



MANUAL OF VOLUNTEERISM

**A MANUAL FOCUSED ON
THE REALITIES OF BOLIVIA,
COLOMBIA, HAITI AND
NICARAGUA DESIGNED
FOR PEOPLE
COORDINATING
TEAMS OF
VOLUNTEERS**



**Alianza por la
Solidaridad**

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EU Aid Volunteers
We Care, We Act



EU AID VOLUNTEERS INITIATIVE

“Empowering local capacities for humanitarian volunteering in Latin America”

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PROJECT FRAMEWORK

This guide is part of the programme being developed by Alliance for Solidarity as part of the capacity-building project “Empowering local capacities for humanitarian volunteering in Latin America” (no. 2017-3658 / 001 - 001) of the *EU Aid Volunteers initiative* financed by the European Union. This project is implemented in eight countries in Latin America and the Caribbean; from among all of them,

The *EU Aid Volunteers* initiative is an opportunity to promote cooperation between European citizens and local communities in countries experiencing humanitarian crises of different types. At the same time, the relationship between humanitarian action and active citizenship means alliances between local, national and global organisations.

The Treaty of Lisbon envisaged the establishment of the *EU Aid Volunteers Initiative* whose aim is “to establish framework for joint contributions from young Europeans to the humanitarian aid operations of the Union” (Art 214.5 TEU). To do this, the Commission opened a consultation period in 2010 in order to obtain an overview of the situation of volunteerism.

Finally, in 2014, the legal framework creating the *European Voluntary Humanitarian Aid Corps (EU Aid Volunteers Initiative)*: Regulation (EU) No 375/2014 of the European Parliament and of the Council of 3 April 2014. The result has been a triple-objective initiative: on the one hand, it focuses on strengthening the European Union’s capacity to provide humanitarian aid based on identified needs, providing professional support through the deployment of volunteers trained for communities in situations of vulnerability in third countries. It is further aimed at strengthening the internal capacities and resilience of these communities, through the implementation of joint projects between experienced humanitarian operators and local organisations in countries outside the European Union. Lastly, the Initiative focuses on disaster risk reduction, promoting the link between relief, rehabilitation and development (LRRD) (VARD) in emergency interventions, as well as strengthening and promoting local volunteerism in communities in third countries where volunteers are deployed.

This latter is the scope addressed by this manual on managing volunteerism: we hope that it will be a useful tool, that it will make it possible to adapt recommendations and advice to the context of each country, community, organisation and particular moment. In fact, this document has been prepared with the intention that it may serve all kinds of organisations (large, small, amateurs, experienced, etc.) that are developing or are planning to develop different types of interventions related to volunteerism, from forms of occasional volunteering, to campaigns, or long-term, including social interventions, or those seeking to respond to challenges caused by natural disasters.

ABBREVIATIONS

ACJ	Young Christians Association
ECAV	Organisations with volunteer action
FDC	Doctora Clown Foundation
GSE	Global Student Embassy
ODV	Organisations of volunteers
SNV	National Volunteerism System

I · INTRODUCTION

A LOOK AT LOCAL VOLUNTEERISM IN LATIN AMERICA AND THE CARIBBEAN

The Americas are continents of contrasts; more than six hundred million people live in the region. This is without doubt one of the regions in the world with the most resources and wealth, but is also the most unequal continent on the planet.

This inequality is also evident in the exercise of local volunteering. In some countries like Argentina or Colombia, there is legislation and rules governing the practice of volunteerism; in other countries, it is under construction or in parliamentary debate; in some, there are very strong movements by civil society and in others, it is starting to emerge.

The structure of civil society is a determining factor in working effectively on the development of countries and on improving people's quality of life, and volunteerism is one of the most important reflections of the advancement and construction of a stronger, more empowered, society. Because a robust and organised civil society is the most effective mechanism of participation in demanding from and controlling the state and in involvement and work aimed at improving the social situation in different countries.

The true value of volunteerism resides not only in the specific action carried out by the volunteers every day by giving some of their time and talent, putting them at the service of different causes. Its essential value resides also in the effective participation in a cause, in being involved as a social agent of transformation, in understanding that true social change begins with oneself, by defending the dignity of all people, regardless of who are or where they were born.

This guide on managing the volunteerism cycle is intended to be a useful tool for all organisations wishing to take the leap and begin to work with local volunteerism in Latin America or for those already working with volunteers and want to incorporate new ideas or good practices that will improve the processes of volunteerism.

The working system used to make it has been supported by field work with organisations from four countries: Bolivia, Colombia, Haiti and Nicaragua. We collected testimonies and good practices and defined challenges through a process of research. At the end of the document is a list of the organisations that have participated in this research process and the script of the interviews conducted. We hope that it will be useful material, that it will support you in your work and that it can be enriched with any contributions made.

One more note before beginning: you will find **CHALLENGES** and **GOOD PRACTICES** throughout the text. A **CHALLENGE** is always an invitation, a provocation, a dare, and we have so defined it. It is an invitation to leave the comfort zone, to delve into the reality of volunteerism with a readiness to make changes.

GOOD PRACTICES are a set of actions that have performed well or even excellently in the organisations participating in the study. We hope that they will yield similar results in your organisations.

To identify challenges and good practices, the team of writers has based itself on evidence. Behind these elements are the principles and values recognised in the volunteers and in the organisations that undertake the task of channelling this participation.

CHECKLISTS appear at the end of some sections. These are questions that serve as a self-assessment in the organisations and that make it possible to measure progress of how far implemented the processes we are talking about are.

The framework of the text presented is completed with a set of **INFORMATION SHEETS** referred to in sections of the text and which can be found in the annexes. These documents are meant to be examples that each organisation should adapt to its philosophy, situation, commitment, and so on.

Everything contained in these texts may be shared, but with a clear idea: it is essential to copy by adapting to each situation. Organisations are made up by people and each person, as we know, is different.

II · CONTEXTS



1 · BOLIVIA

Bolivia has a normative framework aimed at the management of volunteerism, Law No. 3314 of 2005. However, according to organisations consulted for the creation of this guide, the lack of adequate regulation of that law means a lack of effectiveness of its postulates.

The same applies to the municipal legislation of La Paz concerning the management of volunteerism. The Youth Institute, which is also an arm of the municipal government, has been the main promoter of this municipal law and a series of discussion panels with organisations receiving volunteerism, besides organising a number of actions related to the subject in 2017. Apart from the formal regulatory framework as such, the municipal government of La Paz has a programme called “Real Neighbourhoods and Communities”. Thus, the municipality has a specific public policy to support the management of local volunteerism, in which it acts as a territorial partner of volunteerism organisations in order to go into the neighbourhoods and identify families at social risk and subsequently collaborate with the monitoring of these projects.

Similarly, Bolivian organisations interviewed during the prior consultations for this manual confirmed that various municipal authorities throughout the country are offering spontaneous collaborations with different rural projects for managing volunteerism, although they may not have a programme or mechanism of collaboration defined as such.

Any initiative to manage volunteerism in Bolivia must take into account its great cultural diversity. The Plurinational State of Bolivia has several official languages, mainly Spanish, Aymara, Quechua and Guaraní.



2 · COLOMBIA

In Colombia, a normative framework has been developed since 2001 due to the increase of volunteer actions and of the solidarity organisations that manage it, along with recommendations of United Nations (General Assembly resolution 56/83) regarding the ways in which States and organisations must support volunteer actions and the organisations leading these processes.

However, there are two difficulties in that regard. On the one hand, emphasis has been placed on volunteerism in natural disasters –first-response– and, on the other, there is no coordination between

public policies and the actions of the volunteers, of the organisations of volunteerism (ODV) and the entities with volunteer actions (ECAV).

Law 720 of 2001 defined volunteerism in Colombia as *the set of actions of general interest developed by natural or legal persons, who are performing their service to the community by virtue of a civil and voluntary relationship*. In turn, it promotes, recognises and facilitates volunteer action as an expression of citizen participation under the practice of solidarity, and creates a coordination stage called the National Volunteer System (SNV), which functions as a platform for coordinating the ODV.

Accordingly, the law was regulated in 2005 with Decree 4290 under the perspective of volunteer action from disaster prevention, actions in the sectors of health, education, social control and citizen participation, among others. This decree established that the entity responsible for promoting that work would be the National Administrative Department of the Economics of Solidarity, today the Administrative Unit of Solidarity Organisations. In turn, the criteria for the creation of the Municipal Volunteerism Councils (Decree 4290, 2005).

Thanks to these regulations, Colombia has a kind of legal system of volunteer actions, where freedom, participation, solidarity, social commitment, autonomy and respect are essential principles for anyone wishing to embark on the experience of volunteerism in the country.

Furthermore, through the law that promotes and regulates volunteerism in Colombia, emphasis is placed on the importance of national and international organisations intending to engage in social intervention – through volunteerism – fulfilling following purposes of volunteerism: (a) To contribute to the integral development of people and communities, with a foundation based on the recognition of human dignity and the realisation of the essential values of civic coexistence (life, freedom, justice, solidarity and peace) and (b) To promote, through selfless service, a generous and participatory citizens' awareness to shape and strengthen the social fabric.

In the country, the latest regulatory development in terms of volunteerism took place in 2012 with Law 1505, which created the national subsystem of first-response volunteers and created stimuli for volunteers in civil defence, firefighting and the Colombian Red Cross. This legislation also includes the duties of the members of the volunteerism systems and the stimuli and incentives – in education, housing, social security and taxation – granted by the State to whoever decides to get involved in support of the nation through volunteer actions.

Thus, while there is a regulatory and public policy framework, it tends to not be entirely effective with regard to the current demands in the framework of volunteer actions by individuals or legal persons. Therefore, given the increasingly diverse topics of volunteer actions and the increase of the organisations managing them, we suggest that the discussion on legislation be resumed with the aim of updating and optimising the regulatory framework in the sense of coordination, complementarity and subsidiarity of volunteerism actions in the country.



3 · HAITI

Among the countries that make up Caribbean Community is Haiti, the country that became the first independent state of Central America, in 1804. Despite its conquests with regard to the freedom of the Haitian people, this country is widely known for having the highest levels of inequality in Latin America and the Caribbean; among other causes, natural phenomena such as Hurricane Jeanne in 2004 or the earthquake of 2010, are events that affect and impact on the country's ongoing humanitarian crisis.

Because of this, the international community has had a clear impact as a social support for the country through external and internal (to a lesser extent) activities. This is how, through volunteerism activities (which distinguish between a short-term action called *bénévolat* and another, *volontariat*, which is long-term, and in which the expenses incurred by the volunteers are often covered) social intervention is achieved and, based on that, two types of volunteerism is recognised in the country, as reported by the organisation Alliance for Solidarity in its mission report for 2018:

- The main model is identified as the volunteerism work related to and is based on the issue of the environment and attention to natural disasters, accompanied by rescue missions, issues of repair and reconstruction of damage, along with managing the prevention of these events. In this particular situation, it is identified that the base of volunteerism is constant and ongoing during the entire year in the country. This effectively makes it possible to ensure the conclusion and implementation that are the purpose of the interventions.
- There is a secondary volunteerism related to defence work, care and education. Because of the nature of this medium-to-long-term intervention, it requires that the volunteerism be carried out more frequently and for longer. That is why this type of volunteerism is not so widespread or attractive for those applying for the intervention.

In view of this demand and offer in the field of volunteerism, the country's shortfalls and needs become evident and visible in terms of training, the management of the volunteer team, fund-raising for the volunteer missions, among others, that create the urgency for state regulations on shielding and support the interventions of volunteers in the country. Thus, despite the fact that Haiti has the Organisation Law of 10 May 1989, of the Ministry of Planning and External Cooperation, responsible for international relations, appropriate regulations would make it possible to address the entry –often uncommon and disoriented– of humanitarian aid to the country in a more coordinated manner.

Haiti has several decrees and laws to address ongoing states of emergency (Law of 16 September 1966), laws based on the organisation of local authorities (22 March 1996), decrees dealing with development and regulation (12 October 2005); but it does not have specific regulations or a legal framework established with regard to internal or external volunteer actions in the country. Therefore, the relationships of volunteerism are customarily regular under the international standards of the United Nations UN Volunteers programme.

This state of things gives the impression of a lack of need for the State itself to decide to create national regulatory frameworks that suggest particular ways to manage volunteer actions. Thus, in recent years, civil society has tried to co-manage regulatory frameworks that are specific for these initiatives, though it has been impossible to specify these demands and searches.



4 - NICARAGUA

Nicaragua has historically been a society receiving international volunteers and, in more recent years, it has developed an environment conducive for many non-governmental organisations to manage local volunteerism programmes that are, in many cases, combined with cultural and professional exchange programmes through the reception of international volunteerism. In that regard, Nicaragua has a legal framework for managing volunteerism embodied in Law 543 of 2005.

However, this legal framework mentioned above has not been complemented by any public policy of general character. Despite this, it is worth emphasising that, in particular, several municipal authorities (*Alcaldías*) and departmental offices of the Ministry of Education have established cooperation programmes with organisations managing volunteerism. One example is the Ministry of Education in Teustepe in the department of Boaco, which cooperates through its schools with Global Student Embassy, and the case of the Alcaldía of Puerto Cabezas, which has a programme with We World GVC Nicaragua; both cases of organisations managing local and international volunteerism within Nicaragua.

Nicaragua is a predominantly Spanish-speaking country, however, any initiative for managing volunteerism wanting to cover the Atlantic Coast should take into account that the official language of that region is Creole English. There are also native languages in the autonomous regions of the Atlantic (North and South) such as Miskito, Sumo and Rama.

CONTEXTS PRONE TO NATURAL DISASTERS

The different countries that make the context of this guide are exposed to natural disasters, and some of its areas are especially prone to this type of events that may trigger an emergency or humanitarian crisis. Earthquakes, cyclones, tropical storms, floods, droughts, landslides and volcanic actions are some of the most recurrent phenomena in Central and South America.

This should be taken into consideration when managing volunteerism from two perspectives:

- Prevention and safety.
- The particular way to manage volunteerism in emergencies.

Organisations exposed to this type of events should take particular account of the integrity and safety of their volunteers and volunteers, as well of hired staff. This includes making an analysis and having safety protocols that apply both in phases prior to a natural phenomenon (prevention) and during or after¹ it.

In addition, when these types of events trigger a disaster or emergency, may lead to the organisation of volunteerism actions that, because of the context's special characteristics, must also be specially

1 In this regard, we recommend that organisations consult the “Gestión de la Seguridad de las Organizaciones de la Sociedad Civil. Guía práctica para organizaciones locales, Alianza por la Solidaridad, 2019” guide, available at <http://www.aidvolunteers.org/guias/>.

managed. Not all organisations are prepared or have the mission of providing responses in these scenarios, but if it does, it is important to be made clear on how to proceed. In some countries or areas, this type of volunteerism is predominant, and there may even be national regulations that regulate it specifically, as in Colombia, where Volunteerism Act 1507 of 2012 regulates volunteer actions in first responses and obliges volunteers to receive ongoing training in disaster care.

In short, it is about keeping in mind the context in which volunteer actions are being developed and being able to adapt the points and recommendations contained in this guide to each particular case.

(GOOD PRACTICE) For example, a good practice is to include issues of disaster risk reduction and safety in the initial training of volunteers who are going to collaborate in organisations with actions in disaster-prone areas.

III - AN APPROACH TO VOLUNTEERISM

Volunteerism is an expression of citizen action, criticism and solidarity, at the service of society. It is a genuine form of participation in which we find, at the current time we live in, broad possibilities for development.

It would seem, therefore, correct to define **social participation** as the set of actions and mechanisms launched, in a consensual and organised manner, by citizens in order to achieve the common good and social development. We individuals, as members of a society, must actively participate in organising and planning it so that that life in common is as pleasant and successful as possible.

In this key of social participation, we can consider volunteerism as one of the most genuine forms of organised participation that can contribute to strengthening democratic practice in promoting and developing a community in all its potentialities: cultural, educational, social, economic, etc.

But what is volunteerism, exactly? The reality of “volunteer action”, its conception and social implications have changed over time. An assistance-based and protectionist approach has gradually given way to a more current definition built based on principles of democracy and participation. Today, volunteerism is an effective tool for learning, integration, participation and exercise of citizens in order to meet the needs and shortfalls of society.

Many definitions have been given to express the meaning of the word “volunteerism” and almost all of them are characterised by using similar terminology. Words such as freedom, commitment, action, gratuity, organisation, participation, community, solidarity... appear together, giving rise to definitions that are more than eloquent and revealing of the current sense and orientation of the “volunteer action”.

- We understand “volunteerism” as a free, solidarity and transformative action carried out by people in their community, neighbourhood or city, free of charge and within a non-profit, civic and democratic organisation in the search for social development and the common well-being.

1 - DELVING INTO THE CONCEPT OF VOLUNTEERISM AND ITS PRINCIPLES

Let us analyse some concepts in order to better understand this definition of volunteerism:

- **FREE Activity.** Freedom is the power that enables the person to work or not to work in a particular way among a set of possibilities offered to them. “Volunteerism”, as other forms of participation, is freely chosen by people. They come from a personal, free and conscious decision of the subject in the exercise of their autonomy.
- **RESPONSIBLE Activity.** Volunteer actions are conscious activities, products of a deliberate decision taken and assumed by the subject. Our dictionary says that awareness is the knowledge that the person has about him- or herself, their existence, the existence of things and of their acts. Volunteer actions are known and recognised by the subject –him or herself–

and by the organisation they collaborate with. The volunteer is morally responsible for their actions and shares that responsibility with a team of people working with them in the heart of the organisation on the implementation of a project. Participation requires responsibility, especially when the direct recipients of our work are real people.

- **SOLIDARITY Activity.** Volunteer actions are a form of cooperation in solving the problems affecting our society, seeking the common good and the joint development of the entire community. Particular care is given by the most disadvantaged sectors and social spheres, developing their actions based on their own values scheme. However, volunteer actions are based on the reciprocity of contributions: they are not based on a relationship of assistance to the disadvantaged –or at least not exclusively– because they create mutual enrichment, a joint growth of the community.

Obviously, these solidarity activities are being developed based respect for the ideas, beliefs and customs of whoever is taking part in volunteer actions.

- **TRANSFORMATIONAL Activity.** Volunteerism is an exceptional tool for social change and transformation as it allows for direct contact with the reality that is intended to be transformed. One cannot remain merely observing. It is necessary to begin acting after a process of analysis/reflection and to subject one's work to ongoing review and assessment.
- **NO-COST Activity.** Volunteerism is a free service, that is, that doing it does not entail economic compensation. If it did, it would lose all sense because we would be talking about employees, self-employed workers or any other model included at an economic/professional level.

Gratuity is not synonymous with selflessness. Many interests that have nothing to do with personal gain are the objective of volunteer work: social justice, integration, development, education, and so on.

- **COORDINATED Activity.** The volunteer is taking part in the project of an organisation, which is the product of common reflection and work. They are not alone in their work: other volunteers, employees, staff relieved from their jobs, trainees, etc., take part with them in the project. Coordination brings effectiveness and durability to the action as well as an overall vision of the organisation's functioning. It provides structure and projection to volunteer actions.

We shall distinguish this concept of “volunteerism” from other personal actions carried out one's own. Volunteerism develops its action within the framework of a non-profit organisation or an organisation that works for the benefit of the community. An “association” is one of the most common forms of social organisation.

TYPES OF VOLUNTEERISM

The content being developed in this Guide is designed for medium- or long-term volunteerism in which the volunteer remains at the organisation and carries out some tasks during a period of time in which they have the chance to gain knowledge about the environment in which their volunteerism is framed, and to develop a number of competences associated with it.

Although this volunteer profile is usually the most recurrent, we cannot forget that there are other forms of volunteerism that are equally valid and that share some of the characteristics we have mentioned, and that we will address throughout this document.

This way, we shall find different types or modalities of volunteerism based on different factors. Below, we present a selection that is not intended to be exhaustive in any way:

— DURATION

Volunteerism may be short-, medium- or long-term. It may also be an action of volunteerism for a specific action such as, for instance, the commemoration of an international day, or a one-time event.

— THE ORGANISATIONS INVOLVED

There are opportunities for volunteerism within the sector of non-profit organisations, public, educational, religious and international organisations, etc. but also the so-called “corporate volunteerism” driven by for-profit private companies and entities.

— THE DIMENSION

Volunteerism may exist at the local, national or international level.

— THE TOPIC OR CONTEXT

In this regard, the varieties of volunteerism are very broad. On the one hand, activist and awareness-raising volunteerism, which is aimed at a particular cause (ecological, social, cultural, etc.), can be distinguished from assistance-based volunteerism, aimed at providing social care or administrative support. On the other hand, there are volunteerism that mobilise citizens to face emergencies and disasters, in contexts of both development and in developed communities. Some regular sectors of volunteerism are developed in the field of education, assistance to people at risk of social exclusion, management, citizen mobilisation, etc.

2 · MOTIVATION

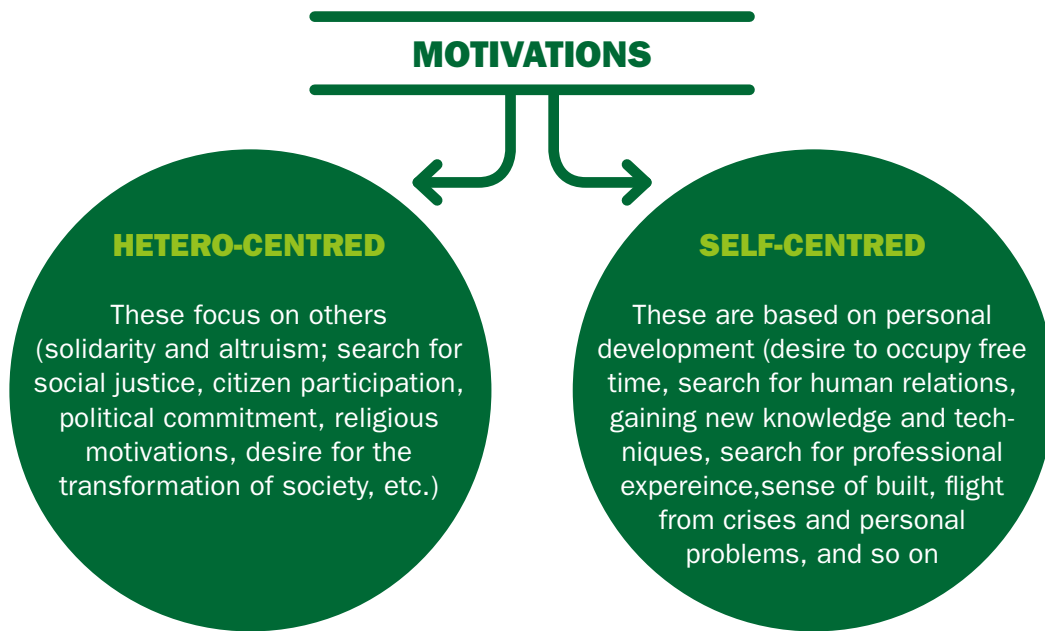
“ They have every right in the world to have whatever motivation they want for being a volunteer, but they are obliged to know what it is ”

José María Burdiel

The reasons why people decide to volunteer are many and very varied. Normally, they are based on values such as altruism, solidarity, selfless assistance to others, ensuring universal access to human rights, social change, and so on.

Neither is there one reason why they want to participate in an organisation; on the contrary, the underlying situation may have several reasons. It is perfectly feasible for volunteers to have several coexisting reasons or motivations, hetero-centred (knowledge, personal development, etc.) and self-centred (religious, social or political values) in order to explain why they wish to make a commitment through social organisations.

There are no better or worse motivations when one starts to volunteer. However, it is an essential aspect for the performance of the action and full participation in the organisation’s mission and objectives.



RULES FOR MOTIVATING: (LANGUAGE)

- Provide positive and constructive assessment or ratings.
- Encourage them to finish the tasks.
- Be attentive to behaviours and comments that demonstrate a good climate. Spotlight them.
- Identify new and useful potential reinforcements.
- Propose alternatives.
- Be timely. Find the right moment.
- Be immediate when providing reinforcements.
- Refer to each person by their name.
- Be consistent with what and how something is said.
- Be honest. Do not dramatise.
- Be clear and concise.
- If someone is thanked for something, offer arguments in favour, give reasons (it should not sound like “soft soap”).
- Be fair and just. Do not treat people differently if there is no reason for it.
- Give meaning to the tasks: –Explain the why and for what. –Report on the results. –Report on the schedule and time. –Adjust the task to the volunteer. –Adjust expectations. –Give value to the task.

- Treat them pleasantly regardless of the results.
- Foster team work.
- Listen.
- Be assertive, socially skilful
- Set clear objectives.
- Note down the remaining recognitions still undone.
- Have celebrations and encounters.
- Send your thanks in writing.
- Recognise the task.
- Facilitate shared responsibility in important decisions.
- Delegate tasks, if they accept them.
- Return results of the action.

3 · RIGHTS AND COMMITMENTS OF VOLUNTEERS

It may be very important and interesting to present the **roadmap of the volunteer from the perspective of rights and commitments and how they are specified in it.**

It is important for these rights and commitments to have a relationship with the Volunteerism Plan and with local law in force as mentioned in earlier chapters.

The volunteer is generally recognised to **have the right to:**

RECEPTION AND ONBOARDING

- Receive sufficient information about the organisation and on the tasks to be performed.
- Be able to freely agree on the conditions.

OF CLOSE CONTACT AND PARTICIPATION IN THE ACTION AND LIFE OF THE ASSOCIATION

- Receive support and guidance on their volunteer work.
- Provide the technical means necessary to carry out their action (materials that are physical, related to hygiene, etc.).
- Promote participation in the organisation's scheduling, and in the design, implementation and assessment of the actions in which they are going to take part.

- Be insured for any accidents, illnesses or damage to third parties that may take place during their volunteer action.
- Be reimbursed for the expenses incurred in any volunteer activities carried out.
- Have the volunteer carry out their actions in the closest possible setting.
- The possibility to change programme (the place and/or space where they do their volunteer work) if the person (and the organisation) find it acceptable.
- Not have tasks assigned to them that are from outside of the organisation.
- Be able to form part of the organisation's management, always in accordance with the articles of association.
- Be respected and recognised for the social value of their action.
- Be treated without discrimination, respecting their freedom, dignity, privacy and beliefs.

OF ASSESSMENT

- Receive sufficient support and information on how to carry out the tasks and on the results obtained, as well as taking part in the assessment.

OF TRAINING

- Receive sufficient training, whether initial or continuing, for the proper exercise of their action.

OF OFFBOARDING

- Be able to freely cease in their capacity as a volunteer.
- Receive a certification of participation in the organisation as a volunteer.

Throughout our roadmap, the **duties** of the volunteers are specified in the following manner:

OF PARTICIPATION

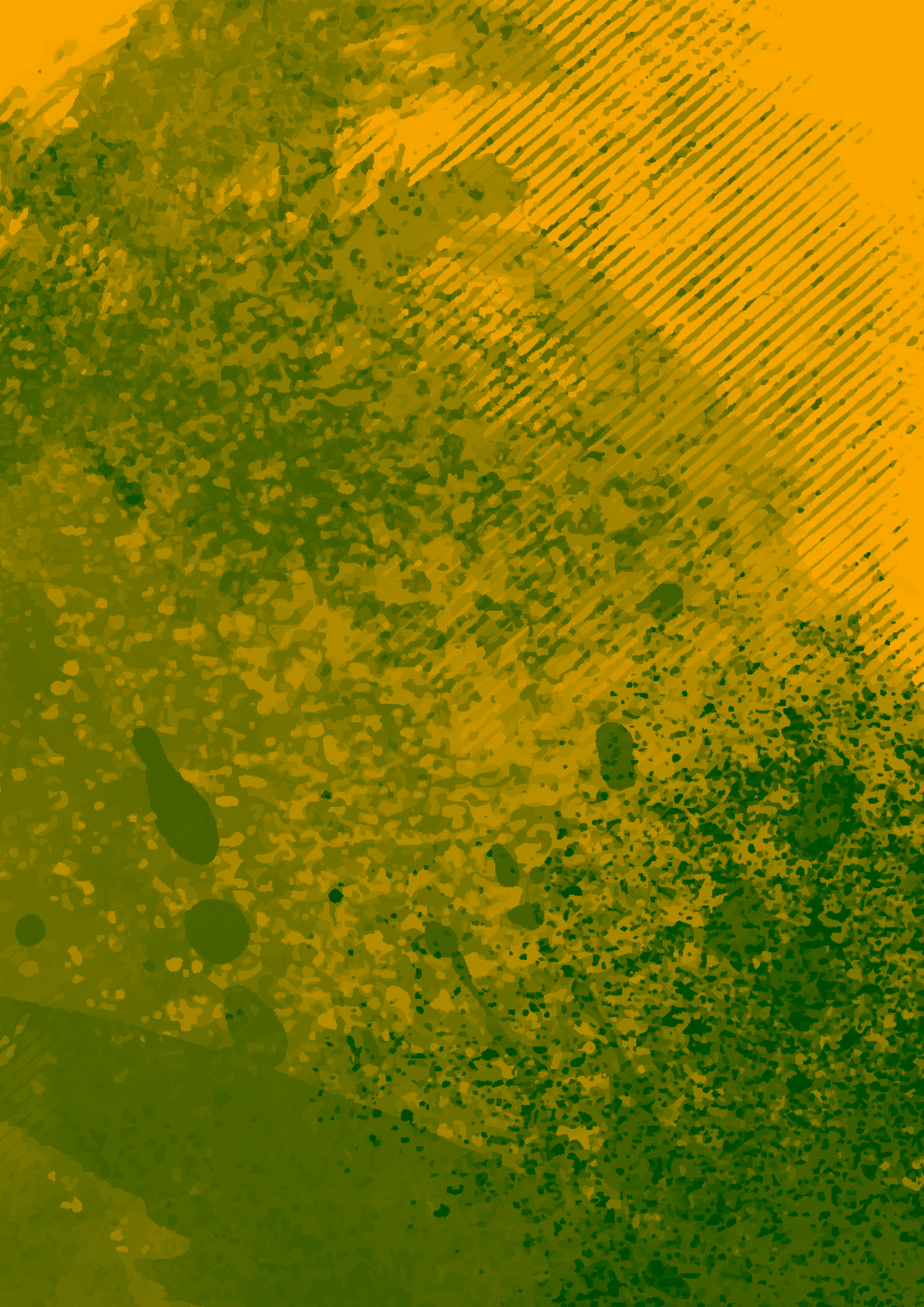
- Respect the organisation's aims and standards.
- Participate in whatever training provided in the organisation that is needed to maintain the quality of the services.
- Collaborate in the planning and assessment of the actions.
- Notify your departure from your volunteer activity sufficiently in advance.

OF EFFICACY

- Act in a diligent, responsible and caring manner.
- Follow the instructions given by the professional responsible for the programme.
- Comply with the rules set out by the organisation.
- Use the accreditations and distinctive marks of the organisation properly.

OF COMMITMENT

- Fulfil the commitment made to the organisation.
- Maintain the confidentiality of any data and information they manage.
- Respect the rights of the programme participants and the other people who make up the team of volunteers.
- Reject any economic or material payment that you may receive from the participant or from other people related to their action.
- Respect and care for the organisation's resources.

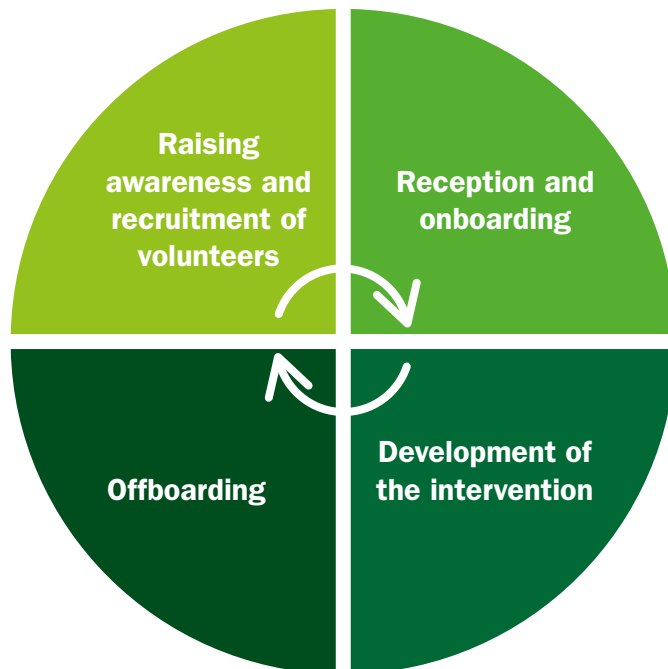


IV · THE VOLUNTEER CYCLE

Volunteerism is a dynamic process that responds to a changing reality in which it is important to address the relationship between the volunteer and the organisations from the first contact until they decide to leave. This relationship entails an educational roadmap for both.

The different moments of the process are:

— VOLUNTEER ROADMAP



If we add some elements to the above picture, we get the following graphic image that allows to cover at a glance the entire life cycle of volunteers within civil organisations. We shall speak of volunteers in this guide, but firstly we must take a look at the topic of **PLANNING**, a preliminary look that may provide different views that will surely be enriching.

1 · PLANNING

It is important to take into account that the set of actions carried out by the volunteers are based on **an initial diagnosis or analysis of the reality**. This means that it is possible to identify and select the needs the intervention will focus on and to set objectives and goals oriented to a situation considered desirable, whether focused on one person, a social group (children, women, etc.) or a social context.

We already know how significant it is, when beginning to volunteer, to know the tasks to be carried out and how to perform them. But it may be even more important to know **why and for what** they are being done, where they are aimed.

(CHALLENGE) Therefore, it is essential to promote the active participation of the benefitting communities and local partners during this stage. **“Consider the community at all levels, and for that, it is essential to understand people’s priorities and times”** Kelly Carpenter, GSE Nicaragua.

(GOOD PRACTICE) One of the best practices that the planning of a cycle of managing volunteerism may have is the effective inclusion of the recipient communities so that they can directly collaborate in the planning prior to this management. **“By including local partners and communities benefiting from the planning phase, there has been a greater capacity to encourage the recruitment of local volunteers prior to the implementation of the projects”** Dr Sergio Zegarra, Mano a Mano, Bolivia.

(CHALLENGE) In addition, the planning phase requires a diagnosis of how the relationship with the regulatory framework of the state, national governments and/or local authorities must be handled. According to the experience of the organisations interviewed for the creation of this guide, in Latin America, the relationship of governmental authorities with the organisations managing volunteerism may range from cooperation to hostility.

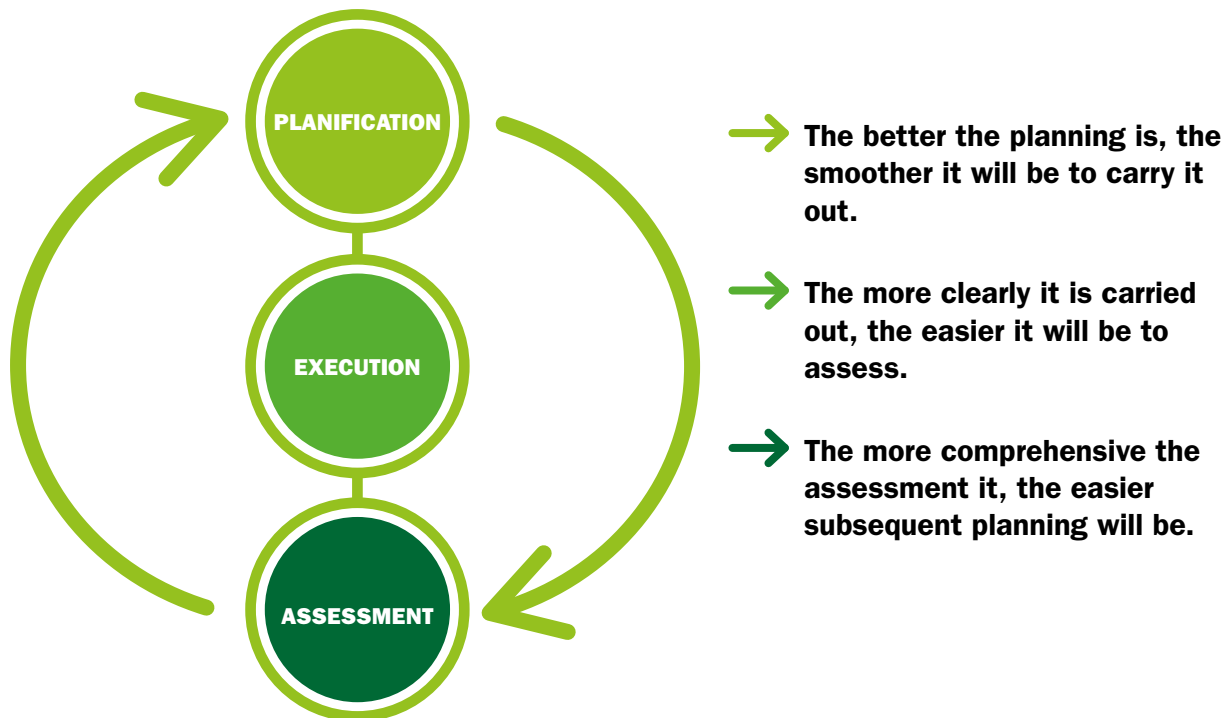
(CHALLENGE) For this reason, public policy governing volunteer actions in the countries must be formulated under the principles of coordination, complementarity and subsidiarity. Once the factors in the context referred to above are analysed, it will be possible to proceed more effectively to suggesting the objectives of a project.

When the objectives of intervention are clear, one is able to make an assessment of the achievement of the results; the action goes beyond good will, and there are also indicators on how to continue improving.



“ Planning is to thinking now about what you are going to do afterward ”

These three moments are essential and equally important; they strengthen each other²:



(CHALLENGE) In that regard, the exercise of volunteerism must not be limited to merely carrying out the task. Of the assessment and training meetings, one can take part in the improvement and adjustment of planning, contributing to the suitability, coherence and impact of the action.

For this reason, some organisations – despite not being fully consistent with national laws – create their own planning protocols by involving the volunteer on an ongoing basis before, during and after the implementation of the volunteer action. In this regard, the Young Christians Association says: **“We have a strategic plan, continuous training, especially on these issues of governance, because the volunteer is the basis of action of the movement, training the volunteer is important”** Marth Roldán, ACJ Colombia.

CREATION OF A VOLUNTEERISM STRATEGY

Before making offers and demands of volunteers, it is necessary to create a strategy or plan of volunteerism in order to ensure effective and correct management of the volunteerism. This plan must be able to answer questions such as: what is understood by volunteerism in the organisation? How is it aligned with the organisation's mission?

Furthermore, the strategy or plan must include and respond to the elements that the legislation in force in each country has set out for volunteers. Depending on the legislation, there may be obligations for needing insurance (accidents, civil liability, etc.), reimbursement of expenses incurred in the performance of the action, health and safety conditions, certification of the action carried out, regulations in terms of volunteerism and job hiring, number of hours of commitment, and so on.

² “Manual para el responsable de personas voluntarias”. Plataforma de Voluntariado de España PVE.

VOLUNTEERISM PLAN

This is a comprehensive and inclusive view of the role and function of volunteerism in the organisation. It is the strategic level that has targets that make sense at the rest of the levels, so that there is consistency.

Time perspective: medium- and long-term

VOLUNTEERISM PROGRAMME

It is a working tool by specific areas.

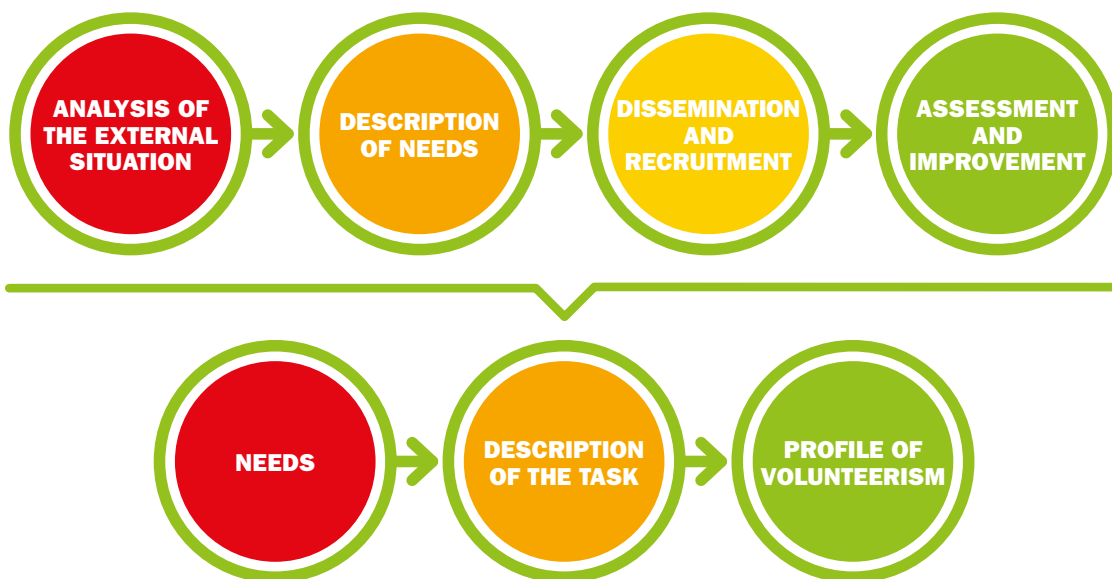
It is the tactical level and is located between the plan and the project. It specifies the most general ideas and objectives of the plan in a particular place and time and based on specific resources available. This way, the general ideas of the plan are made specific.

Time perspective: medium- and long-term

VOLUNTEERISM PROJECT

The refers to a specific, individualised intervention with which to realise some of the actions referred to at the previous level, the tactical level. This is the operating level of the planning process.

Time perspective: short-term



“Volunteerism as a constituent element of third sector organisations puts us in relation to civil society, with the social base that “legitimises” our actions as social organisations, and if we have not clarified that role, we shall be weakening one of our bases”

Keys for the management of volunteerism in non-profit organisations
F. Luis Vives

IMPORTANT ASPECTS

- **Convey a clear image of the organisation.**
- **Invitation that is consistent with the number of volunteers that the organisation needs and is able to manage.**
- **It should respond to actual needs.**

(CHALLENGE) it is important to define whether the project in which the action of volunteerism will be carried out requires specific roles, which makes it possible to define the most efficient search strategy. In this regard, the América Solidaria Foundation in Haiti is professional volunteerism where each person provides support based on their profession **“Each project and community entails a particular profile, and therefore each invitation is unique”** América Solidaria Haití.

(CHALLENGE) It is always hard to recruit people in contexts of low social participation or contexts where people have important needs that are neglected. Maslow says how hard it is to generate volunteerism when other needs are not covered.

WHAT ASPECTS SHOULD A VOLUNTEERISM STRATEGY OR PLAN INCLUDE?

As has been commented, the Plan or Strategy must seek to onboard volunteers to whatever action is being developed, establishing all the processes of closeness, training, communication, etc., just as described in the previous graphs on the life cycle of the volunteer.

A plan may contain the following contents:

- 1** • Presentation of the organisation promoting the volunteer action.
- 2** • Management of volunteers: reception, onboarding, training, offboarding.
- 3** • The participation of volunteers in the processes of the organisation itself, with the aim of effectively engaging them.
- 4** • The rights and duties of the volunteer and the of organisation.

PLANNING CHECKLIST

- ✓ Has what is being sought when onboarding volunteers into the organisation been defined?

- ✓ Has a needs analysis been carried out to identify the areas, programmes and actions where the volunteers can provide support, become engaged or take part?

- ✓ Is there an analysis of the socio-economic context, of the situation of the organisation that is going to develop volunteerism, of the needs and expectations of the communities in which the volunteer action will be developed?

- ✓ Who is going to take part in the creation of the volunteerism strategy?

- ✓ Are there internal procedures for managing volunteerism? (welcome, training, offboarding, etc.)

- ✓ Is the volunteerism strategy consistent with the applicable legislation?

- ✓ Does the volunteerism plan contain measures and principles of equal treatment and non-discrimination?

- ✓ Are the rights and duties of the volunteers and of the organisation defined?

2 · AWARENESS-RAISING AND PROMOTION OF VOLUNTEERISM

Organisations carry out awareness-raising and communication actions aimed at, among other things, promoting the solidarity participation of the citizens in the actions of volunteerism and to facilitate their onboarding within the organisation. It is important to remember that these types of actions must be aligned with the organisation's plan or strategy, so that all the actions are consistent.

(GOOD PRACTICE) In Colombia, a National Volunteerism System has been created aimed at promoting, spotlighting and strengthening volunteerism as a living force, and it intends to be body with the capacity to influence the country's public agenda.

(GOOD PRACTICE) Kiriku Bolivia is another example of this synergy. This organisation works with a programme of the municipal government of La Paz called "Real neighbourhoods and communities". They have had an agreement with the programme since 2007, and the municipality is one of the territorial partners to enter the neighbourhoods and identify families at social risk and follow up on their projects.

(CHALLENGE) It is a major challenge to manage in a way so that the organisation gives full information adjusted to the reality of volunteerism and the context in which it will be carried out, as well as messages consistent with its mission and the value of volunteerism within the organisation.

AWARENESS-RAISING AND VOLUNTEERISM PROMOTION CHECKLIST

- ✓ Are the actions to raise awareness and promote volunteerism aligned with the organisation's volunteerism strategy?
- ✓ Have what tools and channels are going to be used to raise awareness of volunteerism and to offer opportunities for volunteerism been defined?
- ✓ What strategies are going to be used to build loyalty among and inform the volunteers about the organisation's work and role?
- ✓ Does it include the tools and actions that are going to be used to spotlight the actions of the volunteers, their role in raising citizens' awareness and render accounts?
- ✓ Is communication consistent with the content and orientation of the volunteerism plan or strategy?

The annexes contain Fact Sheets 1, 2, 3, 4, and 5 that can help you to work on this point.

Information Sheet 1 ¿How is volunteerism defined in my organisation?

Information Sheet 2 Description of the action and its characteristics.

Information Sheet 3 SWOT on volunteerism.

Information Sheet 4 The profiles of volunteers.

Information Sheet 5 Model for announcing volunteerism needs.

3 - RECEPTION AND ONBOARDING

RECEPTION

This is the process that extends from the first contact made by the person who wishes to do volunteerism to the moment they join the action.

The person who wants to join the organisation as a volunteer will be received individually, and at this first contact, will receive basic information on the organisation: mission, objectives, lines of work, actions, volunteer programmes. Also, at this first contact, the person interested in doing volunteerism will be able to express their expectations, motivations, potentialities and limitations, as well as availability.

It may be interesting to have a document with a simple explanation of the organisation, something of its history, of its mission and values. This document may be handed over at this time.

The reception process begins when the volunteer is contacted by the organisation; this may occur in different ways:

- **Voice to voice.**
- **Web page RRSS.**
- **A telephone call** in response to the request to make an appointment to have a personal interview. This call is also used as a first selection, confirming that they have time available that will make it possible to do the volunteerism at the organisation, as well as to dispel any initial doubts.

Once the volunteer arrives at the organisation, the initial interview could be used for a closer contact.

Initial reception interview

This is the first encounter between the future volunteer and the organisation they chose to do their volunteerism, therefore, they must be clearly informed of the organisation's mission and values, as well as of the programmes and types of volunteerism being carried out in it.

It must be avoided that this process is somewhat impersonal and routine.

In addition, there will be a chat that will make it possible to know, empathically and using active listening:

THE MOTIVATIONS:

- Why do they want to be a volunteer and why at this organisation.

THE ATTITUDES:

- They must present a facility to know how to listen, social skills, discretion and respect, without excessive prominence and work well in a team.

THE EXPECTATIONS:

- It is important to adjust them well; volunteers are not “world saviour”; they must come to work with people with humility, respect and reciprocity.
- It is also advisable to know about their time availability – a commitment to the organisation is required – and their personal stability.
- They are also informed of the training that they will be offered (general, specific and continuing), of the operating guidelines and of the rights and duties of the volunteer, and of the organisation. It is equally important to detail the opportunities for professional and human development that participating in the volunteerism will represent.

1 - Telephone call in response to the application

2 - Initial reception interview:

- Mission and values of the organisation.
- Programmes and types of volunteerism.
- Educational roadmap and operating guidelines.
- Empathic listening in a welcoming environment.

In the **initial interview**, information must be given on the participation process, training, monitoring groups, team meetings, and so on.

The objectives pursued at this time have to be made clear:

- Facilitate or expand on information about the organisation.
- Describe the function of volunteerism in the organisation (role of volunteerism, tasks, actions or spaces of participation).
- Present the conditions in which the volunteerism will be developed (the time committed, insurance of the volunteer).
- Get to know their skills, experiences, expertise, etc.
- Try to get to know the volunteer's motivations (Why do they want to engage in volunteerism? And why in our organisation?).
- Analyse whether their interests are a good fit for those the organisation proposes.

RECEPTION:

- This is a process in which it is necessary to provide information on the organisation, the operating model, actions and tasks to be developed.
- This is a process in which it is necessary to provide information on the attitudes, aptitudes, motivations and interests of the potential volunteer.
- This is a process in which it is necessary to reach a mutual and consensual decision to onboard them to the most suitable task, not onboard them, or not onboarding and referral.

ONBOARDING

When someone is onboarded to the organisation, they are provided with support, generally facilitated by the person managing volunteerism (this role is mentioned specifically in the following pages) who will facilitate the adjustment of expectations and their integration into the programme, into the work team they will join and into the structure of the organisation itself.

It is important to prepare this moment well and to devote the importance and time it deserves, both by the person who is going to be onboarded, as well as by the members of the organisation. For these cases, we recommend preparing a welcome document that will guide us.

It is also the time when the person will receive basic training in order to learn and reflect on the social environment in which their actions are going to be developed, as well as to discuss the model of volunteerism that the organisation wishes to promote in greater detail.

(CHALLENGE) Hence the importance of being clear about each organisation's lines of action, since the more planned, organised and designed the intervention is, the greater likelihood of success and transformation it will have. The América Solidaria Foundation set out specific lines of action on which they build their projects: **“América Solidaria aims its actions at quality education, good nutrition and community health, education for peace and good treatment. As part of education, we also work on a line of education for inclusion and working with people with cognitive disabilities, although they also may have a physical disability”** Magaly Cepeda, América Solidaria Haiti.

With that in mind, organisations start with a specific need in their projects and, based on this, they define the role of volunteerism and its profile.

(GOOD PRACTICE) In the case of the ACJ in Colombia, two types of preparation for and reception of the volunteer are defined: on the one hand, a general profile in accordance with the foundation's projects and social projection, and on the other hand, the specific role and profile of volunteerism.

(GOOD PRACTICE) It is important to highlight this synergy between the project's need and the volunteer's need, **“We have a training plan with manuals, processes and information sheets. We graduate them by triangles; in order to become a volunteer, they have to have at least six months to a year of being part of the movement. At the first level, people get to know what ACJ is, the basic documents, the history of the movement. We have many documents and working methodologies and people develop themselves. You are not going to see a volunteer without a training process, through exercises and play, we train leaders so that they, in turn, multiply it”** Margoth Roldán, ACJ, Colombia.

About the welcome document

This document will include the onboarding protocol, which will take into account the three moments in this phase:

Prepare the onboarding. This may be facilitated by notifying the other people making up the organisation, both workers as well as other volunteers already participating in the programme.

- **On the day of the onboarding**, care will be taken with receiving the person. Who is going to be in charge of this reception?
- **Support the onboarding**, which may be facilitated with phone calls or emails in order to monitor this first moment, which is fundamental. The monitoring and communication process will appear indicated.

The Volunteerism Agreement

In the onboarding process, it is recommended that the organisation and the new volunteer sign a volunteer agreement, a document signed by the two parties (the future volunteer and the organisation) that reflects the rights and obligations of both, the conditions, aspects and framework of the collaboration, and where, if possible, the volunteer's tasks will be defined. The volunteer agreement may also include the training arrangements and options, the code of ethics or of conduct and other policies that must be respected (for example, on the prohibition of discrimination, prevention of harassment, etc.) time schedules, civil liability insurance, compensation for transfers or daily subsistence allowance when participating in day actions, and so on.

All of this depending on the legal framework in the country or region in which the organisation operates. As we saw at the beginning of this document, the situation of volunteerism varies from country to country. If there is legislation regulating volunteerism, it will be necessary to comply with the law in matters of the rights and obligations of the volunteers. If there is no legal framework or law, the best conditions available to volunteers will be offered based on the organisation's capacity and possibilities.

By signing this volunteerism agreement, the two parties acquire a commitment that links them reciprocally, so that:

- **The volunteer commits him- or herself freely and selflessly** to carry out an ongoing solidarity action over time. They accept the organisation's principles and rules of operation and assumes the unpaid nature entailed by all volunteer work for which they will not receive any compensation. They will also assume a commitment to respect the recipients of their volunteer action.
- The volunteer action organisation commits to the development, support and training of the volunteer. **This is the moment in the process in which the organisation explains the offer and the benefits that the experience will have for the professional development of the volunteer.**

A good example of these benefits is the "Education Programme" of Eat United/Comamos Juntos in Nicaragua, which –besides the training of the volunteers aimed towards their work as such– offers technical education classes to stimulate their professional development.

— **(GOOD PRACTICE) Comamos Juntos covers the transport and food costs of the volunteers is generating alliances with different technical training centres in areas such as accounting, English, entrepreneurship, graphic design, nursing and others, so that they offer cost-free courses to its volunteers. This programme is part of the strategy of recruitment, training and loyalty-building strategy of volunteers. In addition, the education programme has a component of recreational actions for volunteers, with a special focus on sports actions.**

IMPORTANT ASPECTS:

- Carefully thought-out and emotionally warm processes. Take care and give time.
- Respect the paces of the different volunteers.
- One must be realistic about the capacity to manage volunteers.
- It is necessary to raise NOT selecting them as a possibility.
- The non-onboarding of people who –for different reasons– do not fit, prevents subsequent misunderstandings and conflicts.

In the annexes you can find sheets 6, 7, and 8 that are useful tools for this aspect.

Information sheet 6 The initial interview.

Information sheet 7 Collect information about the person to be onboarded.

Information sheet 8 Model of onboarding agreement (volunteerism agreement).

RECEPTION AND ONBOARDING ROADMAP CHECKLIST

- ✓ Who or which area manages the candidacies or demonstrations of interest from people who want to be volunteers?

- ✓ How are the volunteers identified and recruited?

- ✓ Is there a written protocol to guarantee a common approach that applies equally to all people?

- ✓ Does the organisation ensure that volunteers comprehend and understand all the information provided to them, that they are aware of their work and involvement in the organisation?

- ✓ Have the motivations, expectations and experience of the person who wishes to engage in volunteerism been discussed?

- ✓ Does the organisation have an onboarding protocol or document that guides the organisation's workers? Who is in charge of developing it and updating it?

- ✓ Has the volunteerism agreement been presented, explained and signed? (An example may be found in fact sheet 8)

- ✓ What data protection measures are there in the organisation? How are volunteers communicated with?



What initiatives for protecting the volunteer are there? How do people communicate with each other?



Are there models to communicate the tasks to be done by the volunteers?



The volunteer may incur some kind of expenditures (transport, food, clothing, etc.). Is there information provided on the policy of expenditures and reimbursements at the organisation? Is it reflected in the volunteerism agreement?

4 · DEVELOPMENT OF THE INTERVENTION

4.1 · THE VOLUNTEERISM MANAGER

The existence of the role of the **volunteerism manager** recognises the importance of volunteerism, both in organisations, and in society in general, as well as in the work they do, the values they convey and the relationships they build.

(GOOD PRACTICE) Consequently, it is important for there to be a person or group of people dedicated to “caring for” the volunteers. This role will support the volunteers and should be attentive to any needs that may arise. They carry out the support, training, guidance and coordination required with volunteers; an example of this work is the therapeutic sessions that the person in charge of volunteerism in Kiriku Bolivia conducts with volunteers every 15 days. In these meetings, they discuss the progress and challenges the volunteers have had in their work and they do group feedback. For this process, they use the service-learning model aimed at having scheduled planning and implementation. This has enabled them to generate impact and demonstrate that they can achieve results systematically.

“ It allows us to monitor, support and give emotional motivation to our volunteers and has been very successful in ensuring good service ”

Ariana Andre, Kiriku Bolivia

(GOOD PRACTICE) Another relevant example is the Doctora Clown Colombia Foundation which, in its organisation, defines action brigades with older volunteer leaders who are responsible for recognising and support each group of volunteers. These leaders receive constant support and training from the organisation.

In addition to this, as recommended aspects, it would be interesting for the person responsible to have the following capacities:

- Capacity of leadership.
- Horizontalness in the relationship with volunteers.
- Communication capacity.
- Creativity.
- And adaptation to change, since volunteerism processes are very changing and may be influenced by multiple external factors.

What does the volunteerism manager do?

- They monitor the organisation's volunteerism needs (depending on its size) through the people responsible for the different programmes of the organisation itself with the aim of creating a "needs map".
- They define the profile of the organisation's volunteer.
- They design the volunteer recruitment campaign.
- They organise reception and information sessions for people interested in doing volunteerism in our organisation.
- They organise the onboarding and reception of the volunteer in the organisation and in the action where they will carry out their volunteer work. They offer general information about the organisation (the programmes carried out and the function of volunteerism with the organisation) and facilitate their integration into the organisation.
- They manage the registration and deregistration of volunteers on the civil liability insurance policy.
- They design the support process:
 - It is important to adjust the type of support depending on the moment of each volunteer. They are the reference person whom the volunteer may turn to clarify doubts, ask questions, manage conflicts, and so on.
 - Ensure a space for the continuous transmission of information.
 - Assess, value the process with volunteers to gradually adapt the procedure.
- They design and prepare the training roadmap of the volunteers:
 - Initial training.
 - Specific training, based on needs.
 - Continuing training.
 - Meetings for exchange and reflection among the volunteers of the entire organisation.

- Coordination with and monitoring of the people responsible for the different programme with volunteers.
- They design the separation process.
- They take part in volunteerism networks.

The volunteers are the responsibility of all the professionals who make up the organisation (not just of the Volunteerism Manager) and so they must be integrated and organised in it, especially their educational roadmaps.

(GOOD PRACTICE) According to the experience of the Boliviana Movimiento Sonrisa that manages volunteerism at a paediatric hospital in Cochabamba, it is the role of the person managing the volunteers who has the ultimate authority in maintaining the constancy and quality of volunteer work “They are who decides who goes to the hospital and when. They also strictly monitor the attendance books, provide the initial orientation for new volunteers and ongoing support. They also coordinate the relevant holiday actions and they are in charge of the organisation’s equipment and lockers. This means a big responsibility in a hospital” Dra. Paola Ovando, Movimiento Sonrisa Bolivia.

And if there is no such role of volunteerism manager?

The work that leads to taking responsibility for or coordinating volunteerism is a task that will have to be taken into account as long as there are volunteers in the organisation. In addition, regardless of whether there is a person or not with this function, it will have to have the support of the rest of the organisation so that it does not become something residual in it.

In cases where the organisation’s size or resource means the lack of a person working exclusively on this task, it will be important that there is someone (one or several people) who is a reference for volunteers and coordinate the volunteer actions. In this case, this responsibility may fall on one or several people of the team who will make this function compatible with other functions of the organisation.

Based on this reality, it is important for the person in this role to have the following attitudes and skills:

- They should be approachable, a listener and have time to be able to support volunteers based on their needs.
- They are able to make or receive criticism, put limits or open possibilities.
- They must know how to work and foster working as a team, making the volunteer see that the action is with others and that, therefore, it is developed in a group.
- They must know how to lead, have a clear understanding of the meaning of the organisation, and the objectives of the project and of the volunteer actions.

They must motivate volunteers based on reality, but without losing sight of the utopian horizon.

Sometimes, especially in smaller organisation, the person responsible for volunteerism is also a volunteer.

(CHALLENGE) In these situations, there is a danger that these people will project their motivations on the rest of the volunteers they coordinate. This means that others have or are based on the same reality or motivation, while training becomes a secondary consideration and motivation is neglected (it is assumed). It is important to help these people responsible for volunteerism and at the same time volunteers realise that the reality of the volunteers in terms of their motivations and life moments are different.

4.2 · SUPPORT

Support will be done formally, in assemblies or meetings with volunteers; it is important for the volunteer to know the frequency of the meetings. During these meetings, a joint review will be carried out on the development of each activity; relevant information will be shared and the proposals for improvements in the activity will be gathered, along with potential new avenues of action. These meetings are also designed as a meeting space where volunteers can share their experiences, concerns and difficulties with the rest of the group, with the goal of improving the cohesion of the project members.

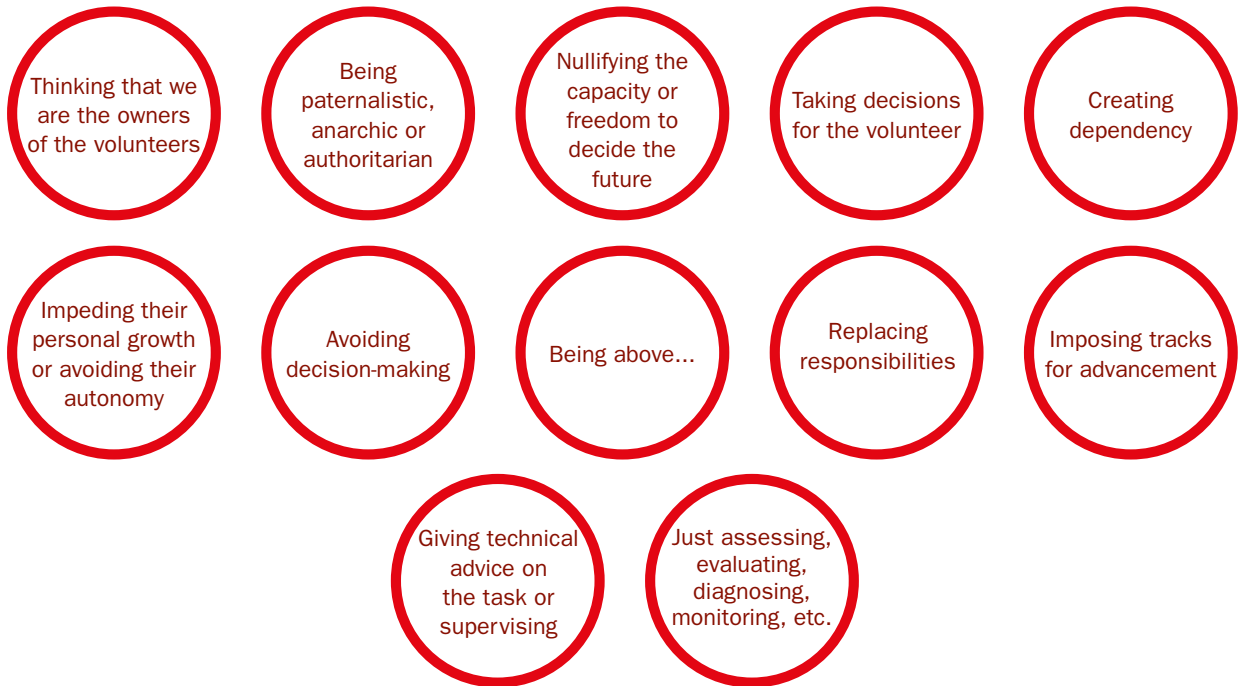
An informal type of monitoring of the volunteers is also envisaged. In this case, the role of the volunteerism manager will be to support the volunteers. If it is not possible to do this in person, this monitoring will be done by telephone or email. In addition, they will also take part in the activities envisaged by the organisation, or any other organisation, that may likely be of their interest, through emails.

Citing what Gustavo Esteve (2004) says, it is possible to state what support IS and what it is NOT.

SUPPORT IS:



SUPPORT IS NOT



SUPPORT CHECKLIST

- ✓ Are the support tasks defined?

- ✓ Is there a definition with whom and how often there will be support meetings with the volunteers?

- ✓ How is the volunteer taking part in the support process envisaged; what is their role?

- ✓ Are the process and journey through the organisation returned to the volunteers?

- ✓ Are records properly kept?

4.3 - TRAINING

Having reached this point in the document, there can be no doubt of the importance training processes must have. Volunteerism is a vital experience that relates to people’s life. It is essential to initiate training processes that will that make the volunteer acquire the skills necessary for the job they are going to develop, the personal habits that are going to be useful to them and the capacities that will allow them to approach their work with a perspective of success.

Each organisation will determine the exact content and the methodology to be applied. Below are some ideas about how this training process can be structured.

Introductory training

This is an introductory course for volunteers that offers an approach to the social context in which the volunteer actions will be carried out, the different intervention models and the priority lines of action. Exercise will be carried out on real cases that will allow an initial analysis and approach to the reality that the volunteer will find.

(GOOD PRACTICE) We find an interesting example in the work of Raleigh Nicaragua. This organisation carries out compulsory training during the induction course for volunteers that lasts about a week and covers these aspects of the training. In addition, the course includes health and safety protocols, in addition to a rather strict code of conduct. The appropriate training of volunteers in respect of safety protocols is essential for saving time and resources on unplanned problems.

(GOOD PRACTICE) In Colombia, an ACJ set out the model of triangles for the graduation of their volunteers –which helps team work– and also defined times and clear methodologies for training, with emphasis on strengthening governance. This means that volunteers are trained as decision-makers in the organisation.

They also carry out training of trainer sessions each year with international guests; this makes it possible to strengthen the training processes in governance and volunteerism. “Every year we have international events and speakers to speak specifically about? Volunteerism. Volunteers are the country’s third force; we sensibly keep numerical data on it. We manage some 1,200 volunteers a year in Colombia. If we multiply that by the current minimum wage, we’re contributing more than one billion to the country’s social management” Margoth Roldán, ACJ, Colombia.

Continuing training

This is a regular training space, adjusted to the profile of the volunteer, which, in turn serves for meeting and group cohesion. This training includes training content and a space for meeting and the exchange of experiences among the volunteers. Just as any training action, it will be assessed and the roadmap will gradually be adapted to the needs of the volunteers and of the organisation.

(GOOD PRACTICE) An important example in Colombia is the Doctora Clown Foundation, which offers international diplomas and continuing training courses in clowning technique, hospital clowning and development of social and emotional skills. These seminars are designed for volunteers. They are processes of level escalation in which not only are they trained in techniques for hospital clowning, but also in personal aspects. In this regard, the foundation highlights:

“We have dedicated ourselves a lot to the volunteers and leaders working a lot on their own happiness. The leaders are increasingly skilled, older, I say, and also

their experience of studying with us, because sometimes we study artists and leaders, generally all the international teachers we bring. We also invite leaders. That makes it a lot easier for when they are going to talk to you, they know where to do it from” Pilar Galindo, FDC, Colombia.

Online training

This space will be complementary to the above lines and will provide updated information about the area in which they are developing their work, volunteerism and social innovation, social movements, etc.

Volunteer meetings

These spaces are aimed at opening up a space for meeting and reflection for the volunteers who are part of the organisation. The aim is for this to be an event that boosts and spotlights the role of volunteerism and the challenges it poses to organisations and today’s society. We recommend using a participatory and dynamic methodology.

(GOOD PRACTICE) The Kiriku organisation in Bolivia, for example, does getaways, retreats and two big volunteer meetings for every yearly cycle. One is mid-year, a day in the country or a party aimed at socialising, strengthening ties and renewing motivation. The other activity, at the end of the cycle, extends invitations to territorial partners, participants and the new volunteers from the upcoming cycle so they can interact with the outgoing volunteers and share experiences and expectations. It includes giving photo albums of the volunteers with their families.

Links to training experiences:

CENOC, (2018), *Modelo básico de voluntariado*, <https://bit.ly/2OhIirP> Retrieved MAR2019

JARAMILLO, MP (2015), *Manual del voluntario y la voluntaria*, <https://uni.cf/2HJJr8W> Retrieved MAR2019

CASTILLA LA MANCHA (2018), *Manual para formadores de voluntariado*, <https://bit.ly/2UKIsu2> Retrieved MAR2019

AAVV, (2015), *Los Voluntariados en América Latina y su rol en la Gestión del Riesgo de Desastres*, <https://bit.ly/2CyEEnp> Retrieved MAR2019

PVE, *Manual para la persona responsable de voluntariado*, <https://bit.ly/2TlcMc1> Retrieved MAR2019

TRAINING CHECKLIST

- ✓ Have the methodology and mechanisms been defined to identify the learning needs that must be taught in accordance with the organisation?

- ✓ Have the basic competences that a volunteer must have been defined? Are there additional competences required for the organisation's framework of action?

- ✓ Has a training plan been defined?

- ✓ Has the training plan been segmented based on the profiles of the volunteers, tasks to be done and so on?

- ✓ Has there been a definition of how to convey what is particular to and personal of each organisation: mission, vision and values?

- ✓ How frequently is the training plan updated?

- ✓ Are the opinions and assessments of the volunteers about training or training activities gathered (meetings and so on)?

4.4 · GROUPS AND TEAM WORK

Volunteerism means recognising people's fluctuations and constant changes; in other words, volunteers choose the time and the tasks to be done.

(CHALLENGE) Therefore, organisations must design strategies not only for building the loyalty of volunteers, but also for guarantees of training and team work in order to ensure the continuity of social projects.

Consequently,

(GOOD PRACTICE) in Colombia, the Young Christian Association develops a programme for training trainers and leadership; it establishes the importance of generating a group that is accountable for the processes, and not just one person.

This way, they prepare volunteers in institutional governance.

“ We have a national volunteer policy, a training plan for volunteers. The policy shows the training cycle and the actions that must be done to rise in category. The training process must be developed by the volunteer; on the one hand hours of volunteerism or social work

that they must carry out, and others are training. What we seek is for people to have the skills and tools so they can take part in all these instances of governance that the movement has. We must ensure that volunteers are trained to assume these leadership roles. Those that make the decisions on the board of directors, which is the organisation's highest body, are volunteers. In every ACJ, the board of directors comprises volunteer. The director take part, but has a voice and no vote. This is a volunteer association and they make their own decisions”

Margoth Roldán, ACJ, Colombia

A team of work is an interaction and interrelation among different people who share a common purpose or objective. On a team, the people who make it up should meet the following requirements:

- They must base their relationships on trust and mutual support.
- They must communicate spontaneously.
- They must understand and identify with the organisation's objectives.
- They must have a problem-solving attitude.
- There must be inclusive leadership.



Characteristics of a group or team

- Every member wishes to development him- or herself through the group's activity.
- It exists autonomously.
- Every member identifies with it.
- It has objectives.
- There is consistency among its components.

→ **It has structure and method.**

→ **It is dynamic.**

Among the basic rules for developing team work, we start with the following:

- Know how to listen and talk.
- Set objectives.
- Accept responsibilities.
- Encourage the group's progress.
- Strengthening of what is group-related: identity, feeling like a team member, feeling part, taking part in shared decisions.
- Think actively; do not be a mere recipient of stimuli from other people.
- Conquer fears and inhibitions.
- Trust.
- Internal organisation: structure, rules, channelling conflicts and disagreements.
- Think that common work is a benefit.
- Foster participation.

Team work must be the main base of volunteer action. It is hard and poses difficulties, but it also offers abundant satisfaction, as we –together with others– achieve things that would not be attained individually.



Collaborating means working with other people to get the sum of tasks with a common objective. Not collaborating means dedicating oneself to doing the individual part, and then waiting for the others to do their own. It is about recognising that people need one another to move forward.

In addition, volunteer action is always done in the framework of an organisation that undertakes programmes and specific actions in response to certain problems or situations. The programme is developed by cohesive groups and work teams that try to properly carry out the organisation's aims and objectives. A large number of the activities carried out in organisations in which people work or participate is implemented between the groups or work groups that make up the organisation, or with the groups to whom the intervention is dedicated. These activities may include carrying out a pre-assessment to win the interest of the recipient community and also to create a work programme based on shared goals that will then be able to measure the impact of the group work.

Team work aimed at the achievement of common objectives is a key activity for the appropriate development of collective action.

Nowadays, many of the phenomena, situations and problems that are the targets of intervention are complex and must be analysed, understood and addressed from different points of analysis, perspectives, disciplines or specialities and with different practices and technical and professional resources. That is why many of the teams are multidisciplinary and require the establishment of complex and group-oriented processes of intercommunication and interdependence. No element of the team or of the organisation knows as much as all of them together.

Nowadays, learning to work as a team is a key tool in order to be to approach many of the activities that intended to be developed. In fact, without team work these actions could not be developed.

Team work also means learning to cooperate, to be interdependent, and that is consistent with what can be fundamental organisational values. **When everyone gains something –although it might not be optimal– the results are beneficial.**

WORK GROUPS CHECKLIST



Does the group have a coordinator?



How are decisions taken in the group: by majority or by consensus? How does this affect the work and the group dynamics?



How are the team members coordinated; does the organisation provide internal management and coordination tools?



Is there a model or position to monitor work groups?



Is a space on the importance of group work included in the training?

4.5 - MONITORING AND ASSESSMENT

Monitoring and continuous assessment facilitate a better fit between the organisation and the volunteers that are part of it. This monitoring will address the evolution of the volunteer in the activity they are performing, their personal development, their fit into the programme assigned to them and in the organisation, and the relationship with the recipients, other volunteers and paid staff.

At this point, it is important to distinguish between monitoring and the support that was spoken of in an earlier section (section 3.2). Support can be placed on the pedagogical resource line based on dialogue, the exchange of experiences, concerns, difficulties, and so on, on the idea of joint growth. Monitoring is approached as a process of assessment that makes it possible to check whether the work being done is headed in the right direction proposed by the organisation, in a search for the effectiveness and efficiency of the volunteer action.

“Periodic actions such as pastoral care, monitoring of the emotional and logistical well-being of the volunteer play a very big role in the prevention and resolution of possible conflicts that are created later during the management of the volunteer teams”

Yolaina Vargas, Raleigh Nicaragua

After the action comes reflection and then a return to action, and so on.

The assessment consists of systematically collecting and analysing information that will allow us to determine the value and/or merit of the subject of assessment in order to facilitate decision-making and future interventions. More focused on scheduling, the assessment would be the process or to find out whether the work being done meets the goals previously outlined.

When speaking of assessment, we must not forget to include all the actors involved in the process, and the volunteers are part of it. Within the social commitment, self-assessment is defined as a basic learning strategy that will help us to collect key elements in order to improve the tasks we are performing. It is important to have a space for personal and group reflection in order to improve volunteer action. The assessment will help growth and must be present throughout the entire path.

THE ASSESSMENT MUST HELP TO:

- Analyse what has been done.
- Criticise the work constructively.
- Dialogue with the human team.
- Accept weak points and strengths.
- Propose improvements and alternative proposals.
- Learn from the experience.

THE ASSESSMENT IS NOT:

- Avoid reality.
- Criticise people.
- Deny one's own responsibilities.
- Defend what has been done at all costs.
- A “settling of scores”.

The assessment is therefore the instrument that makes it possible to compare the situation initially envisaged with the real situation. In this comparison, information is obtained on the degree of achievement of what had initially been planned, as well as of the factors that allowed or hindered this achievement.

Each programme defines the agenda for assessing and monitoring the volunteers assigned. We recommend a quarterly assessment and another at the end of the year or course. In the latter, an analysis will be made of the roadmap followed by the volunteer and points for improvement will be proposed for the following year.

(GOOD PRACTICE) Different organisations in Latin America interviewed for the creation of this guide use different sheets and forms for assessment. One interesting example is that of Eat United/Comamos Juntos in Nicaragua that has a digital tool. This web application designed by one of its volunteers for customised monitoring of the work of Comamos Juntos serves to measure the impact of volunteerism: hours, attendance, food collected, number and distribution, and types of participants.

In the annexes, you can find sheets 10, 11, 12 and 13 that can help you to plan this aspect.

Information Sheet 10 Activity monitoring sheet.

Information Sheet 11 Participation analysis exercises.

Information Sheet 12 Model for a questionnaire for detecting needs for the organisation's volunteers.

Information Sheet 13 Learning assessment model.

MONITORING AND EVALUATION CHECKLIST

- ✓ Has someone been designated to carry out the monitoring and assessment of the volunteer?

- ✓ Is the volunteer informed about the reason for the monitoring and assessment?

- ✓ Is the information or conclusions shared with the volunteer?

- ✓ How does this process take place: is it participatory? Is it carried out on a regular basis? Is the volunteer informed in advance? Does it have a constructive approach?

- ✓ Does the volunteer have the opportunity to self-assess/give their opinion about the organisation?

5 · THE END OF THE VOLUNTEERISM PROCESS/OFFBOARDING

The end of the volunteer action or the process of offboarding the volunteer is part of the natural process of the volunteer's roadmap. That is why organisations must facilitate the offboarding, always from the perspective of recognising the work the person has done and the knowledge and understanding of their reasons for departure. Organisations may even facilitate and support the referral to other organisations, provided that the volunteer requests it. That is why it is important to work on this stage, devoting time and space to finding out the causes and the motives that lead the volunteer to finish their collaboration with the organisation.

This process promotes the improvement of the management of the organisation's volunteerism, because:

- It allows for and encourages the closure of the cycle with the volunteer. This –in addition to helping to recognise their participation– facilitates a possible return to the organisation or to another one later on.
- It collects information in respect of incorporating improvements in the organisation's volunteerism.

Role of the volunteer manager at this moment:

- **Support the decision if it is taken.**
- **Bid farewell to the person warmly and empathically.**
- **Leave the door open to future collaborations.**
- **Facilitate the volunteer to bid farewell in their own way.**
- **Assess with them their entire process of participation.**

The organisation will have to provide for the successor, since the person leaving will leave some function uncovered; this entails a lack of service to the recipient of the volunteer action. That is why it is important for the volunteer to inform the organisation of their departure sufficiently in advance. This is in order to have room for manoeuvring that will enable the organisation to respond to this situation.

In the case the person leaving does their volunteerism in direct contact with people, the aim will be to create a space in which they can leave in a way that the recipient does not feel "abandoned".

Besides providing a certificate of recognition of the work carried out, the organisation will carry out a **process of assessment** and review of what their time at the organisation has been and meant for the organisation. This will strengthen the relationship maintained so far and may help in the subsequent relationship.

It is important to try to promote a process of building loyalty with volunteers, since –regardless of whether they have completed their volunteerism process– at some time they could once again be an active part of the projects or remain allies or participants in other processes within the organisation.

(GOOD PRACTICE) A good example of building the loyalty of the volunteer in the context of the end of the volunteerism cycle is GVC Nicaragua's tool. This organisation has a platform of accredited volunteers and their profiles are kept on the digital platform. This way, volunteers remain in contact with the organisation.

Another can be seen in the organisation Kiriku in Bolivia. As part of their work for the professional development of volunteers, at the end of the cycle, the goal of creating a neighbourhood solidarity committee that will comprise members of the families, members of the neighbours' organisation, members of the municipal government programme and volunteers from Kiriku. This way, there is a support mechanism after the end of the volunteerism cycle. This way they are generating a jobs bank: volunteers who have completed their cycle enter this database as candidates; they can be recommended for different job/professional opportunities with organisations allied with Kiriku.

When the person leaves the organisation displeased, it is appropriate and recommended:

- To understand the motive: what has they felt? With whom or what are they displeased?
- With this approach, we will try to objectify the events, be able to mediate and create solutions, if possible.
- And if the decision is taken, we can offer acceptance and support in the offboarding process.
- That the organisation can rethink the monitoring with volunteers, with the aim of making proposals for improvement and be able to comment on what is not working properly in their volunteer action.

When they do not act in accordance with the mission and common criteria of the volunteer action, the organisation will help the volunteer/or to redirect their actions and, in the case they do not do so, to abandon their activity.

This entails difficulties, but it is the best thing both for the person who does not find their space, and for the organisation itself and the rest of the people who make it up. It is about dealing with this situation in a conciliatory manner, thanking them for their efforts and time at the organisation and advising on alternative forms of action.

However, in cases where the organisation is responsible for the volunteer's departure, which may be caused by multiple causes (incorrect prioritisation of the task over the person, mismanagement, scarce support, etc.) it is important to be able to assume the responsibility that this means and, after apologies, to try to find the channels that would encourage the person to continue to participate in the organisation. If the relationship of trust has been broken, facilitating and supporting the person in their offboarding may be the most appropriate thing.


In any case, all the inputs gathered in this last phase of finalising the volunteerism process must be incorporated into the reflection of the organisation and help to improve the processes.


In this regard, it is important to remember that –although not part of this manual– the cycle of continuous improvement or the Deming cycle (also known as the PDCA *plan-do-check-act* cycle) or *continuous improvement spiral*, is a four-step strategy for continuous quality improvement. All the learning that can be obtained serves the organisation to improve the future.


You can find sheet 14 in the annexes; it is useful in this aspect.


Information Sheet 14 Offboarding interview of the volunteer.


OFFBOARDING CHECKLIST


-  How does the organisation ensure that volunteers receive recognition for their participation?


-  Has any evidence been created for this person's participation in the organisation's programmes?

-  Is there information given about how the information and evidence they have of this person will be handled?

-  Has feedback been received on the volunteerism experience?

-  Has a final assessment been made of the performance and the trajectory of the volunteer?

-  Have the reasons for the volunteer's decision to finalise their collaboration been understood?

-  Has how to remain in touch been defined?



EPILOGUE

Throughout these pages, we have tried to guide and provide basic guidelines, advice and recommendations about managing volunteerism, while also presenting good practices and challenges that this experience can create in organisations that embark on the volunteerism adventure.

This document may be useful for any organisation interested in starting to manage volunteerism at the local level or in improving the existing processes, whether or not they are in one of the countries focused on. The important thing is to know how to adapt the recommendations and steps described to the circumstances of each case (context, type and size of the organisation, type of volunteerism, of activity, resources available, etc.). In other words, the organisations in Bolivia, Haiti, Colombia and Nicaragua –or any other country that uses this resource– must also do the exercise of adapting it in practice to what best suits their needs. To help in this exercise, the “Empowering local capacities for humanitarian volunteers in Latin America” project also includes workshops with partner organisations and other local organisations selected in these countries. However, we hope that the usefulness of this guide can go further and we encourage any organisation interested to find lessons and good practices in it.

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INFORMATION SHEET 1

HOW IS VOLUNTEERISM DEFINED AT MY ORGANISATION?

The purpose of this fact sheet is to help define the concept of volunteerism within the entity in accordance with its mission and vision. So that, based on this conceptualisation, it is possible to gradually define the rest of the process of working with volunteers.

Explanatory note for the fact sheet:

- 1 • Organisations OF volunteers. Those formed mainly of people who are volunteers.
- 2 • Organisations WITH volunteers. Those with both volunteers and with recipients and people who are paid.
- 3 • Organisations FOR volunteers. These do not have volunteers but create collaborative arrangements with others in which people who are volunteers take part.

ABOUT MY ORGANISATION	
Does it have some type of legal personality?	<input type="checkbox"/> YES <input type="checkbox"/> NO
If it does, what is it?	<input type="checkbox"/> Association <input type="checkbox"/> Foundation <input type="checkbox"/> Corporation <input type="checkbox"/> Cooperative <input type="checkbox"/> Other
Identification of support networks:	
Is part of some network of organisations that manage volunteerism?	
The organisation is...	<input type="checkbox"/> OF volunteers <input type="checkbox"/> WITH volunteers <input type="checkbox"/> FOR volunteers
How may one be part of the organisation?	
<input type="checkbox"/> Recipients or participants in the projects in which there is volunteer action.	
<input type="checkbox"/> Family members or people directly related to the above.	
<input type="checkbox"/> Paid staff / Executive team.	
<input type="checkbox"/> Senior managers (directors, managing board).	
<input type="checkbox"/> Partners / Donors / Financiers / Sponsors.	
<input type="checkbox"/> Volunteers.	
VOLUNTEERISM IN MY ORGANISATION	
Are there volunteers in my organisation?	<input type="checkbox"/> YES <input type="checkbox"/> NO

YES, THERE ARE VOLUNTEERS

What do they do in the organisation?

.....

Are their functions defined? YES NO

What actions could they take part in?

.....

How do they coordinate with the rest of the organisation?

.....

What objectives are sought by creating a volunteer programme?

.....

IN CASE THERE ARE STILL NO VOLUNTEERS IN THE ORGANISATION

What objectives are sought by creating a volunteer programme?

.....

Why is there a desire to incorporate volunteers into the organisation?

.....

What space is there for volunteers with regards to other processes of the organisation?

.....

INFORMATION SHEET 2

DESCRIPTION OF THE ACTION AND ITS CHARACTERISTICS

The objective of the fact sheet is to begin to define the type of actions – in the most detailed way possible – that are done in the organisation in order to cover the need detected. Depending on the type of action and the structure of the organisation, the appropriateness of volunteers participating in it and how it will be done will be determined, adjusting the profile to the demands thereof.

ACTIVITY SHEET (One sheet per action will be filled in)
Title/name of the action:
Necessity to be covered:
Objective of the action:
Tasks or actions that make up the action:
Programme of which the action is part:
Coordinator responsible:
Number of volunteers required:
Description of their responsibilities:
Specify the specific tasks:
Profile (age, education, experience, others):

INFORMATION SHEET 3

SWOT ON VOLUNTEERISM

The objective is to analyse and define volunteerism among all the actors involved in the organisation. The conclusions will help to determine the appropriate lines for implementing and developing the volunteerism programme.

WITHIN THE ORGANISATION	OUTSIDE THE ORGANISATION
WEAKNESSES	THREATS
STRENGTHS	OPPORTUNITIES

Questions that can help guide the thought process:

How is the volunteerism plan defined? Strong and weak points

.....

.....

How do volunteers take part in the organisation? (description of the different channels)

.....

.....

Within the organisation, is the role of volunteers defined?

.....

.....

What is the contribution of volunteers to the organisation? And the difficulty?

.....

.....

At the social, local level... What image is there of volunteerism?

.....

.....

.....

.....

INFORMATION SHEET 4

THE PROFILES OF VOLUNTEERS

This fact sheet model helps to gather the requirements of the profile of the volunteer requested by the organisation. This information may be gathered completely or partly as appropriate.

GENERAL INFORMATION ON THE ORGANISATION AND VOLUNTEERISM PROGRAMME

Programme:
Programme manager:
Programme objectives:

PART 1. GENERAL PROFILE OF THE VOLUNTEERISM
Amount of time that can be committed:
Initial motivation:

PART 2. SPECIFIC PROFILE OF THE VOLUNTEERISM
1 · Description of the action to be developed:
2 · Purpose of the action:
3 · Responsibility and duties in the action:

4 · Coordination and oversight mechanisms:

.....
.....
.....

5 · Qualifications, education or training required:

.....
.....
.....

6 · Time commitment to the action required (weekly, monthly, etc.):

7 · Expected duration of the action:

8 · Attitudes, values, etc.:

.....
.....
.....
.....

9 · Miscellaneous:

.....
.....
.....
.....
.....
.....
.....
.....
.....
.....
.....

INFORMATION SHEET 5

MODEL FOR ANNOUNCING VOLUNTEERISM NEEDS

This information sheet can serve as a model when creating an announcement to look for volunteers based on the needs previously detected in the organisation.

ORGANISATION

- Name of organisation.

OFFER OF VOLUNTEERISM

- Name of the offer of volunteerism.
- Programme (in which the offer is included).
- Area, district (where is it developed, if the organisation has different locations or projects in different neighbourhoods, specify).
- Scope or group (with whom the volunteer will collaborate).
- Number of places (if there is a limited number).

THE VOLUNTEER

- Functions of the volunteer:
- Requirements:
- Schedule / days:
- Application period / end of the offer (if there is a deadline):

CONTACT

- Contact person:
- Email:
- Telephone:
- Website:

INFORMATION SHEET 6

THE INITIAL INTERVIEW

This information sheet is designed to provide a guiding model for the interviewer on the aspects that are important to address in the first interview. It is an opportunity to adjust the expectations of people to the organisation's actual needs.

When collecting personal data, the national legislation in force on the protection of data will be taken into account, including, if necessary, an apostille with this information on the information sheet itself.

1 · GET TO KNOW THE PERSON

- How did they hear about us.
- Motivation Why do they want to do volunteerism at this time?
- Experience in volunteerism.

2 · BRIEF DESCRIPTION OF THE ORGANISATION

- History.
- Projects being developed.
- Way of understanding volunteerism in the organisation.

3 · WHAT DO WE ASK OF THE PERSON WHO WILL DO VOLUNTEERISM AND WHAT IS OFFERED TO THEM?

4 · DOCUMENTATION

- Fill up the information sheet (Information sheet 7) and sign the commitment (fact sheet 8).

5 · PROGRAMME IN WHICH THE VOLUNTEERISM WILL BE DONE

6 · ONBOARDING OF THE VOLUNTEER

- Agree dates and way of onboarding.
- Provide the welcome document.

INFORMATION SHEET 7

COLLECT INFORMATION ABOUT THE PERSON TO BE ONBOARDED

This is an information sheet model for gathering the information of the person who is going to be onboarded to do volunteerism at the organisation.

Stop for a moment on the sheet and give thought to whether, by using it, you are going to be able to gather all the information the organisation needs to respond appropriately to the organisation's needs as well as of the people who want to start taking part. Moreover, do not gather anything you consider to be unnecessary information.

When collecting personal data, the national legislation in force on the protection of data will be taken into account, including, if necessary, an apostille with this information on the information sheet itself.

VOLUNTEERISM FACT SHEET			
Names:			FOTO
Surnames:			
Date and place of birth:	Age:		
Address:			
Code:	City:		
Tel:		Mobile:	
Email:			
Occupation:			
National Identity Number / Foreigner Identification Number		Driving licence: <input type="checkbox"/> YES <input type="checkbox"/> NO	
Studies completed:			
Studies underway:			
Knowledge of languages: Level (high, medium, low)			

<p>Computer knowledge Level (high, medium, low)</p>
<p>Hobbies:</p>
<p>Work experience:</p>
<p>Have you participated or are you participated in another NGO? (Which one, how long, type of participation, etc.):</p>
<p>How did you find out about (name of the organisation):</p>
<p>What motivates you to take part in this organisation?</p>
<p>What would like to take part in?</p>
<p>How much time do you have?</p>
<p>her remarks or comments:</p> <p>.....</p> <p>.....</p> <p>.....</p> <p>.....</p> <p>.....</p> <p>.....</p>
<p>(Refer to legislation in force in each country in matters of data protection)</p> <p>In some countries, it is more restrictive than in others. We recommend reviewing the local legislation in force so that it may eventually be taken into consideration.</p>

INFORMATION SHEET 8

ONBOARDING AGREEMENT MODEL

When someone is onboarded to do volunteerism, they are making a commitment to an organisation and to a project. This model can serve to express all the content agreed by the parties, as well as the rights and duties committed to by the person and the organisation. The clearer this process is, the better the onboarding of the person to the volunteerism will be and a sense of belonging will begin to be created.

When collecting personal data, the national legislation in force on the protection of data will be taken into account, including, if necessary, an apostille with this information on the information sheet itself.

Remember: it is important for the organisation to keep a copy and the volunteer to keep another one.

MODEL OF AGREEMENT FOR ONBOARDING VOLUNTEERISM TO AN ORGANISATION

Mr/Ms (Director, President, Volunteerism manager of the organisation), with National Identity Number, in their capacity as (Director, President, Volunteerism manager) of (name of the organisation).

Mr/Ms (name of the volunteer)
 With official address at No. PC
 City Province Tel
 Date of birth National Identity Number, in their capacity as a volunteer, signs the following

AGREEMENT

ONE. That it is the desire of both parties to sign this agreement.

TWO. That the volunteer knows the objectives and guidelines of (name of the organisation) and agrees with them and the means used to carry out the volunteerism project.

THREE. That they know and expressly accept that their action will not be the subject of any compensation whatsoever and undertake to carry out it with responsibility, confidentiality and regularity,

undertaking to give notice sufficiently in advance so that they can be replaced by another volunteer in the event it is impossible for them to attend an arranged action).

FOUR. That they will carry out the following action(s)

On the dates and during the timetables planned:

START TIME	END TIME	M	T	W	T	F	S	S	COMMENTS

From (start and end dates):

FIVE. That the manager of the project on which they are going to collaborate is:

SIX. That, given the voluntary nature of their action, they may end it whenever they wish. In this case, they must inform (name of the organisation) well in advance so that someone to replace them can be found. In a period of (minimum 48 hours, for example).

SEVEN. That they agreed that, should their services not be satisfactory to (name of the organisation), this latter may dispense with them with a reasoned notification. In addition, in the event it ending the action, (name of the organisation) shall inform the volunteer thereof well in advance (minimum 48 hours, for example).

EIGHT. In some countries, there are regulations or legislation on the rights of volunteers; the mention of these texts may be included here.

NINE. In some countries, there are regulations or legislation on the duties of volunteers; the mention of these texts may be included here.

TEN. In some countries, there are regulations or legislation on the commitments that must be fulfilled by organisations working with volunteers; the mention of these texts may be included here.

ELEVEN. In some countries, there are regulations or legislation on the rights of organisations working with volunteers; the mention of these texts may be included here.

TWELVE. That, in the cases in which the volunteer participates in voluntary programmes with minors, their suitability to work with minors must be demonstrated in accordance with the legislation or mechanisms in force in the country. (Background check, or ineligibility to work with minors).

THIRTEEN. The organisation reserves the right to request suitability from the volunteers in respect of working with people (background check or police records of offences).

In, on

Signed:

(Organisation manager)

Signed:

(The volunteer)

INFORMATION SHEET 9

COHESIVE GROUPS

The first contact as a group is very important. To encourage the creation of a cohesive group, it is necessary to create an environment of trust that is dynamic and convivial, and to establish the foundations so that communication between the members will take place smoothly and respectfully.

There are a multitude of exercises that facilitate the objective of the group getting to know one another.

OBJECTIVES:

We begin to consolidate the group by sharing information with the people we are going to play with.

The objectives of this type of technique are:

- Foster a convivial and participatory environment.
- Encourage communication and exchange.
- Achieve a greater degree of confidence in and knowledge of oneself, others and the group itself.

Some possible exercises:

INTRODUCING MYSELF TO THE GROUP

All the people participating are invited to stand up and walk around the room (it can be to the beat of some music, or in silence). Firstly, they should become aware of how they are and gradually come into contact with the other people, through a look, contact... When the facilitator considers it appropriate, for the group to “walk around”, they are invited to either choose someone or place themselves next to whomever is closer. Each encounter will last four minutes. Once this time has elapsed, they are invited to walk around again; the movement will be stopped again and they will choose another partner.

Possible questions on which to focus the encounters:

- I am...
- Something I do well at my job/ my volunteerism...
- Something I like about myself is...

CONCENTRIC CIRCLES

Participants place themselves in two concentric circles. The ones in the inner circle face outward so they have their partner in the outer circle in front of them. The person who facilitates the exercises will read some sentences that will be the subject of conversation with their respective partner (people outside with the person inside). When the facilitator says, the outside circle will begin to move one place. If only the one in the outer circle spoke, now only the one in the inner circle will speak likewise until the facilitator says so. The game can be stopped after several sets.

REMARKS: the exercises will be discussed among the entire group. Some of the questions the facilitator will ask will be: how have you felt; whether you have had fun; and if, on the contrary, the technique was not liked, listened to why.

TIME: it depends on the group's number; its duration is approximately 15 to 20 minutes.

MATERIAL: there is no material resource required.

PLACE: a large space, whether open or closed, is required.

THE BALL OF WOOL

The group sits down in a circle. Once the group is in place, the facilitator tosses a ball of wool to someone in the group while holding on to the strand of wool.

Before tossing the ball of wool, the group is told (it is possible to adapt this exercise to the different stages of the volunteerism roadmap. The questions asked will determine the focus of the exercise).

Some possibilities:

- Say one thing that we highlight about our volunteer action.
- Say what volunteerism means to me
- Say something we do very well (one thing we do very well and not something that we like to do).

Each person receiving the ball of wool wraps the wool around one of their fingers and passes the ball of wool to someone else. And so on until the entire group has said something. Once the ball of wool has been passed around the entire group, participants are invited to comment on how they have felt.

Then, thought is given to what has been built: “What have we built at the end of the exercise?”. “A spider web. A mess, a network”.

Lastly, thought is given to what it means to be a network.

Possible questions to guide the thought process:

When you network,

- Are we a network?
- How does networking affect us? Example: if someone gets up, what will happen to the rest? If they want to go, if they do not want to hold the wool, does it affect the group? If they pull too hard... Real situations in volunteerism can be found to compare with this situation. And there is talk of the advantages and the disadvantages. We can focus on the classroom.

If the group has more than 15 people, this exercise becomes too long.

MATERIAL: a ball of heavy wool and we must take care to ensure that no knots are made.

INFORMATION SHEET 10

ACTIVITY MONITORING SHEET

This information sheet model is used to record the participation process of the volunteer in the organisation.

ACTIVITY MONITORING SHEET

PLANNING

GROUP:

TITLE: DATE:

SPECIFIC OBJECTIVES

.....

ORGANISATION

Timetable:

Starting and departure places:

Routes and means of transport:

Scheduled by:

DEVELOPMENT

Volunteers:

Attendees:

Description and incidents:

INFORMATION SHEET 11

PARTICIPATION ANALYSIS EXERCISES

This proposal is aimed at analysing the level of participation of volunteers within the organisation, as well as the difficulties they encounter.

It can be done with either volunteers or with the organisation's paid staff or other people participating in it, including the people who are the recipients of the volunteer action **(let us not forget it!).**

NOTES TO TAKE INTO ACCOUNT ON WHAT IT IS TO PARTICIPATE

TO PARTICIPATE is:

TO WANT

- **This refers to the volunteer's motivation, which has to do with:** personal interest, the satisfaction they perceive when they carry out or develop an action, the perception that the action being carried out makes sense.

TO KNOW

- **It involves having:**
 - The education to be able to carry out the volunteer action in the most appropriate way.
 - Social skills in order to be able to interact with other people.
 - Knowledge of how the organisation and the channels of communication and participation work.

TO BE ABLE

- **This refers to whether the organisation is open to participation and what the mechanisms for doing so are.**

Subsequently, a SWOT analysis of each of these pillars will be done in order to determine the strengths, weaknesses, opportunities and threats that exist.

FROM THE VOLUNTEER	WEAKNESSES	THREATS	FROM THE ORGANISATION
	TO WANT	TO WANT	
	TO KNOW	TO KNOW	
	TO BE ABLE	TO BE ABLE	
	STRENGTHS	OPPORTUNITIES	
	TO WANT	TO WANT	
	TO KNOW	TO KNOW	
	TO BE ABLE	TO BE ABLE	

In the case of carrying out the exercise with the organisation’s volunteers, the weaknesses and strengths will be answered by the volunteers themselves and the threats and opportunities by analysing the organisation’s management.

All this will be used to prepare the proposals for action and for improvement, trying to answer the following questions:

How can we encourage the volunteer’s motivation?

.....

.....

What improvements can be made in the education of volunteers? What needs do volunteers have?

.....

.....

How can we encourage the effective participation of volunteers?

.....

.....

How can we improve the organisations mechanisms of information and communication?

.....

.....

INFORMATION SHEET 12

MODEL FOR A QUESTIONNAIRE FOR DETECTING NEEDS FOR THE ORGANISATION'S VOLUNTEERS

This model of questionnaire is aimed at offering a tool for gathering the learning needs of the volunteers according to the needs they find in their volunteer action and always seeking to offer spaces to ensure volunteer action of higher quality.

When collecting personal data, the national legislation in force on the protection of data will be taken into account, including, if necessary, an apostille with this information on the information sheet itself.

Dear volunteer, we are sending you this questionnaire that will help us to know what learning needs you have so we can respond to them.

We appreciate your assistance.

Your name and surnames:

Name of the organisation at which you volunteer:

Would you like to take part in learning spaces offered by other organisations?

- Yes No Maybe Other:

If YES, in what areas do you think that XXX (NAME OF THE organisation) could be of help in your learning?

- Knowledge of the group in which I currently perform my volunteer work.
- Creativity and innovation.
- New technologies.
- Knowledge of other groups and/or sectors that I currently do not work with.
- Improvement in my skills as a volunteer.
- Other:

What learning format do you prefer?

- Presentation / Conference Class/workshop Virtual Mix of virtual/in person
- Other:

INFORMATION SHEET 13

LEARNING ASSESSMENT MODEL

Just as learning is fundamental and a quality criterion in a volunteer programme, so is its assessment. The objective is to be able to determine whether the training has been of use to participants, as well as any aspects for improvement.

ASSESSMENT THE TRAINING ACTIVITY

NAME OF CLASS:

Dates held:

1 · IDENTIFYING DETAILS

Age

Male

Female

Sex

< 25 years

25-45 years

> 45 years

Occupation:

2 · CLASS/Training Event ASPECTS TO BE ASSESSED

Do you think the class content has been appropriate?

YES NO

Remarks:

.....

.....

.....

Of the topics presented during the class, indicate those that, because of the way they were presented, seemed more interesting to you, and which less interesting.

More:

Less:

Remarks:

.....

.....

.....

Do you think the content is useful for practical application?

YES NO

Remarks:

.....

.....

.....

Do you think teachers explain things clearly?

YES NO

Remarks:

.....

.....

.....

Do you think there was a suitable balance between theory and practical exercises?

YES NO

Remarks:

.....

.....

.....

What aspects of the classroom and the space where the class took place do you believe could be improved?

.....

.....

Do you think the documentation you received is useful?

YES NO

Remarks:

.....

.....
.....

Do you think the time scheduling was correct?

YES NO

Remarks:

.....
.....
.....

Make a general assessment of the class by rating with a circle on the following scale:

0 1 2 3 4 5 6 7 8 9 10

What aspects do you think could be improved in the organisation of the class?

.....
.....
.....

3 - FUTURE

Propose topics of interest to you for upcoming training actions:

.....
.....
.....
.....
.....
.....
.....
.....
.....
.....

THANK YOU FOR YOUR ASSISTANCE

INFORMATION SHEET 14

OFFBOARDING INTERVIEW OF THE VOLUNTEER

This information sheet is designed to provide a guiding model for the interviewer on the aspects that are important to address in the offboarding interview. This is an important time when you must support this person and help to facilitate the offboarding process.

TOPICS	ASSESSMENT OF THE VOLUNTEER	ASSESSMENT BY THE INTERVIEWER
Assessment of the role of volunteerism in the organisation		
Assessment of the definition phase: clarification of expectations, information, etc.		
Assessment of the onboarding phase: letter of commitment, Welcome Manual, first days, etc.		
Assessment of the development phase: organisation of responsibilities, training, monitoring systems, actions carried out, etc.		
Assessment of recognition techniques		
Assessment of the relationship with the rest of the team (voluntary/paid)		

<p>Contribution to the improvement of the organisation's volunteer work</p>		
<p>Contributions to improving the organisation's functioning</p>		
<p>Miscellaneous</p>		

LIST OF PARTICIPATING LOCAL ORGANISATIONS

This manual has been made possible by the generous participation of the following organisations that shared their volunteer experience.

BOLIVIA

- Kiriku (La Paz)
- Mano a Mano (Cochabamba)
- Movimiento Sonrisa (Cochabamba)

COLOMBIA

- Fundación Doctora Clown (Bogotá)
- Asociación Cristiana de Jóvenes (Bogotá)

HAITI

- Fundación América Solidaria (Puerto Príncipe)
- Coördination Régionale des Organisations du Sud' Est – CROSE (Jacmel)
- Direction de la Protection Civile, Département du Sud' Est (Jacmel)
- FAmn Décidé (Jacmel)

NICARAGUA

- Eat united / Comamos Juntos (Managua)
- Global Student Embassy (Managua / Boaco)
- GVC Nicaragua (Managua)
- Raleigh Nicaragua (Managua)

TEMPLATE FOR INTERVIEWING LOCAL ORGANISATIONS

ABOUT THE STATE OF VOLUNTEERISM

Name:

.....

Position

.....

Organisation:

.....

Place:

.....

Region:

.....

Country:

.....

Contact number:

.....

Interview date:

.....

INTERVIEW BY RESEARCH AREAS

A - Identification of the different volunteerism-related concepts and models within each country, and the legal, regulatory, socio-political and economic contexts with repercussions on managing volunteerism.

Questions:

- 1 • Are there regulatory or legal frameworks on the model of local volunteerism?
- 2 • Do you know of any municipal or governmental provisions for managing volunteerism?
- 3 • How effective are they, in your experience?
- 4 • Are there evaluation instruments available to monitor the volunteerism management process?
- 5 • What social movements or emergencies are mobilising volunteers?

B - Strategies for adapting the volunteerism management cycle to these modalities within the national context of each of the countries (based on interviews conducted).

Questions:

- 1 • Were there communication campaigns created for the relevant cause prior to the volunteerism management cycle?
- 2 • Do volunteers arrive spontaneously? Tell us about this
- 3 • Are there local partnerships prior to the volunteer management cycle in the territories concerned?

- 4** • Do they have instruments that make ongoing monitoring (loyalty-building, training, responsibilities to volunteers) of the volunteerism management strategy?
- 5** • If so, what are they?
- 6** • Does the organisation have some time of training, protocol or guide for managing risk (safety of volunteers and users)?

C - Compilation of good practices and success factors within the management of volunteerism in each of the countries (information sheets).

Questions:

- 1** • What practises were successful in managing the local volunteerism strategy within your organisation?
- 2** • What actions were successful in managing volunteerism? Why were they successful?
- 3** • What factors should be taken into account to improve the volunteerism management strategy? Why?
- 4** • Is there something more that you would like to share? A story or anecdote?



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—REALIZZA IL CAMBIAMENTO—



ADES

