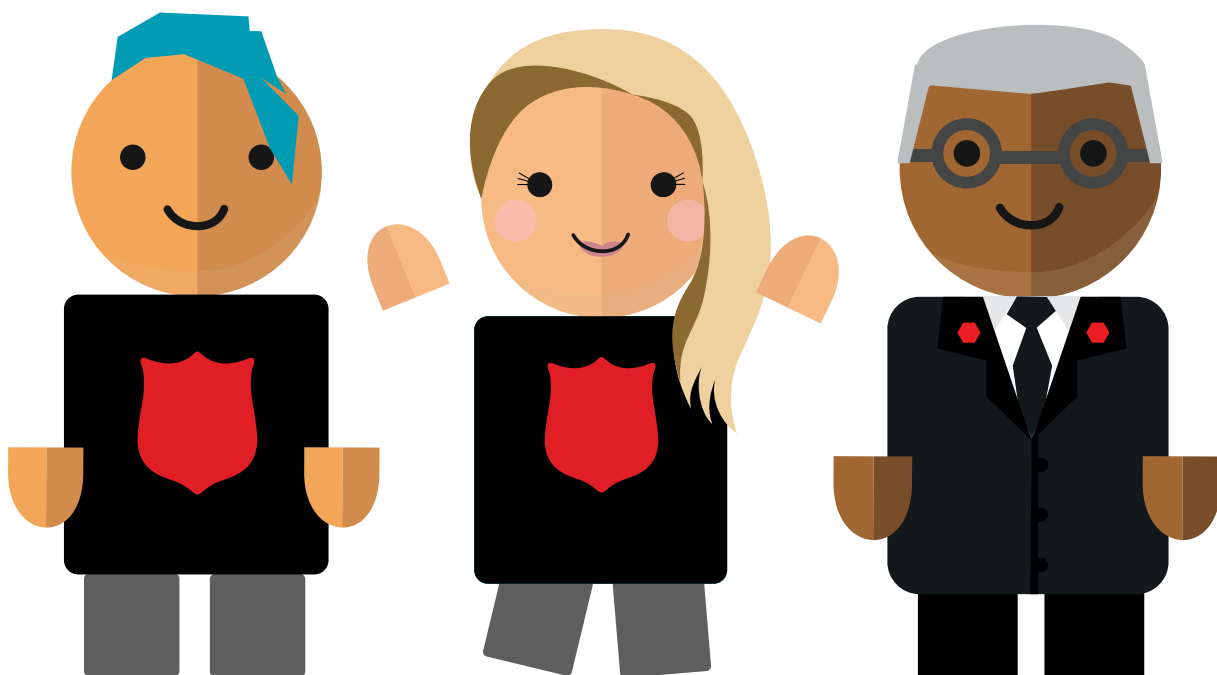




Giving Hope Today

# BEHIND THE SHIELD



THE SALVATION ARMY CANADA AND BERMUDA TERRITORY  
**VOLUNTEER MANAGEMENT HANDBOOK**

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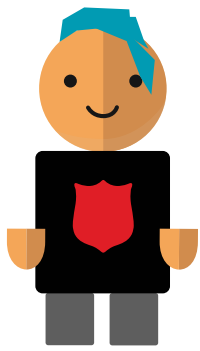
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# INTRODUCTION

## Purpose

The purpose of this handbook is to establish The Salvation Army (TSA) standards for volunteer involvement and provide all TSA personnel with the direction, knowledge and references to work toward implementing these standards.

The handbook is set out in the six stages for effective volunteer engagement:



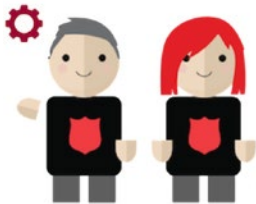
**Plan**



**Recruit**



**Select**



**Train**



**Recognize**



**Evaluate**

The handbook also provides an overview of:

- ▶ Opportunities and risks within these stages
- ▶ Managing performance
- ▶ References for where all supporting resources can be found

The aim of this is to strengthen TSA's volunteer involvement by increasing the capabilities of those who manage volunteers.

With the acknowledgement that volunteers play a crucial role in fulfilling TSA's mission, effective volunteer management is essential.

**“Volunteering is at the very core of being human. No one has made it through life without someone else’s help.”**  
— Heather French Henry



## Scope

Volunteers are vital to the successful execution of The Salvation Army's mission. This handbook has been designed for those who manage volunteers to create consistency across our volunteer services and promote exceptional mission delivery.

The focus of this handbook is on what is involved in managing volunteers at every stage of the volunteer lifecycle. All content will be reviewed on a regular basis and your feedback is both welcomed and valued.

## Development of this Handbook

**This handbook has been developed with:**

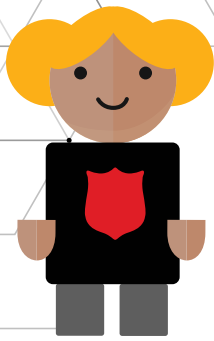
- ▶ Ministry Unit and Corps Consultation
- ▶ Consideration of TSA Policies
- ▶ Canadian Code for Volunteer Involvement
- ▶ National Occupational Standards for Managers of Volunteers
- ▶ Legislation

## National Standards

The National Standards reflect the Canadian Code of Volunteer Involvement as well as the National Occupational Standards.

These two resources have helped develop best practices for volunteer involvement and are designed to provide a gauge of where we are currently placed regarding volunteer management.

This is essential in order to be able to identify opportunities for development and form a baseline for measuring improvement. In this way we can enhance the volunteer experience and most importantly, acknowledge and recognize the significant contributions volunteers make to The Salvation Army.



# VOLUNTEERS AND THE SALVATION ARMY

## Our History Together

Volunteering has been integral to The Salvation Army since its inception, with service as an expression of faith, being fundamental to the Army's core beliefs.

While volunteers have always played an essential role in The Salvation Army, only recently has there been a concerted effort in strategically developing harmonized resources to equip our local offices as they support volunteers.

## The Salvation Army Volunteer Definition

A volunteer is anyone who contributes time, service and skills without expectation of financial gain from TSA to assist in accomplishing the organization's mission.

This includes people who engage in service for spiritual, personal, humanitarian, educational, and/or charitable reasons.

The definition includes but is not limited to:

- ▶ Soldiers and corps members, including local officers in a specific role
- ▶ Committee/advisory board members
- ▶ Community based/court-ordered volunteers
- ▶ Ongoing/long term volunteers
- ▶ Student placements/mandatory high school hours
- ▶ Corporate/group volunteers

## **Board and Councils**

### **The Governing Council of The Salvation Army in Canada**

The Governing Council was incorporated by an Act of Parliament in 1909 and is the primary legal entity that The Salvation Army operates through in Canada. Unlike conventional not for profit corporations that have both members and directors, the Governing Council has only members, who are appointed by the General who is the international leader of The Salvation Army. The Army makes every effort to ensure diversity in international and territorial leadership. All members of the corporation are commissioned Salvation Army Officers or employees who hold senior leadership roles. The corporation holds title to most of The Salvation Army's assets.

In Bermuda, The Salvation Army operates through a similar corporation known as The Salvation Army Corporation of Bermuda, which was incorporated by a special act of the Bermuda legislature.

Supplementing the oversight of Army operations provided by the corporate bodies are various other boards, councils and committees comprised of Salvation Army Officers, employees and volunteers who provide independent voices to assist the Army. These various entities exist at the national, regional and local community levels.

### **National Advisory Board**

The purpose of the Board is to advise and assist the Territorial Commander, the national leader of The Salvation Army in Canada and Bermuda on issues that have a significant impact on its territory-wide operations. Such issues will include the Army's national strategy and development program, as well as its business practices and systems.

Membership should demonstrate good judgement and success across a broad cross section of professions and skills. The Salvation Army will promote the value of ethnic diversity and inclusiveness in all its expressions.

### **Advisory Boards**

The purpose of the Board is to advise and assist divisional leadership of The Salvation Army on issues that have a significant impact on its divisional wide operations. Such issues may include strategic planning, development of donors, finances, legal and government relations.

Membership shall include experienced community leaders who demonstrate good judgment and success in their field. It is desirable that membership represent a broad cross section of community engagement.

### **Community Councils**

The Community Council is a group of volunteers that support a specific service by providing to the executive director, administrative advice relating to program, business and policy matters.

Membership reflects a broad-based community representation in respect to background, interests, gender and race, all familiar with the program delivered by the service. Members should be qualified to assist the community council in achieving its goals and objectives.





## Value of Volunteering to The Salvation Army

Volunteers play an integral role in accomplishing TSA's mission and bring a diverse range of skills and experience to the organization. People volunteer in a variety of roles across all levels of the organization—from senior board members supporting at THQ, to dedicated thrift store teams, to emergency relief interviewers, to the thousands that give up their time for the Kettles. The ways in which people support is endless, as are the opportunities when we work collaboratively toward a shared vision.

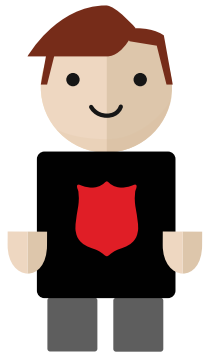
**“When we think of our strengths, we think of our volunteers. Volunteers are an essential asset in mission delivery for The Salvation Army. Church members, business leaders, placement students, and community partners all belong here, and we value their contributions. We are effective in transforming communities because of the strengths, skills, and talents they bring. In Pathway of Hope, many of our participants support us with their time as we support them with the building blocks of life. This mutual exchange restores dignity and presents an opportunity for giving hope.”** – Matthew Craggs, Training and Evaluation Specialist, Community Engagement Department



## RESOURCES

New resources are always being developed!  
Check out the volunteer services website at:  
[Salvationist.ca/volunteerservices](https://salvationist.ca/volunteerservices)





# SALVATION ARMY STANDARDS FOR INVOLVING VOLUNTEERS

The following standards reflect the Canadian Code for Volunteer Involvement as well as the National Occupational Standards for Managers of Volunteers but have been contextualized to The Salvation Army's intention of enhancing the volunteer engagement. The standards represent best practice and provide a gauge of where we are currently placed with volunteer management. In turn, this assists us to identify opportunities for development and form a baseline for measuring improvement.

Most significantly, the standards recognize the significance of volunteers' contribution and the importance of a considered approach toward volunteer engagement.

**We are collectively striving to meet these standards.**

**"Never doubt that a small group of thoughtful, committed citizens can change the world; indeed, it's the only thing that ever has." – Margaret Mead**

## Mission-Based Approach

TSA's leadership, officers and staff will actively acknowledge and support the vital contribution of volunteers in achieving TSA's purpose and mission.

This means a proactive approach whereby the needs of TSA and the potential volunteer are considered.

Our strategy for volunteer engagement recognizes and reflects the unique structure of TSA, and in particular the relationship with corps and those who serve.

Each location will develop its own volunteer engagement strategy, while adhering to the tools and resources developed by THQ. This will contribute to informing, inspiring and supporting staff to strive toward volunteer engagement best practice.



## Mission and Values

### Mission Statement

The Salvation Army exists to share the love of Jesus Christ, meet human needs and be a transforming influence in the communities of our world.

### Core Values

- ▶ **Hope:** We give hope through the power of the gospel of Jesus Christ.
- ▶ **Service:** We reach out to support others without discrimination.
- ▶ **Dignity:** We respect and value each other, recognizing everyone's worth.
- ▶ **Stewardship:** We responsibly manage the resources entrusted to us.

## Volunteer Resources

TSA will ensure volunteers are managed within a defined process and by capable personnel. To achieve this, TSA will have clearly designated and appropriately qualified individuals for the positions of:

- ▶ Territorial Manager Volunteer Services, to provide resources and tools for volunteer management and guidance to Divisional Volunteer Coordinators;
- ▶ Divisional Volunteer Coordinators, to strengthen and/or develop programs through volunteer involvement and provide guidance and support to ministry units and corps;
- ▶ Local volunteer coordinators, to train and support staff and corps officers in effective volunteer engagement.

## **Policies and Procedures**

The application and use of the Canadian Code for Volunteer Involvement as well as the National Occupational Standards for Managers of Volunteers, in alignment with legislation and policies and procedures of The Salvation Army, have collectively provided a framework that defines and supports our volunteers.

Policies and procedures will be consistently applied so on-boarding of volunteers follows a system that ensures safety, fairness, fulfilled expectations and support.

TSA will ensure that these policies and procedures are understood and implemented at all levels of the organization.

## **Volunteer Administration**

TSA will take a proactive and considered approach to the planning of volunteer involvement within any TSA program, service or ministry unit/corps.

This will include identifying clear purposes for volunteer involvement, ministry unit/corps self-assessment as to whether volunteers can be appropriately resourced and the development and use of role descriptions.

## **Risk Management & Quality Assurance**

The involvement of volunteers within programs and services requires the management of the inherent risk involved. This is done through assessments and risk mitigation. The most commonly offered volunteer roles in TSA have been assessed for level of risk and that level is reflected in the screening process outlined in the Territorial Risk Role Matrix.

## **Volunteer Roles**

Volunteers are aligned with and contribute to the mission of The Salvation Army. The roles in which volunteers are involved are meaningful and should reflect their skills, talents, education and passion for our services and programs. TSA will adopt a consistent approach toward volunteer placement to be applied by each ministry unit/corps. This will involve selecting volunteers based on their suitability for the identified role and a criminal background check process based on the volunteer role and environment. To meet legal requirements, community expectations, and maximize opportunities, all ministry units /corps will be responsible for locally recording all TSA volunteers on a volunteer management system.

## **Recruitment**

Recruitment strategies are reflective of the needs and demographics of the community in which recruitment is applied. TSA will incorporate internal and external approaches to reach out to a diverse volunteer base and find the most suited volunteers to match the identified roles. Ministry units/corps will embrace a clear and fair (non- discriminatory) interview process to recruit people according to their ability to fulfil a role.

## **Screening**

The Salvation Army will recognize the importance of screening volunteers by ensuring every ministry unit/corps has a defined volunteer screening process, as suitable for the role, program, location and ministry unit/corps culture. The Salvation Army will communicate and provide a consistent and transparent screening process which aligns with the Risk Role Matrix created in collaboration with THQ, DHQs and local ministry units/corps.

## **Orientation & Training**

Orientation is a part of the on-boarding process and should include an overview of the organization, an outline of the policies and procedures and overall responsibilities of the volunteer role. Training will be specific to the volunteer role.

## **Support & Supervision**

Volunteers will be provided with the necessary support and supervision to ensure that they are given opportunities for providing and receiving feedback on their roles and responsibilities.

Supervision is essential to a quality experience. The ability to provide coaching allows for the development of appropriate training and equipping of the volunteer creating an environment for positive outcomes.

## **Records Management**

Volunteer files should be kept for the duration of time outlined in the Salvation Army policy for retention of records.

## **Technology**

Volunteer engagement can be strengthened by the use of technology tools. A customized and integrated software can help segment your volunteer lists, personalize your engagement with your volunteers and streamline the volunteer application process.

## Recognition and Retention

TSA will actively build an inclusive culture, across all levels of the organization, where volunteers are recognized as part of TSA's team. TSA will do this through the involvement of staff in the planning, recruitment and placement of volunteers and through clear communications on the purpose of volunteer involvement.

TSA will also seek volunteer consultation and feedback on supporting resources.

Recognition should always reflect a volunteer's commitment, loyalty and dedication and the impact they have in their communities.

It is recommended that each ministry unit/corps adopt informal methods to recognize the contributions of volunteers on an ongoing basis, and additionally implement formal recognition.

## Evaluation and Continuous Improvement

It is important to establish a framework that allows us to measure how effectively we engage volunteers across all levels of the organization and how these TSA standards are acknowledged and implemented. With the active support of the Divisions, the THQ team will continuously review and update our territorial volunteer resources. Opportunities to improve our approach and support will be identified and actively pursued.

Each ministry unit/corps will measure the impact of volunteers' contribution and will continuously consider how we can better meet the needs of both TSA and the volunteers.



## Step 1: Clarify – What is the purpose for volunteer involvement?

Managing volunteers effectively requires time and resources and, as such, planning is crucial.

You must have a clear understanding of why you need or want a volunteer/s in your program or service. This involves a proactive approach, rather than involving people simply because they have offered to volunteer. We must ensure that all volunteer roles align with the mission of The Salvation Army.

### A volunteer may be needed to fulfil:

- ▶ An existing role that another volunteer is no longer able to do
- ▶ An existing role that now requires extra help
- ▶ A task/s your existing team doesn't have time to do
- ▶ A task/s your existing team doesn't have the expertise to do
- ▶ A support role for a one-off event or fundraiser
- ▶ A support role to a corps officer or manager
- ▶ Provide assistance as a group for a pre-organized corporate volunteering activity



**Note:** A person cannot be engaged as an employee and a volunteer in the same role. If an employee holds a management or supervisor role they can only work as a volunteer in that service so long as there is a clear differentiation between the roles they perform, and there is no real or perceived conflict of interest between those roles. In some cases, a volunteer role can replace a paid position. This would generally occur only if the paid position was vacant, or where an appropriate change management process leads to the paid position becoming vacant. Please seek further advice from your Divisional HR department.



**A volunteer may add extra value by:**

- ▶ Extending your services (for example, with extra help, could you extend the opening days or hours of your thrift store?)
- ▶ Improving your resources (for example, could one of your rooms use a makeover, such as a fresh coat of paint? A team of volunteers could do this in a day)
- ▶ Enabling you to launch a new program that is only possible with volunteer involvement and support

**We must always treat our volunteers with respect and acknowledge that they are valued members of TSA team. Their roles need to be clearly defined and include meaningful and impactful responsibilities.**

**Offering volunteer opportunities may have additional advantages, such as:**

- ▶ Providing people experiencing disadvantage with purpose and a way to build skills and experience (for example, offering volunteer roles for asylum seekers who are not permitted to have paid employment)
- ▶ Engaging with corporations may lead to other engagement opportunities, such as financial donations. Corporate volunteers can experience the needs of the community, which may motivate them to assist in other ways
- ▶ Providing learning opportunities in a ministry unit/corps, such as a café, may increase the volunteers' employability
- ▶ Providing selected clients in a social program an opportunity to improve their confidence and wellness in a supportive and positive environment
- ▶ Offering student placements may lead to the development of our future employees and donors

**Step 2: Assess – Can you support a volunteer?**

After identifying a clear reason/s for either new or additional volunteers, consider the resources required to undertake the relevant tasks and whether your ministry unit/corps is able to fulfill these.

**Kick-start your thinking!**

- ▶ Do you have the resources to support a volunteer in their role? For example, desk, computer, facilities, tools, time...
- ▶ Who will be responsible for the recruitment process?
- ▶ Who will ensure the administration process is followed? For example, Criminal Background check/s undertaken if necessary for the role, all appropriate forms signed and the volunteer's details recorded
- ▶ Who will train and supervise the volunteer? A more experienced volunteer acting as a mentor or a buddy system may work

**Key question!**

Is your team 'volunteer friendly'? That is, are volunteers welcomed, supported and valued?

### Step 3: Prepare – Find the right person for the role

Before looking for potential volunteers, be clear about whom you are looking for! For example, what skills, attributes and experience are required to complete the identified tasks? When will the tasks need to be undertaken and how often? The answers to these types of questions will inform what information should be included in a role description.

Involve your team so everyone understands the importance of the volunteer role, and ensure it doesn't threaten their own involvement, paid or voluntary. Lines of responsibility will also need to be clarified.

#### Role Description – Is this really necessary?

A volunteer role description outlines the purpose of the volunteer role, personal qualities for success in the role, expected activities and outcomes of the role. While finding or developing an appropriate role description may feel burdensome, it is a precious time investment! Just as an employee would expect a job description, a volunteer role description is vital in setting expectations and ensuring a successful engagement between TSA and the volunteer.

A role description:

- ▶ Enables potential volunteers to understand the role and decide whether it is suitable
- ▶ Sets boundaries for the role in relation to other volunteers and paid staff, helping to avoid conflict arising from misunderstandings
- ▶ Enables the recruitment process to be objective and eases difficult conversations if someone is not suitable for a role
- ▶ Provides a guide for both the volunteer and TSA to refer to if performance issues arise
- ▶ Clarifies in writing that it is a voluntary arrangement

**“I’ve learned that people will forget what you said, people will forget what you did, but people will never forget how you made them feel.”**

**– Maya Angelou, author and poet**



## Legal Considerations

### Volunteering or paid? Setting clear boundaries

There is a risk a volunteer may expect employee entitlements from TSA.

To minimize this risk, volunteer status must be crystal clear. Make sure you have a role description to clarify this is a volunteer arrangement and cannot be misunderstood to have the same entitlements as an employment relationship. The role description needs to be signed by both the volunteer and supervisor and stored accordingly on site.

In situations where TSA employees are also volunteering with TSA, the boundaries and expectations between their paid position and volunteer role need to be specified.

## Opportunities

The Plan process provides the opportunity to:

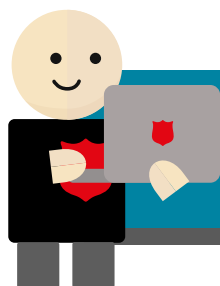
- ▶ Reflect on the specific needs within your ministry unit/corps
- ▶ Reflect on how these needs can be met
- ▶ Explore how the services/programs of the ministry unit /corps can be enhanced
- ▶ Explore how the resources of the ministry unit /corps can be enhanced
- ▶ Consider additional services or programs the ministry unit /corps can offer
- ▶ Identify various ways in which volunteers can enable and/or extend the ministry unit /corps services and resources

## Plan Checklist

Have you:

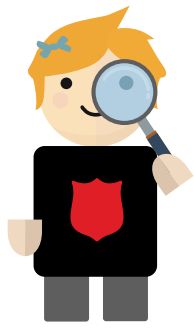
- ☐ Clarified the purpose for volunteer involvement?
- ☐ Assessed your resources as to whether your ministry unit /corps can support a volunteer?
- ☐ Considered what skills and experience would be needed to complete the identified tasks/role?
- ☐ Adopted or developed an appropriate role description?

Yes? Great, you're ready to look at the next step—Recruitment!

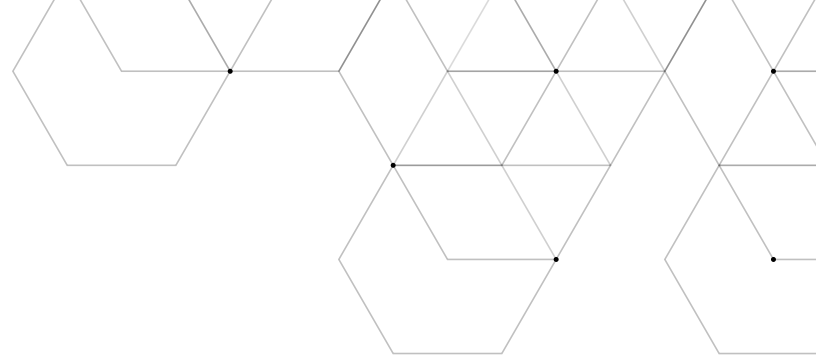


## RESOURCES

New resources are always being developed!  
Check out the volunteer services website at:  
**[Salvationist.ca/volunteerservices](http://Salvationist.ca/volunteerservices)**



# RECRUIT



## What Does Recruitment Involve?

Recruitment involves a considered process to find the right person for the role. Follow these steps to ease stress and increase the likelihood of attracting suitable volunteer applicants.

1. Review the volunteer applications you have received through [salvationarmy.ca](http://salvationarmy.ca) to see if there is a potential volunteer who has already expressed an interest to help
2. Advertise the role
3. Prepare for interview/s
4. Conduct interview/s
5. Reflect after interview/s

## Step 1: Review TSA online volunteer applications

A suitable person for the role may have already expressed an interest to help through [salvationarmy.ca](http://salvationarmy.ca).

Before contacting an applicant, refer to their Registration Date and consider how much time has lapsed as their availability may have changed.

## Step 2: Advertise the role—for free!

If there are no existing suitable applicants, then the next step is to advertise the role. We recommend advertising the role through multiple avenues to increase the number of applicants, and as such, increase the likelihood of finding the right person for the role. Here are some effective, free ways to do this. In line with the TSA values, you must ensure the advertisement is not discriminatory in any way; with respect to race, religion, gender, lifestyle, age etc. Only include the requirements that relate to the skills and experience needed for the role.

### Word-of-mouth

A positive volunteer engagement is to a large extent self-perpetuating. By ensuring existing staff and volunteers feel valued, they will be more likely to spread the word about any new volunteer roles. This is especially important because the most effective way to recruit new volunteers is by word-of-mouth. Your existing team is key in encouraging others to volunteer. Make sure they are aware of how much they are valued and inform them when you are in need of more volunteers.

## Your website and social media channels

Advertise volunteer roles on your website and social media channels. How about posting your role description/s so applicants can see what will be expected of them? Be as specific and transparent as possible.

## Volunteer Centres

Depending on your location, there are Volunteer Centres that are equipped to help with advertising and helping you find the right person for the right role. Review the existing options in your area.

## United Way

Local United Way offices can assist with posting volunteer roles –free of charge! Connect with your local United Way and ask about the best way for you to find the right volunteer through their resources.

**Did you know?**  
**93% of volunteers**  
stated that they wanted to help their community.  
(Statcan.gc.ca 2018)

## Step 3: Prepare for interview/s

After advertising the role and attaining the interest of potential volunteers, it is time to organize interviews. Do not be tempted to jump straight into recruiting without an interview—what appears on paper does not always translate in reality!

### Have you:

- ▶ Organized mutually convenient interview times with applicants?
- ▶ Organized an appropriate (quiet and comfortable) location for the interview/s?
- ▶ Reviewed the role description?
- ▶ Prepared how you will explain TSA as an organization (if they are unfamiliar) and in particular, the program/service the volunteer role sits within?
- ▶ Drafted your interview questions based on how the applicant can demonstrate the required attributes and experience as per the role description?
- ▶ Considered any questions the applicant may ask, and how you will respond?
- ▶ Worked out how you will take notes during the interview, or if someone else will take notes?
- ▶ Organize another person of a higher level of responsibility than the interviewer to attend? (optional)

## Step 4: Conduct the interview/s

### 1. Set the tone

Thank the applicant for coming in and offer them a drink. Ask how they are and how their journey was to get to the interview. When you are both seated and comfortable, outline the interview format so they know what to expect. For example,



*Thanks again for coming in today and for your interest in volunteering with us. I'll start by telling you a bit more about The Salvation Army and the role. Then I will ask you some questions and you can also ask any questions you have. How does that sound?*

## **2. Introduce yourself, TSA and the specific program/service**

Keep this quite broad and conversational. This is an opportunity for the applicant to consider whether they are a suitable cultural fit for TSA and the specific ministry unit/corps.

## **3. Describe the role**

Use the role description as a guide to discuss what the role involves. In particular go over the key tasks of the role and expected outcomes. You might also mention any requirements inherent in these tasks, for example, the ability to sit or stand for prolonged periods, or heavy lifting.

## **4. Ask your prepared questions**

Use open-ended questions to give the applicant an opportunity to demonstrate whether they have the relevant knowledge, skills and experience to fulfill the tasks for the role and assess whether the role can satisfy their motivation for volunteering.

For example, if the role involves working with vulnerable people and possibly unpredictable circumstances, you may ask:

*'Can you tell me about a time when you handled a stressful situation well?'*

Be flexible and ask additional questions as appropriate to the applicant's answers. This demonstrates active listening and gives you a chance to learn more about the applicant.

## **5. Invite the applicant to ask questions**

This allows the applicant to clarify any uncertainties. Remember it's important the role that the ministry unit/corps and TSA are offering is the right fit for the volunteer, as well as them being the right fit for us!

## **6. Thank the applicant**

Recognize that the applicant has given up their time to prepare for and attend the interview. If you believe that the applicant is suitable for the role and they are still interested in pursuing the opportunity, you may wish to contact their reference. Let the applicant know the next stage of the process. For instance, whether you are interviewing other applicants or discussing the decision with your team. Tell them when to expect to hear back from you and be realistic—we all know what it's like to wait for a phone call that doesn't come!



## Step 5: Reflect after interview/s

In reflecting after an interview, consider:

- ▶ Competency
- ▶ Character
- ▶ Culture

### You may ask yourself:

- ▶ Does the applicant have the necessary attributes, skills and qualifications to fulfil the role?
- ▶ Does the applicant have the suitable character to fulfil the role? (For instance, an ability to remain calm in high pressure situations)
- ▶ How will the applicant get along with other people on the team?
- ▶ Does the applicant have the time and other necessities to commit to the role?
- ▶ What is the applicant's motivation for volunteering? And will our ministry unit/corps be able to satisfy their motivation? (For example, if the applicant wants to volunteer to build their skills, will there be an opportunity for them to do that?)
- ▶ Will the applicant fit within the culture of TSA? And the specific ministry unit/corps?

# Role Risk Matrix

The Salvation Army could not deliver its corps programs and services to clients without its volunteers.

We are faced with tough competition from other organizations and challenged with recruiting volunteers while still appropriately managing risk.

In order to make it easy for people to volunteer with TSA and ensure that all of the requirements are met, we have developed a Risk Role Matrix that identifies the risks and risk level of volunteer roles, provides controls on how to mitigate those risks, and identifies opportunities for simplifying the volunteer application process.

This stand-alone matrix allows you to easily plug in any volunteer opportunity and determine what type of recruitment and onboarding is necessary.

It streamlines and simplifies the application process while managing risk, provides consistent outcomes and allows for an individualized volunteer experience.

# Screening

It is imperative to take the time needed to properly screen a volunteer according to the requirements for the role they have applied for.

Please refer to the Role Risk Matrix to identify the correct process by which the applicant must be validated. For example, if the individual will have direct contact with seniors or children, they must submit a clear Police Check. If the candidate will be driving clients from place to place as part of their duties, they will need to submit a document obtained from the Ministry of Transportation showing a clear driving record.

It is vital to the success of your programs and services as well as the reputation of the organization that volunteers are screened for the level of involvement and responsibility they will be given in their assigned role. The screening process should be made transparent to the volunteer and reflect the Risk Role Matrix that has been developed to assess volunteer roles.

## Legal Considerations

### Discrimination in recruiting volunteers

Discrimination is treating, or proposing to treat, someone unfavourably because of a personal attribute protected by law.

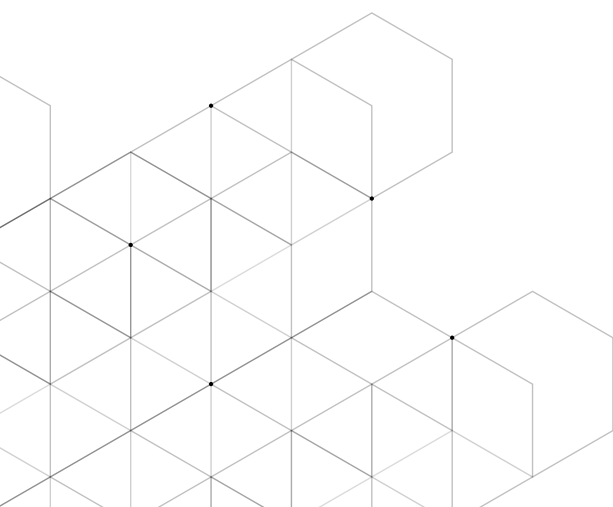
#### To minimize the risk of discrimination:

- ▶ Use a role description to recruit a volunteer, stating the required skills and experience, without references to personal attributes
- ▶ Prepare interview questions that relate directly to the role requirements and adhere to the Canadian Human Rights Act. Do not ask questions that may be relevant only to certain people. For example, a potentially discriminatory question would be asking a woman if she is planning on getting pregnant in the future

## Opportunities

Taking a considered approach to recruitment allows you to:

- ▶ Extend your search for appropriate applicants
- ▶ Feel prepared and confident when interviewing applicants
- ▶ Feel confident to be proactive, rather than reactive, to people who approach and ask to volunteer
- ▶ Find the most suitable person for the role



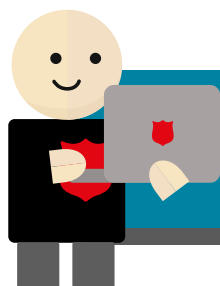
## Recruit Checklist

Have you:

- ☐ Reviewed the applications received through [salvationarmy.ca](http://salvationarmy.ca) to see if there is a suitable person who has already expressed an interest to help?
- ☐ Advertised the role?
- ☐ Prepared for interview/s?
- ☐ Conducted the interview/s?
- ☐ Reflected after the interview/s?
- ☐ Properly screened a volunteer according to the requirements for the role they have applied for?

Yes? Fantastic!

Time to move on to the next stage in the volunteer lifecycle – Select.



## RESOURCES

New resources are always being developed!  
Check out the volunteer services website at:  
**[Salvationist.ca/volunteerservices](http://Salvationist.ca/volunteerservices)**



# SELECT

## What is Meant By 'Select'?

Following careful reflection after interviews, it is time to select who (if anyone) is best suited for the volunteer role. A consideration of competency, character and culture, guided by the role description, will assist in this decision.

Deciding who is, or is not, a 'good match' for a role, is likely to be the easy part. Putting that decision into action is what Select is really about.

In this section we will focus on how to:

1. Confirm a volunteer role with an applicant and the tasks you need to complete before they commence their role.
2. Tell someone they are not successful for this role.

## Confirm a Volunteer Role with an Applicant

Great! You've found a suitable match for the role. Now you must confirm with the applicant.

3. Contact the applicant, in person or by email, within the time period previously communicated.
4. Thank them for their application and coming in for an interview.
5. If not supplied prior, ask for reference contact details.
6. Confirm they are still interested in the role. Their circumstances or level of interest may have changed since the interview.
7. If they **are no longer** interested in the role, once again thank them for their time, and wish them all the best for their future endeavours, or if they **are still interested**, confirm details of the role: start date, location and time commitment.
8. If a criminal background check is required for the role, explain how this will need to be undertaken before they commence.





9. If a valid driver's license is required for the role, check that they have one. This can be done through obtaining a Transportation Transcript, which will also show demerit points and DUI charges. Confirm the process with the Ministry of Transportation in your province.
10. If the details of the role still suit them, explain logistics: what to bring, what to wear, where to park, and who to contact if there are any issues.
11. Explain what to expect on their first day: where to go on arrival, who will greet them, necessary paperwork orientation details, etc. Help them to visualize what to expect.
12. Ask if they have any questions.
13. Thank them again, and explain next steps!

Invest the time here so the new volunteer feels valued and fully supported to commence their role. This will also help to retain them as a volunteer—first impressions count!

## Before the Volunteer Commences Their Role

Before the volunteer commences their new role they must attend an orientation, even if it's simply a quick one on one in your office.

At the end of the orientation, the volunteer will receive a package with pertinent documents to sign. This package will also include a Volunteer Handbook. Please ensure that all necessary documents are signed prior to the volunteer attending training.

## Informing an Unsuccessful Applicant

If someone is not an appropriate or suitable match for a role, it is important to let them know.

1. Contact any unsuccessful applicant within a reasonable time. Contact in person is preferable, otherwise phone, or email as a last resort. For some applicants an unsuccessful outcome can be distressing, so ensure you tell them in a safe environment.
2. Thank the applicant for their time in applying for the role, and coming in for an interview (if applicable).
3. Explain again what the role entails, and the necessary attributes and skills required. It may be that they didn't demonstrate these or maybe another applicant had more experience, etc. Focus on the role and tell them that on this occasion they are not the best match for this particular role. Be clear, calm and empathetic in your language.
4. Be prepared the person may feel distressed. There is often an expectation that anyone can volunteer and people do not always consider their own suitability. However, using a role description and a clear interview process reduces this expectation. In the event someone still expresses dissatisfaction with the decision, stay calm and respectful.
5. You may consider whether there is another role for which this person may be suitable. If not, you can always refer them to a nearby volunteer resource centre or community centre so they can explore other volunteering opportunities.

Telling someone they are not the best match for a volunteer role may feel like a hard conversation, but it will save you time and energy in the long run. Remember, it is in everyone's best interest to have the right person for the role.

## Criminal Background Checks

A criminal background check may be a requirement of a volunteer role. The criminal background check must be completed before the volunteer commences their role.

Whether a criminal background check is a minimum requirement, and to what extent, will be stated on the role description or can be clarified by the Risk Role Matrix. A criminal background check may include a Criminal Record Check, Criminal Record and Judicial Matters Check and/or Vulnerable Sector check.

If after referring to the Risk Role Matrix, you are still unsure as to whether a criminal background check is required, contact the Territorial Manager for Volunteer Services.

A disclosable outcome on a criminal background check does not necessarily exclude someone from the role but indicates a risk assessment will need to be conducted before they commence their role.

The list below outlines some of the most common questions related to criminal background checks.

Question	Explanation
<p>What are the differences between:</p> <ul style="list-style-type: none"> <li>- Criminal Record Check</li> <li>- Criminal Record and Judicial Matters Check</li> <li>- Vulnerable Sector Check</li> </ul>	<p><b>Criminal Record Check:</b> Includes applicable criminal convictions and findings of guilt under the federal Youth Criminal Justice Act.</p> <p><b>Criminal Record and Judicial Matters Check:</b> Includes applicable criminal convictions, findings of guilt under the federal Youth Criminal Justice Act, absolute and conditional discharges, outstanding charges, arrest warrants, and certain judicial orders</p> <p><b>Vulnerable Sector Check:</b> Includes the same type of information that is disclosed in a criminal record and judicial matters check as well as applicable findings of non-criminally responsible due to mental disorder, record suspensions (pardons) related to sexually-based offences, and in certain circumstances, non-conviction charge related information when a strict test is met.</p>
<p>What are the differences between:</p> <ul style="list-style-type: none"> <li>- Name-based criminal record checks</li> <li>- Certified Criminal record checks</li> </ul>	<p><b>Name-based criminal record checks</b></p> <ul style="list-style-type: none"> <li>- Check is done against the RCMP's Canadian Police Information Centre (CPIC) system</li> <li>- Consists of a check of the National Repository of Criminal Records based on a person's name and date of birth</li> <li>- It may also include searches of other national and local databases</li> </ul> <p><i>Note: Name-based checks have weaknesses in verifying a person's identity due to some last names being the same, differences in spelling, use of nicknames, legal name changes and the intentional changing of names to avoid a record of criminal history.</i></p> <p><b>Certified criminal record checks</b></p> <ul style="list-style-type: none"> <li>- Are used when name-based criminal record checks do not provide a definite way of confirming a person's identity</li> <li>- A fingerprint search of the National Repository of Criminal Records is conducted by RCMP's Canadian Criminal Real Time Identification Services (CCRTIS)</li> <li>- The use of fingerprints for criminal record checks is based on informed consent and includes sharing the results of that information to a third party named by you on the application form</li> </ul>

Question	Explanation
What are some other common names used for Criminal Background Checks?	Police certificate, background check, record check, or reference check. Contact your local police to learn more about the terms used in your area.
Who needs a Vulnerable Sector Check?	<p>Volunteers who are in positions of trust or authority over children or vulnerable persons can be asked to obtain a vulnerable sector check. Being in a position of trust or authority is more than just having contact with children or vulnerable persons. To meet the legal requirements for a vulnerable sector check, the nature of the position – not the person – must cause the person to have authority over, or trust of, children or vulnerable persons</p> <p><i>Note: Please connect with your local police service for more details on Vulnerable Sector Checks. In British Columbia, you should contact the British Columbia Criminal Records Review Program.</i></p>
What is the definition of children and vulnerable persons?	Children are defined as being anyone under the age of 18. Vulnerable persons are people who, because of their age, disability or other circumstance, are more vulnerable than others.
Who conducts vulnerable sector checks?	Vulnerable sector checks must be conducted by the local Canadian police service where the applicant lives. In British Columbia, the British Columbia Criminal Records Review Program is the authorized body for conducting vulnerable sector checks.

## Legal Considerations

The process for reducing many legal risks begins with proper placement of the volunteer. Therefore, read this section carefully and take the necessary steps now so everything runs smoothly later.

### **Risk: someone could take legal action against TSA because of the actions of a volunteer**

Examples of risks are...	To minimize or avoid these risks...
A client, member of the public, employee or volunteer is injured by the negligent action/inaction of a volunteer (eg. motor vehicle accident, assault and/or aggressive or inappropriate behaviour)	Screen volunteers, as far as possible, to ensure they are suitable and competent for the role.  Provide orientation, train and supervise volunteers.  Refer to territorial resources on a regular basis and follow best practice. Consider special needs and Supervisory requirements of vulnerable volunteer roles.

### **Risk: a volunteer could take legal action against TSA**

Examples of risks are...	To minimize or avoid these risks...
A volunteer in a vulnerable role is assaulted by a client, member of the public, employee or another volunteer.	Consider special needs and supervisory requirements of vulnerable volunteer roles.  Implement actions and precautions (such as working in pairs) to minimize the likelihood of risk.
TSA discloses or misuses a volunteer's personal information.	Be aware of TSA's privacy policy.  Implement secure record-keeping procedures (locked personnel file cabinets).
A volunteer who is an employee at the same site/service doing the same role.	The volunteer is required to cease the volunteer component of their role. If an employee/volunteer arrangement already exists, ensure cessation or change of the volunteer component is communicated sensitively.





## Opportunities

Adopting a clear selection process allows you to:

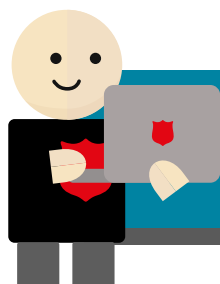
- ▶ Find the best match for a volunteer role
- ▶ Be recognized as valuing volunteers
- ▶ Help feel confident in your decision when someone is not appropriate for a role
- ▶ Reduce the expectation that anyone can volunteer in any role
- ▶ Feel confident you are taking all reasonable steps to reduce any legal risks eventuating



## Select Checklist

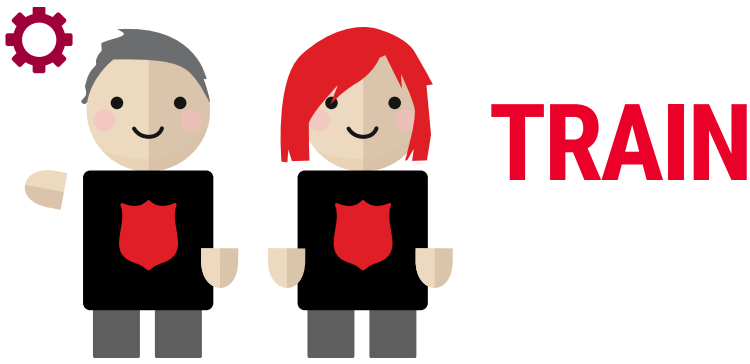
Have you:

- ☐ Contacted the preferred applicant and confirmed they are still interested and able to do the role?
- ☐ Undertaken Criminal background checks and reference checks (if applicable)? Provided the successful applicant with a copy of the role description?
- ☐ Provided the successful applicant with the necessary forms and ensured they have read and signed them?
- ☐ Added the successful applicant to the Volunteer Management System and matched them to a volunteer role?
- ☐ Contacted unsuccessful applicants and informed them that on this occasion they were not the best match for the role?



## RESOURCES

New resources are always being developed!  
Check out the volunteer services website at:  
**[Salvationist.ca/volunteerservices](http://Salvationist.ca/volunteerservices)**



## Why is Training Important?

Training is essential so a volunteer feels comfortable and empowered within TSA and their role. It's also a great opportunity to connect a volunteer with the values of TSA.

Certain elements will always need to be covered in a training. These are:

- ▶ The Role and TSA
- ▶ The Building
- ▶ Health & Safety

You should create an orientation and training checklist with information specific to your ministry unit/corps. Some volunteer roles will require a detailed orientation, or even training, prior to or soon after commencement of a role.

## The Role and The Salvation Army

Have you:

- ▶ Discussed The Salvation Army Mission and Values?
- ▶ Discussed the specific focus/mission of your ministry unit/corps?
- ▶ Discussed the role description? (How much detail you go into depends on your previous communications with the volunteer)
- ▶ Given the volunteer a copy of the Volunteer Handbook?
- ▶ Discussed the Volunteer Handbook, in particular drawing attention to the Code of Conduct
- ▶ Discussed the ministry unit /team reporting structure (if relevant)?
- ▶ Given the volunteer a name tag (if applicable)?
- ▶ Introduced them to other volunteers and staff?

## The Building

Have you:

- ▶ Shown the volunteer the facilities? (For instance, the break/lunch room, washrooms, notice board)
- ▶ Discussed general housekeeping procedures?
- ▶ Discussed other practical issues, such as parking?
- ▶ Shown specific work area?

## Health and Safety

Have you:

- ▶ Informed of evacuation procedure?
- ▶ Shown where the first aid kit is located and who is appointed as the first aid officer?
- ▶ Discussed specific hazards related to the role? (For instance, potential heavy lifting, difficult clients, etc.)
- ▶ Shown safety precautions? (For example, a buzzer alert)
- ▶ Shown how to report a hazard or incident?
- ▶ Advised of their key contact person?

## Role-Specific

Does the volunteer have everything they need to commence and feel confident in their role?

For example, if it is a computer-based role, the volunteer may need a login and password. If the volunteer is tasked with collecting tools from a storage place, or documents from a filing system, then ensure they feel comfortable to access these items on their own (if it is appropriate for them to do so). Both the volunteer and the wider team must be aware of what the volunteer can and cannot do, to create a harmonious environment.

After assessing whether the volunteer has everything they need for their role, ask them how they are feeling. This demonstrates you value their contribution and creates a safe space for them to seek clarification. Orientation for a role designed to support specific operating hours, has to be carefully worded without forceful language like “you must...”

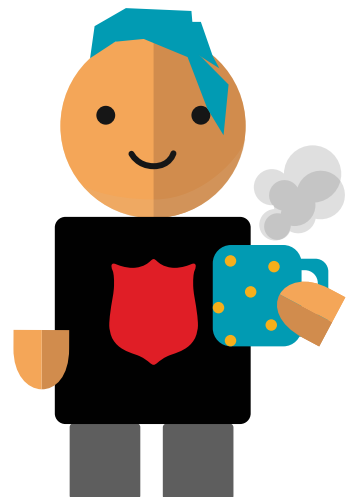
As volunteering is based on time given freely without coercion, roles where volunteers are required for prescribed time periods must have the volunteer’s agreement prior to starting their role. If they are unable to attend the prescribed time periods, either offer flexibility or seek to engage them in a different role.

## Unspoken Rules

### ***'That's MY mug!'***

Are there any unspoken rules in your ministry unit/corps? Or simply things that are assumed knowledge? For example, does everyone have a specific mug they use, or assigned car spaces? While you might not include these in a formal orientation, they are useful details for a volunteer to feel part of the team. You can speak to these in a conversational way during the more formal induction. For instance, when showing someone around the building, you may pause in the kitchen and say:

*'Most people like to use their own mug for tea or coffee. You are welcome to bring in your own mug and leave it here, or you can use a mug from the top shelf.'*



### ***Volunteer Expense Reimbursement***

The corps officer/ministry unit leader may have the authority to decide whether expenses incurred by volunteers in the following areas will be reimbursed. Note that the corps officer/ministry unit manager has to approve any expenditure before the volunteer can incur the expenditure/be reimbursed:

- ▶ Public transport (e.g. subway, bus) when the volunteer presents a ticket. In areas where volunteers use rechargeable/top up cards (and don't have individual tickets—generally in capital cities), the volunteer can be reimbursed at the default or concessional fare for any approved trip
- ▶ Fuel/gas costs. The volunteer will need to produce a logbook that records the starting date, opening and closing kilometres, the number of kilometres travelled and signed by the volunteer to be reimbursed
- ▶ Any incidental expenses, for example milk for tea/coffee purchased by volunteers

If volunteers work independently (without constant supervision) the corps officer/ministry unit leader may prefer to clarify the nature of other expenses that will be reimbursed. For example, out of pocket expenses directly related to the site. Volunteers need to produce an invoice or receipt to provide proof for site records.



## Role-Specific Training

The next step after orientation is role specific training.

Make sure the volunteer leaves the orientation with a set date and time for their training session. It is important to give volunteers enough time and sufficient training in order for them to be successful in their role.

Volunteers appreciate support and peer-to-peer mentoring.

Remember, existing volunteers make great mentors!

## Legal Considerations

The risks listed below could occur while a volunteer is in their role, but effective mitigation of these risks begins with a thorough orientation & training process.

**Risk: someone could take legal action against TSA because of the actions of a volunteer.**

Examples of risks are	To minimize or avoid these risks
<ul style="list-style-type: none"><li>▶ Volunteer represents themselves externally as if they are an employee or have the authority to act on behalf of TSA.</li><li>▶ A client, volunteer or employee's confidentiality is breached by a volunteer.</li><li>▶ Volunteer discriminates against a client, volunteer or employee.</li></ul>	<ul style="list-style-type: none"><li>▶ Provide orientation, train and supervise your volunteers.</li><li>▶ Make it clear what volunteers are and are not authorized to do.</li><li>▶ Ensure understanding of confidentiality.</li><li>▶ Ensure understanding of anti- discrimination legislation.</li></ul>

**Risk: a volunteer could take legal action against TSA**

Examples of risks are	To minimize or avoid these risks
<ul style="list-style-type: none"><li>▶ Volunteer's Intellectual property rights are infringed by TSA.</li></ul>	<ul style="list-style-type: none"><li>▶ Be clear that TSA owns IP that is created by volunteers in their volunteer role (unless written agreement to the contrary).</li></ul>

## Opportunities

Orientation and role specific training provides the opportunity for:

- ▶ A volunteer to feel valued and confident in their role
- ▶ A volunteer to be clear about their rights and responsibilities
- ▶ You to be confident you have set the volunteer up for success
- ▶ A volunteer to understand how their role fits within the wider team
- ▶ A volunteer to be prepared in case of an emergency
- ▶ You to be confident you have reduced the probability of any legal risks eventuating
- ▶ The rest of the team to understand the role of the volunteer

## Orientation & Training Checklist

Have you:

- ☐ Discussed the volunteer role, TSA, the building, and health and safety?
- ☐ Provided the volunteer with a copy of the Volunteer Handbook?
- ☐ Ensured the volunteer has signed the Orientation & Training checklist and you have filed it accordingly?
- ☐ Gone over anything specific to your ministry unit/corps and necessary for the volunteer to commence, and feel confident in their role?
- ☐ Discussed any 'unspoken rules' of your ministry unit/corps?
- ☐ Asked the volunteer how they are feeling?



## RESOURCES

New resources are always being developed!  
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# RECOGNIZE

## Recognition and Retention – Hand in Hand

Retention is directly linked to how a volunteer feels, their relationships within the team, and how their contribution is recognized. There will always be external factors that may contribute or cause a volunteer to leave, but with positive team culture and recognition, you are more likely to retain volunteers.

In this section we'll consider:

1. Staff and volunteer relationships
2. The key to effective recognition
3. Informal recognition
4. Making 'thanks' meaningful
5. Formal recognition

There may be instances where you do not want to retain a volunteer, and this will be explored in the section Managing Performance.

## Staff and Volunteer Relationships

Crucial to volunteer retention is a supportive team environment, with positive relationships between volunteers and staff, and other volunteers.

Volunteers are part of the team and their contributions, ideas and input must be equally valued.

Volunteer activity should complement the work done by paid staff and staff should be consulted on the roles filled by volunteers, especially if those roles were once filled by paid workers.

### Effective staff and volunteer integration depends on:

- ▶ The involvement of paid staff in role development and volunteer placement within the ministry unit/corps
- ▶ Following clear recruitment and selection processes to increase the likelihood volunteer placements are appropriate
- ▶ Use of a role description so expectations and boundaries are clear to everyone
- ▶ Orientation & training so a new volunteer has a greater insight into their role, and specifically the ministry unit/corps culture
- ▶ Training for TSA personnel in supervising volunteers
- ▶ Listening respectfully to issues raised with respect to Health and Safety and taking actions to remove the issue

- ▶ Acknowledging and responding to unsatisfactory volunteer conduct or performance
- ▶ Timely and respectful dispute resolution between volunteers and staff members
- ▶ Defined channels for volunteers to voice ideas or criticisms

**Tensions may arise if:**

- ▶ Paid staff are not involved in the development of the volunteer role
- ▶ Paid staff are not accepting of the volunteer role
- ▶ Volunteers are perceived as threatening paid positions
- ▶ Lines of responsibility are unclear or non-existent
- ▶ Volunteers resist supervision by paid staff
- ▶ Volunteers are seen as having no parameters, such as agreed start and end times, defined tasks, etc
- ▶ Volunteers are expected to act beyond their role without their agreement
- ▶ Volunteers do not feel part of the team

With these potential tensions in mind, you can make constructive suggestions before a dispute arises.

## Understanding Motivations

Recognition is not one-size-fits-all, so consider and apply what is relevant according to the volunteer in mind. The key is to understand their motivation for being involved, and if practical, to satisfy that motivation.

People volunteer for a variety of reasons: to develop their skills, serve the community, make friends, fulfil Court-ordered obligations or study requirements, gain experience and so on.

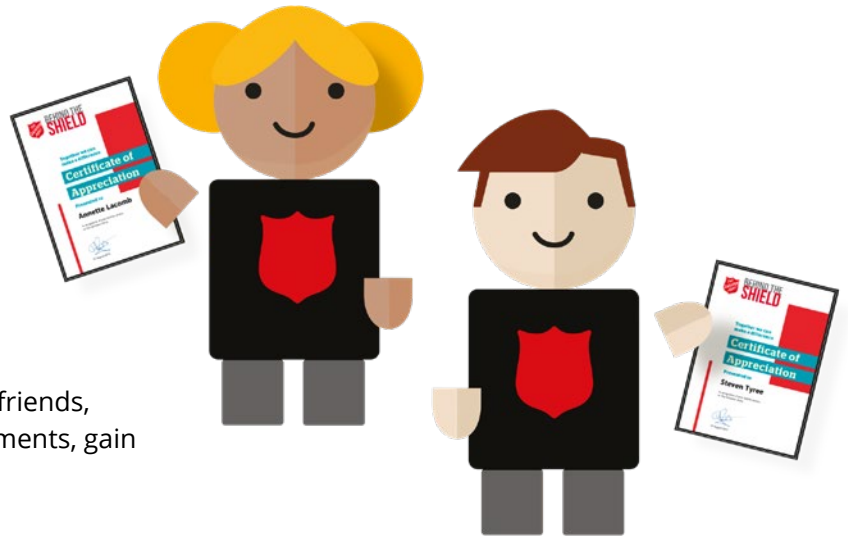
Someone's reason may also change throughout their time volunteering. For example, someone may begin volunteering to fulfil study requirements, stay to gain experience in their field, then continue volunteering to serve the community or maintain relationships.

If someone volunteers to have a social outlet, then ensure they volunteer in a setting that provides plenty of social interaction.

If someone's motivation is to develop skills, then retain them by offering training or linking them with a mentor to teach them new skills.

### ***Unsure of someone's motivation to volunteer?***

**Ask them!**



## Motivation and Recognition

The table below is by no means exhaustive, either in types of possible motivation or recognition ideas, but is to stimulate your thinking.

Possible motivation	Recognition ideas
Serve God	<ul style="list-style-type: none"> <li>▶ Offer to pray with, or for, them from time to time</li> <li>▶ Connect them with corps activities</li> </ul>
Help others or concern for others	<ul style="list-style-type: none"> <li>▶ Spend time discussing the value of the volunteer's contribution and what it means to TSA clients, etc</li> <li>▶ Share impact stories as a regular part of your ministry unit/corps meetings and/or include these stories around the ministry unit/corps</li> <li>▶ If it interests the volunteer, ask them to be the 'sharer of the good news stories' in team meetings, etc</li> </ul>
Meet people and/or increase opportunities for social interactions	<ul style="list-style-type: none"> <li>▶ Say 'hello' to this volunteer each day and ask how they are doing</li> <li>▶ If appropriate, match them to volunteer with other people</li> <li>▶ Prioritize additional social interaction, such as team lunches</li> <li>▶ Introduce them to people where practical</li> <li>▶ Invite them to ministry unit/corps social events</li> </ul>
Use current knowledge or skills	<ul style="list-style-type: none"> <li>▶ Ensure the volunteer has an opportunity to use their skills in their role</li> <li>▶ Actively seek and ask for their input</li> <li>▶ If useful and if they are interested, ask the volunteer to train others in a particular skill and/or act as a mentor for others</li> </ul>
Make contacts in the sector	<ul style="list-style-type: none"> <li>▶ Ask questions about their hopes and ambitions in the sector to demonstrate a genuine interest in them and their life</li> <li>▶ Introduce them to potential contacts</li> <li>▶ If appropriate, suggest other avenues where they may make contacts. For instance, sector newsletters, networking events or information nights</li> <li>▶ If appropriate, offer them opportunities to volunteer in other areas of TSA to meet more people</li> </ul>

Possible motivation	Recognition ideas
Develop new knowledge or skills	<ul style="list-style-type: none"> <li>▶ If relevant to the role, is there another volunteer or staff member who can act as a mentor to pass on skills and knowledge?</li> <li>▶ Are there training courses that are applicable to the role and that interest the volunteer?</li> <li>▶ Offer them extended participation/ responsibilities in their role or in a different role</li> </ul>
Raise self- confidence	<ul style="list-style-type: none"> <li>▶ Be affirmative wherever appropriate</li> <li>▶ Provide tasks that highlight their strengths</li> <li>▶ Notice whether more supervision increases or hinders their confidence</li> <li>▶ Be empathetic in providing any constructive feedback</li> </ul>
Fulfil a court-ordered requirement	<ul style="list-style-type: none"> <li>▶ Understand their exact requirements and speak about this so the volunteer is assured you are on the same page</li> <li>▶ Complete their paperwork as required, and do so discreetly if the volunteer wants this to be private</li> <li>▶ Recognize the value of their contribution so they may see it as more than fulfilling a requirement</li> <li>▶ Understand their circumstances; ask how to make their experience more valuable</li> </ul>
Fulfil a study requirement	<ul style="list-style-type: none"> <li>▶ Understand their exact requirements, and speak about this so the volunteer feels assured you are on the same page</li> <li>▶ Complete their paperwork as required, and show interest in the volunteer's study</li> <li>▶ Ask whether there are other ways you can support with building their knowledge or experience. For example, would they benefit from a mentor?</li> </ul>
Gain work experience	<ul style="list-style-type: none"> <li>▶ Ask questions about their interests and what they are hoping to learn, and/or what particular experience they are after</li> <li>▶ If possible, offer options for additional relevant training</li> <li>▶ Provide them with a formal certificate to recognize their contribution</li> <li>▶ If appropriate, let them know about jobs available (within TSA or externally) that may be of interest</li> <li>▶ If appropriate, offer to be a reference for them if they are applying for work</li> <li>▶ If appropriate, introduce them to other potential contacts</li> </ul>

## Informal Recognition

Informal recognition is acknowledging someone personally. It contributes to a positive culture and has the greatest impact for creating belonging and connection.

### Informal recognition is when you:

- ▶ Remember someone's name and personal details (such as their children's names, what they are studying, etc.)
- ▶ Include them in team meetings/activities
- ▶ Ask for their input
- ▶ Allow them access to information and systems as needed for their role and development
- ▶ Communicate, to them and to others, how their contribution is making a difference to the activity and/or community
- ▶ Offer opportunities for skills/professional development

## Making 'Thanks' Meaningful

Recognition is most meaningful when it's specific. Say a simple 'thank you' but about a specific thing.

### Ideas of specific things you may recognize include:

- ▶ A task performed or completed
- ▶ A skill demonstrated, or quality of character demonstrated
- ▶ Persistence—remaining reliable through a difficult period of time
- ▶ Team effort—pitching in, helping out, supporting others
- ▶ Exemplary customer or client service
- ▶ Their role in resolving a particularly difficult problem
- ▶ Creativity—generating ideas, innovative problem solving

## Formal Recognition

Formal recognition works well as an addition to informal recognition but cannot replace it. Formal recognition celebrates significant dates or achievements in a formal way.

### Formal recognition includes:

- ▶ Certificates
- ▶ Thank you letters or cards
- ▶ A featured volunteer story in a newsletter or on the web
- ▶ Team morning/afternoon coffee breaks, lunches
- ▶ Events/activities
- ▶ Nominating for awards, such as 'Volunteer of the Year'

## Key dates

- ▶ National Volunteer Week, each year during April-May (check the Volunteer Canada website to confirm the date.)
- ▶ International Volunteer Day, 5th of December
- ▶ Volunteers' birthdays
- ▶ Dates of volunteer service (1 year, then 5, 10, 15 etc. years)
- ▶ Easter, Christmas, New Year

## Opportunities

With a considered and team approach to recognition you have the opportunity...

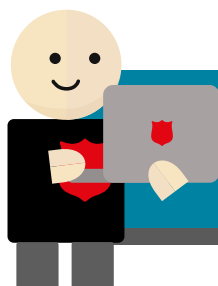
- ▶ For volunteers to be valued, increasing retention
- ▶ To strengthen and/or extend your programs reach
- ▶ To increase staff retention—by the positive, inclusive culture and the support of their work with volunteer contributions
- ▶ To increase the likelihood of volunteers wanting to support TSA in a greater variety of ways, including financial
- ▶ To increase the reputation of your ministry unit/corps and TSA broadly as volunteers will talk about their experience—positive (or negative)



## Recognize Checklist

Do you:

- ☐ Involve staff in the volunteer process (planning and recruitment)?
- ☐ Discuss with staff how volunteers will form part of the team, and assure paid staff of their positions?
- ☐ Take time to understand the motivations of your volunteers? Actively try and find ways to satisfy your volunteers' motivations? Know your volunteers' names?
- ☐ Show an interest in volunteers as individuals? Ask volunteers for their input?
- ☐ Include them in team events/activities?
- ☐ Include them in regular team meetings Say 'thanks' for specific things?
- ☐ Give out birthday cards?
- ☐ Give out cards for other significant life events, such as completing a university degree?
- ☐ Host a 'thank you' lunch or event for, or including, volunteers?
- ☐ Celebrate volunteers' significant dates of service?
- ☐ Offer and plan development pathways?



## RESOURCES

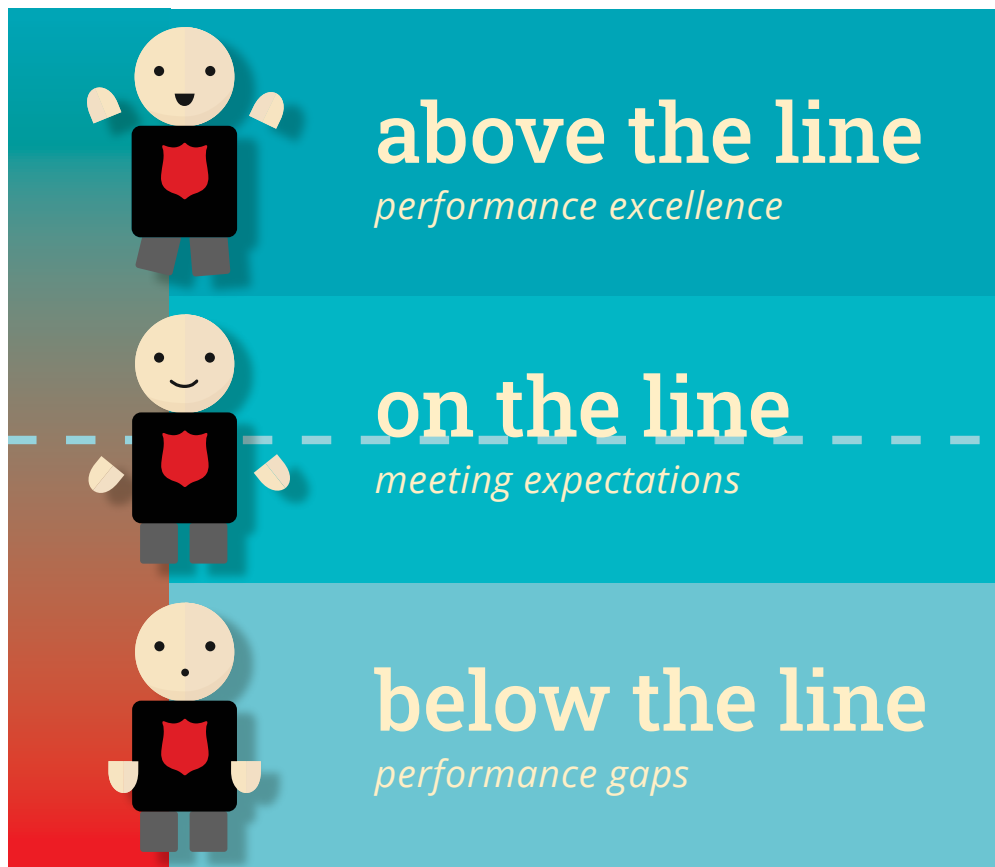
New resources are always being developed!  
Check out the volunteer services website at:  
**[Salvationist.ca/volunteerservices](http://Salvationist.ca/volunteerservices)**

# MANAGING PERFORMANCE

## Managing Performance

In evaluating a volunteer's performance, consider both the **WHAT** and the **HOW**.

Is the volunteer fulfilling the tasks of their role and is their behaviour reflective of TSA values and policies? The answers to these types of questions will inform your evaluation but how you manage this performance should be directed by **WHY** the volunteer is performing well or poorly.

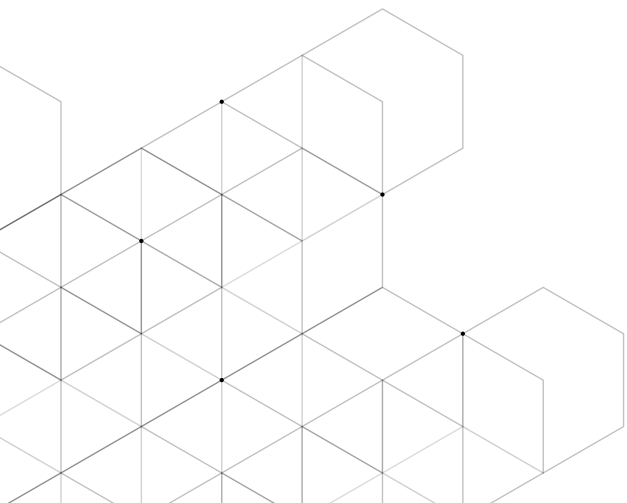


## Above-the-Line

High performance volunteers contribute the most, yet often receive the least amount of attention as they are already capable, engaged and positive. However, if these volunteers are not appropriately managed, they are likely to become bored, burnt out or simply feel undervalued and as a result leave to find an opportunity elsewhere.

**Examples of above-the-line performance and possible actions to reward and retain the volunteer.**

Performance	Actions
Volunteer is recognized as an expert in the field	<ul style="list-style-type: none"><li>▶ If possible, and if they are interested, stretch their tasks beyond their current role—more high profile</li><li>▶ Provide opportunities for them to be the 'highly valued expert'. For example, ask them to deliver a presentation to the ministry unit/corps, seek their input, trust them</li></ul>
Volunteer demonstrates interpersonal skills and emotional intelligence critical of a leader; volunteer sets a high bar for excellence and motivates others	<ul style="list-style-type: none"><li>▶ Ask if they would like to mentor or teach others</li><li>▶ Offer additional responsibilities possibly with a management component</li><li>▶ Invite them to high-level meetings</li><li>▶ If possible, provide them with development opportunities (trainings, etc.)</li></ul>
Volunteer requires minimal supervision even on new tasks; volunteer gains new skills and abilities more quickly than peers	<ul style="list-style-type: none"><li>▶ Trust them, offer them to be in charge of new initiatives or provide them with opportunities to extend their role</li></ul>





## On-the-Line

On-the-line performance is when volunteers meet the standards and expectations of their role.

For on-the-line performers, ask yourself and, if appropriate, the volunteer:

*Do they want to perform at a higher level or are they happy doing what is expected? What would enable someone to move from on-the-line performance to above-the-line? What is holding them back?*

If they want to perform at a higher level but need to strengthen their ability, are there training opportunities available? Could someone act as a mentor for them?

## Below-the-Line

**Performance Management is about people and requires a balance between compassion and accountability.**

Be clear on performance expectations. For example, acting in line with the Code of Conduct, adhering to policies and procedures and fulfilling duties of their role description.

If performance falls short of these expectations, this needs to be addressed immediately and with notes recorded. Revisit policies with the volunteer and draw their attention to documentation that outlines those expectations (role description, Volunteer Handbook).

Seek to clarify if these expectations are understood? Is there a reason why these are not being met? Ask people what they need. Your responsibility is to identify the root reason the volunteer is unable to meet expectations and then take appropriate action, professionally, creatively and compassionately.

**Examples of below-the-line performance and possible actions.**

Issue	Possible Cause	Actions
<p>Volunteer does not undertake tasks as required, showing signs of apathy and lacks motivation,</p>	<p>Role content and design.</p> <p>Inappropriate role fit.</p> <p>Individual or external characteristics, or situation.</p>	<ul style="list-style-type: none"> <li>▶ Begin with informal performance coaching but make notes of discussion</li> <li>▶ Be clear about the role requirements and expected contribution of the role to the work of the organization</li> <li>▶ Explore options for opportunities in other areas of the ministry unit/ corps or externally</li> <li>▶ You may need to terminate volunteer from their role</li> </ul>
<p>Volunteer exhibits aggressive behaviour that impacts team cohesiveness.</p>	<p>Unsatisfied with volunteer conditions/ role.</p> <p>Individual or external characteristics.</p> <p>Personal or health problems.</p>	<ul style="list-style-type: none"> <li>▶ Be clear about expectations for dealing with other people—refer to Volunteer Handbook</li> <li>▶ Explore reasons behind behaviour, consider personal situation, workload, role appropriateness, options for another volunteer role, some time off. <i>*Make notes of any interaction/ meeting</i></li> <li>▶ Model, respect and support the volunteer—be the example</li> <li>▶ You may need to terminate volunteer from their role</li> </ul>

Issue	Possible Cause	Actions
Volunteer will not follow directions or perform tasks as required.	<p>Failure to understand what is required.</p> <p>Inability to perform tasks.</p> <p>Individual or external characteristics.</p>	<ul style="list-style-type: none"> <li>▶ Start with discussions around what is required in the role, as outlined in their role description</li> <li>▶ Look at possible options for training and development if a skill deficit is identified. Setting them up with a mentor may also be an option</li> <li>▶ Assess whether behaviour is a breach of the Code of Conduct. * <i>Make notes of any interaction/meeting</i></li> <li>▶ Examine your own management style</li> <li>▶ You may need to terminate volunteer from their role</li> </ul>
Volunteer does not complete tasks to the required standard.	Lacks the required skills and capabilities.	<ul style="list-style-type: none"> <li>▶ Review recruitment practices to ensure appropriate selection decisions are being made</li> <li>▶ Identify training and development opportunities or mentoring options</li> <li>▶ If volunteer fails to develop required skills, transfer to another role, if appropriate</li> <li>▶ You may need to terminate volunteer from their role</li> </ul>

## Termination of a Volunteer from a Role

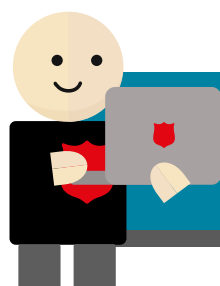
The Salvation Army is committed to resolving conduct and performance issues in the most positive manner possible, such as through support, additional training or supervision, reassignment and/or verbal warnings. However, in times when a volunteer's behaviour amounts to serious misconduct, immediate termination from their role may be necessary. There may also be instances where, despite various interventions and supportive actions, the volunteer's performance or conduct does not improve, and termination may be appropriate.

You should confirm termination in writing.

## Volunteer Resignation from a Role

Someone may choose to resign from their volunteer role at any time and for any reason. It is stated in the Volunteer Handbook that, out of respect, volunteers are asked to provide, where possible, two weeks' notice of their resignation. When informing fellow volunteers, staff members and possibly clients a volunteer is moving on, do so in a way that is respectful to the leaving volunteer.

If appropriate, also seek feedback from the leaving volunteer and thank them for their contribution—for example, with a thank you card. For a long-serving volunteer, you may also choose to celebrate their contribution with a thank you/farewell event, such as a shared morning tea coffee break with a cake.



## RESOURCES

New resources are always being developed!  
Check out the volunteer services website at:  
[Salvationist.ca/volunteerservices](http://Salvationist.ca/volunteerservices)





# EVALUATE

## Why is It Important to Evaluate?

Evaluation is crucial to understand how volunteer engagement is currently tracking, celebrate your team achievements and identify areas that require improvement.

This is the time to look at the big picture of how volunteers are engaged in their roles, programs and the ministry unit/corps. What's working? What's not? Why?

**As you complete the evaluation, be sure to incorporate your learnings into your planning as the cycle of volunteer engagement continues.**

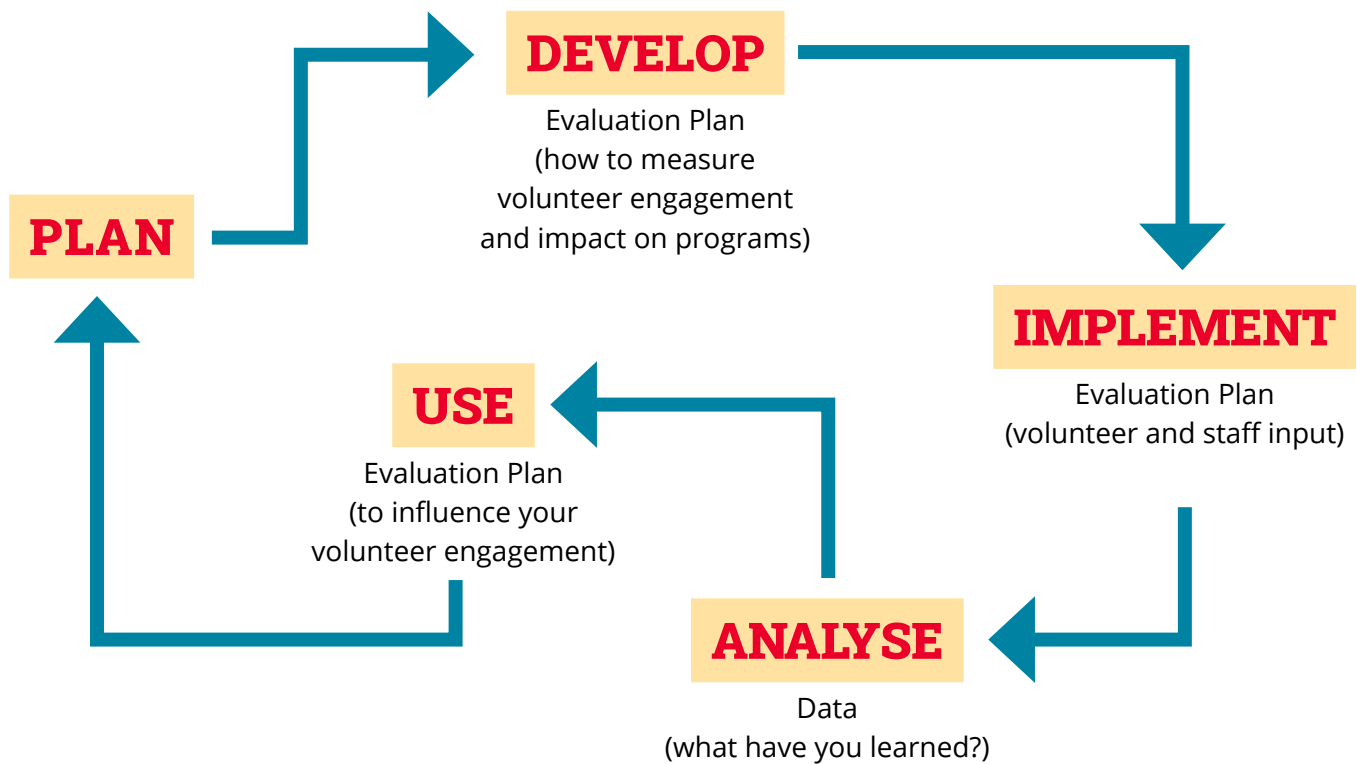
## Volunteer Evaluation

Actively invite volunteers to consider their own contribution, role, the program and the ministry unit /corps. This has a dual benefit:

1. You gain the insight of the volunteers who have a unique perspective of how the program and ministry unit /corps operates.
2. Volunteers feel valued and more invested in the program—increasing likelihood of retention.

How you seek volunteer reflections and input will depend on the size of the volunteer cohort and the dynamic of the program and ministry unit. For a smaller ministry unit/corps, this may happen organically, such as through conversations in the coffee room. For larger ministry units or where volunteers are quite isolated in their role, a more considered and structured approach will be required. For example, through team meetings and planned one-on-one catch-ups.

A structured approach provides a dedicated time to further explore how a volunteer is finding their role, ministry unit/corps, their relationships with staff, other volunteers and possibly clients, and whether they feel supported or effectively resourced. This time can also be used to explore and discuss performance issues.



In addition to organic and structured conversations, a template for volunteer evaluation, such as surveys, is useful for you to collect data to report and measure your volunteer engagement.

## Your Evaluation (Self-Reflection)

Do you feel positive and excited by volunteer involvement? Or do you feel frustrated? Is there a performance concern with a volunteer or multiple volunteers? Invest the time to consider your own strengths and struggles with volunteer involvement and use this to guide you to parts of this handbook that may be worth revisiting.

## Staff Evaluation

For a positive culture within your ministry unit/corps, staff must be actively involved in volunteer engagement. Create a space and opportunity for staff to both voice concerns and celebrate volunteer involvement.

Similar to seeking volunteer feedback, staff evaluation can take place through organic conversations, such as in the staff break room, and/or in a structured format. However, be mindful that organic conversations do not become gossip.

For a more structured approach, you may incorporate questions about volunteer engagement into an employee's performance appraisal, or as a regular discussion item in staff meetings. Survey Monkey is an easy-to-use online tool that can help with conducting evaluations.



## Overall Ministry Unit/Corps Evaluation

Use the Evaluation Checklist to gain an overall idea of how your ministry unit/corps is tracking with volunteer engagement and to identify areas that may require more thought or work.

## Ways to Evaluate

Kick start your thinking!

- ▶ Have regular conversations with each volunteer and ask how they are finding their role, the program and the ministry unit/corps
- ▶ Identify key volunteers and consult with them to inform and shape volunteer involvement in a program or the ministry unit/corps
- ▶ Consider your volunteer demographics and how this impacts planning. For example, if you have an aging volunteer cohort, you may need to consider a succession plan
- ▶ Use surveys (hand-out or online, such as Survey Monkey) to seek volunteer input
- ▶ If plausible, have one-on-one meetings with volunteers every six months
- ▶ Conduct an annual volunteer engagement evaluation
- ▶ Include questions on volunteer involvement in staff appraisals so staff feel invested and valued in how volunteers contribute

**Consider how you will implement what you learn!**

## Evaluate Checklist

- ☐ Are goals established for volunteer involvement? For example, are volunteers included in your ministry unit/corps strategy?
- ☐ Do you use multiple approaches for volunteer recruitment to source the most appropriate person for each role?
- ☐ Do you have a consistent recruitment interview process?
- ☐ Are criminal background checks undertaken when required?
- ☐ Are volunteers provided with a role description, and a Volunteer Handbook?
- ☐ Are volunteers' details captured and recorded?
- ☐ Are volunteers provided with orientation & training?
- ☐ Are volunteers involved in decision-making processes, such as included in staff meetings?
- ☐ Are volunteers involved in program and service evaluations?
- ☐ Do volunteers have access to policies and procedures? Do they know they have access? How do they know?
- ☐ Are volunteer hours recorded?
- ☐ Are volunteer contributions recognized informally and formally through recognition events and certificates?
- ☐ Do you record your volunteer retention rate? Have you noticed any changes in retention as you increase volunteer processes?
- ☐ Do you record expenses for volunteer engagement? For example, costs for recognition activities.
- ☐ Are there defined avenues/ opportunities for volunteers to give feedback about their involvement?
- ☐ Are there ways for everyone to provide feedback on volunteer involvement? Paid staff? Clients/ community?
- ☐ Do you have a plan to improve volunteer engagement?
- ☐ Do you seek support from DHQ and THQ?

# SUMMARY

## This Manual

Everyone needs an army – that’s us. Giving hope today, we have boots on the ground, working with our volunteers to make a real and lasting impact in 400 communities across the country.

Our compassion and stewardship help those who rely on us, not just in the moment, but for the long-term. Because of us, they know they’re not alone in their times of need – they have an entire army on their side.

This manual has been created to assist you in bringing together the different stages of volunteer involvement.

The content has been developed to reflect the Canadian Code for Volunteer Involvement, contextualized to The Salvation Army.

Volunteers are an integral part of The Salvation Army and we would not be able to continue offering life-changing programs and services across Canada and Bermuda without their ongoing generosity.





## Highlights

The stages outlined in this manual will assist to strengthen and extend volunteer involvement in what we do. To recognize the value of volunteers and benefit your services, invest in each of these stages:

- ▶ **Plan**—clarify the purpose for volunteer involvement
- ▶ **Recruit**—advertise and interview
- ▶ **Select**—inform, Criminal Background checks and paperwork
- ▶ **Train**—all information that is necessary to empower volunteers
- ▶ **Recognize**—understand the motivation for volunteering
- ▶ **Managing Performance**—be aware of all levels of performance and strategies to realize the best from, and for, your volunteers
- ▶ **Evaluate**—what is working, what is not working, and why

Recruiting, and on-boarding the right person for the right volunteer role protects us as an organization as well as provides a positive experience for the volunteer and everyone at your corps/ministry unit.

### REMEMBER...

- ▶ Volunteer involvement is an ongoing cycle
- ▶ There are TSA-specific resources to support you through each stage



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