forum
International Forum for
Volunteering in Development

A HANDBOOK FOR ORGANISATIONS THAT WORK WITH VOLUNTEERS IN DEVELOPMENT

Managing Volunteers: Preparation, Training and Learning

In partnership with
Canada

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Introduction

The Global Volunteering Standard is a voluntary standard that seeks to promote continuous learning and improvement for volunteer-involving organisations. It is the result of a collaborative global effort over five years drawing upon the expertise and wisdom of several hundred people and organisations from 80 countries across the volunteering in development sector and beyond. We have aimed to capture and reflect our collective understanding of good practice throughout the volunteering programme cycle:

- **Designing and Delivering Projects**

- **Duty of Care**

- **Managing Volunteers**

- **Measuring Impact**

This manual is the second in a four-part series addressing the Managing Volunteers section. For key terms, please see our Definitions document and visit Forum's **Global Volunteering Standard Resource Library** for guiding documents and templates shared by volunteer-involving organisations. The topics in this manual address how volunteers are prepared for their placements, as well as guidance on ongoing training and learning. Additionally, having and enforcing policies within your organisation helps to improve workplace culture, creates a sense of cohesion and protects your organisation, your partner organisation and your volunteers.

Good Practice:

Use Forum's **Global Volunteering Standard Resource Library** to locate resources to complement this handbook by selecting the overall tag label **"Managing Volunteers"** as well as **"Preparation, Training and Learning"**.

Volunteer Policies and Procedures

MEETING THE STANDARD:

- Volunteers receive a written or online copy of policies and procedures, available for them throughout their placement.

- Volunteers sign and agree to follow these policies throughout the volunteer experience.

- Partners are familiarised and provided with relevant policies and procedures to appropriately support volunteers' placements.

- Partners will ensure all policies regarding volunteer support and management are in alignment prior to the placement taking place.

Every organisation should have clear volunteer policies and procedures. This is important for a number of reasons:

- **Legal compliance:** Ensuring that your organisation is in compliance with relevant laws and regulations, such as labour laws as well as safeguarding and health and safety regulations and/or policies.

- **Consistency:** Ensuring that volunteers are treated consistently and fairly. This helps to avoid confusion and misunderstandings, and provides a basis for addressing any issues that may arise.

- **Protection:** Protecting your organisation, your volunteers, your partner organisations, participants and community members, by setting clear expectations and guidelines. For example, policies may outline the role of volunteers, the types of activities they are permitted to undertake, and any procedures for reporting any incidents or accidents.

- **Training:** Serving as a valuable training tool for volunteers and helping them to understand your organisation's expectations and how they should conduct themselves while volunteering.

- **Improved volunteer experience and placement outcomes:** Providing volunteers with a positive and structured experience can lead to higher levels of satisfaction amongst all key stakeholders, and a more engaged volunteer community.

Overall, volunteer policies and procedures play a critical role in supporting effective volunteer management and ensuring that volunteers have a positive and productive experience and by extension a favourable outcome for the partner organisations and community members whom they work with. Sharing these documents with volunteers whether online or in print is essential,

as is having volunteers sign and agree to policies, including any code of conduct. Documents may be different depending on the type of volunteer placement – for example, an e-volunteer code of conduct may be different from an in-person code of conduct. This acts as a way for your organisation to clearly communicate expectations, obligations, and protections. It is also essential for your organisation to share all relevant policies and procedures with partners, so that they may appropriately support volunteer placements.

Tip:

It is important to ensure that all policies regarding volunteer support and management are in alignment prior to the placement taking place.

Understanding the Code of Conduct:
An initial conversation between the volunteer and the organisation

Volunteer: Hi, I'm excited to start volunteering! Is there anything I should know before I get started?

Organisation: Yes, we have a volunteer code of conduct that we ask all volunteers to abide by. It helps to ensure that everyone is on the same page and working towards the same goals.

Volunteer: Sounds good. What are some of the key parts of the code of conduct?

Organisation: First and foremost, we expect all volunteers to act with integrity and professionalism at all times. This includes treating others with respect, maintaining confidentiality when necessary, and avoiding any behaviour that could be seen as harassment or discrimination.

Volunteer: Of course, that makes sense. What else should I keep in mind?

Organisation: Another important part of the code of conduct is punctuality and reliability. We ask that you show up on time for your work and let us know if you are unable to make it for any reason. Our partners rely on our volunteers to help us fulfil our mission, and we need to be able to count on you.

Volunteer: Absolutely. What about safety? Is that something that's covered in the code of conduct?

Organisation: Yes, safety is a top priority for us. We have specific protocols in place to ensure the safety of our volunteers and anyone else who they may come in contact with. We ask that you follow these protocols at all times, and report any safety concerns or incidents to us immediately.

Volunteer: Got it. Is there anything else I should know?

Just a couple more things. We ask that you respect our organisational policies and procedures, and follow any directions given to you by staff or other volunteers. And finally, we ask that you communicate with us openly and honestly. If you have any questions, concerns, or feedback, please don't hesitate to bring them up.

Volunteer: That all sounds very reasonable. Thanks for explaining everything to me.

Organisation: No problem. We're excited to have you on board!

Good Practice:

Use Forum's **Global Volunteering Standard Resource Library** to locate a range of code of conduct and other types of policy documents that can help your organisation to develop your own.

Partner Expectations

MEETING THE STANDARD:

- Partners clearly understand the capabilities and likely impact of the volunteer's involvement.
- Partners understand the volunteer's code of conduct and provide monitoring support.
- Partners have clear expectations of volunteer behaviour, attitude and mindset in order to get the best from them.
- Partners are made aware of any social or cultural sensitivities that they should bear in mind for the placement.

In addition to managing volunteer expectations, managing partner expectations can be the catalyst for a successful placement. Managing expectations of partners is crucial because it sets the foundation for a successful volunteer experience. Partners need to have clear expectations and requirements for volunteers to ensure that the work they do aligns with partner goals and needs. When expectations are not managed, it can lead to misunderstandings, frustration, and disappointment for both the volunteer and the partner.

Having a conversation about the nature of volunteers is important! By managing expectations, your organisation can build trust with both partners and volunteers and establish a positive reputation, which can help attract and retain volunteers in the future.

This starts with understanding all policies – such as the code of conduct and how to monitor adherence to it – and also understanding the characteristics of volunteer candidates. Workshops and facilitated discussions can be effective in sharing information about volunteer behaviours, attitudes and mindsets as well as any social or cultural sensitivities that they should bear in mind for the placement.

Some specific things that partners can do to get ready to receive volunteers and ensure a successful experience for all involved could include, but is not limited to, the following elements:

- Developing an orientation schedule for volunteers.

- Assigning a specific staff member to be a buddy for all things within the partner organisation and of support outside of the volunteer placement.

- Conducting training that will help volunteers get acclimated to where they will be working, understanding the culture of the organisation, the work culture, and so on.

- Scheduling meetings and orientation with key stakeholders that the volunteer will be working with directly and even indirectly and help with the initial introductions.

- Developing a workplan and receive feedback from the volunteers and adjust as required to ensure comprehension and accuracy of work required.

- Ensure the volunteer understands the mission and vision of both your organisation and the partner as well as the purpose and ultimate outcomes of their volunteer placement from the onset, including what they will be measured against for performance purposes.

HOW TO TALK TO A PARTNER ABOUT GETTING A VOLUNTEER:

Woohoo! That's like getting a new friend to hang out with, except they're here to work and help you out. But, before they arrive, you have make sure you're ready for them. Here are some things to keep in mind:

Communicate with the volunteer about what they'll be doing and what's expected of them. You don't want surprises when they show up.

Get your logistics in order. Figure out where the volunteer will be staying, how they'll get to and from your office, and what kind of support they'll need while they're here. This will help things run smoothly and make the volunteer feel welcome.

Don't forget to get everyone on the same page. The volunteer may have ideas about what they want to do or how things should be done, but it's important to remember that you're the expert on your organisation and your community. Be open to new ideas, but also be clear about what's realistic and what's not.

Ask questions! Provide information about your cultural expectations and work environment, but also feel free to ask about the volunteer's culture and understanding of on-the-job behaviour.

So, get ready for your new colleague! With a little preparation and communication, you'll be able to make the most of your time together and achieve great things.

Good Practice:

Many organisations have specific details on how they prepare partners for the experience of working with volunteers. Documentation and ideas on partner orientation can be found in the **Global Volunteering Standard Resource Library.** Look up documents tagged **"Preparation, Training, and Learning"**.

Understanding Context

MEETING THE STANDARD:

- Volunteers clearly understand the inherent challenges of volunteering for development, the interconnectedness of development issues (i.e. climate change, education, health, poverty, etc.), and how their placements impact on the Sustainable Development Goals.

- Volunteers are provided with information about the developmental objectives of the project on which they are volunteering, including how the project was designed and how their involvement will benefit it.

- Volunteers are inducted into the wider organisation, including its objectives and valuesand how the project fits into the wider mission and vision of the organisation and its partners.

Volunteers need to have a clear understanding of the inherent challenges of volunteering in development and the interconnectedness of development issues because it allows them to approach their work with a holistic perspective. Development is complex and multi-dimensional, addressing interconnected issues such as poverty, education, health, and climate change, among others. Volunteers who have a comprehensive understanding of these issues are better equipped to recognize the root causes of problems and implement sustainable solutions. They can also work collaboratively with local communities and organisations to identify and address challenges in a way that is culturally sensitive and respectful. By recognizing the interconnectedness of development issues, volunteers can help contribute to long-term change rather than short-term fixes. Understanding the challenges and complexities of development work also allows volunteers to manage their expectations, build realistic goals, and effectively measure how their placements impact on the Sustainable Development Goals.

Tip:

Keep your volunteers up to date on the overall successes and challenges of the organisation as a whole – keep them on a mailing list of announcements and public engagement initiatives and invite them to follow your social media channels!

Volunteers should understand any project or programme that they are involved in and be inducted into your organisation, including your objectives and values, and how the programme or project fits into the wider mission and vision of your organisation and its partners because it creates a sense of purpose and belonging. When volunteers have a comprehensive and contextual understanding, they can better align their work with your organisation's overall mission and vision. This helps to create a sense of unity and shared purpose between volunteers and the wider organisation, which can enhance impact. Furthermore, it helps to establish a strong organisational culture. By including volunteers in the wider organisational community, they feel part of a team, which can increase their motivation, satisfaction, and commitment to the project. It also helps them to connect with other stakeholders in the organisation, such as staff members and partners, which can lead to greater collaboration and cooperation. Overall, this is an essential step towards building a sustainable and successful volunteer programme.

Understanding Power Dynamics

It is very important for international volunteers to understand their privileges as someone who has been selected and recruited to support the organisation and its respective participants. Ensuring that the volunteer is assessed for their soft skills as well as their hard skills is important, as is ensuring that information on the local context is shared and training is provided. Volunteers must also do their due diligence and research the organisation and the country and specific location of placement. They must also remain aware of their privilege and reflect on their actions, tone and use of words as to not offend or force their decisions/suggestions onto others. These are elements that should be noted in the various trainings, check-ins and evaluations.

Volunteer Expectations and Effective Training

Although the volunteers need to clearly understand the impact of their involvement, the intended long-term outcomes and the adaptive nature of Volunteering in Development projects, it is valuable for both you and your partner organisations to make an effort to understand the different perspectives and the expectations of international volunteers and be prepared to manage the cultural gaps that will present themselves both at the placement level professionally, but also personally.   Here are some overall keys to volunteer success:

- Making volunteers welcome and part of your team from the onset.

- Providing a clear understanding of your organisation, including its mission, goals and culture.

- Identifying expectations, challenges, opportunities and strategies.

- Encouraging continuous learning and reflection as well as critical thinking.

- Developing ability of volunteers to work effectively with local partners and communities.

- Building engagement and commitment by showing how volunteer efforts will help to make a positive impact, which can help to further develop their connection with your organisation over the long run.

- Helping to address legal, liability and insurance issues by ensuring that volunteers understand their roles and responsibilities and yours as well.

Training can take many forms and each organisation can develop their own approach. This doesn't mean you have to reinvent the wheel, however, as it is possible to consult the large variety of training material, workshop descriptions and briefing documents in the Global Volunteering Standard Resource Library. Training can also be done in person, virtually or through a hybrid approach. Training methods and approaches should be conducive to your organisation, but also encourage learning, discussion and reflection and a sense of belonging for the volunteers.

Good Practice:
Your training process needs to take into consideration the different types of volunteers you have, the unique needs of volunteers, as well as your organisational culture. Don't be afraid to read up on what other organisations are doing!

MESSAGE FOR YOUR ORGANIZATION!

International volunteering has two parts: what you see above the water, and what lies beneath the surface. With the right preparation and attitude, this can be an incredibly rewarding experience that both you and the volunteer will never forget!

Above the water, volunteering seems like a fun adventure. They get to travel to new places, meet new people, and support your organisation. But just like the tip of an iceberg, this is only a small part of the experience.

Beneath the surface lies the real substance of volunteering in development. It's the hard work, the long hours, and the overall toll that comes with being immersed in a new experience – sometimes a new culture. It's the challenges of working with limited resources and dealing with potential barriers. It's the personal growth and self-reflection that comes from being outside of their comfort zone.

Just like an iceberg, international volunteering requires a strong foundation to support what's above the water. This means ensuring your organisation is ready to receive a volunteer, by ensuring there are key focal points who are willing to provide support, an onboarding process that is well organized and coordinated, documentation ready to be reviewed to ensure everyone is on the same page and an opportunity for international volunteers to get adjusted and acclimatized to their new surroundings.
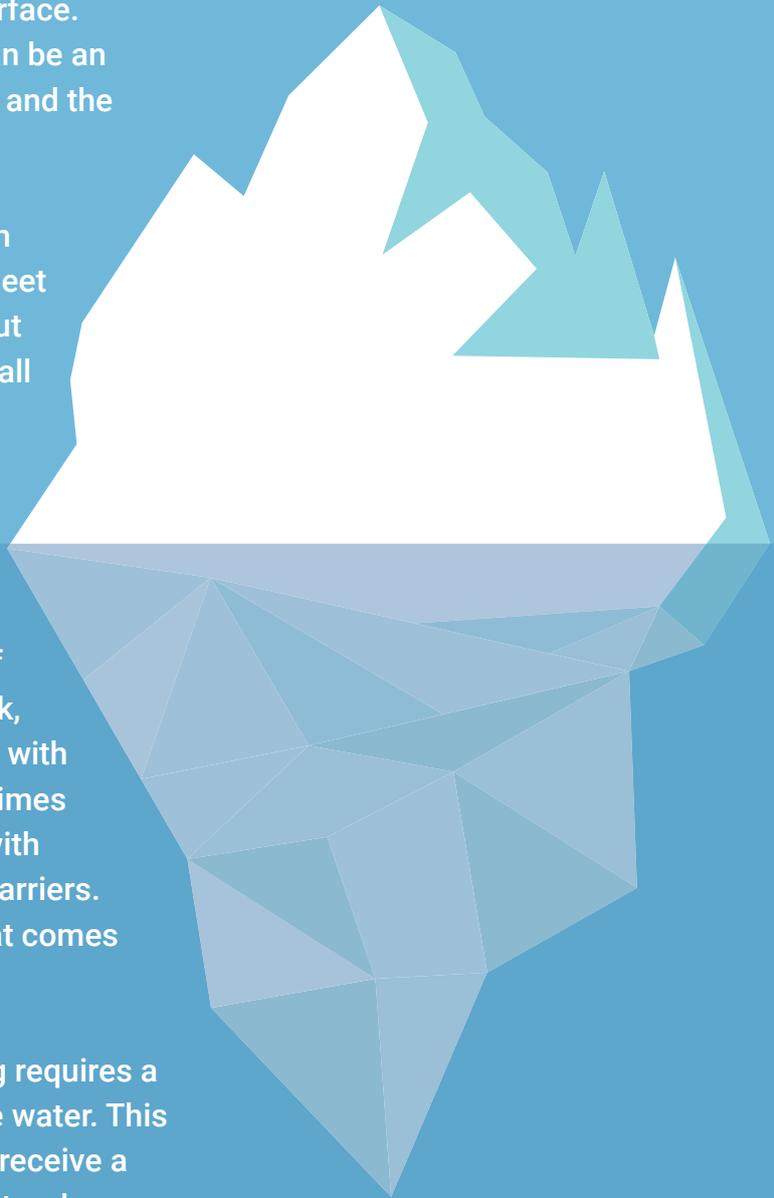
Pre-Placement Training

MEETING THE STANDARD:

- Volunteers clearly understand the inherent challenges of volunteering for development, the interconnectedness of development issues (i.e. climate change, education, health, poverty, etc.), and how their placements impact on the Sustainable Development Goals.

- Volunteers are provided with information about the developmental objectives of the project on which they are volunteering, including how the project was designed and how their involvement will benefit it.

- Volunteers are inducted into the wider organisation, including its objectives and values and how the project fits into the wider mission and vision of the organisation and its partners.

Your organisation has the opportunity and responsibility to make sure that volunteers are prepared for their placements. Make it a priority for your organisation that all training and learning materials, both pre-placement and in-placement, are up-to-date, free, accessible, relevant, and engaging for a diverse range of volunteers with different learning styles.

Some elements that should be thought through as part of the pre-placement training include:

- Making volunteers feel welcome.

- Helping volunteers understand your work and mission.

- Empowering volunteers with the information they need to effectively navigate your organisation and their roles, including basic policies and procedures.

- Ensuring volunteers have access to a point person who can answer their questions and guide them as needed, especially navigating the first few days and weeks of a placement.

- Raising awareness of any social or cultural sensitivities relevant to their placement and discussing good behaviours, attitudes and mind-sets for effective volunteering.

- Underlining the social and financial implications of being on a placement.

- Volunteers should be encouraged to speak to past volunteers of the same or similar placement, partner or project, and, where possible, with members of the local staff team and/or partner.

Good Practice: Your volunteer policy should set out clear procedures for recruitment, induction, support, appraisal, addressing grievances and disciplinary matters. Ensuring this is all clear and made available to the volunteer prior to beginning their placement will manage expectations and ensure clear procedures to follow for yourself, the partner organisation as well as the volunteer.

In-Service Orientation

MEETING THE STANDARD:

Training means that volunteers:

- clearly understand the impact of their involvement, intended long-term outcomes and adaptive nature of projects.
- are encouraged to speak to individuals who have similar experience.
- sign and adhere to a code of conduct whilst on placement.
- are made aware, and given time to discuss, the best behaviours, attitudes and mind-sets for effective volunteering.
- are made aware of relevant social or cultural sensitivities.
- receive detailed induction and training on the culture specific to where they will be volunteering.
- have clear instructions and contacts to help them navigate safely to initial accommodation.
- are made aware of social and financial implications of being on a placement.

Once volunteers have arrived, the orientation continues. Volunteers should be provided with information from your organisation's staff and relevant local partners about workplace culture, local context, and the community. It is essential that volunteers be reminded throughout their placements of information on health and safety and key contact number of staff persons and emergency personnel. This training might also focus on specific logistics: volunteers will want to know how to get around, where to buy food, and how to build their lives in their new spaces. This is all in addition to the information about what they are going to be doing for the work!

Tip
Some elements that should be thought through as part of the in-service training are:
- Specific details of each volunteer's unique role
- Systems and processes related to the role
- Specific cultural information
- Introduction to team members the volunteer will be working with or supporting.
- Access to the tools and resources volunteers will need

Orientation Agenda Example

The following is an example of a 5-day orientation agenda for a programme in which volunteers are placed in a cultural environment different from their own. It can be adapted for regional or national volunteering contexts and e-volunteering contexts by adding or removing certain elements. You can look for other examples like this through the tag **"Preparation, Training, and Learning"** in the **Global Volunteering Standard Resource Library.**

DAY 1	DAY 2	DAY 3	DAY 4	DAY 5
Welcome	Welcome	Welcome	Welcome	Welcome
• Introductions • Official welcome • Objectives & agenda of the orientation • *Preview of Day 1*	• *Review of Day 1* • *Preview of Day 2* • Introduction to the development context	• *Review of Day 2* • *Preview of Day 3* • Introduction to organisation's programmes	• *Review of Day 3* • *Preview of Day 4* • Introduction to the approach to volunteering	• *Review of Day 4* • *Preview of Day 5* • Introduction to roles & responsibilities for volunteers, staff, and partners
Break	Break	Break	Break	Break
• Description of types of volunteer work • Logistics discussion	• Partner organisation introductions	• Programmes (Continued)	• Finance & administration • Self-Briefing	• Context-specific session (topic of your choosing) • Self-Briefing
Lunch	Lunch	Lunch	Lunch	Lunch
• Country context	• Cultural adaptation: Practicalities of living & working in a new environment	• Context-specific session (topic of your choosing)	• Safeguarding session & review of policies	• Review & close of orientation • Evaluation
Break	Break	Break	Break	Break
• Security • Staying Healthy • Open Sharing	• Supporting logistics (i.e. purchasing phones, opening bank account, etc.) • Open sharing	• Policies & procedures overview • Mid-orientation Feedback • Cultural Activity	• Volunteer forum • Open sharing	• One-on-one meetings between programme • Managers & volunteers: Signing of the 3-way agreement
Close	Close	Close	Close	Close
	• Social evening			• Celebrate: Team dinner

Ongoing Training

To encourage a learning culture, provide ongoing training on relevant topics and empower volunteers to apply the skills and knowledge received. Make sure that your organisation reviews and updates both your own as well as local partners' training and learning processes and content regularly. This is also true for volunteer-relevant policies, to ensure high quality, relevance, and accessibility. Volunteers who feel supported and engaged within the organisation are often more committed and have higher retention than those that do not. Therefore it is very important to ensure proper planning and budgeting for all envisioned training to ensure their successful rollout. Below are some tips and things to think about when developing and preparing for your overall volunteer training programme.

TIPS	BRAINSTORMING QUESTIONS
#1: **ENVISION YOUR TRAINING PROGRAMME**	• What does your organisation plan to gain from this training programme? • What are some of the goals of the programme? • Do you have a budget? • What do you want to teach/share with your volunteers? • How will you train your volunteers? • How will partners assist in the ongoing training? • Which one of your team members will facilitate the programme? • Do you need to create a manual with procedures and guidelines?
#2: **CREATE A WELCOMING & SUPPORTIVE ATMOSPHERE**	• Which room will you use to train your volunteers? • Be sure to provide a comfortable room temperature. • Do you plan to provide snacks or coffee? • What appropriate team members will facilitate the training?

TIPS	BRAINSTORMING QUESTIONS
#3: PRODUCE A MEMORABLE INTRODUCTION AND OVERALL TRAINING	• What are the expectations, guidelines, and procedures for the training? • How will you build your volunteers' enthusiasm for the work that you do? • Use this opportunity to inspire your volunteers - share impact stories, create connections between their work and your organisation • What resources/tools do you need and can you share to help volunteers feel empowered?
#4: EXECUTE YOUR TRAINING PROGRAMME	• How will you execute your training? • Will the volunteers be involved in any component other than just being participants? • What materials will you need? • How can you get to know your volunteers? • How can you make the training enjoyable by providing opportunities for breaks, questions and conversations? • How can you avoid information overload?
#5: CELEBRATE MILESTONES	• Celebrate volunteer birthdays • Welcome new volunteers • Celebrate long standing volunteers • Throw a dinner party • Share project successes

Good Practice:

Volunteer training is an ongoing and evolving process. While you might have all the tools and resources in place, don't forget to adjust the content and material as needed based on feedback from your volunteers and your own observations of what could be improved!

Keeping People Safe

The first priority for ensuring safeguarding of volunteers, organisations, and communities in which they will be working, is a strong, consistent and enforceable set of policies. Volunteers must sign and adhere to a code of conduct whilst on placement. Your organisation and its partners need to understand all policies and how they apply. There is also a need to ensure a clear means of acting on the policies and instilling values in volunteers that will make sure they do not breach the code of conduct. If the code is breached, it is important that there are repercussions.

Good Practice:

Safety and security are ongoing concerns. Make sure that every training places emphasis on relevant safeguarding concerns and reminds volunteers, partners, and communities about the essential need to protect everyone involved in your volunteering programme.

Safeguarding is an important element that is everyone's responsibility, however, providing training specific on safeguarding for volunteers, especially those who will be working with children and/or historically marginalised groups and/or individuals is of added value to your organisation.

Safeguarding training will help to:

• Implement and maintain your safeguarding policy;

• Recognise those who are vulnerable and identify people who may be at risk of abuse; and

• Empower volunteers to report safeguarding concerns by providing a safe space for them to do so.

Providing safeguarding training to volunteers can help to ensure that any safeguarding concerns are recognized and reported safely, quickly and using the most appropriate protocols. When reviewing or developing your organisational policies, think through the following elements to be included:

• Prohibit all forms of violence, abuse, exploitation, bullying and harassment.

• Be in compliance with local and where possible, international standards

• Following the provision of a new or a revised policy, staff and volunteers should sign indicating they have understood the policies and understand the consequences of breaching them.

• Inclusion of risk assessments and mitigation plans for programmes and activities.

• Everyone is encouraged to report suspected safeguarding failures without fear of reprisal.

• Reported safeguarding concerns are taken seriously, investigated and documented. Lessons learned and improvements on the way forward are discussed within your senior leadership team.

Next Steps

This manual is only one of a series of guides outlining the sections of the Global Volunteering Standard. We encourage reading through the other guides for a holistic understanding of volunteer management.

For more information on the Global Volunteering Standard and access to the Resource Library, as well as an organisational Self-Assessment Tool, please visit the Global Volunteering Standard Platform: www.forum-ids.org/global-volunteering-standard-platform/.

To learn more about Forum or become a member, please visit www.forum-ids.org/. To share any feedback on the guide, please email globalvolunteeringstandard@forum-ids.org

This handbook was developed and produced in 2023.

The International Forum for Volunteering in Development, commonly known as Forum, is a global network of organisations that work through volunteers to achieve sustainable development. Forum promotes more responsible and impactful volunteering by sharing information and good practice through convening, research, and the Global Volunteering Standard.

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