



# Good Practice Guide for Hosting Organisations

**Summary of lessons and advice  
regarding the Certification and  
Management of European Union  
Aid Volunteers**



Alianza por la  
Solidaridad

Member of

**actionaid**

**EU Aid Volunteers**

We Care, We Act



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**EUROPEAN UNION AID VOLUNTEER INITIATIVE - EU AID  
VOLUNTEERS**

**“Empowerment of local capacities for humanitarian  
volunteers in Latin America and the Caribbean - CB4AID”**

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# Foreword

Alianza por la Solidaridad has taken part in the European Union Aid Volunteers Initiative since its beginnings in 2012 through a pilot programme. Since then, acting in its capacity as both a sending and a hosting organisation for volunteers, Alianza por la Solidaridad has become stronger internally, with the aim of aligning itself more closely with the quality standards of the Initiative. At the same time, Alianza por la Solidaridad has taken part in a series of projects within the Initiative aimed at creating, developing or strengthening to capabilities of civil society organisations interested in the Volunteer Initiative or which have wished to undertake the process of obtaining quality certification as a hosting organisation for volunteers. During the last four years, Alianza por la Solidaridad has accompanied various organisations through this process, strengthening their volunteer development and management capacities, both locally and internationally.

This Guide, commissioned from the consultants Carol Solórzano and Laura Lacayo, supports, on the one hand, the knowledge and experience of Alianza por la Solidaridad, and on the other, the knowledge and lessons of local organisations which have achieved certification or are in the process of obtaining it. The Guide also included the experiences of some EU Aid Volunteers who have supported the various hosting organisations in countries such as Colombia, Mauritania, Mozambique or Cambodia.

This document was conceived as a practical guide which covers not only the various steps to follow in order to obtain quality certification as a hosting organisation within the framework of the EU Aid Volunteers Initiative, but also included advice and good practice related to the management of the volunteers once the certified organisations are implementing deployment projects.

At Alianza por la Solidaridad we hope this Guide can be a useful, practical tool capable of internally strengthening any civil society organisation interested in the consolidation of volunteers at their heart, and for the management of non-local volunteers, while also facilitating the process of certification as a hosting organisation.



# Acknowledgements

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## Civil Society Organisations:

- Actionaid Haití (Angeline Annesteus)
- Alianza por la Solidaridad Haití (Mercedes López)
- Asociación de Mujeres Afrodescendientes del Norte del Cauca – ASOM (Clemencia Carabalí)
- Asociación Para el Desarrollo Integral de la Mujer - APADEIM (Ana Celia Tercero)
- Asociación Salvadoreña de Ayuda Humanitaria – PROVIDA (Karen Ramírez)
- Centro Boliviano de Estudios Multidisciplinarios – CEBEM (José Blanes)
- Colectivo Ecologista MadreSelva (Oscar Conde)
- Convivencia (Angélica Castañeda)
- Orden de las Religiosas Adoratrices de Colombia (Victoria Tenjo)

## EU Aid Volunteers:

- Ana Aizpúrua, Alianza por la Solidaridad, Colombia
- Eleonora Bitocchi, Alianza por la Solidaridad, Haití y Colombia
- Ilias Corbeels, We World GVC, Mozambique
- Francesc Grau Ortiz, Phare Ponleu Selpak (PPSA), Camboya
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# Introduction

The creation of this “Certification and good practice guide for hosting organisations” comes within the framework of the “Empowerment of local capacities for humanitarian volunteers in Latin America and the Caribbean - CB4AID” project, managed by Alianza por la Solidaridad within the framework of participation in the “EU Aid Volunteers”<sup>1</sup> initiative.

“EU Aid Volunteers” is a programme that seeks to unite **European volunteers** and organisations in various countries, in order to support humanitarian aid projects and thus contribute towards improving the competences of local organisations and the resilience against disasters of vulnerable communities. It does this through volunteer deployment projects and the strengthening of capabilities or technical assistance for volunteer sending and hosting organisations.

We hope that this Guide can contribute towards strengthening the capacities and internal policies of organisations that wish to meet the certification standards, the management procedures for EU Aid Volunteers and, in general, strengthen the role of local organisations as volunteer hosting organisations.

**Thus, this document is aimed at local organisations in countries in Latin America and the Caribbean that are seeking to obtain certification as hosting organisations within the framework of the EU Aid Volunteers Initiative, or which are already certified and wish to continue to strengthen internally (in both matters of internal policy and capabilities) with respect to effective, efficient management of humanitarian volunteers.**

The information presented below is based on the knowledge, reflections, challenges and practice shared through an interview with representatives of 9 organisations from Latin America (5 certified, 4 in the process of certification) and 5 volunteers who recently took part in the EU Aid Volunteers Initiative. We thank them for their willingness and commitment to contributing towards the aim of this guide.

Furthermore, the contents of this manual are linked and complemented by key information from pre-existing documents and regulations. Among those documents, the most important are the three regulations from the European Union that cover and specify **obligatory** procedures for this programme, for both hosting and sending organisations. These are:

- **Regulation No. 375 (2014):** It establishes the creation of the EU Aid Volunteers programme. It also explains the values and considerations on which the creation of the programme is based.
- **Application Regulation No.1244 (2014):** This regulation defines the standards for execution, as a complement to No. 375, which establishes the creation of the programme. The document sets out rules for the management of volunteers, training programmes and certification mechanisms for organisations.

<sup>1</sup> In Spanish: Voluntarios de Ayuda de la UE (Unión Europea).

- **Delegated Regulation No.1398 (2014):** This document sets the regulations applicable to volunteers. It complements the standards linked to matters such as recognition, equality of opportunities and the frameworks of collaboration and competence.

Based on these regulations, manuals have been created by some organisations to support training regarding specific areas, Two of these are:

- The **Guide for local organisations**, that is, for hosting. This guide presents specific elements in order to understand the programme. These are presented in a simple manner, for example , the regulations, the humanitarian principles and the key principles in Disaster Risk Reduction, among other matters.
- The **Guide for sending organisations** seeks to present the standards and requirements involved in the EU AID Volunteers Initiative. In this guide we can find general information on the programme and its legal framework, together with simplified information on each of the standards. The guide seeks to present all these elements in a more practical way, beginning with the bases of the regulations.

This guide is divided into two parts: the certification process and the volunteer management cycle. Each topic and sub-topic is linked to the Certification Standards of the EU Aid Volunteers Programme, as indicated in the following table:

CERTIFICATION	Cross-disciplinary standards
<p><b>What is implied in practice for a local organisation?</b></p> <p><b>How and why should standards be established in a participative manner?</b></p>	<ol style="list-style-type: none"> <li>1. Diligence and protection</li> <li>2. Equal opportunities and non-discrimination</li> <li>4. Protection of minors and vulnerable adults</li> <li>5. Health and safety</li> <li>6. Data protection</li> </ol>
<p><b>How can we work within a consortium of sending and hosting organisations</b></p>	<ol style="list-style-type: none"> <li>7. Associations</li> </ol>
VOLUNTEER MANAGEMENT CYCLE	Volunteer management standards
<p><b>Identification of profiles</b></p>	<ol style="list-style-type: none"> <li>8. Task assignment</li> </ol>
<p><b>Selection and preparation</b></p>	<ol style="list-style-type: none"> <li>9. Identification of candidates</li> <li>10. Learning and development plan</li> <li>11. Preparation before deployment</li> <li>13. Practical lessons</li> </ol>
<p><b>Reception and incorporation</b></p>	<ol style="list-style-type: none"> <li>14. Working conditions</li> <li>15. Living conditions</li> </ol>

<b>Development of the intervention</b>	16. Integrity and code of conduct 12. Supervision and management of performance
<b>Exit</b>	3. Recognition 17. Final briefing meeting

The key players in the management of the EU Aid Volunteers Initiative are presented below:

### Key players:

<b>ECHO</b>	ECHO (European Civil Protection and Humanitarian Aid Operations). It is responsible for managing European Union funds in humanitarian matters, and hence it also sets out specific guidelines for all humanitarian action. These directly influence the management of the EU Aid Volunteers programme, due to its humanitarian nature.
<b>EACEA</b>	This is the European Union Education, Audiovisual and Culture Executive Agency responsible for managing the financing of programmes in education, culture, the audio-visual sector, sports, citizenship and volunteers. This Agency is responsible for the EU Aid Volunteers.  Contact: EACEA-EUAID-VOLUNTEERS@ec.europa.eu
<b>Hosting organisation</b>	This refers to organisations with their headquarters outside the European Union. Within the framework of this initiative, they are the places where volunteers from the EU carry out their respective missions.
<b>Sending organisations</b>	This refers to organisations with their headquarters inside the European Union. Within the framework of this initiative they are responsible for the identification and preparation of the volunteer prior to leaving on their mission, together with monitoring at a distance and the return to Europe.
<b>Consortium of organisations</b>	We are referring to the alliance between multiple sending and hosting organisations in order to present a volunteer deployment project. Between them they devise and execute the presented project.
<b>Leader organisation</b>	This is a sending organisation that plays the role of overseeing the correct execution of the project through the coordination of the consortium. This organisation signs the financing contract with the European Union, and receives financing, in order to distribute it among the other members of the consortium. It is also responsible for reporting and drawing up final narrative and financial reports.

**Local volunteers**

Local volunteers will be those persons who are already in the area and decide to commit directly to a mission with a hosting organisation.

**EU Aid Volunteers**

All volunteer personnel who have been selected, trained in accordance with the specific standards, procedures and reference criteria, judged to be suitable, and registered as available for deployment in order to support and complement humanitarian aid in third countries.

We shall refer to international volunteers as those persons who come to the mission under this initiative.

**Local team**

This refers to all persons making up the hosting organisation team. From those with an employment contract to those with volunteer missions.

# The certification process

In order to take part in the EU Aid Volunteers programme, both the hosting and the sending organisations must go through a certification process.

To obtain the certification there is an application process which revolves around 17 quality standards. Below we shall provide details of these quality standards and the most important elements in the application for certification.

## 1

### Quality standards

Based on the regulations<sup>2</sup> of the EU Aid Volunteers (EUAV programme), 17 quality standards have been established, which govern both the programme and the certification process. The quality standards are the indicators of a series of minimum guarantees, both for the funder and for the volunteer personnel, together with the various sending and hosting organisations working together in the consortium. To obtain certification, the organisations provide evidence that they are aligned with at least the minimum levels required with respect to structure and institutional/organisational capacities, and understand the EU Aid Volunteers Initiative and how it operates, together with their capacity to receive and manage volunteer personnel.

At the start of the process as hosting organisation, it is expected that the organisation may ask itself questions about the way it operates, using the standards as categories. This will allow us to better understand ourselves as an organisation, and introduce ourselves to the EU Aid Volunteers programme, showing both what we already have and where we need to strengthen.

In order to facilitate this understanding, in this manual we have divided the standards into two main categories; the cross-disciplinary and those regarding the management of the volunteers.

- a. Cross-disciplinary standards:** There are 6 cross-disciplinary standards (although they conclude with number 7), and they deal with topics which are not solely limited to the volunteers, but guarantee the well-being of every person who forms part of our organisation (volunteers, workers, target groups) based on the respect for Human Rights. This with the exception of number 7, which sets out the ways of associating between organisations. The cross-disciplinary standards are:

**Standard 1.** Diligence and protection.

**Standard 2.** Equal opportunities and non-discrimination.

<sup>2</sup> Further detailed information on the regulations which set out the standards are in the [Guide for sending organisations](#).

**Standard 4.** Protection of minors and vulnerable adults.

**Standard 5.** Health and safety.

**Standard 6.** Data protection.

**Standard 7.** Associations.

**b. Volunteer Management Standards:** As EU Aid Volunteers is a programme which focuses on the volunteer, there are 11 quality standards linked directly to the volunteer management cycle.

**Standard 3.** Recognition.

**Standard 8.** Task assignation.

**Standard 9.** Identification of candidates.

**Standard 10.** Learning and development plan.

**Standard 11.** Preparation before deployment.

**Standard 12.** Practical lessons.

**Standard 13.** Supervision and management of performance.

**Standard 14.** Working conditions.

**Standard 15.** Living conditions.

**Standard 16.** Agreement.

**Standard 17.** Integrity and code of conduct.

Throughout the guide we will come across these standards in practice, and will refer to their numbers in order to better facilitate identification.

## 2

### Key elements for certification

The certification mechanism in itself is a process which takes place solely online, in which a dossier containing a series of elements is presented, and receives a positive or negative response within 6 months of presentation. On the Programme's [website](#) you can consult the deadline for the submission of applications.<sup>3</sup>

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<sup>3</sup> In 2020 applications must be submitted by 30th September.

**TESTIMONY:**

“There is no greater difficulty than the large amount of paperwork”

**José Blanes**

Bolivian Centre for Multidisciplinary Studies - CEBEM (Bolivia)

According to the experience of some of the organisations that have gone through the process, probably the most demanding part is the preparation of each of its elements. For that reason we are presenting below some of the topics to take into consideration, together with a short explanation of the elements making up the dossier.

**In order to carry through this certification mechanism, we recommend:**

- The designation of a person to lead the compilation of each of the necessary elements.
- The designation of a person who is comfortable using computers and the internet, with patience to browse Websites and electronic forms.
- Preferably the person will understand the English language, as some information will only be available in this language.

**Before beginning to prepare the dossier, we recommend:**

- A detailed reading of each of the elements making up the application (forms, references, etc.).
- Having reflected within the organisation of the value of the volunteer to the organisation, as it is the DNA of this programme.
- An evaluation of the needs which provides knowledge of the aspects of the organisation which need strengthening, and which volunteer profiles could be suitable for this task.
- In the case of being in contact with a sending organisation, it may be asked if there is any type of support in the case of not having anyone who understands the English language.

Once we have decided to obtain certification and we are ready to begin to put together the dossier, we can start to prepare each of the elements in the most convenient order. The dossier for the mechanism to become certified as a hosting organisation is made up of a form and multiple annexes, which we will briefly explain below.

In order to present our certification application, it is recommended to begin by registering on the [European Commission participants Portal](#) where we will find important information on how to put together the necessary documentation, and which in addition will allow us to submit the necessary documents.

On registration, the platform will provide us with a 9-digit code called the PIC (Participant Identification Code). From then on, this code will be our identification as an organisation before the European Commission and its Agencies.

When we use our PIC for the first time, it is important to bear in mind that the platform will begin a **validation process** for our organisation, in which it will confirm the information we have provided, and request copies of the necessary documents from our country.

### **Take into account that:**

- Important passwords will only be passed on via telephone or land mail.
- Before beginning to register, it is recommended that you check that the organisation does not already have a PIC from some previous experience.
- The process could take some months, and thus it is very important to safeguard the access credentials to the portal (an email and password).
- It is recommended that you establish as credential the email of a person with a permanent post, or a generic address which could facilitate consultation and access to notifications sent by mail by EACEA.

**E-form:** The E-form is our main form, and will be accompanied by all our annex documents. It is downloaded from [the site](#) when we have a PIC that allows us to enter.

This is an interactive, smart PDF form: it can be filled in directly in our programme for opening PDF files, Adobe Reader, and when we want to upload it to the platform, it will indicate if we have completed all the obligatory fields prior to acceptance.

### **Take into account:**

- The form is in English, but may be filled in in any official European Union language (in Spanish, for example).
- It is necessary to have version 9 or later of Adobe Reader in order to be able to use it.
- It may be filled in several times and saved as many times as we wish on the computer as a normal PDF, until it is ready.
- Annexes are attached to this PDF in the spaces reserved for that.
- More detailed information on this form can be found [in English, on the platform.](#)

**Annexes to the E-form:** Documents to be presented as annexes to the form are specific: the self-assessment form, the obligatory references, the declaration on honour, humanitarian experience in the field, and optional evidence. We shall present each of these annexes and important data regarding each of them below.

- a. Self-assessment form:** This is a Word document which serves as a self-assessment form, and which will be presented as an annex to the E-form. It is categorised by the 16 standards which fall within the competence of hosting organisations. Each category has a series of questions for which to respond yes or no, and a space to add a description of the practice within the organisa-

tion regarding that specific standard. The response to each of the requested descriptions may be guided by the affirmations presented for each category.

This form also asks us to indicate which of our references mentions each specific standard (see the following point on references).

The idea is that for each of the categories, the organisation indicates for each standard if:

- It is committed to implementing the minimum requirements
- It is committed to notifying the relevant personnel regarding this, and putting it into practice.
- There are specific working needs / additional actions in order to address what is lacking.
- The requirement has already been addressed in another approved certification or approval process.

### Take into account:

- This document may be submitted in PDF or Word format.
- Some sending organisations have other tools available which may facilitate a profound self-assessment which can provide results in order to complete this form.
- b. Obligatory references:** Another of the annexes to the E-form contains the obligatory references regarding our organisation. These must follow a specific model which can be downloaded in Spanish, English or French from the “Annexes” section on the [programme Site](#).

There must be 3 references, and the combination of these 3 references must mention, following the form to be downloaded and completed, all the quality standards. In other words, one can be a reference for 4 standards, another 7 and the other 6. When all the standards mentioned are seen as a set, they must have all been mentioned.

The references must come from **at least two** of these groups:

- A certified sending or hosting organisation, with which our organisation has had or plans to have an association in order to take part in the EU Aid Volunteers initiative.
- A humanitarian aid partner from the European Commission with a current framework agreement (association), with which our organisation has successfully worked on a humanitarian aid programme.
- A relevant international organisation or non-profit organisation or public body of a civil nature with which our organisation has successfully worked on a humanitarian aid project.
- An accreditation or auditing organisation which has certified our organisation in areas relevant to the EU Aid Volunteers initiative. In this case the accreditation or auditing documents will be attached.

### Take into account:

- The reference form may be printed, filled in by hand and scanned.
- When attaching it to the dossier, all the references shall be presented as a single PDF.
- It is a good idea to request references while the certification application is being prepared, and not wait until the last minute, as they may be subject to delays.

**c. Declaration on honour:** This is a declaration signed by the legal representative of the organisation. A form is available to download in the [annexes section on the platform](#) as “declaration on honour”.

**d. Proof of experience in humanitarian aid in the field:** This is an Excel document available on [the platform](#) as “Proof of experience in the field of humanitarian aid”. It must be completed with all the projects related to humanitarian aid in which our organisation has taken part in or organised (preferably in the last 5 years).

**e. Evidence:** Evidence for cross-disciplinary standards is obligatory, whereas the others are optional. When speaking about evidence we are referring to both the policies<sup>4</sup> established and good practice in relation to the quality standards. We can attach them and send them by mail.

This evidence must serve to show the expertise, policies or practice that already exist with regards to a standard or process.

### It must be taken into account that:

- This information shall be sent exclusively via email, after having received the reference number provided when clicking on “send” on the form.
- In the final section of the self-assessment form ( the annex) there is a space to mention whether we are going to provide evidence ( to be sent at a later date), and what requirements/ standards the evidence is linked to.
- Some details on the sending of this evidence are in the instructions available on [the platform](#) as “Instructions for Hosting organisations”. There we can find:
  - The email address to which it must be sent.
  - The subject for the email (the reference number generated when sending the E-form).
  - The way to list the files by name.

In order to read further details on the certification process you can visit the [Website](#), which contains instructions and the downloadable templates.

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<sup>4</sup> We understand policy to mean a pre-defined decision-making process to be applied in specific situations.

# 3

## Cross-disciplinary standards



### TESTIMONY:

“It is a learning process which helps you to grow (...) It is important to do it because it helps to strengthen our processes, above all when we are small organisations”

**Clemencia Carabali**

Asociación de Mujeres Afrodescendientes del Norte del Cauca - ASOM (Colombia)

Below we shall look at the cross-disciplinary standards proposed in the EU Aid Volunteers programme, with the exception of number 7, which will be covered in the section on how to work in association with a sending organisation. We have considered them to be cross-disciplinary because they are not solely linked to the volunteers, but have an impact on all dimensions throughout our organisation. The first cross-disciplinary standards are:

- a. **Diligence and protection:** It is connected to the management of security, the evacuation plan, and the evaluation of risks to which all participating members in the activities of our organisation are exposed. A list of security verification is available in the [Guide for local organisations](#).
- b. **Equal opportunities and non-discrimination:** It is connected to the commitment of our organisation to the principles of equal, inclusive treatment in recruitment processes for employees and volunteers.
- c. **Protection of minors and vulnerable adults:** It is linked to the commitment to a policy of zero tolerance for abuse of any nature (including sexual abuse) against children and/or vulnerable adults. This would imply, for example, awareness-raising regarding the issue and operationally, a reporting, prevention and treatment mechanism in the event of such abuse.
- d. **Health and safety:** It refers to the daily inclusion of policies of health and safety.
- e. **Data protection:** This covers the use of personal data in general (not only digital data). It guarantees, for example, that data is gathered for a legitimate reason, processed fairly, corrected and updated (when necessary, saved in a secure manner, accessible only to authorised personnel, available to the owner, and eliminated when no longer necessary).

One of the requirements of the programme is that these standards are present not only in the management of the volunteers, but also in the recruitment of any person, based on international standards, but also on the applicable national legislation.

# 4

## What is implied in practice for a local organisation?

### Challenges

In order to meet the cross-disciplinary standards, each one represents an established policy or practice. This implies certain challenges and commitments on the part of our organisation, which will vary in accordance with what we have to date. Some of these challenges may include:

- Taking time to check whether the policies or practices **we already implement** cover all the standards.
- The designation of a person in charge of the process, who can ensure operationalisation.
- The dedication of human resources and/or time in order to carry out this check, and to create or adapt policies if necessary.
- The dedication of human resources and/or time to provide maintenance to the established mechanisms, in order to ensure they are truly working over time.

#### TESTIMONY:



“The important thing is to have the inclination, the desire, the commitment, and above all the conviction that it is useful for what we do and things flow from there (...) it was a process of construction. The standardising exercise needs time. There were no more difficulties than having the patience, having clarity about what we wanted...when one knows what one wants, it is then taking it step by step to achieve it”

**Clemencia Carabali**

Asociación de Mujeres Afrodescendientes del Norte del Cauca - ASOM (Colombia)



#### GOOD PRACTICE / LESSONS:

The PROVIDA organisation from El Salvador has a telephone line in order to report abuses of any nature. It is administered by a committee, and it was decided that no one beyond the committee could have the line. This measure implies having a team that is vigilant, but also a small budget in order to keep the line active and allow the committee to respond. This allows the reporting mechanism to be sustainable beyond that of being written on paper.



### Advantages

The positive aspect of this investment is that following this process we can find many advantages. On the one hand is the strengthening of capacities, which implies:

- Strengthening our capacities in the management of programmes.
- Institutional / organisational development: the policies are an important part of any organisation. Creating them or updating them means continuous growth with respect to institutionality.

This process allows us to recognise what has already been done and what has to be standardised or improved, together with starting from zero on what is lacking. If we do this conscientiously and in depth, then beyond allowing us to take part in the programme, it will allow us to order our procedures and improve the processes in our organisation.



#### TESTIMONY:

“It helps us to raise standards. In productivity, in work, in processes...”

**Angélica Castañeda**  
Conviventia (Colombia)

- Self-care: Sometimes, in daily life, we do not take the time to look after our own organisation and the people who make achieving our goals possible. This process may facilitate the protection of the team in general, in order to provide a safe place in which to operate, both for volunteers and for those with an employment contract. It is a significant advantage to offer as an employer.

We can take the time to identify the true risks to which all members of our organisation are exposed, and do whatever is possible to have a response plan, both for prevention and as a reaction to what may happen, with clear, adapted mechanisms.

- The quality standards in this programme are linked to the general principles of the European Union. To put into practice these international standards may facilitate other types of cooperation between our organisation and other national or foreign institutions.



#### TESTIMONY:

“These processes are necessary for the organisational part, because they are going to become part of our inbuilt capacities, not only regarding the volunteers we receive from abroad, but internally in the matter of strengthening the volunteers and local working teams”

**Ana Celia Tercero**  
Asociación para el Desarrollo Integral de la Mujer - APADEIM (Ana Celia Tercero)



#### TESTIMONY:

“These processes with the European Union help with this, so that you organise, document everything, and can improve your standards. It is important, it places us at the levels of hosting organisations in which both the volunteers that come and ourselves can benefit. That is the idea of cooperation”

**Angélica Castañeda**  
Conviventia (Colombia)

## Recommendations

In order that this process of self-assessment and/or creation of new policies may serve to map out a space for organisational growth, we have some recommendations:

- Above all, it is important to have taken the decision as an organisation and not as an individual, in order to guarantee the general levels of motivation required to carry it out. This includes those persons responsible for taking decisions in our organisation (for example, the General management or the Board of Directors), particularly in order to ensure the investment of time by our team in order to carry out the process.
- Remember that it is possible to consult other manuals or instructions that are available at your leisure. Some of them are available in the introduction to this guide.
- Take advantage of the opportunity to grow from our current position.
- Do not see it as paperwork or a simple requirement for a programme: if we carry out the exercise of reviewing our policies in depth, and create them based on what we really are and do, then this will be beneficial for our organisation.



### TESTIMONY:

“It should not be just a certification process, but can be carried out within its context and means. A small organisation perhaps does not need to speak about evacuation, etc. But at the level of Human Rights policy it is positive to reflect and put it in writing”

**Mercedes López**  
Alianza (Haiti)

- Standardise what we already have. Often, although we do not have policies, or we do not call them such, the organisation already responds in practice to the standards in some ways. If we begin with what already exists, the implementation will be easier, and sometimes the work will be more about standardisation or documentation than production from zero.



### LESSON:

The Asociación de Mujeres Afrodescendientes del Norte del Cauca in Colombia, when following the certification process, realised that they had always had volunteers, although they did not call them that. They were called “patrons” but they fulfilled the same role. This shows that if we carry out a review, there are things we already have.

- Take it on as an institutional project, in the sense of establishing dates, decision-makers and goals for all actions that we are going to carry out when reviewing, updating and sending our certification application as hosting organisation.
- Try to merge with the pre-existing spaces for internal or institutional analysis, so as not to duplicate efforts.

- Keep internal communication flowing.
- Exchange between organisations:
  - Create and take advantage of spaces for exchanges with other sending or hosting organisations which have already been through the process, in order to learn and receive inspiration from their good practice. If necessary, we could consult the [list of certified organisations](#) on the programme platform.
  - Exchange policies with other friendly organisations. Beyond the EU Aid Volunteers programme, we can find inspiration in the policies of organisations similar to our own that have more experience with internal policies in general, or with some policy type we are lacking.
  - Exchange competences with other organisations going through the same process. Not all organisations have the same profile; sometimes one had what another needs, such as a person with legal knowledge of the country in its team, for example.
- Contextualise the policies:
  - Take the time to adapt names and narratives. In some cases organisations already have a policy with a different name which responds to the same standards. It is important to check this, so as not to create a myriad of policies which will be put in a drawer and become useless once this cooperation comes to an end.
  - It is also important to take the time to think about the name we give it, as words may not mean the same even among the people making up the organisation. In the same way, we have to think about the way in which it is written, ensuring that it is adapted to an understanding of our context.
  - Review once again the laws in the country which are linked to the policy we are working on, to find inspiration and ensure that it falls within the current legal framework.
  - Think about regional adaptations. The policy review process is definitely something we should adapt at a local level; not only on a national level, but also by territory. Think, for example, whether our security plan is realistic, both for the headquarters in the capital and for work in other places where the organisation is present.



#### TESTIMONY:

“In Central America the word “security” is used for many things (interpretations). The same policy works differently, is implemented differently, in San Salvador or in a region where there are other contexts. For example, that transport support cannot be provided for someone; in San Salvador it is easy but in the villages it is not. For the rural population it is different”

**Karen Ramírez**

Provida (El Salvador)



### LESSON:

The organisation Religiosas Adoratrices de Colombia found its greatest difficulty in the security plan, as the first time it was created in very general terms, and did not touch the more specific context. “Not everything covers armed conflict” they say, and there are other places where there are other types of risk which are known but not written down anywhere. Take the time to review each of the risks in the places we work, so that we have a more realistic, adapted security plan.

- Transform it into organisational culture which goes beyond words:
  - What we define as policy also defines our organisation. For it to truly work, it can be seen as a series of stages:
    1. Documentation.
    2. Composition.
    3. Implementation.
    4. Implement it until it becomes “automatic”.
    5. Monitor constantly.
  - Involve all teams from the outset, in order to ensure they support the implementation.
  - Establish spaces for continuous reflection / training, in order to measure the temperature with respect to the policies.
  - Implement them in depth during the induction procedures for volunteers or employees.
  - Plan the “maintenance” of policies: review and update beyond the EU Aid Volunteers.



### GOOD PRACTICE / LESSON:

The organisation PROVIDA in El Salvador wanted to establish the construction of a policy which included sexual harassment in the workplace issues. In order to ensure that the collective spaces were taken full advantage of, before any debate there was awareness-raising regarding gender.



### TESTIMONY:

“Making it part of the culture is the most difficult stage, because it requires a committed team that does not stop working on it”

**Karen Ramírez**  
Provida (El Salvador)



**TESTIMONY:**

“The self-assessment is carried out continuously and permanently with each and every action on the programme (...) It is permanent reflection”

**José Blanes**

Bolivian Centre for Multidisciplinary Studies - CEBEM (Bolivia)

## 5

### How and why should cross-disciplinary standards be established in a participative manner?

It is important that at the time of developing the policies or practices linked to cross-disciplinary standards, we involve the entire team, in order to later facilitate implementation. In that way the policies, over and above rules, will be the result of collective reflection.

In order to carry out this process in a more participative way, we have some recommendations:

- Checking the forms as a group will allow better understanding and analysis of where we are with respect to what we need for certification.
- Delegation of tasks:
  - Identifying the tasks and designating responsibilities, as for any other project, may facilitate compliance with each of the needs.
  - Set up committees, particularly for the implementation of policies. During the creation process it may also be worth considering if the workload seems heavy with respect to the other responsibilities the organisation has on a daily basis. It is equally important to identify the person responsible within the committee who will carry out monitoring so that things are done at the right time and in the correct manner.

**GOOD PRACTICE:**

The organisation Religiosas Adoratrices de Colombia, when reviewing policies, designated a person who was responsible for each of the policies in accordance with the functions they perform or some affinity with the issue. In that way, one person was the reference for the entire process, but many others were responsible for making progress on each of the policies. Later the work was presented to the team for fine tuning. This was fundamental in managing to complete the policies.

- Consultation and measurement spaces:
  - When we are creating a new policy, those responsible may create a draft document, and send it for consultation in order to receive comments, prior to it becoming official.

- We can measure our policy by creating diverse debates on the issue in general. For example, by speaking about the abuse of children without mentioning the policy may create debates that can direct us with regards to the need for a collective update of the policy.
- Spaces which already exist may be used in order to receive feedback, such as meetings of the Board of Directors, or Annual General Meetings.



#### GOOD PRACTICE:

The organisation Conviventia in Colombia involved the directors of the organisation and heads of areas, so that the entire organisation understood the process and was acquainted with it in order to provide support. A timetable was created for the work, which was presented to everyone.

The guidelines with which each area could work were also presented. later there was a meeting in which everything was presented, and reviewed in order to establish the policies.

- Participation in small groups. If we divide our organisation into groups (by geographical region or technical work area, for example) we can ensure that we include the needs / opinions of all sectors. In addition, discussion in small groups may be easier to manage that with the entire team at once.
- Refresh the language. In order that the process is truly collective it is a good idea to ensure that we are speaking about the same thing, and that we understand terminology in the same way.



#### TESTIMONY:

“With the EU Aid Volunteers we were able to receive not only the part to strengthen the organisation, but financing to strengthen local volunteers and technical support for international volunteers”

**Oscar Conde**

Colectivo MadreSelva (Guatemala)

## 6

### How can we work in association with a sending organisation?

In order to take part in the EU Aid Volunteers programme, one of the standards (number 7) has been established as the association between multiple sending and hosting organisations.

It is important that, as a hosting organisation, we are willing to work in a horizontal partnership, in which the the agreements and responsibilities are clear from the outset.

The standard establishes certain principles, such as respect, transparency and a shared vision, together with certain minimum requirements for association between organisations. Details of these may be consulted in the [Guide for local organisations](#).

In order to form a healthy alliance and be able to take full advantage of the project, we have a series of recommendations which we are setting out below.

- Clarify expectations on what will be jointly worked on with the consortium, and what are the elements that define the internal form of each organisation.
- Recognise our value as a local organisation. Although it is the first time we are taking part in the programme, we must always remember our value and make proposals from that perspective. Local organisations usually have a background in and knowledge of the key areas for projects.
- Knowing how to say “no”. Without losing the courage to take on fresh challenges, it is important to know how to position ourselves in order to avoid embarking on projects we do not need or which surpass our capacities for execution or investment. In the same way, identifying the initiatives that are not suitable for our context is key to guaranteeing the success of our project.
- Knowing how to say “but” in a continuous dialogue. The standards are general guidelines set out by the programme. It is essential that organisations understand how to interpret them and adapt them so that the final result is useful and lasting within our organisation.
- Knowing how to ask for help. The consortiums are created in order to exchange ideas and carry out a joint project based on the peculiarities of each organisation or territory. If we take part in a balanced consortium, many organisations will have capacities that we need, and vice versa. It is a good idea to identify where we feel weakest in order to ask for help, and be aware of what the others may need.
- Express oneself with respect but without fear. Asking all the questions we have will facilitate the progress of the project. In addition, any questions we may have will serve to improve future cooperation or generations of volunteers.
- Take advantage of external views The consortiums are usually made up of organisations from Europe and other territories from our own region. This can be a good time to get an alternative, external view regarding our practices, which may enrich what we do.



#### TESTIMONY:

“Each organisation has its own personality and we are not going to lose it, but we must maintain permanent relations with other organisations, other countries (...) In addition, it is very hard to think that we are carrying out our mission alone; it is not possible, faced with such a complex reality (...) You have to dare to think about yourself, critically evaluate yourself, and see yourself within wider standards, within a wider spectrum than the local one”.

**Victoria Tenjo**

Religiosas Adoratrices (Colombia)

- Maintain flowing, continuous, transparent communication which allows the putting into practice of all the above, and executing projects in the best way. This is important, as a good deal of the work will be done at a distance. In the same way, some organisations will be working as a team for the first time.

Maintaining communication, together with taking the initiative to report regularly (without being asked) will build confidence and motivation between organisations.



**TESTIMONY:**

“It is the responsibility of the hosting organisation to put issues on the table and debate matters of interest”.

**Ana Celia Tercero**

Asociación para el Desarrollo Integral de la Mujer - APADEIM (Nicaragua)

# Volunteer management cycle

**The experiences of the volunteers have the chance to create an impact in two ways: they contribute to the development of the communities and organisations in which they participate, while the volunteers obtain a unique, enriching experience on a human and professional level. Our challenge as hosting organisations is to promote general policies or strategies for volunteers that manages that experience, facilitating conditions in order to achieve this double impact.**

Some hosting organisations already have a **volunteer policy** and only need to integrate that policy with EU Aid Volunteers by making the necessary adjustments based on the quality standards. Furthermore, those organisations that do not have a volunteer policy will have to create one, including the organisation's vision regarding volunteers, the various times in the volunteer management cycle, and the rights and duties of the volunteer in accordance with local legislation, together with the quality standards from the EU Aid Volunteers project. In both cases, the aim is to avoid artificial separation between international and local volunteers. In other words, in the heart of the organisation the way of seeing and using the volunteers will share the same general values and processes.

Defining a volunteer policy allows us to strengthen the capacity of our organisation to work with local and international volunteers. Furthermore, its implementation is an opportunity to take full advantage of the contributions and lessons learned between our organisation and the volunteers.



## GOOD PRACTICE:

The organisation Asociación para el Desarrollo Integral de la Mujer - APADEIM in Nicaragua approached other local players with experience in managing volunteers, in order to facilitate its first steps towards the definition of a volunteer policy.

In order to begin to build this general volunteer framework, the first step is to carry out the self-assessment process which invites us to reflect at an internal level on the place the volunteer occupies, whether local or international, in our organisation: What are the aims sought through the link to the volunteers? How do they contribute to the mission of the organisation? How do the volunteers form part of our planning? What are the implications, advantages and challenges for the hosting of volunteers?

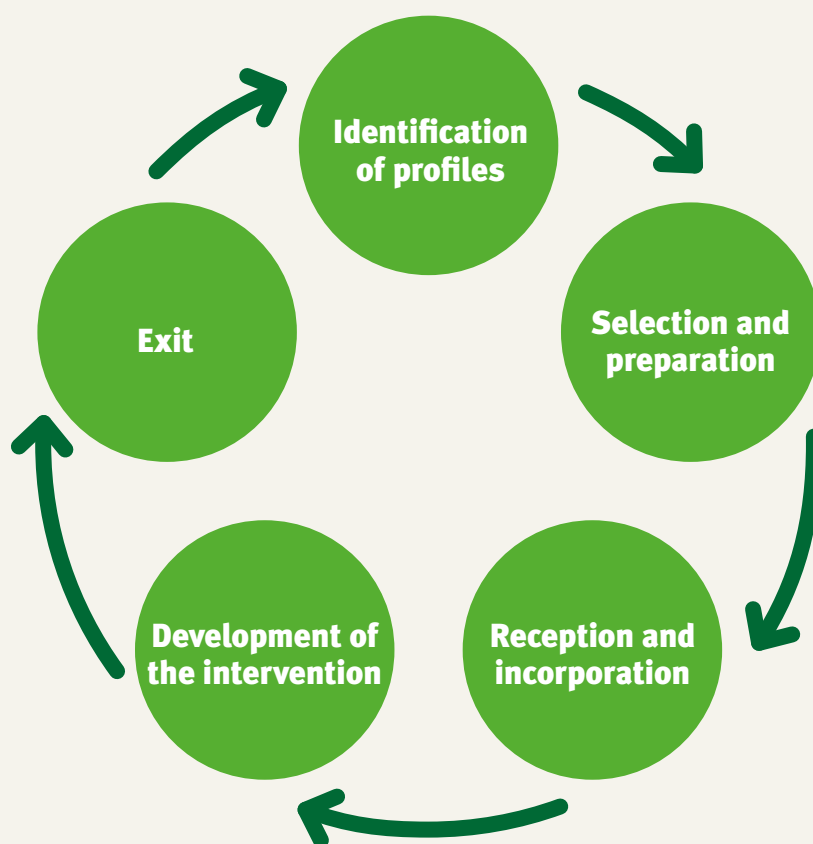
In the definition process for volunteer policy it is essential that we have a person in charge of implementing the definitions. This will allow the view that the importance of the volunteer becomes part of the organisational culture. Furthermore, this person may coordinate the participation of other areas in the grounding of the policy in a **specific implementation plan for the volunteer management cycle** for a specific project.



### GOOD PRACTICE:

The organisation Religiosas Adoratrices de Colombia accessed through the website of the national volunteer system a technical guide on the **management model for volunteer action organisations** drawn up by the Instituto Colombiano de Normas Técnicas y Certificación (ICONTEC).

In this chapter of the guide “Certification and good practice guide for hosting organisations” we shall point out some recommendations and good practice so that hosting organisations can define, implement or strengthen each step of the management cycle for volunteers within the framework of the EU Aid Volunteers initiative. This cycle must take into consideration the various moments in the relationship between the volunteer and the hosting organisation, from first contact to the end of the connection.



## 1

### Identification of profiles

The definition of the profile as the final aim guarantees concordance between the personal expectations of the volunteers and the expectations we have as a hosting organisation. In order to achieve this it is essential to identify volunteer profiles which are a response to the needs of our organisation, and the group or territory which is the object of our intervention.

A definition of the role which is clear and in accordance with the real challenges may make the difference between a negative or positive experience, both for the hosting organisation and for the volunteer.



### TESTIMONY:

“I believe that the selection of profiles is essential in order that those who come can adapt to their positions. Because all the cultural differences and adaptation to the organisation is already sufficient. The definition of the position has to be previously thought out and defined”

**Mercedes López**

Alianza por la Solidaridad (Haití)

## Step by Step

In order to carry out the identification of the volunteer profiles we must take the following steps:

- 1.1 Identify organisational needs:** Taking into account the institutional planning and internal analysis of the resources and capacities we have, we make a list of our organisation’s needs.



### GOOD PRACTICE:

The organisation Conviventia in Colombia draws up a table every year of the needs of each area or project. This table is useful for identifying the profile of future volunteers in accordance with planning within the organisation.

- 1.2 Defining the responsibilities of the volunteers:** based on those specific needs, we can identify responsibilities or roles which provide a response and may be assumed by a volunteer. During this step it is important to take into consideration:

- **Organisational context and capacity:** The definition of profiles in accordance with progress and the specific challenges for our organisation. For new projects which do not form part of our priorities or the real needs of institutional planning may limit us in the capacity to provide monitoring or take advantage of the contribution of the volunteer to our organisation. Furthermore, we do not recommend receiving various volunteers in the same period if we do not yet have experience in the management of volunteers.



### LESSON:

The organisation Provida in El Salvador learned, based on an experience with international volunteers, that the most important thing is to deliver clarity regarding the specific objective that the volunteer is coming to provide, and the context of the matter or project within the organisation. In occasions the mistake of wanting to start from scratch is committed, and it is something that should only happen if it is defined that the specific task will be to set out the bases or design a programme.

- **Temporariness:** EU Aid Volunteers is characterised by assuming a role or responsibility for a specific period of time, and we must thus plan for the volunteer to assume specific responsibilities or projects that may have a clear beginning and end. This facilitates evaluation and re-

cognition of the specific contribution of the volunteer. It is not a good idea to give a volunteer roles that require more permanence over time.

- **Sustainability:** When defining a project or role to be assumed by a volunteer, it is important that we consider the sustainability of their contribution in the medium and long term. In the event that this involves a technical capability that we do not have in the local team, we recommend that the volunteer works in conjunction with a member of our organisation, so that this person can learn about and provide sustainability for the project once the volunteer returns to the EU.
- **Motivation:** we should include tasks that include closeness to our organisation's mission, to the population being benefited, and to the local culture. This may contribute towards the volunteers feeling greater motivation to assume their roles.
- **Flexibility:** the definition of the profile must include a certain degree of flexibility, in order to take into account the contribution and interests of the volunteer, once taken on.

**1.3 Complete the competences profile:** We fill in the format for the advertised vacancy for EU Aid Volunteers in accordance with the **competency framework**<sup>5</sup> desired in order to assume the previously proposed responsibilities. This format includes the tasks to be performed, the selection criteria and the minimum requirements that will be used during the selection process (See example of candidate advertisement). The tasks must be clear and specific, so that later they can facilitate the creation of a work and monitoring plan. Furthermore, we must indicate whether the volunteer must be professional, novice or experienced, and whether **learning practice**<sup>6</sup> is expected with the sending organisation.

#### TESTIMONY:



“It is vital to identify a specific profile which you can monitor and for which you can ascribe tasks, roles for which fewer experts are required but the same level of support”

**Mercedes López**

Alianza por la Solidaridad (Haiti)

**1.4 Send the format to the sending organisation:** The sending organisation will be responsible for reviewing, providing feedback and making the adaptations necessary to the volunteer profiles, in order to guarantee that they include all the necessary information: the description of the vacancy follows a structure of set sections which the sending and hosting organisations complete together.

5 The competences framework defines the cross-disciplinary competences required in multiple volunteer and employment sectors, and sets out the specific competences necessary for the EU Aid Volunteers initiative and for the work in the field of humanitarian aid. It must also include a non-exhaustive list of technical competences. See article 3 and Annex of [Delegated Regulation EU - 1398/2014](#).

6 Within the context of the training process, the sending organisation, following consultation with the hosting organisation, may promote learning practice within its organisation prior to deployment, for young professionals, with the aim of learning, through experience, the procedures, ethics and context of the humanitarian work. See article 13 of Implementing [Regulation EU - 1244/2014](#) and standard 12 from the [Guide for Sending Organisations](#).

Related standards	EU Aid Volunteers Initiative regulatory reference framework
<p><b>Standard 8</b> Task assignment</p>	<p>Implementing Regulation 1244/2014: Article 4: Definition of task assignment, competences profile and selection criteria for EU Aid Volunteers Point 1 of annex 1: Task assignment requirements.</p>

## 2

### Selection and preparation

The selection and preparation stage for the volunteer refers to the procedures prior to the deployment of the volunteer. It must be implemented in conjunction with the sending organisations, with knowledge of the responsibilities and competences of each organisations, in order to avoid duplication of content in the induction spaces.

#### Step by Step

**2.1 Notification of vacancies:** For a minimum period of one month the sending organisation will maintain the advertisement for candidates on the EU Aid Volunteers Initiative central platform. As a hosting organisation, we have the possibility to promote the notification in order to attract candidates to the European Union central platform. During this time information will be received from candidates (CV, self-assessment in accordance with the competences framework, demonstrable experience and motivational letter).

**2.2 Training Programme:** While the final decision has not yet been taken regarding which candidate will be selected as the volunteer, they must receive and complete a training process which will allow them to successfully carry out their tasks and integrate better at their respective destinations. Firstly, they must follow a programme of virtual training for all successfully selected volunteer candidates. Following that, they will receive intensive on-site training of approximately 10 days on issues such as security, prevention of abuse, cultural diversity, communication, etc. The training programme modules on which each person must participate are defined through the creation of a **learning and development plan**<sup>7</sup> which identifies the competences of the selected persons and their learning needs.

During training and on conclusion, the readiness to be deployed of the candidates will be evaluated, with respect to the competences framework. Their learning and development plans must be updated following training, to indicate the courses taken and the results obtained. The training programme is entirely organised by the funder, the EACEA Agency. Communica-

<sup>7</sup> The learning and development plan will indicate the results it is hoped the EU Aid Volunteers will obtain, and will contain information on the required competences, their learning needs, and achievements in the various stages of their participation in the EU Aid Volunteers Initiative. See article 4 of [Delegated Regulation EU - 1398/2014](#).

tion to register the volunteer candidates and logistics will be the responsibility of the sending organisation. Although as hosting organisations we do not play a role in this stage, it is relevant to be up to date with the content of the training in order to avoid duplication, or to be able to go deeper once the volunteer has joined the organisation.

**2.3 Interview and selection:** The sending organisation will send us a first selection of candidates, in order to jointly agree on who is to be interviewed. The interview must be structured, based on the competences framework. Subsequently, we must take the final decision for each volunteer post, and confirm our decision as a hosting organisation to the sending organisation, who will be responsible for notifying the candidate and requesting written confirmation. Candidates may also be selected for a waiting list, in case someone withdraws or ceased to be available.

In order to select the volunteer, we recommend taking into consideration:

- The desired competences profile.
- The possibility of the project or role matching their motivations or interests.
- The capacity of the person to adapt to a new context and experience which requires emotional maturity.

**2.4 Preparations prior to deployment:** The sending organisation must ensure that all the volunteer candidates receive an adapted on-site induction (provided this is possible) prior to deployment, which includes content such as: context, regulations and procedures for the EU Aid Volunteers Initiative. In addition, this will be an occasion to learn more about the mission, structure and programmes of the sending and hosting organisations, together with becoming familiar with the Code of Conduct and policies regarding security, health in the workplace, protection and prevention of abuses, etc.

It is important to develop the motivation of future volunteers during this induction, as it will be an aspect which will be constantly returned to when accompanying the mission of the volunteers.

During preparation prior to deployment, we recommend an interview between the volunteer and someone from our organisation with whom the volunteer is going to work during the deployment (or, for example, with the person who will assume the role of tutor in the future). In any virtual communication with candidates or selected persons with hosting organisations, it is important:

- To make time to clarify doubts on the future tasks, the context in which they will be carried out, and the characteristics of the hosting organisation.
- Speak transparently about positive aspects and possible difficulties that may arise during the time as a volunteer.

**2.5 Signing the contract:** Once the evaluation of the learning from the training programme has taken place, and it has been confirmed that the agreed results have been obtained, the sending organisation must sign a deployment contract with the volunteer. The creation of a folder or file per volunteer is recommended, in which all information may be kept in a orderly fashion: profile, documents, contract, learning and development plan, etc.

Related standards	EU Aid Volunteers Initiative regulatory reference framework
<p><b>Standard 9</b> Identification of candidates</p>	<p>Implementing Regulation 1244/2014: Article 3: Identification and selection procedure.</p>
<p><b>Standard 10</b> Learning and development plan</p>	<p>Article 5: Advertisement and candidacy Article 7: Selection Article 6: Evaluation, first and final selection</p>
<p><b>Standard 11</b> Preparation before deployment</p>	<p>Article 8: Evaluation of learning needs Article 9: Training Programme Article 10: Evaluation of volunteer candidates during and after training</p>
<p><b>Standard 12</b> Practical lessons</p>	<p>Article 11: Induction programme Article 13: Learning practice for new professionals</p>

## 3 Reception and incorporation

Matters regarding logistics and reception during the first few days are key to guaranteeing a positive experience for EU Aid Volunteers. This stage in the volunteer management cycle implies that we pay attention to the various details that will facilitate the incorporation of new members of the team within our organisation.

### Step by Step

- 3.1 Logistical preparation:** Having clear logistical information available can make the experience of volunteers easier. We recommend the preparation and sending by mail, prior to deployment, of a **logistics and preparation manual**. Furthermore, we must take the following logistical considerations into account:
- Country and city of deployment:** It is important that we provide general information on the context in the country and city where the volunteer experience is to take place. For example, to give in a general way some demographic, social, political and economic information. It could be a nice touch to include in the logistics and preparation manual some other local data, such as the climate, rate of exchange for the local currency, recommendations for internet and sim cards for mobile phones, voltages and the types of plug sockets.
  - Visa:** Although the volunteer is the person who must carry out the application and must be aware of the time period and validity of the visa issued, the sending and hosting organisations should provide all the support within their means. The visa application processes may

be tedious, and thus it is important that the volunteer can receive advice on the procedures, requirements and time necessary to deal with and renew visas. This includes being aware of whether it is necessary to submit the passport to the authority carrying out the process, whether it is possible to begin the process from the European Union, or whether it is necessary to pay a fine in the event of the visa expiring prior to renewal. Furthermore, the sending and hosting organisations must provide the institutional documents necessary as requirements in order to obtain a visa.

It is equally important that we state whether it is necessary to pay any tax at the airport, so that the volunteer can bring money in cash.

- **Accommodation:** As a hosting organisation we receive a set amount of money with which to cover costs and guarantee accommodation for the volunteers. The organisations must take into account that the funder assigns the same amount for a particular country based on the cost of living, independently of whether we are going to accommodate volunteers in the capital or in rural areas. If it is the case that various volunteers arrive and are not all found accommodation in the same municipality, it is important that we are transparent regarding the administration process and the conditions regarding the sums available for accommodation, so that everyone feels that they are being treated fairly. At the same time, the organisation will need to distribute the sum in order to cover requirements: in other words, it is possible to allocate a greater amount for accommodation in the capital than in rural areas, for example. Along those lines, it is important to share information on the accommodation conditions, and the type of support we can provide to obtain it. For example, it should be made clear to the volunteer if the decision of where to live with the assigned amount for that objective is personal, and if they can move if they wish.

Some organisations receiving EU Aid Volunteers regularly have opted to have their own apartment or house, where the various volunteers live during their mission. In the event of not having our own apartment, we must ensure that the volunteer has information and is accompanied when seeking accommodation. The aim is that they can find, in the shortest possible time, a furnished house in good condition in a safe neighbourhood, at a price which matches the amount allocated. For example, a map could be drawn up for accommodation possibilities and include information in the logistics and preparation manual on recommended areas, or the pre-selection of 2-3 places where the volunteer could live.

Furthermore, in some cities, it is very difficult to find furnished apartments, and this may limit the volunteer's access to basic furniture such as a cooker, bed, fridge, etc. In these cases, we recommend seeking an agreement with the owner so that the rent for the apartment includes the purchase of furniture and appliances which cover the minimum needs of the volunteers.

In the case of having to wait a few days before deployment to another zone, or while accommodation is being sought, it is recommended to have a rented flat as a provisional alternative which allows the possibility of cooking ( instead of a hotel, which limits that).

- **Transport:** We suggest that you indicate in the logistics and preparation manual recommendations on the use of public transport. We recommend that the hosting organisation provides easy access to a means of transport in the event that it is necessary for reasons of security or accessibility.
- **Security:** We must provide emergency contact numbers, information regarding risks, and recommendations with respect to protection and security within the specific context. Although,

prior to setting off, the volunteers will have already received initial training on security, this information should be expanded during the induction session in the destination country, in accordance with the established policies and protocols.

- **Health:** It is important to include, within the logistics and preparation manual, relevant health information, such as:
  - The vaccinations required for the deployment.
  - Information on the operation and characteristics of the medical insurance, and recommended health centres and hospitals.
  - Recommendations for accessing medical care, including whether it is necessary to pay up front, and the process for reclaiming the money.
  - Health problems that may exist in the country or working area.
  - Recommendations regarding hygiene and food linked to health risks.

Furthermore, regarding all the work contexts in areas where there is an emergency or the possibility of violence, we recommend considering the cover and access to psychological support.



#### LESSON:

The MadreSelva collective in Guatemala learned through experience that it is essential to make simple, clear recommendations on where and what to eat, in order to avoid more complex situations, such as the illness of a volunteer.



#### GOOD PRACTICE:

The organisation Conviventia in Colombia has coordination for the volunteer area which prepares 2 or 3 months in advance, in order to plan with the team all the needs, budget and time line for the arrival of the volunteers.

**3.2 Reception and welcome:** The involvement of the team in the reception and hosting guarantees that the volunteers feel truly integrated and valued. For a good reception and hosting process, we recommend:

- Training the members of the hosting organisation in volunteer policy, so that they understand the importance and relationship to the mission of the organisation.
- Prior to the arrival of a new volunteer it is important that we share the contribution we expect the volunteer to make to the organisation, and the organisation to the volunteer.
- Meeting the volunteer at the airport is a good welcome gesture. To do that, we must provide information in advance regarding reception: Who is going to be waiting for you? Where? What is their contact number? Is there internet or other communication alternatives at the airport?

- Resolve basic logistical concerns before starting the work. For example, we could provide a couple of days after arrival to find rented accommodation or settle in, get to know useful places in the city, such as banks, supermarkets, internet or mobile phone companies, etc.
- Be prepared to give advice to or accompany volunteers to the office over the first few days.
- On the first day in the office we should present the workplace, the various members of the team and reference roles, such as the person responsible for volunteers, who will technically accompany the role or project to be developed, and who is in charge of resolving logistical doubts.
- Promote interaction with the team within our hosting organisation so that they can integrate with the local dynamics. For example, organise joint welcome lunches, and the dynamics of integration and teamwork.

#### TESTIMONY:

“The link with local culture is one of the strongest points from my personal experience... It was a very large organisation in which the majority of workers were local, and it was a very good opportunity to get to know the traditional culture and to have very direct contact with local people and create close ties of friendship, as they were also young people, it was easy enough to be able to interact and the organisation facilitated that, it was a good intervention for that reason”

**Francesc Grau Ortiz**  
EU Aid Volunteer in Cambodia

**3.3 Preparation in the destination country:** As part of the incorporation process, we must complement the Training Programme and preparation prior to deployment by the sending organisation with induction sessions in the destination country which include:

- Country and city of deployment context.
- Organisation context: structure, projects, areas, administrative processes, etc.
- The specific role to be carried out on the ground.
- Information session on protection and security within the specific context (within a period of no more than 24 hours after arrival). In this session we should include: evaluation of risks, evacuation plans and protection administration, including notification of incidents related to protection, the procedures for evacuation and repatriation, the communications structure, contact persons for crisis management and contact information for embassies, police stations, fire stations and hospitals.
- The sharing of other internal policies linked to cross-disciplinary standards: code of conduct, health and safety protocol, equal opportunities and non-discrimination policy, the protection of minors and vulnerable adults.



### TESTIMONY:

“On a general level I think it is very important to have cultural awareness and a strong capacity to adapt; these are competences that should be addressed from the induction processes... Part of the reason an experience is successful is the capacity to be empathetic, to understand the situation in the places we go. From the other side it is also important that personnel in the hosting organisation and the communities in which we work understand the objectives, responsibilities and motivation of the volunteers. It should be a two-way process”

**Ana Aizpúrua**

EU Aid Volunteer in Colombia

Related standards	EU Aid Volunteers Initiative regulatory reference framework
<b>Standard 14</b> Living conditions	Implementing Regulation 1244/2014: Article 18: Induction in the destination country
<b>Standard 15</b> Working conditions	Article 26: Accommodation

## 4

### Development of the intervention

The development of the intervention requires the setting up of a monitoring process for the responsibilities taken on by the volunteers, and the provision of human accompaniment in order to identify and contribute towards resolving the problems that may arise when living in another country. We must develop, in conjunction with the sending organisation, a system of monitoring and performance management, with that aim.

#### Step by Step

The performance management system must include, as a minimum, the following:

**4.1 Initial meeting:** We must set up a meeting in which the hosting and sending organisations review in conjunction with the volunteer the objectives of the results, in order to adapt any flexible elements necessary in the assignation of tasks. In this instance we must set up a working plan which includes dates, responsibilities and tasks, or specific results.

**4.2 Monitoring meetings:** We will designate a person with a higher hierarchical role as responsible for supervising the volunteer. The person in this role must be involved in the tech-

nical tasks carried out by the volunteer, and is responsible for holding periodical monitoring meetings. These times may be used to evaluate and recognise the contribution by the volunteer, and to provide feedback on areas for improvement. Although conversations may occur on a daily basis regarding this matter, it is important, so that volunteers feel that importance is given to monitoring, to set a specific date with a meeting to deal only with progress and to decide if any changes need to be made, which aspects have caused difficulties, etc.

**4.3 Accompaniment meetings:** In addition to the supervisory role mentioned above, it is necessary that the volunteer has a tutor. This person is responsible for holding periodical meetings in order to take stock of their progress, taking as a starting point the learning plan and the assigned tasks. Furthermore, they will cover issues linked to cultural adaptation, conflict management and psycho-social problems, to ensure the well-being, motivation and growth of the volunteer.

**4.4 Intermediate evaluation:** The person responsible for supervising the volunteers in the hosting organisation, in conjunction with the sending organisation and the volunteer, must carry out a joint examination in order to evaluate progress in the proposed objectives and adjust, if necessary, the tasks and the learning and development plan.

## Cross-disciplinary considerations:

Furthermore, during the course of the intervention, it is important to consider as part of performance management the following topics:

**a. Management of responsibilities:** It is important to respect the responsibilities and working hours previously defined by the two parties. In other words, volunteers should not be abused by being asked to take on further responsibilities, or allowed to treat the experience as a paid holiday.

It is important to take into consideration that the volunteers are not full-time workers, and thus should not take on responsibilities that go beyond their roles. If the organisation deems it necessary and the volunteer is in agreement, they may take on these responsibilities provided there is the necessary support from the hosting organisation, in order not to feel “alone” or overloaded.

**b. Continuous learning through practice:** As we mentioned earlier, volunteering is in itself a learning process for both the volunteer, and for the hosting organisation and community at which the intervention is aimed. In order to promote continuous learning, we recommend:

- The use of the learning and development plan as a tool to identify learning objectives and monitor progress. More than completing the tool as a bureaucratic process, the important thing is that it is useful, and when reviewed it allows for identification and reflection on what has been learned.
- The promotion of an exchange of experiences with other people in the hosting organisation’s team who have a similar role to that of the volunteer. This can contribute towards creating greater clarity in the role, or the sharing of good practice in order to speed up the “learning curve”.
- When the project to be carried out by the volunteer involves another person providing continuity, it is important to involve people from the hosting organisation’s team. In that way they

can be involved in the various stages of the management of the project, and learn the essentials for its future sustainability.

- Highlighting from the first meetings the fact that the organisation recognises and values diversity of knowledge, and that the same is expected of the volunteers.
- Reflecting with all the players involved in the volunteer management cycle, including the volunteer, on: How can we learn from this experience?



#### TESTIMONY:

“The volunteers sometimes have more qualifications than those employed by Provida, as it is an organisation that values personal experience much more than diplomas. No difference in behaviour or treatment as a result of this will be permitted”

**Karen Ramírez**

Provida (El Salvador)



#### TESTIMONY:

“The volunteers are going to allow us to extend our possibilities and strengthen local capabilities. We aim that the people who come share with us, but also learn from us”

**Ana Celia Tercero**

Asociación para el Desarrollo Integral de la Mujer - APADEIM (Nicaragua)

- c. Conflict management:** As in all collective processes in which people with different personalities, interests and motivations interact, conflicts may arise on the EU Aid Volunteers programme. For example, misunderstandings due to cultural differences, frustrations regarding the tasks received, problems with sharing accommodation, or non-compliance with the code of conduct. Below are a series of recommendations for managing conflicts in a better way:
- **Common language:** In order to avoid possible misunderstandings due to cultural differences, it is important that we promote clear, constant communication in which there is a common language between the hosting organisation and the volunteer.
  - **Clarity regarding expectations:** Provide clarity with respect to expectations regarding the experience, the code of conduct and accompaniment, as that may avoid conflicts concerning what each person expects with respect to conditions, support and control during the deployment. This implies a high degree of transparency prior to deployment regarding what the volunteer will find as the country and organisational context. Furthermore, it is important that when explaining the code of conduct, it is made clear what each point refers to and the consequences of non-compliance.



### TESTIMONY:

“There have been difficulties with some people who have come here because they were unclear about what they were coming to or why they were coming, and the context, the contexts regarding volunteers have to be looked at very carefully”

**Ana Celia Tercero**

Asociación para el Desarrollo Integral de la Mujer - APADEIM (Nicaragua)



### GOOD PRACTICE:

The organisation Alianza por la Solidaridad - Haiti, pointed out that it is important to speak clearly about the expectations regarding accompaniment. For example, make it clear that it is necessary to have constant communication and information in order to take action in the event of an emergency, but that this does not imply that the hosting organisation wants to have full control over the volunteers' lives.

- **Accompaniment roles:** As previously mentioned, during reception the reference roles for the volunteer must be made clear: Who will provide technical monitoring to the role or project to be developed? Who is in charge of resolving logistical doubts? Who will provide accompaniment in matters of adaptation or conflicts? Furthermore, we must ensure that these people have the necessary time and competences in order to provide comprehensive accompaniment to the experience of the volunteer.



### TESTIMONY:

“There were situations which could have been resolved much faster if the right person had arrived sooner”

**Yasmina Mitrovic Arenal**

EU Aid Volunteers in Mauritania

- **Motivation:** Both the sending organisation and the hosting organisation (in particular) must be well aware of the various motivations that have drawn a person to want to take part in the EU Aid Volunteers Programme. This allows us to provide better monitoring and provide support in the event of difficulties in this area.
- **Trust and listening:** We must create close, periodical times to build trust, respect and horizontality, where the volunteer can share their disagreements or conflicts, and the tutor listens actively in order to provide feedback or support. If there are no times set aside to speak about disagreements, then possibly the volunteer will express themselves through attitudes of annoyance or demotivation, and will share these with others in the environment who do not have the capacity to resolve them.

During these times it is important to find out how the volunteer feels with their tasks and responsibilities. On many occasions there are disagreements or conflicts associated with a lack of clarity or motivation regarding the role to be filled. Furthermore, there may be highs and

lows throughout the experience, and so the continuous willingness and capacity to generate trust are key characteristics which should be strengthened in the tutor.

- Communication with the sending organisation:** Although the responsibility for the closest daily monitoring and accompaniment falls to the hosting organisation, the volunteer will in addition have other coordination and accompaniment times with the sending organisation. Depending on the skills of the people in charge of the accompaniment, affinities or methodologies of these sessions, the information received by the sending organisation may be different to that handled by the hosting organisation. In order to provide better accompaniment and better understand possible conflicts or disagreements, it is important to create times with the sending organisation that facilitate “triangulation of the information” and joint decision-making regarding how to manage more complex conflict situations.
- Taking decisions:** It is important to have a responsible person who has a neutral role, and who, in the case of conflict between volunteers or between one of them and the hosting organisation, can mediate, intervene and take decisions without allowing time to pass. Good conflict handling begins by not ignoring or minimising it, but by managing it in time by speaking to the parties involved and taking decisions in accordance with the management policies of the sending organisation.

If there is a serious breach of the code of conduct by a volunteer, then the procedure would involve early return and, if necessary, notification of their conduct to the professional organisations or relevant authorities.



#### LESSON:

The organisation Asociación para el Desarrollo Integral de la Mujer - APADEIM in Nicaragua learned the importance of making expectations clear and dealing with conflicts on one occasion when they received volunteers who did not identify with the organisation, did not want to respect internal procedures, and talked about their disagreements at times that were inappropriate.

Finally, the conflict was resolved by holding a meeting with those involved and taking the decision to return the volunteers early.

Related standards	EU Aid Volunteers Initiative regulatory reference framework
<p><b>Standard 17</b> Integrity and code of conduct</p> <p><b>Standard 12</b> Supervision and management of performance</p>	<p>Implementing Regulation 1244/2014:</p> <p>Article 19: Supervision and management of performance.</p> <p>Article 21: Tutoring</p> <p>Article 31: Monitoring and evaluation of the specific performance of EU Aid Volunteers</p> <p>Delegated Regulation 1398/2014:</p> <p>Article 17. Integrity and code of conduct</p>

# 5

## Exit

Once the intervention is over, it is necessary for us to close the volunteer management cycle, which will allow us to recognise the achievements and contributions of the volunteers, while evaluating the experience in order to learn lessons.

### Step by Step

**5.1 Final evaluation meeting:** The sending organisation and the person in charge of supervising from the hosting organisation (hierarchical superior), in conjunction with the EU Aid Volunteer, must hold a final information session in order to evaluate and provide clear information on the results of the mission, the achievements of the volunteer based on the objectives of the assigned tasks and the learning and development plan. It is the ideal moment to obtain recommendations or lessons from the experience, and to give an account and a professional closure to the mission.

#### For this meeting we recommend:

- Holding a private meeting in a trusted environment in order to recognise and express gratitude for the contribution to the organisation, and to evaluate the experience from the point of view of the volunteer and the hosting organisation.
- This is a two-way evaluation process. It thus allows the sending and hosting organisations to receive further feedback from the volunteers at the end of each cycle as essential input in order to continuously improve the implementation of the volunteer management cycle.
- It should not be limited to a numerical score for each aspect of the evaluation, but should develop an explanation of the reason for each score.
- While the certificate accrediting satisfactory participation in the initiative is a responsibility of the sending organisation, the hosting organisation may be willing to write a letter of recommendation for the volunteer that facilitates access to other work, study or volunteering opportunities.



#### TESTIMONY:

“In the hosting organisation there was an open mentality when listening to feedback and criticisms, and a desire to learn from that. To close the experience there was a meeting with all the volunteers, and later an individual meeting to deal with more personal matters”

**Francesc Grau Ortiz**

EU Aid Volunteer in Cambodia



### GOOD PRACTICE:

El Centro Boliviano de Estudios Multidisciplinarios - CEBEM notified the volunteer at the closing meeting that they were willing to send a letter of recommendation or reference. However, they did not present it at that moment, in order to be able to adapt in to the needs of the moment when required.

**5.2 Farewell and acknowledgement sessions:** We recommend the creation of a farewell session which allows acknowledgement of the volunteer at an internal level, with other colleagues from the hosting organisation. Depending on the time available and the culture of the hosting organisation, these farewell sessions can be held in many different ways. For example, by making an announcement at a team meeting, sending an acknowledgement and farewell email with copies for the entire team, organising a team lunch or a farewell celebration.

Furthermore, and particularly when it is the explicit desire of the volunteer, we recommend that the organisations (both hosting and sending) find ways in which to keep in touch. For example, by sending newsletters or invitations for future talks or activities promoting volunteering.



### TESTIMONY:

“The management team expressed gratitude for the work done, and to the sending and hosting organisations. There was a party and farewell in which the director publicly expressed gratitude for the work done by each person”

**Francesc Grau Ortiz**

EU Aid Volunteer in Cambodia



### TESTIMONY:

“It is an emotional time in which there is a recap of the work done from start to finish. The volunteers express what they have experienced. It is a very “natural time with others from the team, as they are now part of that team. It is a farewell. A moment for camaraderie. From tears to pasties”

**José Blanes**

Centro Boliviano de Estudios Multidisciplinarios - CEBEM (Bolivia)



### TESTIMONY:

“What is most valued is recognition from your colleagues. Seeing the local team recognise your work allows you to see the impact you have made”

**Eleonora Bitocchi**

EU Aid Volunteer in Haiti and Colombia

Related standards	EU Aid Volunteers Initiative regulatory reference framework
<p><b>Standard 3</b> Recognition</p> <p><b>Standard 18</b> Final briefing meeting</p>	<p>Implementing Regulation 1244/2014:</p> <ul style="list-style-type: none"> <li>Article 19. Supervision and management of performance.</li> <li>Article 23. Support at end of mission and after deployment</li> </ul> <p>Delegated Regulation 1398/2014:</p> <ul style="list-style-type: none"> <li>Article 6. Professional acknowledgement</li> <li>Article 7. Social acknowledgement</li> </ul>







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# EU Aid Volunteers

We Care, We Act



Alianza por la  
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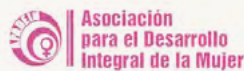
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Αλλάζουμε ζωές, αλλάζουμε τον κόσμο

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— REALIZZA IL CAMBIAMENTO —



RELIGIOSAS ADORATRICES