

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

Values for Volunteer Involvement

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

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

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

Volunteer involvement is based on relationships.
Volunteers are expected to act with integrity and be respectful and responsive to others with whom they interact.

In addition to the values statements, the *Canadian Code for Volunteer Involvement* contains two guiding principles which are considered as important guides to the organization/volunteer relationships. While these guiding principles supplement the values statements, they are important because they further articulate the reciprocal relationship which develops between the organization and the volunteers and act as guides for the organization standards. The guiding principles ensure that there is commitment and support for the volunteer program from both the organizations and volunteers perspectives. This means both an understanding of the role volunteers play in assisting the organization achieve its mission or purpose as well as ensuring that appropriate resources, both human and financial, are in place to support volunteers and the volunteer program.

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

GUIDING PRINCIPLES FOR VOLUNTEER INVOLVEMENT

Voluntary organizations recognize that volunteers are a vital human resource and will commit to the appropriate infrastructure to support volunteers.

The organization's practices ensure effective volunteer involvement.

The organization commits to providing a safe and supportive environment for volunteers.

Volunteers make a commitment and are accountable to the organization.

Volunteers will act with respect for beneficiaries and community.

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

The organization standards for volunteer involvement largely follow the volunteer management cycle including having in place appropriate policies and procedures for the volunteer program, volunteer position design, volunteer recruitment and retention strategies, and volunteer recognition. The first organization standard for volunteer involvement links back to the values and guiding principles by requiring that the board of directors and senior management within the organization both understand how the volunteer program assists the organization in achieving its mission or purpose and provide appropriate resources to support volunteer involvement. Without the first organization standard in place, the volunteer program is often seen as or functions as an adjunct to the organization rather than an integral element supporting the delivery of services and the achievement of the organization's mission or purpose.

ORGANIZATION STANDARDS FOR VOLUNTEER INVOLVEMENT

The boards of directors and senior management acknowledge and support the vital role of volunteers in achieving the organization's purpose or mission.

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

A qualified person is designated to be responsible for the volunteer program.

A clearly communicated screening process is consistently applied.

Volunteer assignments address the purpose of the organization and involve volunteers in meaningful ways – reflecting their various abilities, needs and backgrounds.

Volunteer recruitment and selection reaches out to diverse sources of volunteers.

Volunteers receive an orientation to the organization, its policies and procedures, and receive training for their volunteer assignments.

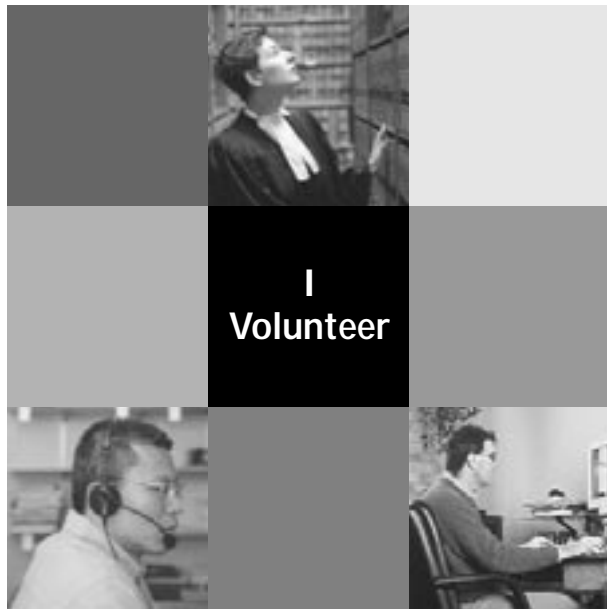
Volunteers receive appropriate levels of supervision according to their task and are given regular opportunities to receive and give feedback.

Volunteers are welcomed and treated as valuable and integral members of the organization's human resources.

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

During the International Year of Volunteers, Volunteer Canada encouraged local, provincial and national voluntary sector organizations to review the code, host discussions with board members, staff and volunteers about the important role volunteers play in supporting the mission of the organization and consider adopting the *Canadian Code for Volunteer Involvement*. The *Canadian Code for Volunteer Involvement* resource book described the relevance and importance of volunteer engagement within Canada and provided a series of discussion starters for organizations to consider.

Many organizations have adopted the *Canadian Code for Volunteer Involvement* and the code and resource book continue to be a popular resource item requested by organizations. For a copy of the *Canadian Code for Volunteer Involvement* visit the www.volunteer.ca website or call Volunteer Canada at 1-800-670-0401.



2. Volunteer Management Audit: The Canadian Code for Volunteer Involvement

The **Volunteer Management Audit: The Canadian Code for Volunteer Involvement** has been developed as an ancillary tool for non-profit and charitable organizations to assess their volunteer resources program. This audit tool can be used by both organizations which have adopted the *Canadian Code for Volunteer Involvement* and those organizations which have not.

The **Volunteer Management Audit: The Canadian Code for Volunteer Involvement** is composed of seven sections which will provide important information about volunteer involvement and management practices within your organization. *Please note that it is not necessary for your organization to have adopted the Canadian Code for Volunteer Involvement in order to complete the audit.*

Section 1: Organization Profile

In this section you will be asked to provide basic contact information about your organization

Section 2: Volunteer Resources Program Profile

In this section, you will be asked to provide information about the staff person who has the primary responsibility in the organization for managing and supporting volunteers. There is also a section asking you to profile the volunteer program including the number of volunteers and their roles within the organization.

Section 3: Values and Guiding Principles

Using the values statements and guiding principles which are described in the Canadian Code for Volunteer Involvement, you will be asked to assess whether your organization adopted these completely or amended them as appropriate to the context of your organization.

Section 4: Key Elements of a Volunteer Resources Program

Using the Canadian Code for Volunteer Involvement as a benchmark document, you will be asked to assess your organization and specifically the volunteer program within your organization against the Code.

Section 5: Organization Standards Checklist

The Canadian Code for Volunteer Involvement again provides the background for this section of the audit. Respondents are asked to provide commentary on innovative approaches they have developed or challenges which the organization faces when assessing the volunteer program against each of the standards.

Section 6: Resources/Knowledge Transfer

In this section, you will be asked to share how volunteer resources management and practices are shared within your organization. Where are volunteer resources developed and how is knowledge transferred between the national office, provincial offices and local affiliates/branches?

Section 7: Final Reflections

This section provides you with an opportunity to reflect on your volunteer resources program.

3. Completing the Volunteer Management Audit

Please take the time to fully complete the Audit form. The information provided by participating organizations will enable us to reflect on the both the *Canadian Code for Volunteer Involvement* and the volunteer management practices and approaches which exist within organizations. There is no right or wrong answer.

It will take respondents approximately 1.5 hours to fully work through all the sections of the Volunteer Management Audit form. Once completed, please forward a copy to Volunteer Canada. Volunteer Canada is collecting Volunteer Management Audit information as part of a review process for the *Canadian Code for Volunteer Involvement*. The information generated through the Volunteer Management Audit process will provide important data for both the review and potential revision of the *Canadian Code for Volunteer Involvement*.



4. Interpreting the Sections

SECTION 1: ORGANIZATION PROFILE

Section 1 of the Volunteer Management Audit requires the respondent to provide basic information about the organization. There are three interesting reflective areas to consider.

The first is identifying the **sector served by the organization**. There are more than 180,000 voluntary and not-for-profit organizations in Canada serving all segments of the community. While many of these organizations have formal structures, a large percentage of organizations are community-based and volunteer driven. The Volunteer Management Audit is applicable to all types of organizations from the small, grassroots to the large and structured. Many organizations provide service to a variety of clients and through a variety of programs. Please try to identify the primary sector—arts, culture, health, education, human services, environment, etc.—that your organization serves.

SECTION 1: ORGANIZATION PROFILE	
Name of Organization:	
Address:	
Telephone:	Fax:
Organization Contact:	
Email:	Web:
Please check the following sector served:	
<input type="checkbox"/> Arts and Culture	<input type="checkbox"/> Education
<input type="checkbox"/> Health	<input type="checkbox"/> Youth
<input type="checkbox"/> Diverse Cultures	<input type="checkbox"/> Other _____ (specify)
Please check the following:	
<input type="checkbox"/> National Office	# of Staff in Organization _____
<input type="checkbox"/> Provincial/Regional Office	# of Volunteers in Organization _____
<input type="checkbox"/> Local Branch/Affiliate	
<input type="checkbox"/> Other _____ (specify)	
Size of Organizational Budget:	Size of Volunteer Resources Budget:
Has the organization formally adopted the Canadian Code for Volunteer Involvement?	
<input type="checkbox"/> Yes <input type="checkbox"/> No <input type="checkbox"/> In process	
If Yes – Please provide the Policy Statement Adopted by the Board of Directors:	
If No – Please indicate why the organization has not adopted the Canadian Code for Volunteer Involvement:	

The second reflective area is the **Staff/Volunteer Ratio** in your organization. This ratio provides the respondent with information on the number of staff supporting the organization versus the number of volunteers involved in service delivery. If the number of volunteers is small, there is probably room for the volunteer program to expand. For successful volunteer involvement, however, the volunteer resources program must be in alignment with the mission of the organization and the volunteer positions provide meaningful activity for the individuals engaged.

Some questions to consider about current and new volunteer positions:

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

Valuing of Volunteer Contribution to the Organization:

During the International Year of Volunteers, a number of research projects were funded which explored in detail the value of volunteer contributions to an organization's bottom line. Many managers of volunteer resources track the number of volunteers and the number of volunteer hours contributed and use this data as the estimated value of the contribution that volunteers have made to the organization. Few go the next step to track all of the other financial donations, special events ticket purchases and in-kind

support provided by volunteers to the organization. Have you ever considered how often volunteers are asked to participate in events hosted by the organization, purchase raffle tickets or host meetings in their work place. These financial and in-kind contributions impact the organization either directly or indirectly through financial support or dollars saved on program delivery costs. Take a few minutes to consider the full value of volunteer contributions to your organization. Below is a table to help you consider some of the contributions and their value.

Type of Contribution	Number of Volunteers	Estimated/Real Value
Program Volunteer Hours (\$16.50 per hour)		
Board Member Hours		
Committee Volunteer Hours		
Total Volunteer Financial Donations to Organization		
Total of Volunteer Ticket Purchases for Special Events		
Total In-Kind Support – meeting space, materials, refreshments		
Total Human Resources Support – meeting facilitation, workshop leaders, trainer, etc.		
Other Support (please detail)		
Total Volunteer Contribution		

Estimating the Expenses of the Volunteer Program and Comparing with the Organization Budget :

The next step is to get a better understanding of the costs of the volunteer resources program. The Canadian Code for Volunteer Involvement Audit provides a reflective **budget comparator** in this section to review and consider is the size of the volunteer resources budget versus the size of the Organizational budget. Are these two figures consistent with the number of volunteers involved in the organization? It is important to include in the volunteer resources budget the appropriate amount of salaries and benefits for all staff supporting the volunteer program. If the manager of volunteers is only working part-time supporting the volunteer program and receives an annual total compensation of \$ 30,000, then you would include \$ 15,000 in the volunteer resources budget line. Other volunteer resources budget items might include administrative costs such as postage, telephone, a portion of rent, computer and web access, volunteer recognition, etc. In many cases, the volunteer resources budget is not maintained as a separate line budget and so the respondent may have to approximate some of the costs associated with the volunteer resources budget. Below is a table to assist you.

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

SECTION 2: VOLUNTEER RESOURCES PROGRAM PROFILE

This section of the Volunteer Management Audit is designed to provide respondents with a **profile of the volunteer resources program** within the organization. Specifically, the section is designed to provide information about the individual with the lead responsibility for managing and supporting volunteers within the organization and also provide synthesized data about the volunteer program. At the completion of this section of the audit, the respondent should have a useful profile of the volunteer program. This profile information can be used in a variety of ways, as a positioning tool both within and outside of the organization, with funders, with potential and current volunteers and with the community.

Staffing Information:

Many voluntary sector organizations do not have a full-time, paid manager of volunteer resources whose sole duty is to manage and support volunteers and the volunteer resources program. Rather, the manager of volunteer resources might be a part-time position, either paid, contract or unpaid, and the individual fulfilling the job duties may also have other administrative or management responsibilities within the organization. In other cases, such as in a large institutional setting like a hospital, there may be more than one individual hired to support the volunteer program.

The staffing information section provides the respondent with a range of approaches that an organization might use to manage their volunteers.

The staffing section includes a series of questions which will provide demographic information about the individual(s) managing the volunteer program.

Once you have completed this section of the audit, you might want to consider the following questions:

- Is the staff profile for the volunteer program consistent with the National Profile of Managers of Volunteer Resources?
- Where are the gaps between the national profile and our local program?
- What training opportunities and education levels does the current manager of volunteer resources have? Are there gaps in training and education?
- Is the annual level of compensation consistent with the duties and education of the staff person fulfilling the role of manager of volunteers?

Volunteer Program Profile:

This series of questions will provide the respondent with a valuable profile of the current volunteer program as well as identifying areas where additional targeted recruitment might be necessary. Completing this section of the audit on an annual basis will enable the organization and respondent to track trends in volunteer involvement across the organization. Are the number of volunteers involved and the number of hours contributed increasing or decreasing? Does the volunteer group represent key stakeholder groups in the community or are there recruitment gaps?

Included in the volunteer program profile are the voluntary contributions of board members, committee members and fundraising/special event volunteers. Often the manager of volunteer resources is only involved with the recruitment, training and placement of volunteers involved in program and service delivery. We are asking respondents to consider all volunteer positions within the organization including

those at the board, fundraising and committee levels. There might be strategies which the manager of volunteers employs with respect to recruitment, screening, and training which could be effectively applied to these other volunteer groups within the organization. Does the manager of volunteers have volunteer information forms, resource materials or training which could be relevant to all volunteers within the organization?

Included in this section as well is a table requiring the respondent to list all volunteer positions and the time commitment required for the volunteer position. This table will provide the organization with a good perspective of volunteer activities available within the organization and could be used in volunteer recruitment materials providing perspective volunteers with a range of activities to consider.

- Does the organization have a range of volunteer opportunities available?
- Are there a variety of time commitments available for volunteers?

The final question asks the respondent to consider trends in volunteer recruitment that they have experienced. This question will enable the respondent to identify gaps or success strategies. Responses to this question should be contrasted to the previous question.

For example, if it is getting more difficult to recruit youth volunteers, are the volunteer positions currently available within the organization flexible with limited time commitment. Youth volunteers often require a high degree of flexibility because they fit volunteering in between the demands of school, a part-time job, recreational, social and family commitments. Many youth are also available outside of normal business hours and this often presents a challenge to organizations which provide services in a 9 a.m. to 5 p.m. timeframe.

Once you have completed this section of the audit, the respondent will have a detailed picture of both the current status of the volunteer program and the position of the manager of volunteer resources. The respondent should also be able to identify some of the strengths of the current program and some of the gaps. This will assist the manager of volunteer resources in determining and establishing goals for the volunteer program.

Staffing Information:

1. The organization has a person(s) designated to manage volunteers: (recruitment, interviewing, orientation, training, placing, supervision, recognition and evaluation are core volunteer management functions)

- Yes No

2. Please indicated the number of person(s) who have the primary responsibility to manage volunteers: _____

3. Role of person(s) managing the volunteer program within the organization:
Senior Management – a senior staff member – vice president, director, etc with significant decision-making, program development and budget responsibilities
Management – a member of the management team with limited decision-making, program development and budget responsibilities
Administrative – a clerical or support staff role within the organization

- Full-time (35 hours per week +), paid position with senior management status
 Full-time (35 hours per week +), paid position with management status
 Full-time (35 hours per week +), paid position with administrative status
 Part-time (under 20 hours per week), paid position with senior management status
 Part-time (under 20 hours per week), paid position with management status
 Part-time (under 20 hours per week), paid position with administrative status
 Full-time (35 hours per week +), unpaid position with senior management status
 Full-time (35 hours per week +), unpaid position with management status
 Full-time (35 hours per week +), unpaid position with administrative status

- Education and/or training (non-certified) in Volunteer Management
 Experience (5 years or more) in managing staff and/or volunteers
 No or limited experience in volunteer Management
 Other Experience (please detail): _____

7. Please detail other educational experience of the person who has the primary responsibility for managing volunteer resources in the organization:

- Masters or Doctoral Degree, University
 Undergraduate Degree, University
 Some University, but not completed
 Community College Program other than Volunteer Management
 High School
 Other (please specify): _____

8. Please detail the current annual compensation range of the person who has the primary responsibility for managing volunteer resources in the organization:

- Under \$ 10,000 \$ 11,000 – 25,000 \$ 26,000 – 35,000
 \$36,000 – 45,000 \$ 46,000 – 55,000 Over \$55,000

9. Demographic Information about the person who has the primary responsibility for managing volunteer resources within the organization:

- Sex: Male Female
 Age Range: under 18 19 – 25 years 26 – 35 years
 36 – 45 years 46- 55 years over 55 years

10. Estimate the total number of persons active as volunteers with the organization during the year 2001. Factor the following in the estimate:

- _____ Board Members
 _____ Committee Members
 _____ Fundraising/Special Event Volunteers
 _____ Number of individuals active as volunteers in program/service delivery
 _____ Other (Please specify) _____
 _____ **Total Number of Persons active as volunteers in 2001** (total of five lines above)

- Part-time (under 20 hours per week), unpaid position with senior management status
 Part-time (under 20 hours per week), unpaid position with management status
 Part-time (under 20 hour per week), unpaid position with administrative status
 Full-time Paid Contract position (35 hours per week +) with senior management status
 Full-time Paid Contract position (35 hours per week +) with management status
 Full-time Paid Contract position (35 hours per week +) with administrative status
 Part-time Paid Contract position (under 20 hours per week) with senior management status

_____ Part-time Paid Contract position (under 20 hours per week) with management status
 _____ Part-time Paid Contract position (under 20 hours per week) with administrative status
 _____ (specify) _____
 _____ managing volunteer resources the sole responsibility of the staff person(s)?
 No
 _____ Please list other duties: _____
 _____ the position title of the staff person with the primary responsibility for managing volunteer resources within the organization: _____
 _____ All the volunteer management educational and experience background of person(s) who have the primary responsibility for managing volunteer resources in the organization:
 _____ Community College Certificate in Volunteer Management
 _____ Certification in Volunteer Management (Canadian Administrators of Volunteer Resources, Provincial Administrators of Volunteer Resources – etc)

SECTION 3: CANADIAN CODE FOR VOLUNTEER INVOLVEMENT – VALUES AND GUIDING PRINCIPLES

This section of the Volunteer Management Audit specifically deals with the values and guiding principles found in the *Canadian Code for Volunteer Involvement*. In the 2000 National Survey of Giving, Volunteering and Participating, volunteers cited belief in a cause as one of the major factors motivating them to either volunteer their time or contribute financially.

The mission or purpose of voluntary organizations is the fundamental reason that these organizations exist. And yet, volunteer resources programs are often developed primarily to respond to a specific need or service delivery requirement in the organization rather than linking back to the mission and purpose of the organization.

The *Canadian Code for Volunteer Involvement* articulates core Canadian values and guiding principles which are applicable to all volunteer programs regardless of size. This section of the Volunteer Management Audit will be most relevant to those organizations who have already adopted the *Canadian Code for Volunteer Involvement*. Other organizations may want to reflect on both the values statements and guiding principles. Below are some questions for the organization to consider:

Below are some questions for the organization to consider:

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

Canadian Code for Volunteer Involvement – Values and Guiding Principles

Below you will find the values statements and guiding principles which have been articulated in the *Canadian Code for Volunteer Involvement*. These statements guide a philosophical approach to the involvement of volunteers in any voluntary sector organizations. The basic premise identifies that volunteers contribute value to Canadian society, communities and voluntary sector organizations but that there is an accountable relationship required between the volunteer and the organization. The *Canadian Code for Volunteer Involvement* asks that boards of directors adopt a values statement about the nature of volunteer involvement within the organization.

Values for Volunteer Involvement

Volunteer involvement is vital to a just and democratic society.

It fosters civic responsibility, participation and interaction.

Volunteer involvement strengthens communities.

It promotes change and development by identifying and responding to community needs.

Volunteer involvement mutually benefits both the volunteer and the organization.

It increases the capacity of organizations to accomplish their goals, and provides volunteers with opportunities to develop and contribute.

Volunteer involvement is based on relationships.

Volunteers are expected to act with integrity and be respectful and responsive to others with whom they interact.

No.	Question	Response
1.	Did the organization adopt the values statements associated with the Canadian Code for Volunteer Involvement?	<input type="checkbox"/> Yes with no revisions <input type="checkbox"/> Yes with some revisions (see below) <input type="checkbox"/> No (please describe why the organization was unable to adopt the values statements)
2.	What changes did your organization make to the Values statements?	
3.	Are the values statements relevant to the current context of the organization?	<input type="checkbox"/> Yes with no revisions <input type="checkbox"/> Yes, with some revisions (see below) <input type="checkbox"/> No (please describe below why the values statements are no longer relevant)

SECTION 4: KEY ELEMENTS OF A VOLUNTEER RESOURCES PROGRAM

In the *Canadian Code for Volunteer Involvement*, ten organization standards were articulated. Each of these standards is a key element of an effective volunteer resources program. In this section of the Volunteer Management Audit, respondents are asked to review each of the standards and determine the degree to which their volunteer resources program is complying with the standard as it is articulated. In the next section of the audit, each standard will be described in detail, although this section provides a ‘top of the trees’ approach to reviewing the volunteer program.

After completing this section, the respondent will be able to see both where the organization currently meets the standard and where there are gaps.

Additional Evaluation: Some respondents may use this and the next section as a 360-degree evaluation tool. In this case, you would recruit others in your organization to complete these two sections and provide you with their views about the volunteer program. In order for a 360-degree evaluation to be successful, the respondent should recruit board members, staff, volunteers and clients of the volunteer program. The 360-degree evaluation provides the organization and the manager of volunteers with additional feedback and views about the volunteer program. It also provides a check for the manager of volunteers to evaluate his or her response relative to the other respondents.

Key Elements of a Volunteer Resources Program

The *Canadian Code for Volunteer Involvement* provides a framework for assessing the key elements of the volunteer resources program within an organization. This section will assist you in assess the degree to which your organization complies with these key elements of volunteer resources management practices. There is a section below each table where you may comment on an innovative approach or particular challenge that your organization faces when involving or managing volunteers.

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

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

Please provide comments on innovative approaches developed or challenges faced by your organization related to involving and managing volunteers:

SECTION 5: ORGANIZATION STANDARDS CHECKLIST

Section 5 of the Volunteer Management Audit enables a more detailed evaluation and review of each of the ten organization standards for the volunteer program. In this section, respondents are again asked to rate the effectiveness of the volunteer resources program on a four-point scale. This rating allows the respondent to identify strong components for each of the standards and areas where program improvements might be required.

If the organization is using Sections 4 and 5 of the Volunteer Management Audit as a 360-degree evaluation tool, the respondent may want to include the questions found in the boxes at the end of each of the rating sections for comments and suggestions from the evaluators. These questions also provide an opportunity for the individual managing the volunteer program to reflect on the innovative approaches or challenges faced by the organization and the volunteer program relative to each standard. This reflection could be used to develop a report on the volunteer management audit and on the volunteer program.

Once each of the ten organization standards have been evaluated, the respondent should review the ratings against the initial ratings for Section 4.

Here are some questions to consider:

- Which of the ten organization standards are strengths for us?
- Where are the gaps for the volunteer resources program?
- What will the volunteer program need to do to address the gaps?
- What are short, medium and long term issues for the volunteer program?

Once you have completed Sections 4 and 5 of the Volunteer Management Audit, you should have defined the current state of the volunteer program and identified some areas where strategies could be developed to improve the volunteer resources program. In the final section of this guide, there are tools which will assist you with prioritizing your development strategies.

Organization Standards Checklist

This section of the Volunteer Management Audit will enable the organization to thoroughly review volunteer involvement and management practices. Assess your organization's compliance in each of the core areas. You are also invited to provide comments and/or suggestions on the innovative practices or challenges faced by your organization when involving volunteers in achieving the mission or mandate of the organization.

1. The board of directors and senior management acknowledge and support the vital role of volunteers in achieving the organization's mission.

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

Elements of Volunteer Resources Management	Currently in place to a large degree	Currently in place to some degree	Not currently being done	Not applicable not relevant
Appropriate insurance is purchased to minimize volunteer liability.				
Volunteer involvement is evaluated regularly.				

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

3. A qualified person is designated to be responsible for the volunteer program.

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

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

4. A screening process is clearly communicated and consistently delivered.

Elements of Volunteer Resources Management	Currently in place to a large degree	Currently in place to some degree	Not currently being done	Not applicable not relevant
Screening is considered to be an essential process that continues throughout the volunteer's involvement with the organization.				
All volunteer assignments are assessed for level of risk.				
Screening measures are used according to the level of risk of the assignment.				
All volunteers complete an application form and attend an interview.				
Screening procedures are delivered consistently with no exceptions made for certain individuals or positions.				

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

6. Volunteer recruitment and selection reaches out to diverse sources of volunteers.

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

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

- Volunteers receive an orientation to the organization and its policies and procedures, and receive training for volunteer assignments.

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

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

9. Volunteers are welcomed and treated as valuable and integral members of the organization's human resources.

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

Please provide comments on innovative approaches employed or challenges faced by your organization when integrating volunteers within the human resources strategy of the organization:

SECTION 6: RESOURCES/KNOWLEDGE TRANSFER

The final section of the Volunteer Management Audit requires organizations to consider both how knowledge and resources are developed and how these resources might be shared both within your community and within the organizational network. In these days of scarce resources, knowledge management and knowledge transfer are important skills for voluntary sector organizations to develop and utilize. There are an increasing number of online resources provided by both Volunteer Canada and the Canadian Centre for Philanthropy which enhance volunteer management practices. As well, many organizations electronically create reporting documents, templates, and tools which can easily be shared with others.

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

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

Resources/Knowledge Transfer

In this final section of the Volunteer Management Audit, we would like to explore the degree to which volunteer management resources and practices are shared and transferred within all levels of the organization. Please check where applicable.

1. Organizational Policies – Volunteer Resources

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

- Yes and shared with our National/Provincial/Local Offices (please circle as appropriate)
- Yes, but we have not shared it with others in our association
- In process of development
- No
- Other (please specify) _____

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

- Yes and shared with our National/Provincial/Local Offices (Please circle as appropriate)
- Yes, but we have not shared it with others in our association
- In process of development
- No
- Other (please specify) _____

2. Volunteer Resources Program Statistics

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

- Yes and shared with our National/Provincial/Local Offices (Please circle as appropriate)
- Yes, but we have not shared it with others in our association
- In process of development
- No
- Other (please specify) _____

Are volunteer involvement statistics shared with the senior management and board of directors of the organization?

- Yes and shared with our National/Provincial/Local Offices (Please circle as appropriate)
- Yes, but we have not shared it with others in our association
- In process of development
- No
- Other (please specify) _____

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

- Yes and shared with our National/Provincial/Local Offices (Please circle as appropriate)
- Yes, but we have not shared it with others in our association
- In process of development
- No
- Other (please specify) _____

3. Volunteer Resources Program Materials

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

- Yes and shared with our National/Provincial/Local Offices (Please circle as appropriate)
- Yes, but we have not shared it with others in our association
- In process of development
- No
- Other (please specify) _____

Does the organization have formal volunteer recruitment tools and strategies?

- Yes and shared with our National/Provincial/Local Offices
(Please circle as appropriate)
- Yes, but we have not shared it with others in our association
- In process of development
- No
- Other (please specify) _____

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

- Yes and shared with our National/Provincial/Local Offices
(Please circle as appropriate)
- Yes, but we have not shared it with others in our association
- In process of development
- No
- Other (please specify) _____

Does the organization have formal tools for orientating and/or training volunteers?

- Yes and shared with our National/Provincial/Local Offices
(Please circle as appropriate)
- Yes, but we have not shared it with others in our association
- In process of development
- No
- Other (please specify) _____

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

- Yes and shared with our National/Provincial/Local Offices
(Please circle as appropriate)
- Yes, but we have not shared it with others in our association
- In process of development
- No
- Other (please specify) _____

Does the organization have formal tools and/or processes for recognizing the contributions made by volunteers?

- Yes and shared with our National/Provincial/Local Offices
(Please circle as appropriate)
- Yes, but we have not shared it with others in our association
- In process of development
- No
- Other (please specify) _____

4. Training Activities

Please describe the volunteer program management training opportunities at the annual or bi-annual National Conference of the Association.	
Please describe the volunteer program management training opportunities which might occur at provincial/regional conferences or meetings.	
Please describe the volunteer program management training opportunities which might occur at local affiliates.	
Please describe any volunteer program management resources or tools which have been developed and shared by a national/provincial or local affiliate.	
Please describe any online volunteer program management training which is provided by the National/provincial or local affiliates.	

For more information or clarification about the **Volunteer Management Audit: The Canadian Code for Volunteer Involvement**, please contact: Volunteer Canada 1-800-670-0401 or by email at info@volunteer.ca

5. Developing Strategies to Enhance your Volunteer Program

COMMUNICATION TOOLS

Completing the **Volunteer Management Audit: The Canadian Code for Volunteer Involvement** will provide your volunteer program with some useful and succinct information about the current state of the program and potential activities to further enhance and develop volunteer management practices. However, a completed Volunteer Management Audit can also provide the background data for developing a communications or positioning tool for enhancing volunteer involvement. To develop an effective communications plan, there are a number of excellent on-line resources but Fenton Communications has a wonderful tool **Now Hear This** (found at www.fenton.com/resources/nht_report.asp) which will take you through communications planning.

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

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

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

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

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

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

EVALUATION TOOLS

The **Volunteer Management Audit: The Canadian Code for Volunteer Involvement** is a tool which can be used to evaluate the current status of the volunteer program. The sections of the Volunteer Management Audit can be separated by the respondent. One evaluation strategy to consider is to have the Volunteer Management Audit completed by the manager of the volunteer program. This individual will likely have access to much of the information required to complete the audit. A review of the volunteer program files as well as information from the organization will provide important data required to complete the audit.

Another evaluation strategy is to consider having the Volunteer Management Audit completed by a number of individuals in the organization. This 360-degree feedback can provide the organization with some very useful information and a better understanding of the knowledge and impressions that other staff, board members and volunteers might have about the volunteer program. It also provides a unique opportunity to dialogue with respondents about their impressions

The Volunteer Management Audit can also be used as an interview or focus group tool. The questions posed throughout the audit can be used as interview or focus group questions. Volunteer Canada has released a workbook which assists organizations in designing facilitated discussions.

For a thorough and comprehensive evaluation, it is often recommended that more than one data source be used. Individuals may be biased or may only have part of the picture or program files may be incomplete or inaccurate. Collecting data through multiple sources will enhance the Volunteer Management Audit process.

When reporting out the results of the Volunteer Management Audit Process, you might consider the following Guidelines which are found in *Interagency Projects: An Evaluation Guide* which was developed by Saskatchewan Human Services in March 1997.

GENERAL GUIDELINES FOR REPORT PREPARATION

- **Consider your audience** when you are preparing the report. Use language that is appropriate for the audience. Generally, this means simple, clear language with no technical terms or jargon.
- **Appoint one person to write the report.** This will ensure consistency. Sometimes, people mistakenly think that they will save time by assigning different sections to different people. This approach usually doesn't work because people's writing styles are so different.
- In most cases, a report goes through **three drafts**. After each draft, the writer submits the report to the evaluation committee, who provides feedback and comments. The writer incorporates comments into the next draft.
- Ask someone who has a good eye for detail to **proofread** the third draft of the report. Typographical errors and small grammatical mistakes make the report seem unprofessional.

- **Use tables, charts, graphs and diagrams.** These often help to make a point clearer and usually make a report more interesting to read.
- **Include a table of contents and a list of figures.**
- Provide only **relevant information** in the report. It should be user-friendly and easy to follow.
- **Prepare a summary** of your report. This summary should be the first thing in the report. (It is all that some people will read. You can also hand it out separately if appropriate.)
- **Finish the report as quickly as possible.** If it appears months after the evaluation has been completed, people will have lost interest, or the situation may have changed dramatically.

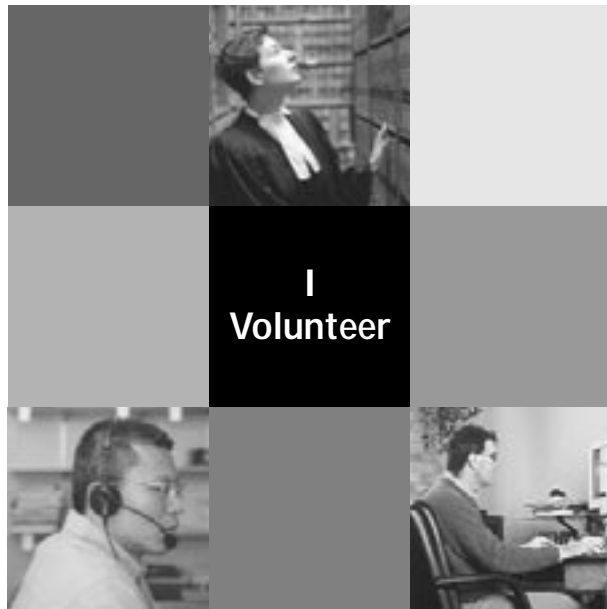
SECTIONS OF THE EVALUATION REPORT

Most evaluation reports include the following sections:

- I. **Executive Summary** – Brief overview of the purpose, methodology and results of the evaluation presented in a non-technical terms.
- II. **Objectives of the Evaluation**
- III. **Description of the Program** – Can be taken from Sections One and Two of the Volunteer Management Audit – should include origin of the program, goals and objectives of the program, clients served, description of program activities, staff and volunteers in program and management structure of the program.
- IV. **Methodology of the Evaluation** – Describe what was done to gather data.
- V. **Limitations of the Evaluation** – Describe any reasons why all the information needed couldn't be collected or why some of the data may be incomplete or inaccurate.
- VI. **Results** – Each of the evaluation questions should be listed followed by an answer derived from the data – there might also be a section titled 'Other Findings'.
- VII. **Conclusions and Recommendations** – Make recommendations for the future of this program or similar programs.

STRATEGY TOOLS

The Conclusions and Recommendations generated from the Evaluation Report provide the context for setting goals, objectives or strategies to improve the volunteer program or volunteer involvement at the organization. The key to setting effective goals or strategies is to make them **SMART**—the goals should be **S**trategic, **M**easurable, **A**chievable, identified with a person **R**esponsible for the action assigned and should be **T**ime limited. The goals or objectives should be included in the annual plan developed for the volunteer program. For evaluation planning tools visit TOTAL Non-Profit Resources – www.tnpr.ca.



6. Electronic Volunteer Management Resources

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

Volunteer Canada – www.volunteer.ca

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

Canadian Centre for Philanthropy – www.ccp.ca

The Canadian Centre for Philanthropy hosts a number of interesting websites about giving, volunteering and participating in Canada. Included is a nonprofit research site, www.givingandvolunteering.ca containing resources generated from the 1997 and 2000 National Surveys of Giving, Volunteering and Participating (of particular interest is Volunteer Numbers: Using the NSGVP for Volunteer Management by Norah McClintock) and Imagine, a site about corporate social responsibility.

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

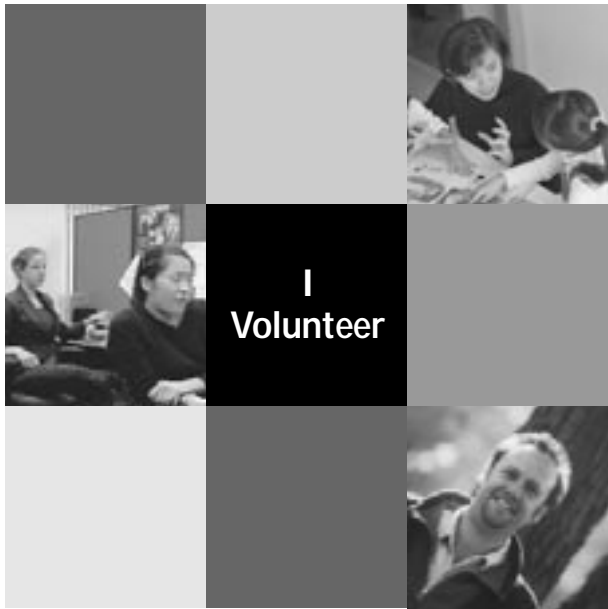
The CAVR website provides information on standards of practice for managers of volunteer programs.

TOTAL Non-Profit Resources – www.tnpr.ca

TOTAL Non-Profit Resources provides a wide variety of tools and links to organizational management practices including communications tools, strategic planning and evaluation tools.

Association for Volunteer Administration (AVA) – www.avaintl.org

The Association for Volunteer Administration site provides tools and information for managers of volunteer programs.

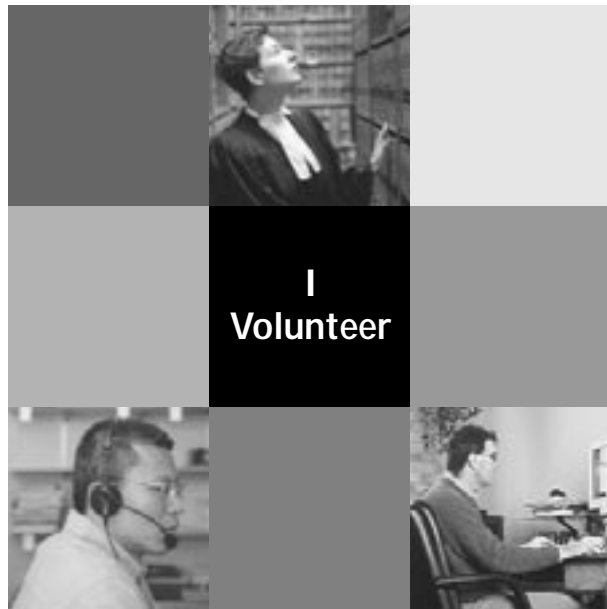


7. Final Thoughts

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

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

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



SECTION 1: ORGANIZATION PROFILE

Name of Organization:	
Address:	
Telephone:	Fax:
Organization Contact:	
Email:	Web:
Please check the following sector served:	
<input type="checkbox"/> Arts and Culture <input type="checkbox"/> Education <input type="checkbox"/> Human Services <input type="checkbox"/> Health <input type="checkbox"/> Youth <input type="checkbox"/> Sports & Recreation <input type="checkbox"/> Diverse Cultures <input type="checkbox"/> Other _____ (specify)	
Please check the following: <input type="checkbox"/> National Office <input type="checkbox"/> Provincial/Regional Office <input type="checkbox"/> Local Branch/Affiliate <input type="checkbox"/> Other _____ (specify)	# of Staff in Organization _____ # of Volunteers in Organization _____
Size of Organizational Budget:	Size of Volunteer Resources Budget:
Has the organization formally adopted the Canadian Code for Volunteer Involvement? <input type="checkbox"/> Yes <input type="checkbox"/> No <input type="checkbox"/> In process If Yes – Please provide the Policy Statement Adopted by the Board of Directors: If No – Please indicate why the organization has not adopted the Canadian Code for Volunteer Involvement:	

SECTION 2: VOLUNTEER RESOURCES PROGRAM PROFILE:

This section is designed to provide a profile of the volunteer resources program within your organization.

Staffing Information:

1. The organization has a person(s) designated to manage volunteers: (recruitment, interviewing, orientation, training, placing, supervision, recognition and evaluation are core volunteer management functions)

Yes No

2. Please indicated the number of person(s) who have the primary responsibility to manage volunteers: _____

3. Role of person(s) managing the volunteer program within the organization:

Senior Management – a senior staff member – vice president, director, etc with significant decision-making, program development and budget responsibilities

Management – a member of the management team with limited decision-making, program development and budget responsibilities

Administrative – a clerical or support staff role within the organization

Full-time (35 hours per week +), paid position with senior management status

Full-time (35 hours per week +), paid position with management status

Full-time (35 hours per week +), paid position with administrative status

Part-time (under 20 hours per week), paid position with senior management status

Part-time (under 20 hours per week), paid position with management status

Part-time(under 20 hours per week), paid position with administrative status

Full-time (35 hours per week +), unpaid position with senior management status

Full-time (35 hours per week +), unpaid position with management status

Full-time (35 hours per week +), unpaid position with administrative status

- Part-time (under 20 hours per week), unpaid position with senior management status
- Part-time (under 20 hours per week), unpaid position with management status
- Part-time (under 20 hour per week), unpaid position with administrative status

- Full-time Paid Contract position (35 hours per week +) with senior management status
- Full-time Paid Contract position (35 hours per week +) with management status
- Full-time Paid Contract position (35 hours per week +) with administrative status

- Part-time Paid Contract position (under 20 hours per week) with senior management status
- Part-time Paid Contract position (under 20 hours per week) with management status
- Part-time paid Contract position (under 20 hours per week) with administrative status

- Other _____ (specify)

4. Is managing volunteer resources the sole responsibility of the staff person(s)?
- Yes No

If no, please list other duties: _____

5. What is the position title of the staff person with the primary responsibility for managing volunteer resources within the organization: _____
-

6. Please detail the volunteer management educational and experience background of the person(s) who have the primary responsibility for managing volunteer resources in the organization:

- Community College Certificate in Volunteer Management
- Other Certification in Volunteer Management (*Canadian Administrators of Volunteer Resources, Provincial Administrators of Volunteer Resources – Ontario, etc*)

- Education and/or training (non-certified) in Volunteer Management
 - Experience (5 years or more) in managing staff and/or volunteers
 - No or limited experience in volunteer Management
 - Other Experience (please detail): _____
7. Please detail other educational experience of the person who has the primary responsibility for managing volunteer resources in the organization:
- Masters or Doctoral Degree, University
 - Undergraduate Degree, University
 - Some University, but not completed
 - Community College Program other than Volunteer Management
 - High School
 - Other (please specify): _____
8. Please detail the current annual compensation range of the person who has the primary responsibility for managing volunteer resources in the organization:
- Under \$ 10,000 \$ 11,000 – 25,000 \$ 26,000 – 35,000
 - \$36,000 – 45,000 \$ 46,000 – 55,000 Over \$55,000
9. Demographic Information about the person who has the primary responsibility for managing volunteer resources within the organization:
- Sex: Male Female
- Age Range: under 18 19 – 25 years 26 – 35 years
- 36 – 45 years 46- 55 years over 55 years
10. Estimate the total number of persons active as volunteers with the organization during the year 2001. Factor the following in the estimate:
- _____ Board Members
 - _____ Committee Members
 - _____ Fundraising/Special Event Volunteers
 - _____ Number of individuals active as volunteers in program/service delivery
 - _____ Other (Please specify) _____
 - _____ **Total Number of Persons active as volunteers in 2001** (total of five lines above)

11. Please estimate the total number of hours of services provided by volunteers to your organization during the year 2001.

_____ Board Members

_____ Committee Members

_____ Fundraising/Special Event Volunteers

_____ Number of individuals active as volunteers in program/service delivery

_____ Other (Please specify) _____

_____ **Total Number of service hours provided by volunteers in 2001**
(should be total of five lines above)

12. Please detail the diversity of volunteers within your organization

Total Number of Volunteers in 2001: _____

Please estimate the number of volunteers in each of the categories below.

Age Range	Diversity	Groups Represented	Years of Volunteer Service
_____ under 15 years	_____ Culturally Diverse	_____ Employed - Professional	_____ 0 – 6 months
_____ 16 – 21 years	_____ Aboriginal	_____ Employed – Administrative	_____ 7 – 12 months
_____ 22 – 35 years	_____ Individuals with Special Needs	_____ Unemployed	_____ 1 – 3 years
_____ 36 – 45 years	_____ Seniors	_____ Family	_____ 4 – 5 years
_____ 46 – 55 years	_____ Youth		_____ 6 – 10 years
_____ 56 – 65 years			_____ over 11 years
_____ over 65 years			

SECTION 3: CANADIAN CODE FOR VOLUNTEER INVOLVEMENT – VALUES AND GUIDING PRINCIPLES

Below you will find the values statements and guiding principles which have been articulated in the *Canadian Code for Volunteer Involvement*. These statements guide a philosophical approach to the involvement of volunteers in any voluntary sector organizations. The basic premise identifies that volunteers contribute value to Canadian society, communities and voluntary sector organizations but that there is an accountable relationship required between the volunteer and the organization. The *Canadian Code for Volunteer Involvement* asks that boards of directors adopt a values statement about the nature of volunteer involvement within the organization.

Values for Volunteer Involvement

Volunteer involvement is vital to a just and democratic society.

It fosters civic responsibility, participation and interaction.

Volunteer involvement strengthens communities.

It promotes change and development by identifying and responding to community needs.

Volunteer involvement mutually benefits both the volunteer and the organization.

It increases the capacity of organizations to accomplish their goals, and provides volunteers with opportunities to develop and contribute.

Volunteer involvement is based on relationships.

Volunteers are expected to act with integrity and be respectful and responsive to others with whom they interact.

No.	Question	Response
1.	Did the organization adopt the values statements associated with the Canadian Code for Volunteer Involvement?	<input type="checkbox"/> Yes with no revisions <input type="checkbox"/> Yes with some revisions (see below) <input type="checkbox"/> No (please describe why the organization was unable to adopt the values statements)
2.	What changes did your organization make to the Values statements?	
3.	Are the values statements relevant to the current context of the organization?	<input type="checkbox"/> Yes with no revisions <input type="checkbox"/> Yes, with some revisions (see below) <input type="checkbox"/> No (please describe below why the values statements are no longer relevant)

Guiding Principles for Volunteer Involvement

Voluntary organizations recognize that volunteers are a vital human resource and will commit to the appropriate infrastructure to support volunteers.

The organization's practices ensure effective volunteer involvement.

The organization commits to providing a safe and supportive environment for volunteers.

Volunteers make a commitment and are accountable to the organization.

Volunteers will act with respect for beneficiaries and the community.

Volunteers will act responsibly and with integrity.

No.	Question	Response
1.	Did the organization adopt the guiding principles associated with the Canadian Code for Volunteer Involvement?	<input type="checkbox"/> Yes with no revisions <input type="checkbox"/> Yes with some revisions (see below) <input type="checkbox"/> No (please describe why the organization was unable to adopt the guiding principles)
2.	What changes did your organization make to the guiding principles?	
3.	Are the guiding principles relevant to the current Context of the organization?	<input type="checkbox"/> Yes with no revisions <input type="checkbox"/> Yes, with some revisions (see below) <input type="checkbox"/> No (please describe below why the guiding principles are no longer relevant)

SECTION 4: KEY ELEMENTS OF A VOLUNTEER RESOURCES PROGRAM

The Canadian Code for Volunteer Involvement (CCVI) provides a framework for assessing the key elements of the volunteer resources program within an organization. This section will assist you in assess the degree to which your organization complies with these key elements of volunteer resources management practices. There is a section below each table where you may comment on an innovative approach or particular challenge that your organization faces when involving or managing volunteers.

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

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

Please provide comments on innovative approaches developed or challenges faced by your organization related to involving and managing volunteers:

SECTION 5: ORGANIZATION STANDARDS CHECKLIST

This section of the Volunteer Management Audit will enable the organization to thoroughly review volunteer involvement and management practices. Assess your organization's compliance in each of the core areas. You are also invited to provide comments and/or suggestions on the innovative practices or challenges faced by your organization when involving volunteers in achieving the mission or mandate of the organization.

1. The board of directors and senior management acknowledge and support the vital role of volunteers in achieving the organization's mission.

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

Elements of Volunteer Resources Management	Currently in place to a large degree	Currently in place to some degree	Not currently being done	Not applicable not relevant
Appropriate insurance is purchased to minimize volunteer liability.				
Volunteer involvement is evaluated regularly.				

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

2. Policies and procedures provide a framework that defines and supports the involvement of volunteers within the organization.

Elements of Volunteer Resources Management	Currently in place to a large degree	Currently in place to some degree	Not currently being done	Not applicable not relevant
Governance and operational policies are in place and are reviewed regularly with input from board, staff and volunteers.				
Standardized administrative procedures and records management practices are utilized by the volunteer department or program.				
Policies and procedures are communicated to all staff and volunteers.				
Policies and procedures are followed consistently and equitably.				
Policies and procedure are consistent with national and provincial Human Rights Codes, the Freedom of Information and Protection of Privacy Act, and provincial employment standards legislation.				

3. A qualified person is designated to be responsible for the volunteer program.

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

4. A screening process is clearly communicated and consistently delivered.

Elements of Volunteer Resources Management	Currently in place to a large degree	Currently in place to some degree	Not currently being done	Not applicable not relevant
Screening is considered to be an essential process that continues throughout the volunteer's involvement with the organization.				
All volunteer assignments are assessed for level of risk.				
Screening measures are used according to the level of risk of the assignment.				
All volunteers complete an application form and attend an interview.				
Screening procedures are delivered consistently with no exceptions made for certain individuals or positions.				

5. Volunteer assignments address the purpose of the organization and involve volunteers in meaningful ways that reflect their various abilities, needs and backgrounds.

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

6. Volunteer recruitment and selection reaches out to diverse sources of volunteers.

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

7. Volunteers receive an orientation to the organization and its policies and procedures, and receive training for volunteer assignments.

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

8. Volunteers receive appropriate levels of supervision according to their task and are give regular opportunities to receive and give feedback.

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

9. Volunteers are welcomed and treated as valuable and integral members of the organization's human resources.

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

Please provide comments on innovative approaches employed or challenges faced by your organization when integrating volunteers within the human resources strategy of the organization:

SECTION 6: RESOURCES/KNOWLEDGE TRANSFER

In this final section of the **Volunteer Management Audit**, we would like to explore the degree to which volunteer management resources and practices are shared and transferred within all levels of the organization. Please check where applicable.

1. Organizational Policies – Volunteer Resources

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

- Yes and shared with our National/Provincial/Local Offices
(please circle as appropriate)
- Yes, but we have not shared it with others in our association
- In process of development
- No
- Other (please specify)_____

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

- Yes and shared with our National/Provincial/Local Offices
(Please circle as appropriate)
- Yes, but we have not shared it with others in our association
- In process of development
- No
- Other (please specify)_____

2. Volunteer Resources Program Statistics

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

- Yes and shared with our National/Provincial/Local Offices
(Please circle as appropriate)
- Yes, but we have not shared it with others in our association
- In process of development
- No
- Other (please specify)_____

Are volunteer involvement statistics shared with the senior management and board of directors of the organization?

- Yes and shared with our National/Provincial/Local Offices
(Please circle as appropriate)
- Yes, but we have not shared it with others in our association
- In process of development
- No
- Other (please specify)_____

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

- Yes and shared with our National/Provincial/Local Offices
(Please circle as appropriate)
- Yes, but we have not shared it with others in our association
- In process of development
- No
- Other (please specify)_____

3. Volunteer Resources Program Materials

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

- Yes and shared with our National/Provincial/Local Offices
(Please circle as appropriate)
- Yes, but we have not shared it with others in our association
- In process of development
- No
- Other (please specify)_____

Does the organization have formal volunteer recruitment tools and strategies?

- Yes and shared with our National/Provincial/Local Offices
(Please circle as appropriate)
- Yes, but we have not shared it with others in our association
- In process of development
- No
- Other (please specify)_____

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

- Yes and shared with our National/Provincial/Local Offices
(Please circle as appropriate)
- Yes, but we have not shared it with others in our association
- In process of development
- No
- Other (please specify)_____

Does the organization have formal tools for orientating and/or training volunteers?

- Yes and shared with our National/Provincial/Local Offices
(Please circle as appropriate)
- Yes, but we have not shared it with others in our association
- In process of development
- No
- Other (please specify)_____

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

- Yes and shared with our National/Provincial/Local Offices
(Please circle as appropriate)
- Yes, but we have not shared it with others in our association
- In process of development
- No
- Other (please specify)_____

Does the organization have formal tools and/or processes for recognizing the contributions made by volunteers?

- Yes and shared with our National/Provincial/Local Offices
(Please circle as appropriate)
- Yes, but we have not shared it with others in our association
- In process of development
- No
- Other (please specify)_____

4. Training Activities

<p>Please describe the volunteer program management training opportunities at the annual or bi-annual National Conference of the Association.</p>	
<p>Please describe the volunteer program management training opportunities which might occur at provincial/regional conferences or meetings.</p>	
<p>Please describe the volunteer program management training opportunities which might occur at local affiliates.</p>	
<p>Please describe any volunteer program management resources or tools which have been developed and shared by a national/provincial or local affiliate.</p>	
<p>Please describe any online volunteer program management training which is provided by the National/provincial or local affiliates.</p>	

For more information or clarification about the **Volunteer Management Audit: The Canadian Code for Volunteer Involvement**, please contact: Volunteer Canada 1-800-670-0401 or by email at info@volunteer.ca

