CRS Guide to Working with Volunteers

This guidance document is designed to help country programs address programmatic issues surrounding volunteer engagement in our work.

CRS GUIDE TO WORKING WITH VOLUNTEERS

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ACKNOWLEDGMENTS

1. INTRODUCTION

Catholic Relief Services (CRS) has a sixty-year tradition of working in partnership with the local Catholic Church, local organizations, communities and people. Partnership with volunteers is critical to CRS' work. They deserve the same respect and support as our institutional partners.

Volunteers perform invaluable services in projects across all sectors in which CRS works. Many CRS-supported and partner-implemented projects* rely heavily on community volunteers to achieve project objectives. Although volunteers are integral to the success of many CRS projects, depending on the project, they may be recruited, managed and incentivized differently at times even within the same country.

> ***Volunteers may have different titles:***
>
> **Community Health Worker**
>
> **Health Promoter**
>
> **Village Health Worker**
>
> **Home Visitor**
>
> **Mentor**
>
> **Peer Educator/ Promoter**
>
> **Caregiver**

In October 2008, the CRS headquarters-based HIV Unit held a "CRS Orphans and Vulnerable Children (OVC) Expert Consultation" in Baltimore, Maryland, USA. During this consultation, interested CRS HIV technical advisors agreed to work together to develop this guidance document **to harmonize the agency's approach to working with volunteers**. The goal was to provide a framework to help country programs address programmatic issues surrounding volunteer engagement in our programs (OVC or other).

Even though volunteers are essential to much of CRS' work, standardized guidance on volunteers is absent. This document is intended to fill that gap. The authors hope that the guide will improve volunteer wellbeing and performance, and in turn the wellbeing of all whom we serve.

The primary audiences for this publication include those involved in the design and management of projects including volunteers:

- At the country program level: Heads of Programs, Project Managers, partners and others involved in the design, implementation of projects involving volunteers

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* We acknowledge that CRS does not actually implement projects (except in emergency settings), but rather it is CRS' local **partners** who are implementers. For the sake of simplicity, throughout this document we will use the simplified term "CRS Projects" which in reality refers to "CRS-supported and local partner-implemented" projects.

- <u>At the regional level</u>: Deputy Regional Directors for Program Quality, Technical Advisors

- <u>At headquarters level</u>: Technical Advisors, Business Development Team Specialists, and others involved in project design or implementation

HOW THE GUIDE IS TO BE USED

This document is intended to provide information for CRS country program staff and others who work with or who are planning to work with volunteers in their programs. It is not meant to be prescriptive, but rather to be a guide which is to be adapted to local contexts. Figure 1 outlines some of these chapters which often follow a chronological order. Individuals may want to reference the document when preparing new project proposals involving volunteers. The document covers several key aspects:

- Chapter 2 provides a brief overview of volunteers in development, including within CRS;

- Chapter 3 discusses the various roles and responsibilities of volunteers;

- Chapter 4 presents information around incentives/remuneration;

- Chapter 5 provides an overview on recruitment issues;

- Chapter 6 delves into volunteer training;

- Chapter 7 discusses the importance and factors

Determine project's volunteer needs (Chapter 3) → Establish incentives (Chapter 4) → Recruit volunteers (Chapter 5) → Train volunteers (Chapter 6) → Care for volunteers (Chapter 7) → Supervise and manage (Chapter 8)
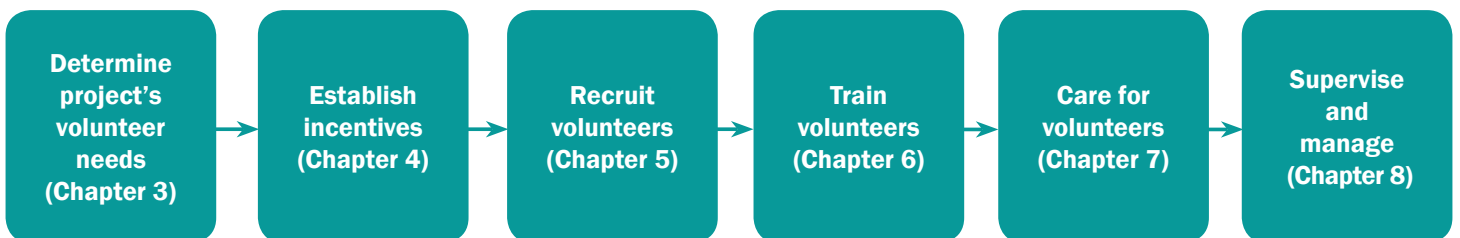
Figure 1. Some key steps to incorporating volunteers into a project and their associated chapter numbers.

2. VOLUNTEER BACKGROUND

WHO ARE VOLUNTEERS?

Although there are numerous definitions and terms used to describe volunteers, for the purpose of this document we consider volunteers to be: **individuals working on behalf of others (not as an employee), in particular lay persons, who do so without receiving payment for work performed.**[*]

Some volunteers may receive a stipend. A **stipend** is distinct from a **wage** or **salary** in that it is not an exchange of money for services, but rather a payment to defray an individual's expenses that allows them to undertake a role that is normally unpaid, or voluntary.

Stipends are usually lower than what would be expected as a permanent salary for similar work. This is because the stipend is often complemented by other motivating factors such as opportunity for personal development, recognition from the community, or personal access to work tools (e.g., a bicycle).

Stipend	Salary
• Usually small amounts of money; can be given once or on a regular basis. • May be regulated by national volunteer policies • Provided to a volunteer	• Money provided on a regular basis in exchange for an agreed upon service. • Regulated by local labor laws. • Provided to an employee

Volunteers often provide services to people living in a specific geographic area, very often the same area in which they themselves live. Volunteers also often serve on a part-time basis, as their work to better their communities is not intended to serve as their source of livelihood.

WHAT KINDS OF THINGS DO VOLUNTEERS DO?

Among other things, volunteers may:

• Attend trainings which help prepare them for their role as a volunteer

• Conduct group meetings to learn the needs and views of the community

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[*] Stipend description adapted from: "Merriam-Webster" Merriem-Webster, Incorporated, accessed January 24, 2012, http://www.merriam-webster.com/dictionary/stipend.

- Conduct education campaigns to improve community knowledge on target topics

- Visit individuals in their homes to provide one-on-one support

- Refer individuals to other service providers

- Gather data for monitoring and evaluation purposes

ADVANTAGES OF INVOLVING VOLUNTEERS IN CRS PROJECTS

Volunteers bring many assets to CRS projects. In addition to the time and direct services they provide, they also serve to connect community members with the projects they represent. They often bridge language barriers and inform cultural considerations. They are often better positioned, as a community member, to provide feedback to project staff and to advocate for community needs. Finally, they may serve as a resource for communities long after a project is complete which enhances the sustainability of project objectives.

VOLUNTEERS AND CRS

Two Catholic social teaching principles, fundamental to how CRS operates in the world, guide CRS' relations with volunteers. The first, *subsidiarity*, tells us that no one should perform a task which can be handled more effectively by people who are closer to the problem and who have a better understanding of the issues. Volunteers, who most often come from the communities in which they serve, often possess invaluable knowledge of local language and customs that many others may not. The second, *solidarity*, is a reminder that those in need, those who help them, and those who support the volunteers are one. This interconnectedness requires our recognition of the need to ensure adequate support for volunteers.

CRS' recognition of the invaluable role of volunteers, as well as its obligation to collaborate in solidarity with those in need and those who serve them, results in an agency that relies heavily on support from its volunteers. CRS engages volunteers across all sectors of project activity including health, HIV, agriculture, peacebuilding, education, water and sanitation, and microfinance.

In order to capture the significant contributions of volunteers as well as to support their work, CRS has made volunteers a key subject of its operations research.[*] Examples include:

- Needs of home-based care volunteers in Zambia[1]

- Characteristics of OVC volunteers in Cameroon[2]

- Feasibility of community volunteer use of cell phones for beneficiary monitoring in Tanzania[3]

* Operations research is a data collection and analysis process which uses scientific, systematic methods to evaluate development projects. Unlike traditional research, operations research is more applied, with an ultimate goal of improving program quality, assisting CRS partners in documenting promising practices, and ultimately to better serving the targeted communities.

3. VOLUNTEER ROLES AND RESPONSIBILITIES

Engaging volunteers requires clear definitions of the volunteers' roles and responsibilities to ensure a) appropriate service delivery, b) intervention quality, c) beneficiary safety, d) volunteer safety, and d) volunteer fulfillment.

Depending on the nature of the project, volunteers may have roles as caregivers, supervisors, coordinators, team leaders or any combination of the above. A series of five steps may be followed (see Figure 2) to elaborate a volunteers' role and responsibilities and to determine an appropriate workload.

These include the following:

1. Identify tasks
2. Estimate time needed to perform tasks
3. Estimate volunteer time available
4. Determine volunteer to client / household ratio
5. Determine number of volunteers needed and/ or clients to be served
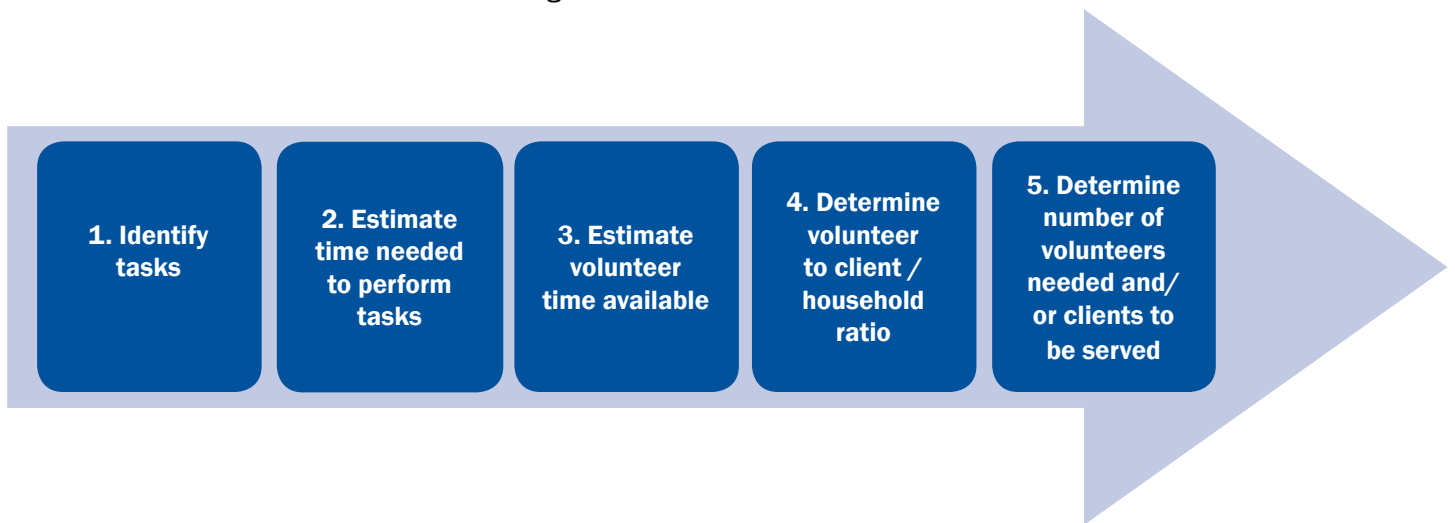
Figure 2. Steps to elaborate a volunteers' role and workload.

Figure 3 below uses a growth monitoring intervention to illustrate how this can be done. Details on how to calculate figures for each chapter are shared under descriptions of each task.

- Identify households with children 5 years old and younger
- Weigh and measure children
- Provide feedback and advice to parents and caregivers
- Facilitate appropriate referrals
- Travel to community sites
- Record data, write report

- 10 hours/month (based on general employment status in the community, household responsibilities, etc. or national guidelines)

1. Identify tasks

2. Estimate time needed to perform tasks

3. Estimate volunteer time available

4. Determine volunteer to client / household ratio

5. Determine number of volunteers needed and/ or clients to be served

- Monthly monitoring
- Approximately 2 hours per month per household (Approximately 4 children/ household)

- Use sample formula for calculation: 10 hours/month [divided by symbol] 2 hours/ household/month= 5 households per volunteer

- Project needs to serve 3,000 children under 5 years
- 5 households/volunteer/ month X 4 children in a household=20 children per volunteer
- 3000 children to be served [divided by symbol] 20 children/volunteer=150 volunteers needed

Figure 3. Growth monitoring example using the five steps to elaborate a volunteers' role and workload.

1. IDENTIFY TASKS TO BE PERFORMED

The first step during the project design phase is to establish a realistic list of specific tasks to be performed by the volunteers. These tasks may be based on such factors as the needs of the target population, the educational abilities or skill sets of the volunteer, and/or the country's national volunteer policies in the service area (e.g., health, agriculture, finance, water and sanitation, etc.). This analysis will help to ensure that volunteers are assigned tasks which are appropriate to their skill level, feasible to accomplish and consistent with government, donor and CRS policies.

> ### The Importance of Knowing National Volunteer Policies
>
> **Example: A project planned for volunteers conducting home visits to treat young children with fever; however, the national policy in that country forbade volunteers to administer any type of medication. This resulted in the need to quickly rework the project design and to ensure that all stakeholders were informed and in agreement with the new plan. Thus, it is important to ensure that the list of volunteer activities is permissible under national, donor and CRS policies.**

2. ESTIMATE TIME NEEDED TO PERFORM TASKS

Once volunteer tasks are defined, the next step is to estimate how much time a volunteer will need, on average, to complete a particular activity. Factors to take into consideration include the time needed for:

• Activity preparation (e.g., packing home visit kits, paperwork)

• Transport to/from the activity site and between sites, particularly when long distances are involved

• The actual activity (e.g., home visit, community education session)

• Any necessary follow-up work (e.g., report writing, speaking to a supervisor)

• Frequency of the service (e.g., daily, weekly, monthly).

Client-related Variables	Context-related Variables
Services needed	Population density
Average time to perform service/s	# of clients in need of the service
Service frequency needed	Transportation options
Time-sensitivity of needed services	Terrain

3. ESTIMATE AMOUNT OF TIME AN INDIVIDUAL IS AVAILABLE TO VOLUNTEER

It is important to keep in mind that the work expected of the volunteer should not interfere with their family and household responsibilities. Someone with regular employment or other responsibilities may be willing to volunteer an average of one to two hours per week. However, in an impoverished area an unemployed volunteer may be willing to work longer hours (up to 20 hours per week) in exchange for various incentives. Please see Chapter 4 for more information on incentives.

Volunteer-related Variables
Household, family or other responsibilities
Employment status
Experience
Physical health and stamina

4. ESTIMATE VOLUNTEER TO CLIENT/HOUSEHOLD RATIO

The last step is estimating how many clients or households a volunteer will be able to serve. It is important to note that no "standard" ratio exists. Some countries may have national policies that suggest a volunteer to client ratio. For instance, in one African country, the Ministry of Health suggests a ratio of one volunteer to five households for growth monitoring interventions. In this case, since it is likely that each household will have more than one child in the under-five age bracket, assigning five households to a volunteer might imply a ratio of one volunteer to as many as 20 children (1:20). This is considered feasible in this case because the frequency of growth monitoring activities is once a month.

However, in projects providing home-based care for the chronically ill, a volunteer may be expected to help the client with basic hygiene tasks (e.g., bathing, cooking and feeding) which might take several hours to complete.

Furthermore, these visits are likely to be daily and the volunteers might only be able to see a maximum of one or two clients a day. In this case the volunteer to client ratio would be one to two (1:2). When establishing the volunteer to client ratio, it is important to be realistic about volunteer expectations in addition to compliance with national policies.

After national policies are researched, project tasks identified, and volunteer availability has been estimated, the volunteer to client/household ratios can be established. As an example, the growth monitoring intervention mentioned above will be used as an example of how to calculate the ratio:

Basic Ratio Formula:

# of households (or clients) per volunteer =

$$= \frac{\textbf{Approximate \# hours a volunteer is available per month}}{\textbf{Approximate \# hours required of volunteer to perform service}}$$

Formula applied to the growth monitoring example above:

# of households per month per volunteer =

$$\frac{\textbf{10 hours per month}^{*}}{\textbf{2 hours per household per month}}$$

= 5 households per month per volunteer or 1 volunteer for every 5 households (1:5)

5. DETERMINE NUMBER OF VOLUNTEERS NEEDED AND/ OR CLIENTS TO BE SERVED

Once a volunteer to client or household ratio is established, the number of volunteers required for the project can be determined based on the target population for service. Or, if the project will have a limited number of volunteers, the client population may need to be reduced in order to ensure adequate coverage.

*Note: all numbers in these examples are illustrative

a) If you have a "fixed" target population:

Step 1: If you have a project, for example, where you intend to serve 3,000 vulnerable children (VC) per month, you can estimate the number of volunteers needed to serve these VC. First, determine the volunteer to VC ratio:

# of VC per volunteer =

Estimate 30 hours of volunteer time per month*

—————————————————————

Estimate average of 1 hour per VC per month

Volunteer to client ratio = # of VC per volunteer = 30

Step 2: Knowing that one volunteer can properly serve 30 children, and there are 3,000 children in the project, you will need to engage at a minimum 100 volunteers (3,000 children divided by 30 per volunteer):

# of volunteers needed =

3000 children

—————————————

30 children per volunteer

# of volunteers needed = 100

b) If you have a "fixed" number of volunteers:

Step 1: Based on past project experiences, partner information, etc., you may already have an idea of the number of volunteers that are likely to be available for your project. If this is the case, then you can use this information to more accurately determine the number of clients that you can feasibly serve. Again, first determine the volunteer to VC ratio:

# of VC per volunteer =

Estimate 30 hours of volunteer time per month

—————————————————————

Estimate average of 1 hour per VC per month

# of VC per volunteer = 30

Step 2: In one particular project area, you estimate that you could recruit 150 volunteers for a particular project. If the volunteer to VC ratio is 1 volunteer: 30 VC, then the project could anticipate serving 4,500 VC (150 volunteers multiplied by 30 VC per volunteer).

# of VC that can served =

150 volunteers available * **(30 VC per volunteer)**

# of VC that can be served=4,500

*Note: all numbers in these examples are illustrative

How much to over-recruit?

- You will likely want to recruit about 10-20% more volunteers than the actual number you need as some volunteers may drop out or may be otherwise inactive

- Over-recruiting will allow you to postpone re-recruitment and the second round of training;

- However, try to avoid recruiting so many volunteers that they become bored due to under-utilization, or that their numbers overload the management structure

4. MOTIVATION AND INCENTIVES

The World Health Organization describes incentives as a way to "motivate effort and encourage volunteers to improve and sustain their performance in the community." Factors that motivate volunteers can be both intrinsic and extrinsic. Intrinsic factors include feelings of empathy, altruism, religious convictions, community norms and family obligations. Volunteers might also be motivated by external factors like recognition by community members and authorities, ambitions to get job opportunities, material and financial rewards and acquiring knowledge and skills. While there are ongoing debates concerning which of these factors are critical in promoting the spirit of voluntarism, in reality volunteer motivations can be emotional, psychological, or material; hence, combinations of approaches need to be considered to ensure sustained commitment from community volunteers in development contexts.

CRS recognizes the importance of using diverse incentive approaches; to this end, incentive choices should depend on the context, resource availability, prior volunteer management experience, the nature of volunteers' responsibilities, etc., to motivate community volunteers. Incentives are commonly classified into monetary and non-monetary (in-kind and intangible) incentives, both of which have advantages and disadvantages (see Figure 4).

Monetary Incentives

Non-Monetary Incentives
- **In-kind**
- **Intangible**
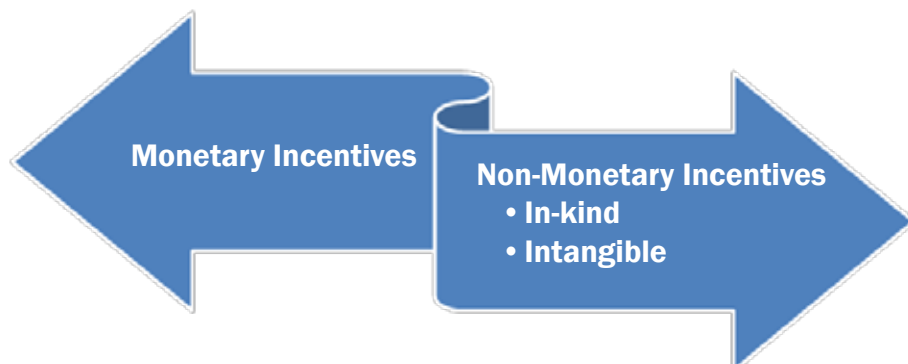
Figure 4. Common classification of incentives.

A. MONETARY INCENTIVES

The term "monetary incentives" generally refers to money given to volunteers from time to time or on a regular basis. This may also be called a "stipend." The amount may range from being a low (but symbolic) stipend to higher amounts. From the volunteer's perspective, an appropriate, respectful, and regular stipend may supplement other income. Research suggests that the main advantage to

cash incentives is that they typically result in lower attrition rates among paid community volunteers.[5] Long-serving volunteers often become more efficient over time and may be able to take on other tasks such as in-service training of new volunteers. The need for training replacement volunteers is decreased, thus reduced attrition is both cost-effective and cost-saving.

Cash incentives may also be tied to revenues from project activities, including drug sales, commodity monetization, services fees, etc. In this case, volunteers may be entitled to receive a small percentage of the sale in addition to having access to the same products at discounted rates.

Although not an "official" monetary incentive, a volunteer may consider a work tool such as per diem or travel allowance to be a monetary incentive. This is because a volunteer might manage the money in order to save some of it for personal use (e.g., not eat a meal, or combine a trip for personal use with one for volunteer work).

Providing volunteers with a stipend can have significant budget implications. It is important to consult with other stakeholders in the project area before opting to provide monetary incentives. As much as possible, trying to harmonize approaches may help reduce unnecessary attrition to/from the CRS-supported project to/from another project in the same area due to differences in incentive packages.

Sometimes, the source of volunteers' payment can be the government, non-government organizations (NGOs), for-profit companies, and even the community. For instance, an NGO may create community revolving fund schemes or other type of community-based credit systems to generate volunteer cash incentives. In countries with decentralized government systems, local government structures have experimented with alternative financing approaches, including community insurance plans, low-interest loans, Savings and Internal Lending Communities (SILC) or similar community level saving and microcredit schemes, income-generating activities and community contributions. A drawback to community-funded volunteer stipends is that the poorest households might not be able to contribute, which may exclude them from the service. This situation would have the potential to further isolate and marginalize the very same population we aim to serve.

B. NON-MONETARY INCENTIVES

The term "non-monetary incentives" refers to goods other than money given to volunteers from time to time. These goods may have a hidden monetary or sentimental value and could become an asset to the volunteer. Since a monetary incentive may be insufficient (or non-existent), other types of incentives, often intangible, are critical to job satisfaction and fulfillment. These incentives include a good relationship with project staff, perception of personal growth and development opportunities, training, and peer support. Furthermore, relationships with community members, other volunteers, and development

partners are also critical and may be as simple as a community leader's recognition of a volunteer's good work during a community gathering.

"In-kind" Incentives*

Motivating community volunteers through in-kind incentives has its advantages. These types of incentives are less prone to comparison with salaried employees' levels of compensation. In-kind incentives tend to be material goods with everyday practicality for the volunteer. Community volunteers can be paid in-kind with cooking utensils, food, housing materials, and assistance with agricultural work and child care. Most successful in-kind incentives are planned and implemented by the community.

As with field allowances for per diem or transportation, some volunteers may perceive work tools to be an in-kind incentive. These items are usually provided to volunteers to facilitate or make them more comfortable during the implementation of his/her tasks. Some examples of in-kind incentives are bags/totes, agriculture tools, raincoats, backpacks, boots, umbrellas, and bicycles.

"Intangible" Incentives

Intangible incentives tend to make volunteers feel appreciated and desired by the program. The World Health Organization defines intangible incentives as "incentives that cannot be quantified in monetary terms," such as "satisfaction with being a volunteer; recognition by the community; sense of personal achievement and/or altruism."   As they are intangible, it is nearly impossible to calculate their monetary value; however, they play a pivotal role in motivating volunteers and should be integrated into volunteer motivation packages.

Examples of In-kind Incentives
Supporting volunteers' children with educational materials.
One-time or periodic in-kind gifts (e.g., food, clothing, household utensils, agricultural tools, etc.).
Mobilizing communities to assist volunteers with periodic farm activities or domestic chores.
Considering volunteers as beneficiaries of project activities and commodities (e.g., food aid, bed-nets, potable water sources, agricultural inputs, credit facilities, etc.).
Transfer of ownership of project equipment to the volunteer after a certain amount of time volunteering (e.g.,two years).

* Please note that some authors classify "in-kind" incentives as a type of monetary incentive. The rationale being that it is a non-cash input which can be given a cash value. For the purposes of this document, however, we are considering "in-kind" to mean a non-monetary/non-cash incentive.

Examples of "Intangible" Incentives

Providing preferential treatment, such as first-in-line treatment at service centers or identity cards that allow volunteers to be seen quickly at clinics.

Sending letters of appreciation to the community volunteers and their families.

Organizing public events and volunteer days to honor volunteer contributions and raise awareness of the positive social and economic changes that occur as a result their work.

Public praise of volunteers by respected community elders/leaders.

Volunteer certificates on completion of a training, to recognize best performing volunteers, and on successful completion of service terms.

Employment opportunities promoting best performing volunteers through career ladders and creating transparent path for professional development and successions.

Showing solidarity with the volunteers during family events (weddings, funeral, childbirth, etc.) as appropriate.

Organizing annual celebrations for the volunteers, where they can be acknowledged by the project staff and/or communities where they work.

Monthly awards, such as "Volunteer of the Month", could provide volunteer recognition.

Christmas cards or personal notes of thanks from senior CRS representatives delivered to the volunteers annually.

Volunteers are invited to give presentations and share their experiences in the capital for special occasions. For example, the "Volunteer of the Month" could be invited to give a reflection during a partnership meeting with CRS or provide opening remarks during a CRS workshop on Catholic social teaching.

What About Work Tools?

Work tools are goods or cash provided to volunteers in order for them to perform their assigned tasks. Projects using volunteers must ensure that volunteers *never* have to pay out of their own pockets in order to complete their assignments. Absence or shortage of work tools may be detrimental to the effectiveness and retention of community volunteers.

Programs that use community volunteers are advised to develop an exhaustive list of relevant work tools and allocate the necessary monies to ensure their acquisition starting from project inception. It is also recommended that clear written guidance on use of work tools be in place and shared with volunteers in advance. The following are items that may be considered work tools, particularly for programming that requires outreach:

• T-shirts, caps, bags and badges that identify community volunteers

• Registers, basic stationery supplied and reporting equipment

• Umbrellas, bicycles, raincoats, and boots to facilitate transportation within the project area and to protect volunteers from weather

• Transportation costs (in the absence of designated project transportation)

• Relevant basic and refresher trainings

• Communication materials for referencing and/or distributing to beneficiaries

• Payment of project related communications, including telephone or any other electronic communications

• Work spaces and basic furniture for office-based activities

• Home-based care kits, first-aid kits or delivery kits, and supplies

• Volunteer updates on policy or procedural changes

• Experience sharing and on-the-job training opportunities

• Exchange visits with other projects (either in-country or out-of-country)

• Referral system

• Effective feedback and communication systems

• Counseling and psychosocial support for community volunteers

Is a Work Tool an Incentive?

Work tools may be perceived as incentives...

...by the volunteer when they have the potential to personally benefit the volunteer. However, when planning, regardless of how a work tool may be perceived by a volunteer, it should still be considered a work tool and not an incentive. True volunteer incentives and motivations must be identified.

Example 1: bicycles are often provided to volunteers to facilitate client access. However, after finishing his/her task, the volunteer may use his/her bicycle to transport people for a fee or to pick-up his/her kids at school.

Example 2: volunteers are often provided with cash to cover transportation costs to attend project meetings. A volunteer may take a route which allows him/her to both attend the meeting and visit a relative or a local market, thus providing an additional personal benefit.

As a reminder:

Incentives

May be either monetary or non-monetary goods given to volunteers in appreciation of their work, such as a stipend allowing volunteer to spend at his/her discretion.

Work Tools

May be either monetary or non-monetary goods necessary for volunteers to perform their tasks, such as bus fare necessary for home visits or quarterly meeting.
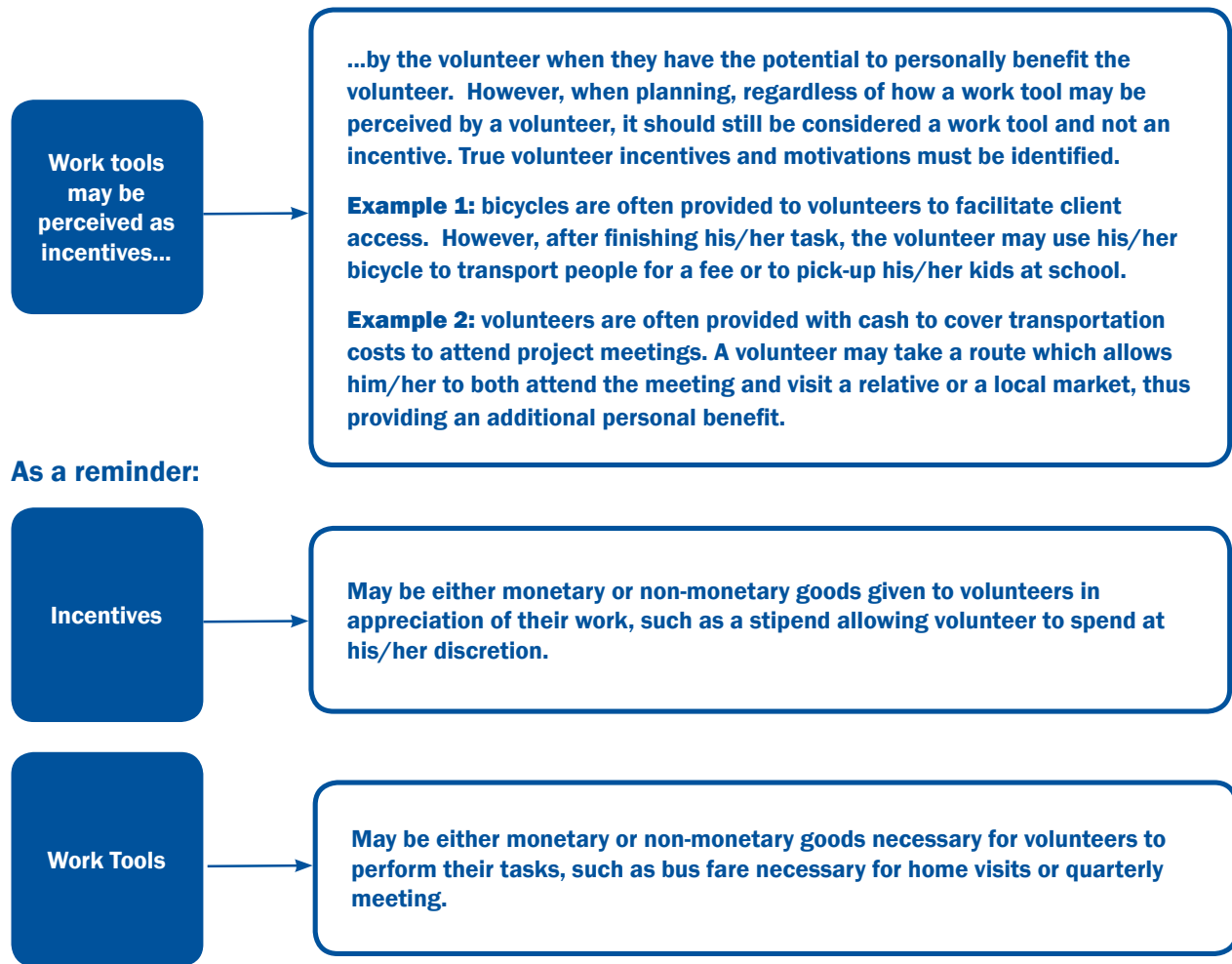
Figure 5 below lists examples of non-monetary incentives as well as work tools to clarify the differences between the two. Finally, Annex A provides more detailed examples of these items as well their budgetary implications.

In-kind Incentives	Intangible Incentives	Work Tools
Health insurance	Recognition and respect	Bicycle Maintenance
Food support	Possibility for professional growth and/or advancement	Handbags
School fees	Exposure to SILC or other	Quarterly Meetings
Hygiene products	Economic empowerment opportunities	Flip Charts
		Books
		Bicycles*
		Cellphones*
		Raincoats*
		Meals during quarterely* meetings
		Trainings*

Figure 5. Sample incentives and work tools.

*These work tools are often percieved as incentives.

5.VOLUNTEER RECRUITMENT

Successful volunteer recruitment is achieved when qualified individuals commit to performing project tasks (detailed in a volunteer agreement or scope of work) in ways that are culturally and linguistically acceptable, appropriate and relevant. Volunteer recruitment follows a series of activities. Once completed, the project will need to re-engage in the process when volunteers resign or the needs of the project change. Please see Figure 6 below.

Establish recruitment committee	→	Identify volunteer candidates	→	Select volunteers	→	Secure volunteer agreement	→	Plan for re-recruitment

Figure 6. Steps required for volunteer recruitment.

It is important to establish a recruitment committee which ideally will have representation from all key stakeholders such as project staff, community members, and the target population. A CRS staff member could also have representation in the committee.

Committee members may find it helpful to develop a **recruitment plan**. Involving someone from Human Resources, if possible, can be very helpful in designing the process. The plan should define the responsibilities of recruitment committee members, outline recruitment dates and the advertising strategy, and explain the process that will be used for volunteer selection, including the establishment of the selection criteria.

IDENTIFICATION OF VOLUNTEER CANDIDATES

The way volunteer candidates are identified varies. Some individuals take initiative by responding to a volunteer announcement or contacting project organizers, while others are identified by key stakeholders and requested to volunteer. Volunteers who self-select may be motivated by a particular interest (e.g., newborns, HIV or hygiene) and may actively seek out volunteering opportunities that allow them to pursue their interest.

Those recruited by a project may be prominent individuals in the community

or hold particular attributes that the project needs. Some individuals may be identified by community members as leaders and/or role models in their community. Recruitment processes vary from being very informal to highly structured and formal.

Know local volunteering practices!

Questions to ask:

What volunteering practices already exist in the community?

Does the community have an existing list of volunteers willing to be called upon?

What organizations operating in my project area might also be using volunteers?

Are there existing volunteers currently working with groups in a church or community program?

Why?

- Lack of knowledge of volunteering practices may result in inefficient use of time and resources
- Lack of coordination with other organizations might cause volunteer migration from one projrect or organization to another, which is ultimately costly and disruptive

VOLUNTEER SELECTION

Regardless of how they were identified, volunteers will need to meet certain selection criteria. The criteria will vary depending on the context, project, community, and national guidelines, among other factors. When using volunteers, it is important to be aware of these factors as well as the community's perceptions of volunteers. Communities and beneficiaries to be served by volunteers must be made aware of the roles and responsibilities of volunteers and vice versa. In some instances, community leaders play critical roles in the identification and final selection of volunteers. Where applicable and appropriate, the community members and leaders should be part of developing the criteria for volunteer selection. Depending on the objectives of the project, it may be appropriate to aim for a representation of the community considering gender, ethnicity, faith and age amongst one's cadre of volunteers.

On an individual level, the following selection criteria may be useful to consider:

- Permanent residency in the project area

- Willingness to volunteer

- Ability to read and write

- Enthusiasm to learn

- Concern about the welfare of people and/or their community

- Integrity, honesty, promptness, and dependability

- Good standing in community of service

- Good interpersonal and communication skills

- Supported by spouse or partner

- Represents the project target group (e.g., was/is a vulnerable youth him/herself, is living with HIV)

Whereas the above criteria are not exhaustive, it is important to ensure that specific attributes that are important for each community and project are included. It is helpful to involve community leaders in the establishment of volunteer criteria when communities are directly involved in identifying volunteers. Shared ownership will help to ensure that volunteers meet critical pre-requisites.

The recruitment committee should then receive applications, screen applications for eligibility, conduct interviews and, in some cases, administer tests to confirm requisite skill levels (usually literacy or numeracy).[*] The process may require community endorsement, background checks and official confirmation letters. The committee may want to develop an evaluation and scoring system that evaluates all candidates on the same set of criteria. During this process, all committee members should discuss their score results and whether they feel the scores reflect the reality of the candidate.
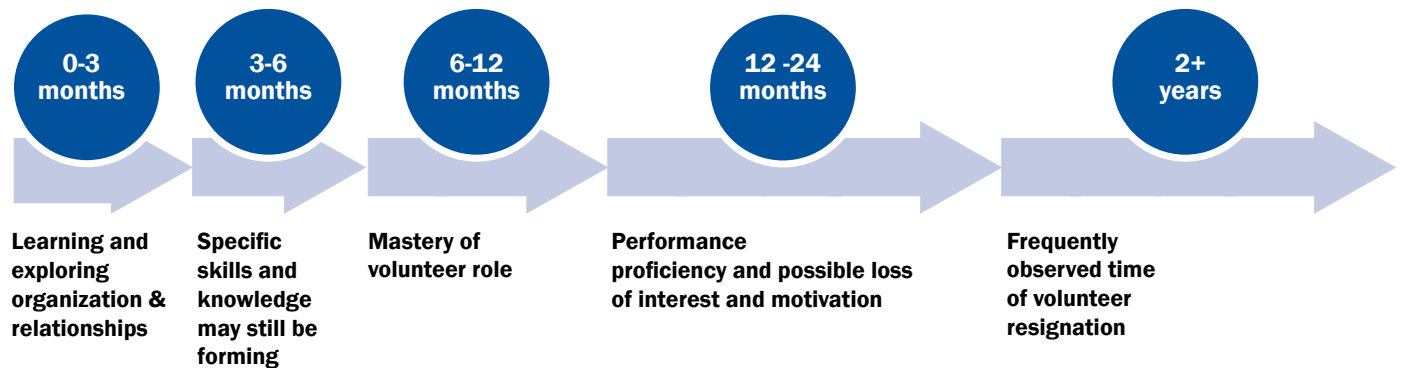
DURATION OF SERVICE AND ATTRITION

Duration of volunteer service varies widely. CRS has worked in communities in which volunteers have participated in community development activities for over a decade. There are also instances in which community volunteers' engagement lasted only a few months. On average, however, many CRS staff observed that attrition escalates markedly after two years of service.[*] Understanding the evolution of a volunteer's experience can help supervisors address the needs of volunteers, helping to keep them engaged, fulfilled and successful in their work.

- During the first three months of service, volunteers generally spend much of their time exploring the organization and relationships. Skills and knowledge specific to the assignment might still be forming by six months and volunteers may need extra reassurance, mentoring, and appreciation for their efforts. Volunteers often achieve mastery of their role between 6-12

months, but in the subsequent months, during the most productive period of proficiency, they may start losing interest and motivation. It is important to discover and use their expertise, and to develop long term plans for their continued service, if applicable. Volunteers often resign after two years. Figure 7 below is a visual representation of the evolution of a volunteer's proficiency as well as interest which has been observed amongst CRS staff.

0-3 months	3-6 months	6-12 months	12-24 months	2+ years
Learning and exploring organization & relationships	Specific skills and knowledge may still be forming	Mastery of volunteer role	Performance proficiency and possible loss of interest and motivation	Frequently observed time of volunteer resignation

Figure 7. Approximate timeline of volunteer proficiency and interest.

Due to the high cost of recruitment and training and to maximize volunteer effectiveness in development programs, CRS recommends that volunteers be requested to serve for 2 to 3 years.[*] As per CRS staff observation and experience, volunteers serving for less than one year may be inefficient, not cost-effective and hence should be discouraged.

VOLUNTEER AGREEMENT

CRS recommends that a written agreement between community volunteers and the implementing partner be signed at the beginning of each service commitment. A sample volunteer agreement is provided in Annex B. The volunteer agreement should specify roles and responsibilities on the parts of both the volunteers and the implementing partner. The following points are a guide to useful content in the volunteer agreement:

• Position description, duration of service and working hours

• Accountability structure and expectations including supervisory/supportive relationships

• Necessary materials and work tools to be provided

• Type of trainings required and possibly to be offered by the project

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[*] Some exceptions to this recommendation would include projects with a one-year funding cycle or emergency projects involving food distribution, shelter construction, or other time-limited interventions which would require services for much less than the suggested 2-3 years.

- Volunteer's duties and obligations while serving their community including adherence to a code of conduct (see box on next page and Annexes C and D for reference documents)

- Specific information about remuneration

- Description of the process* for addressing grievances or ethical concerns, should they arise

- Description of how volunteers can address any significant ethical concerns they may have

- Acknowledgement that such agreements are not legally binding documents nor are they employment contracts

Important: Code of Conduct!

- **The "code of conduct" refers to the behavioral principles or standards developed by project staff that community volunteers are expected to uphold while rendering services.**

- **These are intended to promote self-regulation and guard against intentional or unintentional harm during service provision.**

- **It is strongly recommended that all projects develop a code of conduct and require volunteers to sign it.**

- **New volunteers should be introduced to the code of conduct through a rigorous orientation before starting volunteer activities in the community.**

- **Project staff are also advised to assess volunteer compliance with the code of conduct in a regular manner during their service years.**

- **Annex C provides some examples of topics which may be included in a code of conduct**

- **Budgets should allow for printing copies of the volunteer's code of conduct and include the eventual design, printing, and distribution of a pocket version of the code of conduct. Pocket versions work well as a constant reminder for volunteers. See Annex D for an example.**

* Sometimes referred to as a "grievance policy" in an employment situation

DURATION OF SERVICE AND ATTRITION

Irrespective of the recruitment process, motivation package or work environment, some volunteers will resign from their role as volunteers. Some may experience burn-out while others may drop out due to unavoidable circumstances such as change in family circumstances or relocation. For some, volunteering may serve to gain experience until they are able to obtain a paying job. Hence, projects need to expect and plan for attrition.

One way to delay re-recruitment is to over-recruit during the initial phase of volunteer selection. Knowing that some volunteers may opt out of the project even before they've officially started, others may resign or even abscond once they see what's involved, or others may be simply inactive or unproductive, you may want to over-recruit by 10-20 percent.

An estimate of 10-20 percent[*] may be used to forecast the level of re-recruitment and training needed to maintain a full cadre of project volunteers. If an implementing partner already has experience with volunteers in a specific geographic location, project officers may be able to predict the average time volunteers will remain with a project. This information is useful for estimation of expected drop-out rates and will allow for planning for volunteer replacement and training.[*]

> **Be Prepared for Volunteer Attrition**
>
> **Planning for volunteer drop-out from the beginning of the project is imperative. This means planning and budgeting for additional rounds of recruitment, orientation and trainings!**

Once all replacement volunteers have been identified, an orientation and training will need to be conducted as with all new volunteers. Budgeting for replacement volunteer recruitment activities, orientation and training are therefore key to ensuring adequate numbers of volunteers throughout the life of the project.

VOLUNTEER EXIT INTERVIEWS

Ideally, an exit interview should be conducted with all volunteers who leave the program. Where this is not feasible, interviews can be periodically conducted with serving volunteers to understand what keeps them motivated and to solicit their inputs on volunteer retention. Information gathered either from exit interviews or periodic surveys can be used to help improve overall volunteer management.

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* Drop-out rate, which is equal to the number of volunteers who leave the project divided by the number of volunteers recruited. This figure is based on Catholic Relief Service staff (C. Bishop, J. Thoya, and A. Ferraz de Campos) experiences in the field.

6. VOLUNTEER TRAINING

Volunteers will likely require training to prepare them for their roles in the project. A strong foundational training coupled with continuous updating/improvement of knowledge and skills are critical to project success.

ORIENTATION TO THE PROJECT

Volunteers should first be oriented to the project, organizations involved and the work arrangements. The orientation should include an overview of the project areas, the organizational culture, and key stakeholders. Project staff should again review volunteer roles and responsibilities. A Volunteer Code of Conduct agreement will be explained and all volunteers will need to sign off indicating that they understand behavioral expectations of volunteers towards children and possible disciplinary actions or legal procedures in the event of non-compliance. Grievance procedures and other personnel issues should be discussed at this point. In addition, any necessary paperwork should be completed.

TYPES OF TRAININGS

Volunteer training is designed to build a volunteer's capacity to work with communities to achieve specific program objectives. The types of training should therefore provide the relevant knowledge and skills that volunteers need in order to perform their tasks. An initial training should therefore be conducted at the beginning of the project. Shorter refresher trainings should also be conducted every year – or as frequently as needed to ensure provision of quality services. Refresher trainings can focus on new developments in the field (e.g., changes in ART protocol) and/or on issues that supervisors may have found to be problematic amongst volunteers. A training needs assessment would prove particularly helpful for any refresher training.

In addition, the project needs to plan and budget for at least a second/future wave of initial training, possibly more. "Replacement" volunteers recruited after project start-up would attend this foundational training. They could also be trained through in-service training whereby new volunteers are paired with experienced volunteers for one-on-one instruction and mentoring. This method of training is likely to cost less and may even produce a higher level of new volunteer performance due to the individualized attention.

> ## Common Types of Trainings
>
> **Initial Training:** The primary training provided to a volunteer. This is usually the longest training. An initial training may last two to three days while another may take two weeks or more.
>
> **Refresher Training:** Any training provided to volunteers who have already attended an initial training and who have also been practicing. These may be conducted at any frequency but most often are conducted annually or semi-annually and take place over one to three (or more) days.
>
> **Future Wave(s) of Initial Training:** A complete "initial training" provided to volunteers who have been recruited later on in the project cycle.
>
> **In-service Training:** Training of a new volunteer by pairing her/him with an experienced high functioning volunteer. The new volunteer may accompany this volunteer for an extended period of time.

TRAINING CONTENT

Although the project will have pre-defined training topics, project administrators should ensure that all training content be in compliance with national policies. If possible, trainings should also promote and use existing local government training modules. A standardized training curriculum should be developed/adapted and documented so that it can be used for all waves of training including that of replacement volunteers.

Conducting a training needs assessment will help facilitators to have a better understanding of the trainees' knowledge and skill levels. Ideally, the training needs assessment will seek to understand the volunteers' knowledge levels, any existing gaps, areas of interest and expectations. This information should be gathered at least four weeks before the proposed training. Once analyzed, it will help the facilitators to be better prepared to provide extra (or less) emphasis on particular aspects of the standardized training curriculum.

TRAINING METHODOLOGIES

There are a range of training techniques that can be used to provide variety and stimulate learners. Participatory, action-oriented methods are often very useful for all audiences. It is also important to involve, as much as possible, local authorities in the training of volunteers. Specific training techniques will not be presented in this document, but readers may refer to a listing of effective training methodologies in the "Supplementary Resources" chapter at the end of this document.

7. CARE AND SUPPORT OF COMMUNITY VOLUNTEERS

Community volunteers need to be supported in a variety of ways. Volunteers need consistent and supportive supervision, resources to do their work, and incentives that are fair and equitable. Community volunteers should feel empowered, valued, and respected. Unlike supervision, which is usually focused on ensuring the volunteer meets the organization's or project's needs, support aims to meet volunteers' personal needs. Support needs to be responsive to a volunteer's changing needs over time.
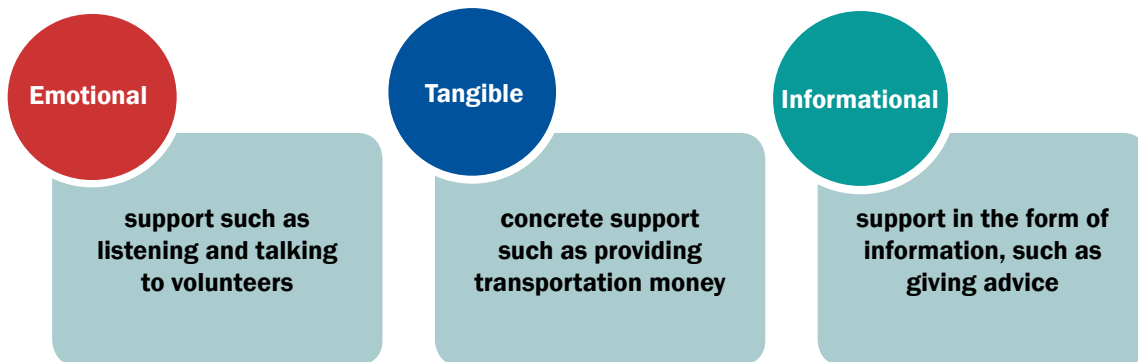
A SOCIAL SUPPORT FRAMEWORK

The well-being of volunteers may be affected by both the primary stressors involved with caring for a client and by secondary stressors in a volunteer's life, such as family responsibilities and economic strife. Addressing the perception of the stressors from the volunteer's perspective through social support can mediate the impact of the primary stressors on the volunteer. While the stressors themselves may not change, social support has been shown to increase the caregiver's overall wellbeing and psychological state. Thus, social support becomes an essential component of community volunteer care.

Social support is multidimensional, composed of structural characteristics such as social network size, frequency of contacts, and social ties, as well as functional characteristics such as the type of support received (including informational, tangible, and emotional support), satisfaction with the support system, and the perceived need for support. See Figures 8 and 9 below. The sources of social support may be varied and can come from informal networks such as family, friends, community members, and/or more formal networks such as paid staff.

Structural Characteristics
- Social network size
- Frequency of contacts
- Social ties

Social Support

Functional Characterstics
- Type of support (tangible, informational, emotional
- Support system satisfaction
- Perceived need for support

Figure 8. Steps required for volunteer recruitment.*

Emotional

support such as listening and talking to volunteers

Tangible

concrete support such as providing transportation money

Informational

support in the form of information, such as giving advice

Figure 9. Types of Social Support

CRS projects can positively influence the amount of social support available to community volunteers.

SUPPORT OPTIONS

Volunteers are individuals with their own unique needs and thus will differ in the types and frequency of support that they require. The best approach for supporting volunteers is to consult the volunteers individually to ensure that they are receiving the support they need. A combination of approaches is often the best solution to ensure that volunteers are supported. Some general promising practices for supporting volunteers include:

1. Designate a primary support contact for volunteers. These primary contacts ensure that the volunteers have someone from the project who is responsible for maintaining regular contact with them. This will ensure that the volunteers know that there is someone who regularly is available to discuss their work and its impact on them as individuals, as well as to acknowledge difficulties in the volunteers' lives (e.g., death in the family). Ideally, this person will not be a supervisor so as not to confuse project monitoring and supervision, but rather will provide a unique focus on volunteers' needs. Some examples of this type of person are: someone from the project (but not a direct supervisor), a

person from the partner staff who works in human resources, a counselor who is affiliated with the project, or a supervisor from another project site. In the absence of other options, a direct supervisor could play this role, however, they would have to be trained not to let the support they offer interfere with their overall rating of the volunteer's performance.

2. <u>Ensure that all volunteers have access to their support person</u> even if they state that they do not want or require support in the beginning. By fostering that relationship from the beginning, volunteers will know that if they do ever need such support it will be available to them. One example of facilitating this interaction would be to invite the support person/s to attend regular project meetings. For example, if volunteers attend a monthly project meeting, 15-30 minutes of that meeting could be dedicated for support contacts to check-in with their assigned volunteers. Additional follow-up support could be arranged as needed. If volunteers are trained quarterly at central locations, then the support contacts could also be present at these trainings to offer support to the volunteers. By arranging regular meetings, volunteers can come to know their support person and will feel more comfortable contacting this person outside of these formal opportunities as needed.

3. <u>Treat volunteers with the same respect as paid employees</u>. Often, volunteers are not included in management decisions or are even informed of changing regulations or policies that will affect their work. This may de-motivate the volunteers and make them feel as though they are not valued members of the team. Instead, volunteers should be included whenever possible in decisions involving their work, and at the very least, informed immediately whenever such changes may occur. Like paid employees, they should be provided with opportunities for professional growth and should have access to accurate letters of recommendation and references for their participation in the project.

4. <u>Acknowledge and praise the work of volunteers</u>. Volunteers often work long hours and give selflessly to the work they do. They should be acknowledged and praised for their work. This can occur on an ongoing basis through supervision and training, but might also be done with special events. These methods not only serve to increase the volunteers' morale within the project, but may also motivate additional social support for the volunteers from within the communities where they work. Further discussion on this topic may be found in Chapter 4 "Motivation and Incentives."

5. <u>Organize group volunteer support meetings</u>. These could occur after a monthly meeting where updated training information is provided, or they could be organized as separate meetings. Regardless, there should be regular occasions for the volunteers to come together in a group to support one another. This provides an opportunity for the project to listen to the volunteers about their work, which may influence the overall project.

6. <u>Encourage informal peer support networks</u>. Volunteers may often live in close

proximity to each other. Linking these volunteers to form an informal peer support network ensures that the volunteers have access to ongoing local support. Volunteers can be paired by geographic location or other factors, depending on the context.

7. <u>Consider a mentoring system</u>. New volunteers may be paired with more experienced volunteers in the community. This provides a mechanism for the more experienced volunteer to augment his or her self-worth by contributing to the training of another volunteer. It also ensures that new volunteers are not thrown into the work on their own, but have an opportunity to transition into the work with a more experienced volunteer.

8. <u>Consider a care model approach for high-stress volunteer assignments</u>. The care model approach distributes the responsibility of caring among several volunteers, thus forming a team to provide the services. This approach may be especially beneficial in high-stress volunteer roles, such as caring for the chronically ill. The team approach ensures that volunteers are always available to respond to the needs of the project, while also providing the volunteers an informal network of support amongst their team.

9. <u>Additional specialized support for high-need volunteers</u>: Some volunteers may require additional social support beyond that provided for the other volunteers in the group. Having a policy in place that denotes whether this will be provided under the project or not is important. Many organizations will provide such specialized support if it is linked to the overall project. For example, a home-based care volunteer may become depressed after witnessing several clients grow physically worse. He or she may not respond to traditional social support and may require more advanced services. In this case, the project may identify possible sources of advanced support for the volunteer.

8. SUPERVISION AND MANAGEMENT OF VOLUNTEERS

To ensure that standards of quality are being met requires systematic monitoring and evaluation of the volunteers' work. Volunteer supervision and management includes a variety of activities. These activities include reviewing and assisting in developing work plans, setting objectives and goals, observing, assisting and providing guidance to the volunteer as appropriate to ensure that the goals are achieved, performance evaluation and rewards are attained as the case may be. In some settings, volunteers in supervisory positions are involved in core management related issues such as volunteer home visitor recruitment and training.

Engaging volunteers in supervisory roles is a way to promote and recognize experienced volunteers. For example, volunteers providing psychosocial support to vulnerable children may be distributed based on geographic units (e.g., parishes). A volunteer may serve as the parish coordinator. Depending on the level of experience, volunteers in supervisory roles generally provide mid-level coordination, on site mentorship and support.

DETERMINING RATIO OF VOLUNTEERS PER SUPERVISOR

Volunteer supervision ensures quality and efficient delivery of services by the volunteer; the higher the complexity of the task, the higher the demand for supervision and follow-up. One supervisor will only be able to support a certain number of volunteers depending on how often and for how long each supervisory visit might take. In the experience of CRS staff, a common supervisor to volunteer ratio is 1:10.[*]   Common factors influencing supervisor to volunteer ratio include:

• Complexity and scope of volunteer tasks

• Volunteer experience and competence

• Distance between supervisor and volunteers

COMMUNICATION LINES AND RELATIONSHIPS WITH RELEVANT FORMAL INSTITUTIONS

An effective communication system for projects that use volunteers should ensure the flow of accurate information that is delivered timely in a culturally

* Personal communication with Catholic Relief Service staff: Ana Maria Ferraz de Campos, Alemayehu Gebremariam and Jackson Thoya (June 23, 2011).

sensitive manner. Most CRS projects that use volunteers cover several distinct communities with different administrative structures and are spread over relatively large areas. Arguably, the biggest challenge to setting up an effective communication system is the different geographic and administrative units with inherent differences in culture as well as the different layers of supervision, monitoring and reporting.

Effective communication lines in this context should ideally be viewed as a web that connects the different units ensuring that information flows horizontally and vertically. Communication in both directions should be clear and varied to prevent problems that might occur in the future.

In order to address the challenges posed by the different administrative structures, it might be necessary to appoint and delegate key staff in the different geographic areas to communicate directly with the local authorities. Increased attention and resources should be allocated to improve communication with volunteer staff in distant areas, especially those in enclave and hard to reach communities. This will prevent delays and avoid misunderstandings that usually stem from fears of exclusion, especially from decision making.

It is important to avoid withholding relevant information from staff simply because they are volunteers. This can lead to misunderstandings, mistrust, the perception of exclusion, and feelings of not being appreciated.

SUPERVISOR ROLES

1. **Delegation** refers to the process of entrusting responsibility from one person to another. Effective delegation improves efficacy and efficiency. Volunteers generally feel motivated when given encouragement and delegated responsibility with authority. Always remember that one of the key reasons people volunteer their services is because volunteering offers an opportunity for personal growth and building self-esteem.

2. **On-site monitoring**, as used here, refers to the process of checking to ensure that the volunteers are carrying out activities as planned. One of the important benefits of site visits is that they provide an opportunity for follow-up. Frequently projects recruit, train and assign duties to volunteers and assume that everything will follow suit. Invariably this does not happen. During monitoring visits, project staff check on the activities of volunteers to ensure that they have received sufficient training, resources, and that their needs are being met.

The following suggestions should be considered when making monitoring visits:

• Plan ahead and inform the field team of visits

• Use a combination of approaches to solicit information (ask questions, review

records for accuracy, compare reports with work plans) and be as unobtrusive as possible

- Meet separately with beneficiaries to discuss their perception of volunteer activity and performance

- Hold meetings with volunteers and give and receive constructive feedback

- Share reports with the key staff and follow up on outstanding issues

3. **Volunteer meetings/peer support.** Coordinating and organizing regular meetings with volunteers under her or his supervision is a very important aspect of a supervisor's role. These meetings help facilitate exchange between volunteers and also give the supervisor a chance to hear from the volunteers about their experiences and challenges.

4. **Performance Management.** The objective of this process is to give constructive feedback on performance. Ideally a volunteer's performance should be appraised at the beginning of the assignment, every four to six months and at the end of the assignment. The frequency of performance management also should be determined by any significant changes in performance, activity, management or work activity.

> **At the beginning of the project, volunteers may spend a fair amount of time participating in trainings, and supervisors may have a busier supervision schedule. Quality improvement checklists are well suited to track volunteer and supervisor performance.**

Appraisal should focus on the following: measuring the level of attainment of the objectives/goals; measuring punctuality, consistency, reliability, flexibility, adaptability, enthusiasm, and interaction with others; ascertaining the effectiveness of the position and whether the volunteer is a good fit for her/his particular assignment; and identifying areas of weakness and need. Ideally, every area of contribution of the volunteer's work should be assessed and feedback offered. This will ensure optimal matching of skills to tasks, appropriate reallocation of tasks as necessary and overall improvement in project performance.

Assessing the actual amount of time individual volunteers contribute to the project on a weekly or monthly basis will also help inform the appraisal process. This information will help staff understand a volunteer's workload. It will also help project staff determine how accurately they originally estimated the time needed for volunteer contributions as compared to the **actual** quantity of time volunteers spend on service delivery. Having this information will help in the design of future projects involving volunteers.

Possible questions* for use during volunteer performance management sessions:

1. What part of volunteering are you enjoying the most?

2. What have you learned over the past four months?

3. What work relationships or partnerships have you built?

4. What actions have you taken over the past four months to achieve the objectives presented in your scope of work?

5. What are you struggling with? What can we do about this?

6. What will be your main focus for the next four months?

7. Do we need to make changes to any volunteer objectives?

8. What can I do to support you in the achievement of your responsibilities?

*Adapted from the required questions for CRS Coaching

SUPERVISOR ROLES

Grievance refers to problems, concerns or complaints associated with community volunteer involvement during the cycle of volunteerism. Processes including recruitment, development and training, placement, or termination might cause complaints. Moreover, grievances might occur as a result of communication gaps, discrimination, harassment, partiality in motivation, benefits, workload, performance, beneficiary relationships, leadership styles and/or personalities.

Volunteers should have a constructive and harmonious environment in which to work, with sound relationships where individual rights and responsibilities are respected. Furthermore, community volunteers should feel empowered to ask questions when unsure and challenge things they find unacceptable.

A volunteer's grievance should be handled promptly, transparently and in a professional manner irrespective of causes or individuals involved. The following underlying principles should be fostered while handling grievances:

• Clear orientation on the grievance procedure will be provided to community volunteers at the beginning of service commitment

- Confidentiality: only those directly involved in the grievance can have access to related information.

- Impartiality (fairness): all should be provided with an opportunity to share their version of the story. No one should make assumptions or take action until all relevant information has been collected and considered.

- Timeliness: CRS or partners will deal with grievances as quickly as possible.

Based on the above, CRS and its partners will handle grievances in the context of community volunteerism through either informal or formal procedures as stipulated below.

Informal Procedure

- The parties involved in the grievance will be encouraged by project staff, relevant community leaders or by themselves to discuss the complaints face-to-face and find solutions through simple mediation.

- If complaints are about work conditions or systems, then CRS staff or responsible partner staff will address these complaints through appropriate channels. This may require explanation of expectations thoroughly and/or appropriate technical and psychosocial support.

Formal Procedure

- Formal procedures vary by country program. CRS staff should refer to their respective grievance policy located in their Human Resources Policy, through a Do No Harm Implementation Strategy or other such reference document.

9. VOLUNTEERS AND PROJECT BUDGETS

Once a project involves the community through volunteer work, there are two important budget issues that need to be addressed. The first aspect refers to money spent on the volunteers. This includes money the project will need for recruitment, training and to provide work tools and incentives to the volunteers. Please note that all tools, supplies and trainings required for program implementation would be accounted for in budgets regardless of whether it was a volunteer or a paid employee providing the service. The second aspect refers to assigning a monetary value to the volunteer's work which represents the community's contribution to the project's budget.

WORK TOOL BUDGETS

During the project design phase, volunteer roles and responsibilities should be identified along with relevant tools needed. There should be enough money budgeted for work tools for each of the volunteers to be enrolled throughout the life of the project. It is prudent to budget an extra 5 percent to 10 percent to cover for volunteer replacements and for lost or faulty tools. If the work tools are consumable (e.g., notebooks, pens, pencils, cell phone air-time, etc.) consider budgeting for them on an annual basis. More durable work tools such as gumboots, raincoats, umbrellas, and t-shirts, which are likely to last for a year or two, should be budgeted for at project inception and at project mid-term.

Work tools which are not consumable, but are likely to require maintenance should also be included in the budget. A maintenance budget should provide for the purchase of bicycles, spare parts and cell phone batteries and chargers. Trainings are also considered work tools and should be budgeted for accordingly. The project should consider the number of volunteers, the number and duration of trainings, training materials, facilitator fees, lodging, and meals for the initial and future refresher trainings when determining the budget.

Budgeting for Volunteers: Costs and Contributions	
Cost refers to the money spent on volunteers to cover working tools and incentives.	**Contribution** refers to the calculated financial value of volunteer work, for example, as community contribution to the project budget.

Lastly, if the project requires volunteers to meet periodically, reimbursement for transportation expenses to and from the meeting should be budgeted for in accordance to periodicity of the meetings, numbers of volunteers and average costs of transport. If volunteers will use bicycles provided by the project to attend meetings, transportation reimbursement may be waived. Depending on distances to reach the meeting point and duration of the meeting, a budget for snacks, tea and meals is advisable.

Question	What will happen to the working tools if a volunteer drops out of the project or if the project ends?
Answer	Project staff need to have a plan in place ahead of time. It should be clear to volunteers whether the working tools will be returned to the project or become the volunteer's property.

BUDGETING FOR INCENTIVES

The project will also need to budget for incentives. The amounts should correspond to the type of incentive, periodicity of incentive provision and the number of volunteers. If the incentives provided are not consumable and are to remain with the volunteer in the case of drop-out (such as cell phones, rain boots, etc.), then the budget should also allow for replacements. *A rule of thumb is to budget 5 to 10 percent throughout the life of the project for replacement costs.*

Monetary incentives should follow both the partner and the donor's policies. A project providing monetary incentives should also consider the practices and amounts provided by other organizations working in the same catchment area of the project to avoid disturbing the current environment and to minimize negative impact on sustainability.

THE VALUE OF VOLUNTEER WORK:COMMUNITY VOLUNTEERS' CONTRIBUTIONS

The time volunteers dedicate to a project can be converted into a monetary value as a contribution from the community. In some cases, donors request or allow volunteers' work to be considered a community in-kind contribution which can be incorporated into the budget. In other cases, the project might choose to show to the donor the value of the community in-kind contribution as a way of leveraging funds. [**]
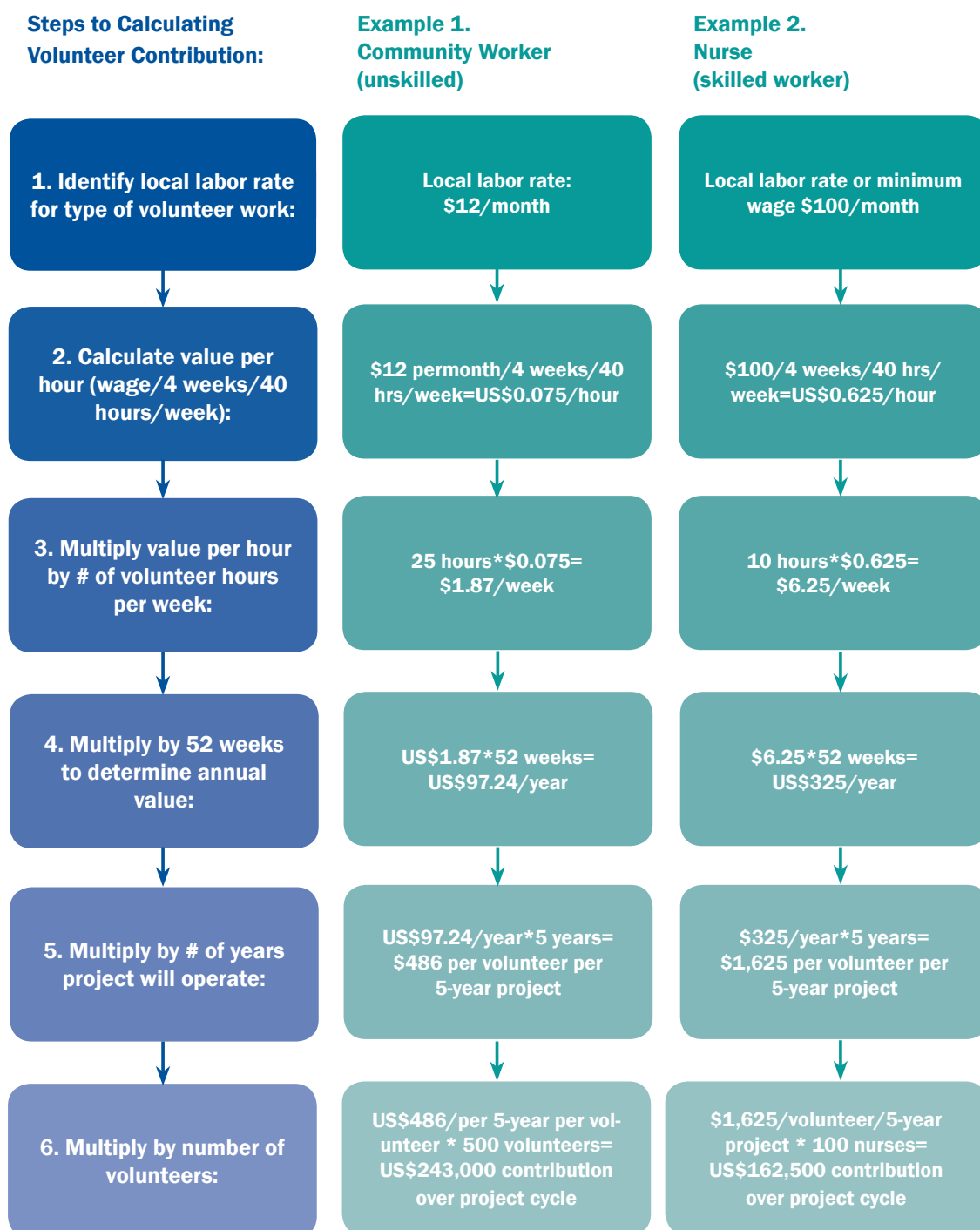
In order to calculate volunteers' contribution, the following will need to be considered: education and skill level of the volunteer, the local labor rate for service provided, the minimum wage in the country for the related skill levels, and hours per week devoted to the project.[*] A country's national minimum wage may be used as a starting point for some calculations, but it will need to be adapted to rural/ urban contexts, job responsibilities, education levels, etc. Once these variables are known, it is possible to calculate the value of the contribution per month, year and life of the project. CRS' Business Development Team has developed two worksheets to help calculate the value of volunteer work contribution. One is for skilled labor and the other is for unskilled work.[*] These forms are to be used when donors request or allow volunteer work as an in-kind cost-share.

Lastly, if the project would like to calculate the value of the volunteers' contribution not as an in-kind cost-share but as leverage which will not be tracked, a simpler methodology can be used (see Table 1).

[*] If actual time spent by volunteers were tracked in a previous or an on-going project, this information could be used to more accurately calculate volunteer contributions for future proposals.
[*] Volunteer Labor Hours (unskilled) and Volunteer Labor Hours (skilled) forms can be found at: https://global.crs. org/teams/inkindcostsharecop/Functional%20Documents/Forms/AllItems.aspx

Steps to Calculating Volunteer Contribution:	Example 1. Community Worker (unskilled)	Example 2. Nurse (skilled worker)
1. Identify local labor rate for type of volunteer work:	Local labor rate: $12/month	Local labor rate or minimum wage $100/month
2. Calculate value per hour (wage/4 weeks/40 hours/week):	$12 permonth/4 weeks/40 hrs/week=US$0.075/hour	$100/4 weeks/40 hrs/week=US$0.625/hour
3. Multiply value per hour by # of volunteer hours per week:	25 hours*$0.075= $1.87/week	10 hours*$0.625= $6.25/week
4. Multiply by 52 weeks to determine annual value:	US$1.87*52 weeks= US$97.24/year	$6.25*52 weeks= US$325/year
5. Multiply by # of years project will operate:	US$97.24/year*5 years= $486 per volunteer per 5-year project	$325/year*5 years= $1,625 per volunteer per 5-year project
6. Multiply by number of volunteers:	US$486/per 5-year per volunteer * 500 volunteers= US$243,000 contribution over project cycle	$1,625/volunteer/5-year project * 100 nurses= US$162,500 contribution over project cycle

Figure 11. Calculating Volunteer Contributions: Two Examples

10. SUPPLEMENTARY RESOURCES

GENERAL VOLUNTEER

Community Health Worker Central (CHW Central): http://www.CHWCENTRAL.org.   A website to increase exchange of best practices and foster dialogue about community health workers amongst experts, practitioners and supporters. The website includes a resource center housing training materials, practical tools and most recent guidelines pertaining to community health workers.

CORE Group: http://www.coregroup.org. CORE Group is a network of over 50 member organizations and partners who generate collaborative action and learning to improve and expand community-focused public health practices for underserved populations around the world. They have done significant work with volunteers, particularly community health workers and have numerous resources on their website.

Department of Health and Human Services [US], Substance Abuse and Mental Health Services Administration Center for Substance Abuse Treatment, *Successful Strategies for Recruiting, Training, and Utilizing Volunteers – A Guide for Faith- and Community-Based Service Providers* (Rockville, Maryland: Substance Abuse and Mental Health Services Administration, 2008). A searchable online version may be accessed through the internet at http://www.samhsa.gov.

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ANNEX A:
EXAMPLES OF VOLUNTEER INCENTIVES AND WORK TOOLS*

Incentive: Something monetary, material or non-material intended to motivate project volunteers to perform their tasks. These items are expected to be used for personal benefit.

Work tool: Any training or material provided to volunteers to facilitate or increase their ability to deliver the services and tasks the project expects of them. *(Some work tools may be perceived to be incentives if they can be used for personal benefit; however this does not eliminate the need to identify true incentives for volunteers.)*

Table 1. Sample Volunteer Incentives

Incentive	Notes	Budgetary implications
Blankets, mosquito nets, hats, caps, shoes, fleeces	These are often given once a year. These items can be purchased locally at subsidized prices from other institutions and/or NGO's selling them.	Require budgeting based on number of volunteers and the periodicity that the incentive will be provided
Education support to volunteers' children	This might include all or some of the following: uniforms, scholastic materials, fees, hygienic pads for girls.	Require budgeting at same costs as for an OVC beneficiary and depending on school year
Food support	This is often the same support provided to beneficiaries.	Require budgeting at the same costs as for the same type of support provided to the project beneficiaries
Holiday gifts	This can be any type of token provided to volunteers at the end of the year.	Require budgeting
House repair/ building material	Provision of roof tiles, cement bag, and/or sand. This is often the same support provided to beneficiaries.	Require budgeting
Hygiene products	Products purchased locally. Examples includes soap and deodorant.	Require budgeting
Market vouchers	This will require agreement with local vendors to accept the vouchers.	Require budgeting in relation to voucher value and the voucher-making
Monetary incentive/Stipend	Need to measure long-term impact and coordinate with other NGOs. There are sustainability issues.	Require budgeting
Participation in SILC groups	The materials required for SILC groups (e.g., box, notebook, pens) are provided.	Require budgeting
Possibility of professional growth	Volunteers have the opportunity to become supervisors.	Require budgeting for supervisors positions
Recognition	This has excellent impact on volunteers. Examples include having special sits for volunteers during community meetings, priests and religious leaders recognizing volunteers at the end of religious services, and provision of volunteer certificates during community meetings.	Little to no cost

Table 2. Sample Volunteer Work tools

Work Tool	Notes	Budgetary implications
Bicycle maintenance allowance	Periodicity varies: monthly or on reimbursement basis.	Require budgeting based on average maintenance costs of a bicycle.
IEC materials, stationary, notebooks	Materials will need to be replaced during the life of the project. Plan generously.	Require budgeting based on number of volunteers. Consider budgeting for replacement of materials.
Quarterly meetings	Often a meal is provided at the end of the meeting.	Require budgeting based on program meetings periodicity and number of volunteers.
Training	This should include initial training, refresher trainings and trainings to replace volunteers who will drop-out.	Require budgeting based on training curricula, number of volunteers, periodicity of refresher trainings and replacement training.
Transportation allowance	This is given to ensure volunteer attendance to program meetings.	Require budgeting based on program meetings periodicity and number of volunteers.
T-shirts, caps	If provided for identification purposes.	Require budgeting for provision to each volunteer upon enrollment and replacement (probably once a year). Need to consider volunteer drop-out rates as well.

Table 3. Sample work tools which are sometimes perceived by volunteers as incentives

Work Tool	As a perceived incentive	As a Work tool	Notes / Budgetary Implications
Access to office services	When it refers to photocopying personal documents of the volunteers or providing access to books and literature (personal growth).	When it refers to re-stocking the volunteers with materials they need to perform their tasks.	If work tool, transportation costs to and from the office should be reimbursed to the volunteer. Requires a small lump sum in the budget to cover cost of materials and transport.
Cell phone air time	If volunteer is able to use it for personal use.	If use is exclusively to call supervisor and report on data.	Difficult to track. Require budgeting and a good monitoring.
Bicycles	When volunteers are allowed to use it for personal use. Bicycles fitted with passenger back seat.	When volunteers share the use of it and it is kept in a central location.	Bicycles models should be provided according to the volunteer's gender. Require budget for bicycle purchase.
Rain boots, raincoats, umbrellas	When volunteers are allowed to use it for personal use.	When volunteers share the use of it and it is kept in a central location.	Require budgeting as per number of volunteers. Consider budgeting for replacements and for new volunteers (drop-out replacement).

ANNEX B:
SAMPLE VOLUNTEER AGREEMENT

Name of volunteer:
Address, P.O. Box:
Telephone:
Position title:
The following areas of work and responsibilities have been agreed on between the _____and the above volunteer: • • • •
Main duties (attach task description as necessary)
Availability (how long/when?):
Training required/provided:
Introductory period (induction for two weeks) orientation program, policy, work tools Expectation and roles:
I _____agree to provide voluntary service in the above stated task and duration while adhering to the PC3 volunteers management policy.
Emergency contact:
Date Signed   Volunteer   Volunteer Manager

Source: Adapted from Save the Children, *Positive Change: Children, Care and Communities (PC3) Program, Volunteer Guidelines for the PC3 Program, FinalDraft*, Addis Ababa, Ethiopia: Save the Children, January 2007.

ANNEX C:
CODE OF CONDUCT SAMPLE TOPICS*

SAFETY

- Follow all technical and administrative procedures as instructed.

- Respect

- Treat all people as unique individuals and value their beliefs, opinions, knowledge and experiences.

- Treat each other with courtesy, sensitivity, tact, consideration, and humility.

- Respect the authority of those who hold office in the community and respect each other regardless of position.

CONFIDENTIALITY

- Individuals have a fundamental right to the privacy and confidentiality of information related to their health and social care. Therefore, community volunteers must respect clients' rights to a relationship of trust, to privacy, reliability and confidentiality and to the responsible use of information obtained from or about the beneficiaries.

- Divulge confidential information only with the consent of the service user or informant, except where there is clear evidence of serious risk to the service user, community volunteers, or other persons in the community after exceptional consideration and consultation of immediate volunteer coordinator/supervisor.

- Ensure, that records, whether manual or electronic, are stored securely, are protected from unauthorized access, and are not transferred, manually or electronically, to locations where access may not be satisfactorily controlled as instructed by the organization.

INTEGRITY

- Treat each other and beneficiaries fairly

- Demonstrate honesty, truthfulness, loyalty

- Value others regardless of ethnicity, religion, color, age, gender, or creed

- Stand up for the rights of others as well as one's own and seek equitable solutions

- Record information impartially and accurately, recording only relevant matters

SELF-DISCIPLINE

- Exercise self control in managing stress, anger, and tendencies of burnout. When in need of assistance, seek the help of the organization.

- Demonstrate self-commitment towards personal development and furthering knowledge and skills.

- Exert optimum effort towards achieving excellence and high quality standards.

TEAMWORK

- Promote participation and cooperation when working with other volunteers and staff.

- Be available and work in close collaboration with community leaders, project coordinators and other volunteers towards achieving common goal.

- Recognize and acknowledge each other's skills and abilities.

- Acknowledge that combined efforts exceed the sum of individual contributions.

- Accept that there are differing roles within the team.

- Recognize and congratulate the achievements of others.

COMMUNICATION

- Respect and give constructive comment and feedback.

- Practice effective listening with beneficiaries, colleagues and community leaders.

- Seek advice whenever appropriate.

- Submit reports and other requirements timely and accurately.

COMMITMENT

- Share and promote the culture, purpose, and objectives of community volunteerism.

- Carry out responsibilities with diligence and up to standards.

- Promote efficient use of time and other resources.

IMPACT Program

Pocket Code of Conduct for Community Volunteers

The IMPACT Program is dedicated to improving the quality of life of orphans and vulnerable children. As a volunteer with the IMPACT Program, I understand that my work may include direct contact with children and their caregivers. In my work as a volunteer, I pledge to support and protect the rights of children in my community and beyond by observing the following:

1. I will not abuse or exploit children in any way. If I commit any abuse or exploitation of any child, I will be reported to the appropriate authorities and my work as a volunteer will cease immediately. I will return any program supplies in my possession to the Promoter.

2. I will not provide money, goods or assistance to beneficiaries in exchange for sex or sexual favors, nor will I withhold goods or services from a beneficiary for refusing to engage in sex or sexual favors.

3. I will not engage in sexual activity with children (person under the age of 18), except in case of a locally sanctioned marriage with a child aged 16 or 17, as permitted by local law.

4. If I have suspicions that a fellow volunteer has abused or exploited a child, I will report such concerns to my Promoter, and to local legal authorities, as appropriate.

5. If I have suspicions that a staff member (Promoter, Facilitator, Coordinator, etc.) has abused or exploited a child, I will report such concerns to the organization's Country Director, and to local legal authorities, as appropriate. I may also report this information to the IMPACT Chief of Party at 01835511 or 01757272.

6. I will not unlawfully harass, discriminate, abuse, intimidate, show favoritism toward or exploit children. I understand that I am strongly discouraged from having a sexual relationship with a direct beneficiary.

7. Everything I do for and with children shall be in their best interest.

IMPACT

Promoting the Wellbeing of Vulnerable Families

IMPACT PROGRAM CODE OF CONDUCT

CERTIFICATION OF RECEIPT OF CODE OF CONDUCT CARD

By signing below I certify that I have received a copy of the IMPACT Program Code of Conduct, that I have read the IMPACT Program Code of Conduct, that I have had the IMPACT Program Code of Conduct explained to me and that I agree to follow the IMPACT Program Code of Conduct at all times.

DATE_____   VILLAGE_____

NO	DATE	NAME	POSITION	SIGNATURE
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