



Policy development for your volunteer program

Why are policies Important in your volunteer program?

Policies guide the operation and decision making process within your volunteer program. Many organizations do not have written policies but have standard practices they follow. If written down, these practices could become policy.

Policies are important because:

- They provide the basic framework for how your organization involves volunteers
- They are a risk management tool
- They provide your program with consistency and eliminate guesswork in decision making
- They can help guide decisions for difficult situations and provide support to justify the decision when needed

What is a policy?

A policy is a formal documented statement that *tells us **what** to do*. Policies can be a statement of belief, a statement of principle, or a statement of action.

A **statement of belief** is a policy that tells us how our organization sees things or what is important to the organization. Examples of this type of policy would be: diversity policy or involvement of volunteers' policy.

A **statement of principle** is a policy that tells us what is safe and what is not. Examples of this type of policy would be: standard of care policy, use of waivers policy or standard of conduct policy.

A **statement of action** is a policy that helps our organization run effectively. Examples of this type of policy would be all those policies that are directly related to the management of volunteers in your organization: orientation & training policy, supervision policy, recruitment policy or recognition policy.

What is a procedure?

A procedure is a set of formally documented steps that guide you through implementation of your policy. A procedure *tells us **who** will do the work and **how** it will be done*.

Who should be involved in developing policy for your volunteer program?

When adopting policies for your volunteer program or reviewing existing policies it is important to secure support and help from others connected to your organization. By bringing others in to assist you, you create the buy-in and support to begin to implement new policies or change your existing policies. Others who may be able to assist you include:

Other staff: those connected to your volunteer program, those with an interest in involving volunteers, or those who have had experience writing policies and procedures.

Volunteers: often the very people for whom we are writing policies are not consulted. You may have volunteers within your organization that would be able to contribute to developing or re-developing policies for your program. Long term volunteers may be able to bring the experience you need and the perspective of a volunteer to the table.

Member(s) of your board of directors: if the board of directors of your organization is responsible for adopting or approving policy, it would be advantageous to include them in the development of new or revision of existing policies. Even if they are not responsible for approving the policy within your volunteer program, they may be able to bring a “big picture” perspective to the policies you are developing.

Lawyers or insurance agents: connected to your organization, they may be able to provide input into policy development. Policies related to or tied into risk management may benefit from having the perspective of lawyers or insurance agents.

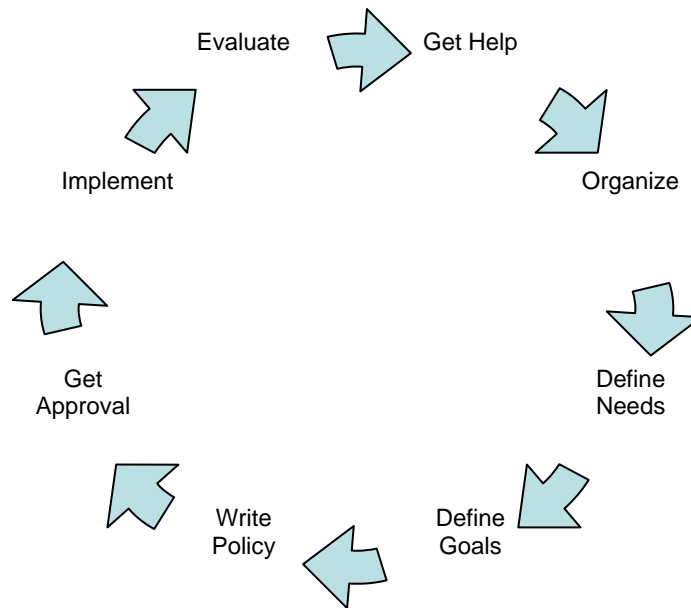
Clients: as with volunteers, often our clients are overlooked. Depending on the nature and mandate of your organization, clients may be able to provide assistance with the development of policies for your volunteer program.

How do you write effective policies?

When developing policies for your volunteer program, consider the following steps:

1. **Get help.** Ensure that you secure help and support. Ask yourself who you can involve (see previous section).
2. **Organize.** What policies do you currently have? Review these. What policies do other organizations have that may operate similar to yours? Review these as well. A word of caution: although it is beneficial to review policies from other organizations, you should never just adopt them as they are. Make sure you consider the needs, risk management strategies and outcomes required for your own organization.
3. **Define needs.** What are the needs of your volunteer program? Ask yourself:
 - Are there issues, problems or opportunities that exist?
 - Would a policy statement assist in alleviating issues or problems or in enhancing opportunities?
 - What area of your volunteer program is least effective and what rules need clarifying?
4. **Write the policy.** You want to ensure that it is written in plain language and easily understood by everyone in your organization. By using the present tense, a directive tone and active words, your policy statement will read like a “what” to do statement. Although you want the statement to be as brief as possible, ensure that what you need to say can be understood.
5. **Approve the policy.** Once you have the policy written, you need to ensure it goes through the proper approval process in your organization. Find out how the approval process works in your organization. Some organizations need to have the board approve the policy, in other organizations senior management may be able to approve the policy.

6. **Implement and communicate the policy.** Once approved, you need to begin to implement the policy. Part of implementing policy is communicating to those in your organization – staff, volunteers, clients and others what the policy is and what the purpose is.
7. **Evaluate the policy (review).** Once written, approved, and implemented, it is important to ensure that your policies are reviewed on a regular basis. As trends change and new legislation or practices come into effect, you may find that your policy statements need updating.



What policies support a strong volunteer program?

The following is a list of policies that are needed to support a strong volunteer program. This list of policies is also helpful when organizations are considering adopting the Canadian Code for Volunteer Involvement:

- Mission
- Vision
- Values
- Definition of volunteer
- Philosophy of Involvement
- Goals for the volunteer program
- Objectives of the volunteer program
- Organization chart
- Designated manager of volunteers
- Planning
- Evaluation of volunteer resources
- Benefits of volunteering
- Resource allocation
- Development of policies and procedures
- Updating policies and procedures
- Risk management
- Insurance coverage
- Record keeping and administration

- Communication between paid staff and volunteers
- Volunteer/client/member relations
- Training paid staff to work with volunteers
- AIDS/HIV and other communicable diseases
- Special case volunteers – paid staff, clients, next of kin, fine options, people with special needs
- Recruitment
- Diversity
- Volunteer position description
- Application
- Interview
- Initial screening
- Selection and placement
- Exclusion of applicants
- Orientation
- Volunteer training
- Ongoing screening
- Standards of conduct (conflict of interest, representing the organization, confidentiality, alcohol/drugs/smoking, dress code, acceptance of gifts, allergies, reimbursement of expenses)
- Volunteer support and supervision
- Retention of volunteers
- Ongoing recognition of volunteers
- Vacation or leave of absence
- Termination of volunteers
- Harassment
- Grievance
- Appeal

Samples of policy statements can be found in the reference books identified in the Resource section of this document.

Resources

Graff, L. G. (1997). *By Definition: Policies for Volunteer Programs: A Manual for Executive Directors, Board Members, and Managers of Volunteers*. Dundas, ON: Graff & Associates.

Davies, Mary. (2000) *Developing Your Policies & Procedures Manual: The Basics*. Toronto, Ontario. Ontario Community Support Association

Fletcher, Kathleen. (2000) *The Policy Sampler: A Resource for Nonprofit Boards*. Washington, DC. BoardSource.

Acknowledgement

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