




**PRINCIPLES OF GOOD PRACTICE**  
**FOR THE**  
**FIELD OF VOLUNTEERISM**

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## PREFACE

The Principles of Good Practice is intended as a useful guideline for all types of volunteer programs. The general principles set forth are intended to be flexible and could be followed in whole or in part by any volunteer program, regardless of size and scope. Criteria are offered for interpretation and application of the principles in designing, developing, implementing, clarifying and evaluating. The criteria do not exhaust every potential application, but they do embody the attempt and spirit of the principle. No attempt is made in this publication to standardize the many and varied volunteer programs in this country.

Following the statement of each principle is a set of more specific elements that can lead to good practice. The degree to which a volunteer program can develop or implement these principles will depend on their size, scope, and availability of resources. The principles and elements of good practice presented in this document are not radically different from those identified elsewhere in the literature as important and desirable. What is different here is the consolidation and refinement of principles and elements from the varied experience of volunteer programs, especially over the last ten years.

It was not until the mid-1970's that the diverse kinds of volunteer organizations in the human services field were examined for those common and unique elements which create success in effectively meeting program goals. Through a grant from the Lilly Endowment in 1975, and in cooperation with the Alliance on Volunteerism and the Association of Volunteer Bureaus, a set of standards were published based on existing experience and literature from volunteer bureaus and major national organizations. The establishment, verification and identification of such management policies and administrative elements are as vital today as they were then.

The Principles of Good Practice is based in part on the Standards and Guidelines for the Field of Volunteerism published in 1978 by the Association of Volunteer Bureaus. It reflects many years of growth in the field of volunteerism and continued review by the editor of current practices in the field of in volunteer administration as well as practices followed by major national organizations.

Before 1975 few models, standards or guidelines existed in the field of volunteerism to guide emerging and on-going programs. Volunteer turnover in new programs was prevalent and volunteer programs were started with little knowledge and background in volunteer personnel administration, the basis for any sound volunteer operation.

In the 1970's standards were seen as benefiting involved volunteers by providing more personally enriching experiences for individuals, thereby expanding the capabilities of human service organizations to provide better services to people in need. The Principles of Good Practice, in turn, can enhance volunteer programs in the acceptance of those principles and can bridge the gap between existing practices and desirable goals. Principles provide direction and methods to achieve these goals.

The application and acceptance of principles by organizations that involve volunteers in their work would assist them in seeking funds and would serve as indicators of quality and effectiveness to potential donors. Principles also serve as a means for leaders of organizations to measure the effectiveness of administrative support and assistance to their constituencies.

The Principles of Good Practice can be used in a variety of ways:

- . As a guideline for the internal organizational structure, administration and development of volunteer programs;
- . As a guideline for educational institutions and organizations in developing and implementing training programs in volunteer administration;
- . As a guideline for managers, administrators, and lay leaders in developing and maintaining volunteer programs;
- . As a basis for bringing forth issues to be addressed by key personnel with a volunteer program who have responsibility for establishing or improving volunteer programs.

It is the hope that by setting forth these principles for the field of volunteerism, they will assist and encourage the development of new volunteer programs. These principles provide a body of knowledge to extend and enrich programs through the effective, well-organized and meaningful involvement of people who wish to give their talents, skills and time to helping others. It is the hope that through these principles volunteers will be given help to learn and grow themselves.

Ann Jacobson, LCSW  
Editor

#### RESOURCES:

Materials for this publication were adapted and/or adopted from the following sources:

Standards and Guidelines for the Field of Volunteerism, Association of Volunteer Bureaus, 1978 (out of print)

Principles and Guidelines for Organizations in Their Use of Volunteers, Volunteer Bureau of the Welfare Council of Metropolitan Chicago, undated.

## SECTION I

### FOUNDATION FOR VOLUNTEERISM - AN INTRODUCTION

#### PRINCIPLES AND CRITERIA FOR THE FIELD OF VOLUNTEERISM

Principles bridge the gap between existing practices and desirable levels of achievement. Principles are statements of desirable levels of performance, and criteria provide direction and methods to accomplish these levels. Principles exist in most fields of endeavor in order to maintain acceptable levels of performance, and the voluntary sector needs them as well. Even the most knowledgeable and experienced in the field need to be reminded of principles.

Principles represent the level or performance of a given service which the community expects and is willing to support and accept. They are the criteria by which performance is judged. Principles are attainable levels and can determine good practice in professional management.

These principles deal with specific areas of concern, and criteria have been designed to help people to meet them. There is room for alternative approaches, depending on the uniqueness of each program. The integrity and identity of any organization need not be violated and would be strengthened by clarification of goals and roles.

Many organizations utilizing volunteers have developed some standards. The impetus for establishing these standards come from the expressed desire of the organizations themselves for this kind of guidance. Where practices currently are less than desirable, guidelines can lead toward improvement.

If volunteers are to be an integral part of an overall operation of an organization, there is a responsibility to assist and maintain standards to protect the person served, the organization, the staff, the board and the individual volunteer.

Those who use these principles accept that, in the development of our democratic society, volunteers have played a significant role. Citizen participation in community affairs is a phenomenon deeply rooted in the American ethos. During the 1970's, application of the principle of maximum feasible participation caused a sharp surge of volunteer activity by the poor and by the consumers of services. Volunteer participation continues to provide a way of applying democratic principles and individual responsibility in an increasingly complex society. The practice of giving and serving continues into the '90's. Openness and citizen participation are required by recent legislation for human services programs. At the same time citizens demand direct access to the decision making process. Volunteer service is one important dimension of access and meaningful participation.

As the Gallup Surveys indicate, volunteering is increasing for men as well as women. The surveys also underscore the variety of reasons people volunteer. Volunteer opportunities for self realization may be particularly important for people in a time of role transition. Volunteering is seen as an alternative for those seeking gainful employment, because it may provide opportunities for gaining self-confidence and acquiring skills. For the employed it can lead to job advancement. It should continue to be an option for those who choose it.

## ORGANIZATION OF THE SERVICE

Experience in tested and well-conceived volunteer programs demonstrates that volunteers have special contributions to make to human services at every level of practice.

It is essential in any service involving volunteers that there be some form of organization of their work. By organizational framework, we mean the provision of a system within and through which volunteers are enabled to perform their work - as far as possible - effectively, smoothly and with satisfaction to those served, themselves and the services which need their help.

Not all volunteers feel the need to work within a formal structure. Thus, many grass root and self-help efforts begin in an informal way. As such efforts grow, eventually the necessity for some person, or persons, to undertake the organization or management of it will become apparent. The principles for an organizational framework deal with a legally constituted governing body and a well organized advisory committee. The governing body may be a function or division of a not-for-profit corporate entity or of a federal, state or local government agency.

These governing bodies can help insure a volunteer program's effective achievement of goals, legal protection and continuity. They can also enhance the organization's consideration, setting and/or recommending policies and developing and implementing programs.

The principles have been reviewed by various bodies that involve volunteers and have been found to relate to the following organizational frameworks:

1. Centralized Volunteer Clearinghouses (including Volunteer Bureaus/Voluntary Action Centers, Volunteer Centers and skillbanks in corporations and churches)
2. Public or private agencies with volunteer services as a department or division services primarily provided by paid staff, (i.e., hospitals, state departments of social services, VNA.)
3. Agencies with services primarily provided by volunteers with relatively little or no paid staff, (i.e., Red Cross, The Salvation Army, Hospice, religious institutions, etc.)
4. Membership associations (i.e., Association of Junior Leagues, Jaycees, etc.)

### 1. CENTRALIZED VOLUNTEER CLEARINGHOUSES

Centralized Volunteer Clearinghouses play an important role in the community planning for social service delivery. Experience has proven that they are effective in securing leadership, improving the management of volunteer programs and the quality of services performed.



A Centralized Volunteer Clearinghouse operates on a community-wide basis, available to all citizens and to all recognized, tax-supported and voluntary health, welfare, recreational, environmental, educational, civic and cultural agencies in its service area. The CVCB can be structured with sufficient flexibility to permit growth and change of emphasis in line with community change.

A Centralized Volunteer Clearinghouse can meet an established community need and should be a recognized part of the community's overall plan for service.

A Centralized Volunteer Clearinghouse can perform the basic role of recruitment and referral of individuals and groups to agencies in the community. It can assume responsibility in the community for developing standards for volunteer involvement, exploring new avenues for volunteer service, coordinating volunteer activities, promoting training and consulting with local agencies and citizen groups on volunteer participation.

A Centralized Volunteer Clearinghouse can be chartered or incorporated as an independent agency or set up as a department of an existing agency with a definite plan of organization.

Usually sufficient commitment of interest from community groups can be gathered to insure responsible and sustained leadership.

A Centralized Volunteer Clearinghouse must receive financial support from a dependable source. Also, it must have a clear understanding with the agency to whom it refers volunteers regarding that agency's responsibility to the volunteer for appropriate orientation, training, supervision and consultation.

The role of the Centralized Volunteer Clearinghouse must be clear in identifying the responsibilities and rights of volunteers; of the organization with which the volunteers are associated; and of the people assisted by the volunteer effort.

2. PUBLIC AND PRIVATE AGENCIES WITH VOLUNTEER SERVICES AS A DEPARTMENT OR DIVISION (services primarily provided by paid staff)

In larger systems the volunteer program can be a separate division or department as in hospitals, public school systems, museums, city hall, state social services. It can be a state office of volunteerism.

Volunteers contribute significantly to agencies when the need for increased services to individuals far surpasses the supply of financial and human resources.

The volunteers in a service agency or organization substantially increase the service to those served, promote community understanding and cooperation, and assist in achieving the overall goals of the agency.

Planned volunteer participation in an agency must incorporate certain components and procedures such as volunteer job descriptions, recruitment, interviewing, placement, orientation and training, supervision, evaluation and recognition.

Such a program requires strong administrative support for program direction and constructive supervision. Staff should be oriented to the meaningful and effective involvement of volunteers.

Leaders of the volunteer component must believe in the values and advantages of volunteer participation and should express firm convictions about the benefits which can result from volunteer efforts.

Plans for volunteers in a program should be inaugurated and maintained with encouragement of creative ideas and actions.

Volunteer participation should allow individuals to realize their highest potentials while serving others.

Volunteer activity should offer opportunities for expanding the scope of services being provided by the agency.

3. **AGENCIES WITH SERVICES PRIMARILY PROVIDED BY VOLUNTEERS (with relatively little or no paid staff)**

The Voluntary sector now includes many informal and formal associations devoted to a special interest, project or cause: self-help, neighborhood improvement, advocacy for vulnerable people such as youth, aged, disabled, etc., research on and prevention of health problems, issues such as transportation or housing shortages. Concerned citizens with a high proportion of consumers in the constituency mobilize community citizen support and organize associations. Some eventually organize into formal organizations and agencies.

Examples of volunteer services offered by highly volunteer weighted organizations are:

- a. Youth group leadership and support, Boy Scouts and Campfire
- b. Widow-to-widow or hospice services to bring empathy and dignity to grieving or dying persons.
- c. Respite care for families with invalids, aging persons, retarded persons, etc.
- d. Emergency services in natural disasters as the Red Cross, etc.

#### 4. MEMBERSHIP ASSOCIATIONS AND SELF-HELP GROUPS

Throughout the years, membership associations have responded to the needs of their institutions and in their responses have demonstrated great value. Today, new needs have opened wider the doors of opportunity for services, and membership associations and self-help groups have proved their flexibility by adopting roles for meeting newly-emerging needs.

Membership associations and self-help groups should seek to shape vital new roles appropriate to today's world by exploring concepts of service in untried areas of activity while, at the same time, continuing their work in traditional programs that serve an actual need.

These types of groups should help their membership to comprehend and appreciate fully the community, its sociological structure, its attitudes toward available services, and its resources. To be effective, membership associations should periodically re-evaluate their basic programs and determine whether they continue to serve important purposes.

With the support and approval of their members, these associations should devise plans of action to help establish new and needed programs and develop ways and means of fund raising that favorably reflect on the images of the associations to assist programs for which financing may not yet be available.

Membership associations and self-help groups should use their influence for social change where the need is seen, provided that their roles are clearly understood and accepted by all parties affected.

No matter what type of organizational framework is involved, an organization should clearly state exactly what volunteers and the program are to accomplish. Ongoing feedback from experience should be reflected in a continuous process of readjustment of goals and objectives.

#### PROGRAM DEVELOPMENT

When establishing or evaluating any program the first step is to identify and define the needs which that particular volunteer program meets in the community. The goals for volunteer programs should be to enrich services to those it serves, the agency, the community and the volunteer.

These goals should also provide insight into the human service field, into public policy consideration and encourage participation in the organizational structure of the service.

In setting goals it is important to consider:

- . alternatives for implementing objectives
- . wishes of the staff and volunteers
- . nature, objectives, and structure of the organization
- . nature of people to be served
- . local community conditions and resources
- . existing volunteer and paid staff resources
- . funding resources

Effective volunteer service requires effective planning. Without planning there would be little sense of purpose, direction or achievement. Planning enables one to figure out where one is going and points out the road most likely to get one there. Planning will help in dealing with future survival and also with the day-to-day problems of volunteer programs and paid staff.

An organization should utilize planning as a vehicle to accomplish short-term objectives which contribute to long-term objectives. This in turn, enables the organization to achieve its purpose and function effectively.

In planning for a volunteer service the following criteria should be considered:

- . Plans should be logical and in agreement with the organization's goals and objectives.
- . Set short-range and long-range objectives annually and review them periodically and revise if needed.
- . Plans should evaluate the validity of current objectives and be related to available fund, sites and resources.
- . Community commitment to the program or service is necessary.
- . Plans should consider the feasibility of implementing the services to be provided.
- . They should encompass a developmental design which includes recruitment, placement, training, supervision, record-keeping, evaluation and recognition.
- . Completion dates and specific tasks to be performed should be indicated.
- . Encourage a plan for public information/public relations.
- . Realistic board or committee planning that includes in-depth deliberation, periodic brainstorming, lengthy discussion and evaluation.

Effective planning can accomplish the following:

- . Enable the volunteer organization to make the most efficient and effective use of available people and other resources.
- . Provide for continuity of the operation and become a vehicle for effective management of programs and activities.
- . Eliminate overlapping and duplication by being related to community agencies.

## ROLES OF VOLUNTEERS

A very important preliminary part of the planning process is determining various roles for agency or organizational volunteers. These roles help identify and clarify the services volunteers will perform and are useful in developing volunteer job descriptions and performance evaluations which are effective tools in assessing the productivity of volunteers. Volunteers' interests and skills should be matched to appropriate volunteer work and roles.

Essentially, there are five types of volunteer roles:

- . The first is a **direct service** role, direct-service volunteers may visit families, teach first aid to a scout troop, assemble family medical histories in a neighborhood clinic, translate physician's instructions to a Spanish-speaking patient, give one-to-one attention to an institutionalized child, etc.
- . The second is an **indirect service** role where volunteers help those served without necessarily having contact with them, by contributing funds, preparing food for Meals on Wheels and paint or repair homes for needy persons.
- . The third major category of volunteer roles is **administrative**. Among the major functions of administrative volunteers are organization, delegation, planning, training, supervision and evaluation. The administrative volunteer plans, organizes and arranges for the implementation of policies set by boards and other leadership bodies.
- . The fourth type of volunteer is the **policy-maker**. This category of volunteer serves on the board of a neighborhood center or as a member of a planning committee. Policy-making involves analysis of problems and issues, broad vision, decision-making within a well-defined social framework, and a thorough understanding of the goals of an organization. It may also involve dealing with sensitive issues of precedent, of major re-direction of a project or agency, of compliance with internally set requirements, or with personnel decisions.
- . The **advocacy** volunteer, the fifth type, influences policy making, affects public attitudes, stimulates social change and works for change in services or systems affecting others; e.g., demanding adequate housing, welfare rights, prison reform or improved services for the elderly. It might mean fighting for higher personnel standards, supporting a budget, intervening on a consumer complaint.

## VOLUNTEERS' RIGHTS AND RESPONSIBILITIES

Closely tied with volunteer role models are volunteers' rights and responsibilities. These should be included in the planning stages of a good volunteer program. Volunteering is a rewarding experience when all participants in the relationship have mutual respect and desire to cooperate in meeting designated needs. The following list identifies these rights and responsibilities.

Volunteers have the right to:

- . Receive a clear specific job description
- . Be assigned jobs which are worthwhile and challenging, with freedom to use existing skills or develop new ones.
- . Be trusted with confidential information that will help carry out assignments.
- . Be kept informed through house organs, attendance at staff meeting, memoranda, etc., about what is going on in the organization.
- . Be made aware of the relationship of the job--however small--to the total effort, and the importance of their contributions.
- . Have successful job experiences that provide opportunities for growth development.
- . Receive orientation, training and supervision support for the jobs they accept and know why they are being asked to do a particular task.
- . Expect that their time will not be wasted by lack of planning, coordination and cooperation within the organization.
- . Know whether their work is effective and what makes it important.
- . Have a chance to increase understanding of self, others, and the community.
- . Be reimbursed for out-of-pocket costs, if that is the only way they can volunteer. Reimbursing might include meals, transportation and babysitting. Insurance coverage for volunteer should be available.
- . Declare allowable, non-reimbursed, out-of-pocket costs for federal (some state and local) income tax purposes if serving with a charitable organization.
- . Expect valid recommendations and encouragement from supervisors so they can move to other jobs, paid or unpaid.
- . Be given appropriate recognition in form of awards such as certificates of achievement, but even more importantly, recognition of day-to-day contributions by other participants in the volunteering relationship.
- . Ask for new assignments within an organization or return to a volunteer center when ready for reassignment.
- . Have access to the system through volunteer opportunities in policy-making, advocacy, direct services and administration in human service agencies.

Participate in the planning and evaluation of his or her work and, when appropriate, in the planning, priorities setting and evaluation of the program in which he/she serves.

Expect that personnel records will be kept documenting volunteer experience, positions held, training, evaluation and commendation.

Traditionally service volunteer activities provide satisfaction and rewards other than money. This factor should not be overlooked. Opportunities to participate in policy-formulation and community decision-making should be expanded to include the total spectrum of citizens. Training should include the entire group if participation is to be effective.

Volunteer roles should be integrated into an official agency structure where such exists, with emphasis placed on the team approach in community care delivery.

Where sizable numbers of volunteers are involved in an agency or organization provision should be made for positions of administrator of volunteer services to provide volunteer registration, interviewing, orientation, and supervision on a systematic basis. Central Volunteer Coordinating bodies are in a position to provide training, support and consultation. Institutionalizing volunteer status, position and visibility within an organizational structure ensures credibility.

Position descriptions should clearly delineate the tasks to be performed by both paid and volunteer staff. For continuity and coordination, administration of the program should be a paid staff function.

As the citizen becomes part of the official agency structure, additional questions pertaining to liability, labor management codes, and reimbursement of volunteer expenses need to be answered. Additionally, the question of insurance coverage for paid and volunteer personnel needs to be addressed.

Written policies of agencies should include the following:

A statement of assurance that volunteers will not be used to replace or decrease use of paid staff.

A clear understanding of which functions and activities should be performed by volunteer and/or paid staff.

Job descriptions for each category of volunteer.

Provision for reimbursement of volunteer expenses, as appropriate and if available.

Procedures for monitoring, evaluating and measuring volunteer activities and contributions.

State a strong policy of affirmative action.

Provisions should be made for adequate insurance for injury sustained by the volunteer in line of volunteer duty and liability.

Provisions should be made for rewards and incentives for staff who work well with volunteers.

A model contract should be drafted defining the relationship between volunteers and the organization which formulates a clear volunteer job description and volunteer personnel practices. Also it should describe relationships and respective responsibilities between volunteers and paid staff.

A volunteer activity is of benefit when people profit from participation and a human need is being met.

Every effort should be made on the part of the agencies or organizations to avoid exploitation of volunteers.

Roles of volunteers should be integrated into an official agency structure, emphasizing the team concept of community care giving.

Costs for required health tests and uniforms for volunteers, funds for training and educational opportunities should be included in agency budgets.

#### RIGHTS AND RESPONSIBILITIES OF PAID STAFF

Just as there are rights and responsibilities for volunteers, so there are also rights and responsibilities for paid staff who work with volunteers. The following identifies these rights and responsibilities:

Paid staff has the right to:

- . decline unacceptable volunteers.
- . know the limitations and expectations of volunteers.
- . expect communication with volunteers.

Paid staff has the responsibility to :

- . involve volunteers to extend services within in time and budget limitations
- . provide for liaison with volunteers
- . prepare staff to work with volunteers.
- . define volunteer jobs that provide personalized service so that professionals may be free to perform specialized roles.
- . integrate volunteers into the organization.
- . prepare the recipients of the volunteers' service.



## ADVOCACY AND PUBLIC AND PRIVATE SOCIAL POLICY

The primary role of voluntary associations in America is to continuously shape and reshape the visions of a more just social order. Volunteer organizations must accept moral and legal responsibility for influencing public policy if our nation and world are to remain viable, honest and responsive to human needs. Advocacy activities must remain within the limitations of the not-for-profit 501(c)3 status of the organization under the U.S. Internal Revenue Codes and be consistent with the policies of the service as set forth by the governing body. Advocacy activities may include influencing legislative actions or rules and regulations. Advocacy activities should also be provided to support the involvement of volunteer services in the private sector, as well as the corporate sector, including educational and religious institutions. Organizations should take advantage of opportunities to act and speak for volunteers.

## SECTION II

### PRINCIPLES AND CRITERIA FOR PROGRAM COMPONENTS

#### A. RESOURCE INFORMATION

##### 1. SERVICES

***PRINCIPLE:***

Accurate, up-to-date information of volunteer needs in the agency are acquired, organized, maintained and periodically reviewed.

\*Accurate, up-to-date information of community needs and volunteer opportunities in the designated geographic area of human services are acquired, organized, maintained and periodically reviewed.

***CRITERIA:***

- a. Organizations conduct periodic surveys of all staff and departments for the purpose of identifying and classifying resources and volunteer opportunities.
- \*a. Organizations conduct periodic surveys of all public and private agencies, organizations and services for the purpose of identifying and classifying resources and volunteer opportunities.
- b. Organizations establish a methodology for identifying needs for volunteer activities and/or service within the organization.
- c. Organizations develop and maintain files on all department and staff needs involving service volunteers and advocacy or issue-oriented volunteers. The files include: name, address, telephone, description of program or project, supervisor, and/or staff contact person, description and requirements of volunteer job (skills, education, hours, uniform, duties, etc.) and benefits available to volunteer (insurance, reimbursement, etc.)
- \*c. Organizations develop and maintain files on all agencies and organizations involving service volunteers and advocacy or issue-oriented volunteers. The files include: the name, address, telephone, description of agency service, volunteer supervisor, and/or staff contact person, description and requirements of volunteer job (skills, education, hours, uniform, duties, etc.) and benefits available to volunteer (insurance, reimbursement, etc.)
- d. Organizations establish procedures for developing written descriptions of paid and unpaid staff responsibilities.

\*Applicable only to Central Volunteer Coordinating Bodies

- e. Organizations acquire written position descriptions of specific volunteer tasks for each department, program, agency or organization.
- f. Organizations promote and maintain dialogue with staff, departments and other community groups for a mutual understanding and sharing of information about volunteerism.
- \*f. Organizations promote and maintain dialogue with other community groups for a mutual understanding and sharing of information about volunteerism.
- g. Organizations maintain active involvement with local, state and national volunteer-servicing organizations.

## 2. MATERIALS (Equipment, supplies, space, etc.)

### *PRINCIPLE:*

Volunteer organizations identify their material needs and try to secure donated (and minimal cost) resources that contribute to and enhance the organization's operations.

### *CRITERIA:*

- a. Organizations survey resources for supplies, materials, equipment, vehicles, facilities, technical knowledge, public relations, press, etc.
- b. Organizations identify contributors of resources such as businesses, industries, civic groups, individuals or institutions.
- c. Organizations maintain records of the availability of the resources and person to contact.
- d. Organizations provide appropriate appreciation and recognition of contributors of material or services.

## B. RECORD KEEPING

### *PRINCIPLE:*

The record-keeping system includes adequate information concerning the volunteer for appropriate linkage and retention in addition to service and training records of volunteers. Safeguards for confidentiality are essential.

The system also provides for information for purposes of documentation of legal responsibilities, accountability, evaluation and planning.

\*Applicable only to Central Volunteer Coordinating Bodies

**CRITERIA:**

- a. Forms are developed for recording the following information as appropriate and needed about volunteers: name, address, phone number, access to transportation, abilities, language capabilities, preferences, times available, interests, social security number, and person to notify in case of emergency, sex, age, marital status, children and education. If volunteer is to drive during the course of the volunteer assignment, the following information also is included: verification of valid driver's license, license number and expiration date and insurance company (if using own car). Other information is included when required to meet an agency policy or specific requirement.
- b. Volunteer service records contain no less than the following information: types of assignment, work performed, hours served, training attended, recognition received and performance evaluation.
- \*c. Recording forms include agencies referred to, agencies placed with, satisfaction of placements, sources of volunteer referral to the CVCB, date of volunteers' initial contact with the CVCB, dates of referral and placements.
- d. Records are reviewed periodically, adding new information and deleting obsolete information.
- e. All records are kept confidential and properly protected in keeping with the Privacy Act.

**C. JOB DESCRIPTIONS**

**PRINCIPLE:**

Written job descriptions of volunteer tasks are available. They are updated as needed and outline time required, skills needed and duties to be performed.

**CRITERIA:**

- a. Information includes name, address and telephone number of the organization, name of the department, job title, name of the immediate supervisor or staff contact person, duties, education and experience requirements, skills, aptitudes, abilities, provisions for transportation, reimbursement for expenses and other comments deemed appropriate.
- b. A volunteer job is developed on the basis of its usefulness to the organization, the possibility of recruiting the kind and/or number of volunteers needed, the availability of training and supervision (volunteer or paid) and its potential for realizing volunteer satisfaction and future personal development.

\*Applicable only to Central Volunteer Coordinating Bodies

## **D. RECRUITMENT**

### ***PRINCIPLE:***

Recruitment is designed to attract potential volunteers from the entire population in response to the number and kinds of volunteer opportunities that are available.

### ***CRITERIA:***

- a. Volunteers are recruited only after job descriptions and qualifications have been drawn up.
- b. An organization utilizes recruiting methods which reach every segment of society, including all ethnic, sex, age, disabled and socio-economic groups and recipients of services.
- c. Potential volunteers include the retired, low-income persons, youth, homemakers, professionals, clients and disabled persons and persons with special skills.
- d. Recruiting may include, but need not be limited to radio, television, newspapers, speakers bureaus, bumper stickers, window displays, and liaison committees.
- e. Recruiting is an ongoing effort which includes, but is not limited to special campaigns.
- \*f. Central volunteer coordinating services support, assist and strengthen the efforts of agencies in recruiting volunteers for agency programs.

## **E. INTERVIEWING**

### ***PRINCIPLE:***

Interviewing is conducted to determine how the desires, skills, and capabilities of the potential volunteers relate to the needs of an agency/organization.

### ***CRITERIA:***

- a. Prospective volunteers are interviewed and assigned individually with minimal delay.
- b. Appropriate forms are completed by/for potential volunteers.
- c. Information is given to prospective volunteers regarding volunteer jobs available and job responsibilities, obligations in becoming a volunteer (trial period, commitment, etc.)
- d. Volunteers are given the opportunity to discuss their preferences as to agency or program placement.

\*Applicable only to Central Volunteer Coordinating Bodies

- e. The interview determines potential volunteers' creative ability, social attitudes, technical skills, and leadership abilities.
- f. Information is given regarding probationary placement prior to making a long-term commitment.
- g. Interviews are conducted either face-to-face, by telephone, and/or other means to obtain sufficient information regarding the time, skills, talents, desires, and needs of volunteers.
- h. If there are no volunteer jobs available which are suited to the time, skills, talents and interests of volunteers, they are informed of such during or shortly after the interview and/or referred to a volunteer center.

## **F. SELECTION AND PLACEMENT**

### ***PRINCIPLE:***

Volunteers are selected and placed in the volunteer jobs which best meet the needs of the volunteers, receivers of service, and the agency in compliance with an affirmative action policy. Volunteers do not displace paid staff.

### ***CRITERIA:***

- a. Volunteers are assigned to roles which adequately reflect their skills, abilities and needs and are non-discriminatory.
- b. Volunteers are assigned to jobs according to their ability and willingness to perform the required work.
- c. Volunteers are provided jobs that are sufficiently challenging to give a sense of loyalty and dedication to the agency/organization and offer growth to the volunteer.
- d. The selection of volunteers is made to meet the needs of the client and the agency.
- e. Volunteer assignments are made with minimal delay after initial contacts.
- f. Volunteers who are unsuited to the work available are not accepted. They are asked to explore other opportunities and/or referred to a volunteer center.
- g. Prospective volunteers are given the opportunity for a trial period prior to making a long-term commitment.
- h. A mutually-signed volunteer/agency agreement is tailored to needs and abilities.
- i. Volunteer jobs are created, if necessary, to meet special and unique skills, experience and talents of volunteers.

- \*j. Volunteers referred for placement by a Central Coordinating Body or by an agency to one of its departments or divisions meet the following minimum requirements:
  - (1) The agency agrees to work closely with the CVCB to assure the best use of the volunteers' services, or in the case of a division or department within an agency, work with the volunteer department.
  - (2) Written job descriptions are provided.
  - (3) A staff person is assigned to supervise the volunteers.
  - (4) Orientation and training of volunteers is provided.
- \*k. Volunteers are only referred to agencies or programs approved by the CVCB and not to an individual.
  - l. Responsibility for arrangement of placement of volunteers is clearly delineated.

## **G. FOLLOW-UP**

### ***PRINCIPLE:***

Follow-up is provided to insure volunteer and agency satisfaction.

### ***CRITERIA:***

- a. Follow-up consists of contacting the volunteer and/or the agency to which a volunteer referral has been made to determine whether placement is satisfactory.
- b. Follow-up is done within an agreed-upon period of time after placement or whenever the agencies request such a service.
- c. Review of placement occurs at regular intervals. When placement is considered unsatisfactory or inappropriate by the agency or the volunteer, the volunteer is directed to explore other opportunities.
- d. Once volunteers are placed and have initiated a relationship with an agency/department/division the referring organization does not assume responsibility for supervision and makes no other assignment of those persons until such time as the volunteers or the agency request reassignment.

\* Applicable to Central Volunteer Coordinating Bodies and Volunteer Membership organizations

## **H. PREPARATION: ORIENTATION AND TRAINING**

### ***PRINCIPLE:***

The agency provides for orientation that prepares volunteers to perform their volunteer role in accordance with agency policy and training leading to the continued personal development of the volunteer.

### ***CRITERIA:***

- a. An orientation to the agency and its program is given volunteers prior to their beginning the work.
- b. The orientation provides both a conceptual overview and an operational description of the organization, its program, practices, policies, objectives, and its importance to the community.
- c. The orientation includes information regarding a volunteer's rights, volunteer-staff relationships and avenues of volunteer service and career advancement.
- d. Training offers the volunteer growth and challenge, a worthwhile assignment to update and challenge his/her knowledge and skills, and the opportunity for participation, development and recognition.
- e. Training includes exposing the volunteer to specific procedures and functions of the institution; specific responsibilities; the issues and trends in the given field; and provisions for attitudinal development.
- f. Methods of training may include workshops, seminars, on-the-job, lectures, meetings, films, interviews, institutes, and community training resources.
- g. Training for staff members in the agency involving volunteers is developed as needed by the agency.
- h. Training for volunteers may be given by either the program, the agency in which the volunteers are placed or a volunteer center.

## **I. SUPERVISION**

### ***PRINCIPLE:***

Clearly defined lines of supervision and/or support are communicated so that volunteers know to whom they are responsible, to clarify lines of authority, to facilitate accountability, and to help volunteers understand sources of information and guidance.



**CRITERIA:**

- a. Supervision is a continuing process enhanced by active involvement of the volunteer, affording opportunity for innovation.
- b. Regular contact between volunteer and supervisor is made to assure continued communication.
- c. Supervisors discuss with each volunteer their work, focusing on recognition for positive efforts and strengthening areas of weakness.

**J. EVALUATION**

**1. VOLUNTEER PROGRAM**

**PRINCIPLE:**

There is continuing evaluation of the volunteer program in the attainment of stated goals and objectives. Evaluation is a process upon which to make decisions regarding volunteers and an ability to interpret their value.

**CRITERIA:**

- a. A strong evaluation component is built into the organization's administration.
- b. Careful record keeping, personal and public observations and communications aid in determining the value of volunteer activities to the client, and to the organization.
- c. The organization periodically evaluates its adherence to the principles contained herein and its achievements of stated goals and objectives.
- d. The organization's policies and practices of training supervision and working with volunteers is periodically reviewed and evaluated to determine the organization's abilities to meet the volunteer and client needs.
- \*e. Participants in the evaluation process are: the designated administrator of volunteers; the supervisory staff; the clientele or consumers of the agency or program's services; the volunteers; the program sponsors.
- f. The evaluation of program operation indicates areas of strength as well as areas requiring corrective action or redirection of resources.
- g. Agencies policies and practices of training, supervision and working with volunteers are periodically evaluated to determine the agencies' abilities to meet the volunteers' needs.

Applicable only to Central Volunteer Coordinating Bodies

## **2. VOLUNTEER COMPETENCIES, SKILLS AND SATISFACTION ASSESSMENT**

### ***PRINCIPLE:***

Volunteer performance is evaluated on a regular basis to determine the volunteers' potentials, their needs and growth, their satisfaction, and contribution to the agency and clients.

### ***CRITERIA:***

- a. Evaluation is a distinct part of the supervisory process and includes volunteers' assessment of their work assignments.
- b. Volunteer service is measured in terms of the extent to which it enriched and increased services to the agency, those served, the board and the community.
- c. Evaluation is based on a recorded accounting of volunteer's time, effort, training, donations in-kind, and the effect on the persons served.
- d. Staff members are informed of their rights and obligations to evaluate the performances of volunteers and communicate evaluations to the volunteers.
- e. Evaluations of a volunteer are based on careful record keeping, personal observation and communication.
- f. Evaluation assessment of the volunteer includes the volunteer's personal growth and satisfaction as well as his/her value to the agency and staff.
- g. Referrals and placements of volunteers are periodically reviewed and assessed to determine if volunteers are appropriately and effectively linked.

## **K. MOTIVATION**

### **1. RECOGNITION**

#### ***PRINCIPLE:***

Formal, as well as informal, recognition is an integral part of the volunteer program.

#### ***CRITERIA:***

- a. Volunteers are involved in planning and evaluation of program activity.
- b. Volunteers are identified in the form of badges, pins, name tags or other identification which gives them special recognition.

- c. Informal recognition includes warmth, friendliness and personalization on the part of the staff.
- d. Staff provides praise, compliments and congratulations to volunteers for their performance whenever possible.
- e. Staff accepts volunteers as a "part of the team".
- f. Formal recognition may include job promotions, special award meetings, certificates, publicity and pictures in public media and letters of appreciation.
- g. Staff makes volunteers aware of the relationship of the job they do to the total effort and makes them feel needed and wanted.

## 2. RETENTION

### ***PRINCIPLE:***

The staff provides guidance, supervision and planned responsibilities for needed services for the successful retention of volunteers.

### ***CRITERIA:***

- a. Volunteers are shown that their efforts are needed and appreciated.
- b. Staff offers guidance to build interest, increase skills and instill confidence in volunteers.
- c. Staff makes certain that volunteers feel free to communicate with their supervisors.
- d. Volunteers are consulted for ideas and suggestions.
- e. Volunteers are not taken for granted.
- f. Partiality toward volunteer is avoided.
- g. Volunteer-agency contracts are reviewed and adjusted.
- h. Opportunities are provided for the volunteer to take on varied jobs and increased responsibilities.

### **3. CAREER DEVELOPMENT**

#### ***PRINCIPLE:***

Volunteer opportunities exist in all human service fields at all levels.

#### ***CRITERIA:***

- a. Provisions are made for upgrading volunteer responsibilities and varying experiences as desired by volunteers and appropriate to the organization.
- b. Agencies define volunteers' roles and provide for appropriate supervision so that records of skills gained through volunteer experiences can be made available to potential employers and school admissions offices accurately evaluating potential skills gained through these experiences.
- c. Agencies strive for personnel policies that include flexible hours and weeks, part-time contracts, seasonal work and position sharing so that maximum opportunities for participation is afforded volunteers.
- d. Formulas or procedures whereby some volunteer work can be considered toward meeting certification and professional requirements are be developed.
- e. Agencies work with educational institutions to provide for career exploration through volunteer opportunities.
- f. Volunteers are offered "work-learning" experiences beyond their normal responsibilities that will provide growth experiences.

## SECTION III.

### ORGANIZATIONAL STRUCTURE AND ADMINISTRATION

Structure under which a volunteer program operates

#### A. ORGANIZATIONAL STRUCTURE

##### *PRINCIPLE:*

The auspices under which the volunteer service operates ensures the achievement of the volunteer service program goals.

##### *CRITERIA:*

Volunteer service programs that are functions of incorporated nonprofit organizations have the following characteristics and responsibilities:

1. **The constitution and bylaws of nonprofit corporations include but are not be limited to:**
  - . A statement of the governing body's responsibility for the formulation and implementation of general policy;
  - . A definition of goals, purposes and objectives;
  - . A definition of the scope and area of the program;
  - . Qualifications for membership in the governing body;
  - . Procedures for selecting members of the governing body;
  - . Terms of office for members of the governing body;
  - . Voting procedures for members;
  - . Guidelines for determining the frequency of meetings;
  - . Appropriate standing committees;
  - . Designation of lines of authority and communications;
  - . Methods for amending the corporation's constitution and bylaws;
  - . A statement of the responsibilities and duties of the corporation's administrator and staff;
  - . A statement of compliance with the Civil Rights Act of 1964 and with all other federal, state and local laws that safeguard civil rights;
  - . A statement of asset disbursement in case of corporate liquidation.

2. **The governing body of a nonprofit corporation has certain characteristics and responsibilities.**

*CHARACTERISTICS:*

The membership of the governing body:

- . Is broadly representative of the geographic area and includes representatives of constituent groups within the program area, as well as professions, business, labor, government, education, finance, volunteer, civic groups, religious bodies, health and social services, and consumer.
- . Serves without pay and accrues no financial benefit as a result of membership in the governing body. However, members may be reimbursed for costs incurred (transportation, childcare, etc.)

*RESPONSIBILITIES:*

The governing body:

- . Formulates policy to plan, implement and evaluate the volunteer service;
- . Provides for an annual evaluation of the Volunteer service program;
- . Promotes the volunteer program throughout the community;
- . Assists in procuring financial and technical assistance;
- . Is responsible for contracts, for adopting and operating an annual budget, for maintaining financial records, and for providing an annual audit by an independent certified public accountant;
- . Adheres to Standards of Accounting and Reporting for Voluntary Health and Welfare Organizations;
- . Employs an administrator and gives that person the authority to manage the daily affairs of the volunteer service or program, according to established personnel and corporate policies and practices;
- . Meets at least quarterly as a general body;
- . Maintains minutes of all official proceedings that any interested party can inspect;
- . Is responsible for establishing and implementing appropriate publicity, public relations, and marketing;

- . Exercises an advocacy role within the limitations imposed by Sec. 501(c)3 of the Internal Revenue Code, and as appropriate and necessary with other agencies, groups and programs to ensure the adequate provision and sensitivity of these organizations to the needs of volunteers and those they serve.
- . Is given a full orientation about the organization and well-defined written description of the roles and responsibilities;
- . Is provided requisite information and resources to enable decision-making in the areas of administration, program development, funding, record keeping, personnel, properties, and public relations.

3. **The advisory committee of the incorporated nonprofit volunteer program has certain characteristics and responsibilities.**

*CHARACTERISTICS:*

The membership of such an advisory committee:

- . Is broadly representative of the geographic area and includes representatives of constituent groups within the program area, as well as professions, business, labor, government, education, finance, volunteer, civic groups, religious bodies, health and social services, and consumers; and
- . Serves without pay and accrues no financial benefit as a result of membership in the governing body. However, members may be reimbursed for costs incurred (transportation, childcare, etc.)

*RESPONSIBILITIES:*

The advisory committee:

- . Advises and assists the governing body in formulating policies and practices;
- . Provides recommendations to the governing body for the effective functioning of the volunteer program;
- . Advises and assists the staff in formulating and implementing program goals and standards;
- . Promotes the volunteer service in the community;
- . Assists in procuring financial and technical assistance;
- . Develops the necessary committee structure to accomplish its goals;

- . Exercises an advocacy role within the limitations imposed by Sec. 501(c)3 of the Internal Revenue Code, and as appropriate and necessary with other agencies, groups and programs to ensure the adequate provision and sensitivity of these organizations to the needs of volunteers.

- . Provides advice in selecting and evaluating staff;

- . Assumes other duties as delegated by the governing body.

4. **Volunteer Programs that are functions of federal, state, or local governments have the following characteristics and responsibilities:**

*CHARACTERISTICS:*

The membership of such an advisory committee or council:

- . Is broadly representative of the geographic area and includes representatives of constituent groups within the program area, as well as professions, business, labor, government, education, finance, volunteer, civic groups, religious bodies, health and social services, and consumers.

- . Serves without pay and accrues no financial benefit as a result of membership in the governing body. However, members may be reimbursed for costs incurred (transportation, childcare, etc.)

*RESPONSIBILITIES:*

The advisory committee or council:

- . Advises and assists the governing bodies in formulating policies and practices; and

- . Assumes other duties as delegated by the governing body.

**B. ADMINISTRATIVE STAFF - BOTH PAID AND UNPAID**

*PRINCIPLE:*

Staff is sufficient in number to implement the policies and carry out the responsibilities of the volunteer service.

**1. STAFF RESPONSIBILITIES**

*PRINCIPLE:*

The staff is responsible for the operation and direction of the program and works in partnership with the governing body and/or advisory committee.



**CRITERIA:**

The staff:

- a. Implements policy established by the governing body and/or recommended by advisory committee.
- b. Undertakes planning and program coordination.
- c. Provides assistance to Boards and Committees.
- d. Provides fiscal management in terms of maintaining financial and program statistics, purchasing, budget preparation and projection, and monitoring the program.
- e. Establishes sound working relationships and coordination with recognized agencies as well as community groups and organizations that provide essential human services.
- f. Promotes and develops volunteer leadership.
- g. Maintains good public relations.
- \*h. Encourages other agencies to provide orientation, training and supervision for administrative advocacy and service volunteers.
- i. Administrative staff employs, supervises and provides training for additional staff.
- j. Maintains confidentiality.
- k. Provides input into community planning processes.
- l. Is knowledgeable of new trends and issues and communicates them to the boards, volunteers, peers, committees, and administration.
- m. Assists staff, departments and/or \*agencies in identifying areas in which to involve volunteers.
- n. Develops and effectively utilizes a resource file of agency needs and volunteers.
- o. Provides an adequate record system including volunteer placement, service and training.
- p. Recommends and assists in implementation of an ongoing and effective recruitment process.

\*Applicable only to Central Volunteer Coordinating Bodies.

- q. Assesses strengths and capabilities of the volunteers.
- r. Develops and effectively uses a procedure to refer volunteers for placement.
- s. Provides for supervision and training of volunteers.
- t. Provides sufficient follow-up to ensure satisfactory placement of volunteers.
- u. Encourages the development of a program of recognition for volunteers.
- v. Provides for effective recognition for volunteers.
- w. Provides on-going evaluation of the program.
- x. Provides advocacy service for volunteerism when necessary.
- y. Communicates effectively with the public regarding the program and its need for volunteers.

## **2. PAID STAFF-VOLUNTEER/UNPAID STAFF RELATIONSHIPS**

### ***PRINCIPLE:***

Unpaid staff does not displace paid workers nor are they placed in a job slot for which funding is available. The paid and unpaid staff share the responsibility for carrying out the assigned tasks or functions of the agency. Decision-making and policy-formulation involves those who will be affected by it.

### ***CRITERIA:***

- a. All paid staff receives information and learns all aspects of the agency volunteer program including individual staff responsibilities to volunteers.
- b. The paid staff is knowledgeable of the agency volunteer personnel policies and practices.
- c. The paid staff is clear about their job function in relationship to the volunteer.
- d. The paid staff is responsible for the work specifically delegated to them.
- e. The paid staff assumes the responsibility for creating a feeling of "belonging" to the volunteers.
- f. The value of volunteerism and paid staff responsibility to volunteers is interpreted to paid staff through appropriate staff training and consultation.
- g. Volunteer jobs are developed keeping in mind the distinctive roles of paid staff.

### 3. PAID STAFF QUALIFICATIONS

#### **PRINCIPLE:**

Staff of the program believes in the value of volunteer participation and its benefits. Staff makes every effort to build in co-worker satisfaction and confidence in the value of volunteer participation and its benefits to the organization. Staff has sufficient knowledge, experience and demonstrated skills to perform effectively and to accomplish the program objectives.

#### **CRITERIA:**

- a. Paid staff has the willingness and capacity to work with volunteers.
- b. Paid staff has the ability to communicate ideas effectively, orally and in writing, and is capable of listening and sharing information.
- c. Paid staff has knowledge of community organization and management processes.
- d. Management level and administrative staff has organizational ability, an understanding of interpersonal dynamics and creativity.
- e. Management and administrative staff holds bachelors degrees and/or the equivalent and demonstrated administrative and/or supervisory experience.
- f. Management, administrative and professional staff possesses good leadership skills and experience in administration and supervision.
- g. Paid staff has interest in professional self-development.
- h. Paid staff has active volunteer experience in direct service administrative, and/or advocacy volunteering, and/or participation in social service agencies that deal with people problems.
- i. Paid staff has the ability to work with persons of all ages, ethnic groups, education and organizational backgrounds, and all socio-economic strata.
- j. Supervisory staff has the ability to delegate authority and the skill to coordinate many activities simultaneously.
- k. Staff possesses the ability to motivate others.

#### **4. STAFF SELECTION**

***PRINCIPLE:***

Paid staff is selected on realistic basis of suitability to agency needs.

***CRITERIA:***

- a. Position descriptions are developed which define needed and desired qualifications, requirements and responsibilities.
- b. Volunteer participants and volunteer leaders in currently existing volunteer programs are informed about paid job openings.
- c. Employment services and media are utilized to announce paid job openings.
- d. Volunteer associations, professional societies, social service agencies, colleges and universities are contacted.

#### **5. PAID STAFF ORIENTATION AND TRAINING**

***PRINCIPLE:***

Paid staff is provided orientation and training.

***CRITERIA:***

- a. Paid staff is given opportunities to acquire knowledge of the history, philosophy and ethics of volunteerism and the application to the organization.
- b. Staff is given opportunities to acquire skills of managing volunteers.

#### **6. SALARIES/BENEFITS FOR PAID STAFF**

***PRINCIPLE:***

Organizations offer salaries and benefits commensurate with the work to be accomplished and comparable to paid staff positions in the current job market and existing classifications at professional levels. Regional cost of living differentials are considered.

***CRITERIA:***

- a. Benefits for paid staff include vacations, hospitalization, workmen's compensation, social security, accident and liability insurance, pension plans, allowances for sick leave, holidays, personal emergencies, jury duty, and maternity leaves.
- b. Paid staff persons have opportunities for professional growth through continuing education, workshops, seminars and courses.

- c. The organization uses non-discriminatory hiring practices consistent with equal employment opportunity practices.
- d. Personnel policies are in writing and available to all paid staff.

## **7. BENEFITS FOR VOLUNTEERS/UNPAID STAFF**

### ***PRINCIPLE:***

Organization offers benefits to volunteers/unpaid staff.

### ***CRITERIA:***

Benefits for volunteers/unpaid staff include:

- a. Vacation leave, workmen's compensation or liability insurance, holidays and personal emergency leave are provided.
- b. Professional growth opportunities are available through continuing education, workshops, seminars and courses.
- c. Organizations use non-discriminatory selection practices consistent with affirmative action practices and federal, state and local laws.
- d. Appropriate records on volunteer's contribution are kept for career advancement references and school admission.
- e. Opportunities for career advancement are available.
- f. Appropriate grievance procedures are available.
- g. A system for recognition is provided.
- h. Written information on policies and benefits is available to volunteers.

## **C. FACILITIES**

### ***PRINCIPLE:***

Facilities are provided in sufficient quality and quantity to insure the adequate operation of the volunteer service program.

### ***CRITERIA:***

#### **1. ACCESSIBILITY**

##### ***PRINCIPLE:***

The facility is visible and available to all people including the physically disabled and to both public and private transportation.

**CRITERIA:**

- \*a. The central volunteer coordinating body is situated in a centralized, accessible area of the community.
- b. Special provisions are made to facilitate interviewing disabled persons. (i.e. ramps.)
- c. Signs directing the public to volunteer offices are visible and clear.
- \*d. Outreach sites are established to meet special needs and to allow for greater accessibility.
- e. Volunteer service office maintains accessible office hours.

**2. SPACE AND EQUIPMENT**

**PRINCIPLE:**

The facility has adequate space and the necessary equipment for the program to function efficiently and comfortably.

**CRITERIA:**

- a. The facility meets local codes and regulations.
- b. Reception area and space is sufficient to insure confidentiality in interviewing.
- c. An adequate telephone system is provided.
- d. Office and other mechanical equipment is provided and receives regular maintenance.
- e. Furnishings, materials and supplies are provided to meet the operational needs of the program.
- f. Designated space is available for volunteers.
- g. The facility designates space for a library and audio-visual equipment.

**D. FINANCIAL MANAGEMENT**

**PRINCIPLE:**

The program operates on sound financial basis and according to acceptable accounting practices.

\*Applicable to Central Volunteer Coordinating Bodies and large agencies.

## 1. FUNDING THE SERVICE

### **PRINCIPLE:**

Financial resources are sufficient to carry out the program of the agency or organization and to meet the standards set forth in this document.

### **CRITERIA:**

- a. The governing body is responsible for securing financial resources sufficient to carry out the purpose of the agency or organization.
- b. Sources of funding may include grants from some of the following: federal, state and local governments; private foundations; professional associations, universities, church groups, federated fundraising campaigns (i.e., United Way), industry, the business community, service clubs, civic organizations and personal donations.
- c. The administrator is responsible for maintaining proper financial records, assisting in preparing annual budgets, operating within the guidelines of budgets, projecting future needs and assisting in securing adequate financing.
- d. The organization weighs the advantages and disadvantages of accepting funding, reach an informed decision that includes an understanding of the impact the decision will have on the organization and consider the short-term and long-term implications.

## 2. BUDGET

### **PRINCIPLE:**

A budget is prepared annually and represents an organized estimate of anticipated costs for achieving desired goals.

### **CRITERIA:**

- a. Budget considerations include the needs of paid and unpaid staff, and the organization.
- b. A budget includes provisions for personnel, facilities, equipment, telephone, supplies, postage, publicity, printed materials, transportation, training, conferences, insurance, and reimbursement for out-of-pocket expenses to volunteers in accordance with established policies.

## GLOSSARY OF TERMS\*

**Administrator** - chief executive officer; responsible for operation of an organization

**Advocacy** - participation in communicating or representing a cause; defending the interests and interpreting the point of view of persons in need.

**Agency** - organization or institution through which something is accomplished.

**Auxiliary** - an organization formed for the purpose of supporting the parent organization.

**Client** - person who engages or utilizes services.

**Community Relations** - actions to promote goodwill and understanding between the organization and the community.

**Consumer** - a recipient of services.

**Criteria** - standards, requirements or rules which define acceptable practices or by which something can be judged.

**Employ** - to put to work with or without salary or wages.

**Ethics** - standards of conduct.

**Evaluation** - assessing the effects/value of volunteerism.

**Guidelines** - ideal direction to achieve standards and goals.

**Interview** - process through which information is mutually exchanged between two people.

**Job description** - a systematic outline describing expectations of volunteer and agency; an outline of specific requirements needed for the performance of volunteer opportunities.

**Material** - equipment, apparatus and supplies used by an organization or institution.

**Methodology** - principles or procedures of inquiry in a particular field.

**Models** - select programs tested and proven useful.

**Motivation** - a needed desire that causes a person to volunteer.

**Organization** - a structure for planning and carrying out a united effort or common goal; agency

**Orientation** - introduction to a new or unfamiliar situation; guidance in an experience or activity of a new kind; giving a sense of awareness to one's position in relationship to the environment; a period of attitude development.

**Planning** - a vehicle to accomplish objectives which enables an agency/organization to realize its goals, purposes and functions.

**Principle** - a general or fundamental rule or assumption.

\*Standards and Guidelines for the Field of Volunteerism,  
Association of Volunteer Bureaus, Inc. 1978, pp 31-32



**Process** - a series of actions, relationships or operations directed toward a particular result.

**Program** - an established plan of activities; work performed by an agency, institution or organization.

**Program Development** - determination of goals, methods for achieving stated goals, and process for contributing continuity and vitality to the program for accomplishing purposes and ideals of the agency/organization; to increase, to better or to expand work performed by an agency, institution or organization.

**Recognition** - acknowledgement of achievement and service by volunteers; means of communicating appreciation to volunteers for giving freely of their time and skills.

**Record Keeping** - a system which includes information concerning volunteers.

**Records** - written account of activities, known facts about a person and documentation of experiences.

**Recruitment** - the means for stimulating persons to volunteer their time and skills.

**Resource information** - ongoing survey of all recognized public and private organization involving volunteers.

**Service** - the performing of designated activities or duties, work done for and benefiting others, specifically in health, welfare, educational, employment, recreational and cultural agencies, institutions and organizations.

**Staff** - persons working in agency, institution and/or for an organization; can be paid or unpaid(volunteer); persons having duties concerned with management, delivery of services.

**Standard** - a rule for measuring; bridge gap between existing practices and desirable goals.

**Supervision** - offered to volunteers for carrying out assignments and for guidance.

**Survey** - a close examination of all agencies and organizations involving or desiring volunteers.

**Training** - the teaching, or discipline, which develops skills, knowledge and understanding.

**Volunteer** - unpaid staff person who contributes service to organizations without financial remuneration.

**Volunteer Coordinator** - person responsible for developing and implementing volunteer program of given agency/organization and managing volunteers.

## ABOUT THE AUTHOR.....

Ann R. Jacobson, LCSW, has more than twenty-five years of experience in the fields of volunteerism and information and referral. She was the founder and director of the Voluntary Action Center and the Info-Line of Kansas City, Missouri and was formerly Vice-President for Volunteer and Community Resources of Heart of America United Way. She is currently President of Ann Jacobson and Associates, which provides training and consulting for organizations in such fields as volunteer management, board development, information and referral services, and curriculum design.

Her publications include ABC's of I & R, a series of training manuals for information and referral, Self-Study Guide for Information and Referral Services, Handbook for Volunteer Management, Principles of Good Practice for the Field of Volunteerism and Self-Study Guide for Volunteer Programs. She was editor of Standards and Guidelines for the Field of Volunteerism and has published numerous articles in professional journals.

Ann holds a Master's Degree in Social Work from the University of Kansas. She has taught courses in volunteer administration and boardmanship at community colleges in Kansas City, Missouri and at the University of Kansas School of Social Welfare.

She served as National President of the Association of Volunteer Bureaus and as President of the Missouri Chapter of the National Association of Social Workers. She has served as Regional Chair for the Association for Volunteer Administration and as national boardmember of the Alliance of Information and Referral Systems. She is listed in Who's Who of American Women and Who's Who in the World.