

Functional Map of Managing Volunteers

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The Management Standards Consultancy

for

The Voluntary Sector National Training Organisation

Introduction

A functional map attempts to describe succinctly all the functions carried out by workers in a specific occupational area. This is the third draft of the Functional Map of Managing Volunteers. It has been developed from an analysis of information received from:

- a review of the literature on managing volunteers
- suggestions from the project's Technical Working Group
- the experiences of 78 volunteer managers who attended regional focus groups
- responses from 125 individuals who reviewed the first draft of the Functional Map of Managing Volunteers
- input from a standards development session of the Technical Working Group
- guidance from the Project Steering Group.

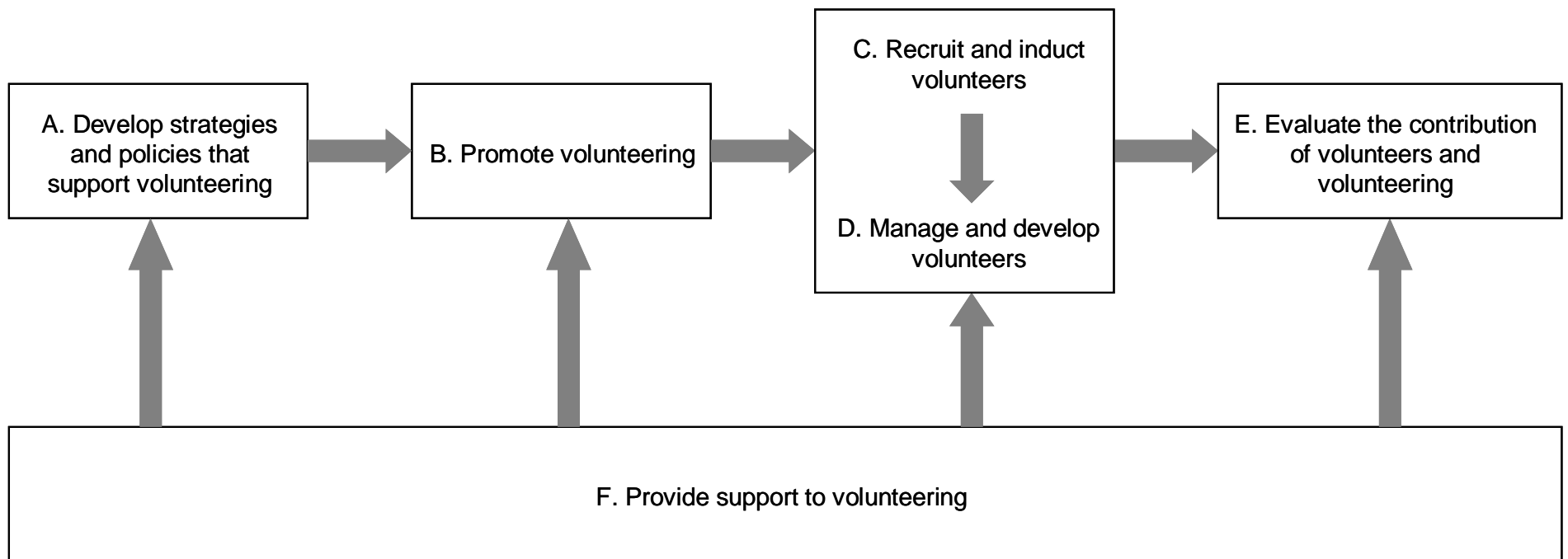
A functional map starts with a key purpose statement, a concise phrase which describes the mission or key purpose towards which everyone in the occupational area is working. The original draft key purpose statement for managing volunteers, developed by the Technical Working Group, was *To create and sustain an environment that ensures voluntary resources achieve the added value sought by the volunteer, the service provider and the client*. This was felt to be too cold, remote and bureaucratic by many participants at the focus groups and not to include all stakeholders (such as funders). We also considered using the definition from the Universal Declaration on the Profession of Leading and Managing Volunteers, *mobilize and support volunteers to engage in effective action that addresses specified needs* but this was felt to be a directive rather than an empowering model and did not recognise the importance of also meeting the needs of volunteers themselves. In our consultation we tested a third version *Enable volunteers to address the needs of the organisation's beneficiaries and the expectations of other stakeholders whilst satisfying their own motivations*. This had the support of 74% of respondents, although many found the wording (particularly *beneficiaries, expectations* and *satisfying their own motivations*) still rather cold, remote and inaccessible. We have therefore sought to retain the spirit whilst adapting the language in this revised key purpose statement:

**Enable volunteers to make their full contribution to the organisation's goals
whilst developing their own skills and interests.**

The key areas, units and elements within the functional map have been developed through the deductive process of repeatedly asking the question: "What needs to happen to achieve the outcomes expressed in the key purpose (key area or unit)?"

Please note that the functional map only contains those functions carried out by volunteer managers when working, directly or indirectly, towards the key purpose of enabling volunteers to make their full contribution to the organisation's goals whilst developing their own skills and interests. It does not cover other sector-specific functions they perform, as these are outside the project's scope.

Volunteer managers work at strategic, operational and tactical levels. The mix of functions they carry out is dependent upon the nature, size and structure of their organisation and their level of responsibility and authority within it. It is unlikely that any volunteer manager will carry out all of the functions described...but in a small voluntary organisation he or she may be carrying out many of them, plus a wide range of other functions not listed.



Functional Map of Managing Volunteers

Key Area A. Develop strategies and policies that support volunteering

Units	Elements	Notes
A1. Contribute to the development of your organisation's strategy	<p>A1.1 Contribute to identifying your organisation's beneficiaries and other stakeholders and their needs</p> <p>A1.2 Contribute to the definition of your organisation's strategic direction</p> <p>A1.3 Contribute to the development of your organisation's objectives</p>	<p>This unit is about showing that you can make an important contribution to developing your organisation's strategy, whilst not having overall responsibility for defining it. It requires you to have a good understanding of your organisation's beneficiaries, volunteers, other stakeholders and their needs. You will need to use this understanding to evaluate the organisation's strategic direction and to empower beneficiaries, volunteers and others to do the same.</p>
A2. Develop plans to meet your organisation's goals	<p>A2.1 Plan to meet your organisation's goals</p> <p>A2.2 Identify the resources required to carry out your plans</p> <p>A2.3 Gain understanding and support for your plans</p>	<p>This unit is about developing plans that will help you and your team to achieve your organisation's goals. It requires you to show that you can set 'smart' objectives and break these down into achievable tasks based on an understanding of the risks they involve and the resources they will require (including paid staff and volunteers). You will need to build in mechanisms for monitoring and evaluating the success of your plans. You must also show that you can win support for your plans from stakeholders, such as beneficiaries, volunteers, paid staff and partner organisations and demonstrate that you can seek feedback from them and use it to improve your plans.</p>
A3. Develop your organisation's volunteering policy	<p>A3.1 Identify how volunteers can contribute to your organisation's goals</p> <p>A3.2 Develop policy for integrating volunteers within your organisation's plans</p> <p>A3.3 Gain understanding and support for your volunteering policy</p>	<p>This unit is about developing policy to cover the use of volunteers. It requires you to explore the contributions that volunteers can make to the work of your organisation; identify the implications of using volunteers in various areas; identify relevant legal and regulatory requirements and best practice in other organisations, and to develop codes of conduct to cover these. You will need to win support for your policy from stakeholders, such as beneficiaries, volunteers, paid staff and partner organisations as well as seek feedback from them which you use to improve your policy.</p>

<p>A4. Develop organisational structures and systems to support volunteering</p>	<p>A4.1 Identify and evaluate organisational structures and systems to support volunteering</p> <p>A4.2 Design organisational structures and systems to support volunteering</p> <p>A4.3 Implement organisational structures and systems to support volunteering</p>	<p>This unit is about making sure your organisation has the right structures and systems to support volunteers. You will need to be able to identify the needs of volunteers; evaluate current structures and systems against these needs; design new or improved systems and structures and consult on these with volunteers, colleagues and other stakeholders. You will also need to show that you can put your changes into practice and provide support to volunteers and others during the period of change.</p>
<p>A5. Obtain funds to realise your organisation's volunteering policies and plans</p>	<p>A5.1 Identify sources of funding to implement volunteering policies and plans</p> <p>A5.2 Prepare bids and tenders to acquire funding to implement volunteering policies and plans</p> <p>A5.3 Negotiate and agree funding to implement volunteering policies and plans</p>	<p>This unit is about securing significant funds for the organisation's volunteer work. It may be carried out at various levels within a voluntary organisation. It requires you to show that you can identify and prioritise possible sources of funding, make applications for funding and carry out detailed negotiations with the funding source to secure the funds.</p>

Key Area B. Promote volunteering

Units	Elements	Notes
B1. Champion volunteering within your organisation	<p>B1.1 Promote the contribution volunteers make to your organisation's goals</p> <p>B1.2 Identify and reduce barriers to volunteering in your organisation</p> <p>B1.3 Articulate how members of your organisation can help volunteers make effective contributions</p> <p>B1.4 Monitor and take action to enhance a culture that is supportive of volunteering</p>	As a manager of volunteers you need to enable volunteers to maximise the contributions they can make to achieving the organisation's goals. A large part of achieving this entails taking practical steps to help the organisation and the people who work for it to do the same. To achieve this, you will need to help them understand the value of volunteering to the organisation.
B2 Promote people's equality, diversity and rights	<p>B2.1 Promote people's rights and responsibilities</p> <p>B2.2 Promote equality and diversity of people</p> <p>B2.3 Promote people's right to the confidentiality of information</p>	This unit is about showing you can promote the equality and diversity of people and their rights and responsibilities in your work. Given the sensitive nature of information about people with which you deal, this unit also requires that you demonstrate that you promote confidentiality. You are expected to be proactive in your promotion of people's rights and responsibilities, equality and diversity and their right to confidentiality.
B3. Develop and maintain relationships with volunteers	<p>B3.1 Develop relationships with individuals and groups of potential volunteers</p> <p>B3.2 Develop effective relationships with volunteers in your organisation</p> <p>B3.4 Maintain relationships with individuals who no longer volunteer with your organisation</p>	This unit is about showing you can establish, develop and maintain relationships with all the volunteers for whom you have responsibility. You need to show that you can build relationships with volunteers before they join and after they leave the organisation as well as throughout their time as a volunteer for the organisation.
B4. Develop productive working relationships	<p>B4.1 Develop the trust and support of colleagues and team members</p> <p>B4.2 Develop the trust and support of your manager</p> <p>B4.3 Minimise interpersonal conflict</p>	As a volunteer manager you need to show that you can work effectively with others. This will involve developing productive working relationships with your manager, team members and other colleagues in your organisation. You also need to show that you can minimise opportunities for conflict but deal with conflicts when they arise.

<p>B5. Develop relationships with individuals and organisations that can support your volunteering strategy</p>	<p>B5.1 Evaluate individuals and organisations that can support your volunteering strategy</p> <p>B5.2 Agree mutual expectations and protocols for working with individuals and organisations</p> <p>B5.3 Work in partnership with individuals and organisations that can support your volunteering strategy</p> <p>B5.4 Review relationships with organisations and individuals</p>	<p>The volunteering strategy of your organisation may require the involvement of external individuals and organisations. This unit is concerned with showing that you can work in partnership with external parties to achieve the objectives of your volunteering strategy.</p>
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Key Area C. Recruit and induct volunteers

Units	Elements	Notes
C1. Identify volunteer placements	C1.1 Identify suitable roles and activities for volunteer placements C1.2 Specify the knowledge, skills and experience required for volunteer placements	As a volunteer manager you will need to involve members of your organisation in creatively identifying meaningful roles and activities for volunteers and specifying the knowledge, skills, experience and personal qualities required for these roles.
C2. Promote volunteering to potential volunteers	C2.1 Identify and access potential volunteers C2.2 Encourage people to volunteer their services	To recruit new volunteers you will need to promote volunteering and encourage people to volunteer their services.
C3. Advertise for volunteers	C3.1 Select advertising media C3.2 Draw up and place advertisements	Recruiting volunteers may involve you in drafting suitable advertisements and placing them in appropriate media.
C4. Recruit volunteers	C4.1 Help potential volunteers understand their suitability for specific volunteer roles C4.2 Assess the suitability of people for specific volunteer roles C4.3 Enter into volunteering arrangements with volunteers	Recruiting volunteers requires you to assess potential volunteers - their knowledge, skills and personal qualities - and to select those who are suitable for specific volunteer roles. You will need to help volunteers decide whether particular volunteer roles are likely to meet their needs and expectations and enter into formal or informal volunteering agreements with them.
C5. Place volunteers	C5.1 Match volunteers to suitable volunteer placements C5.2 Refer volunteers to more suitable volunteer placements	It is important that volunteers are placed in suitable roles to meet both organisational goals and the needs and expectations of the volunteers themselves.
C6. Induct volunteers into the organisation	C6.1 Identify volunteers' induction requirements C6.2 Prepare guidance materials for volunteers C6.3 Prepare induction plans for volunteers C6.4 Provide induction training to volunteers	For volunteers to perform a role effectively and in a healthy, safe and secure manner it is important that they are properly inducted into the organisation and the role. You will need to induct volunteers who are new to your organisation as well as those who are already volunteering with the organisation but who are taking on a new role.

Key Area D. Manage and develop volunteers

Units	Elements	Notes
D1. Manage the performance of volunteers	<p>D1.1 Brief volunteers on their role and requirements</p> <p>D1.2 Supervise the work of volunteers</p> <p>D1.3 Evaluate the work of volunteers</p> <p>D1.4 Give volunteers feedback on their actions and their contribution</p> <p>D1.5 Deal with situations where volunteers' actions are not in line with organisational objectives or policies</p>	<p>This unit is about showing you can manage the performance of individual volunteers and volunteer teams. It requires clear communication with your volunteers, involving them in determining roles, responsibilities and working methods, evaluating their work, and giving and receiving positive and negative feedback. You will also need to show that you can deal with difficult situations involving volunteers.</p>
D2. Lead the work of volunteers	<p>D2.1 Brief volunteers on work requirements and their responsibilities</p> <p>D2.2 Supervise the work of volunteers</p> <p>D2.3 Evaluate and provide feedback on the work of volunteers</p>	<p>This unit is about showing you can lead individual volunteers and volunteer teams to carry out specific work requirements. It requires clear communication with your volunteers, involving them in determining roles, responsibilities and working methods, evaluating their work, and giving and receiving positive and negative feedback.</p>
D3. Solve problems during volunteering activities	<p>D3.1 Identify problems arising during volunteering activities</p> <p>D3.2 Take action to resolve problems during volunteering activities</p>	<p>This unit is about showing you can identify and deal with the many and varied problems that arise during volunteering activities. It necessitates good communication skills, involving others in problem analysis and problem solving, avoiding a culture of blame and providing support to all those involved in the problem.</p>
D4. Support the development of volunteers' knowledge, skills and competence	<p>D4.1 Help volunteers plan their learning and development</p> <p>D4.2 Provide suitable learning and development opportunities for volunteers</p> <p>D4.3 Help volunteers evaluate their learning and development</p>	<p>This unit is about showing you can help volunteers develop their knowledge, skills and competence to meet the needs of current and future volunteer roles and to meet their personal aspirations. Appropriate ways of doing this may vary from the highly rigorous to the very informal, depending on your organisation's policy, the level of the volunteer's time commitment to your organisation and the level of risk involved in their particular volunteer role.</p>

D5. Facilitate learning through demonstration and instruction	D5.1 Demonstrate methods and skills to volunteers D5.2 Instruct volunteers	This unit is about showing you can demonstrate skills and methods to volunteers and instruct them in how to carry out specific activities.
D6. Involve and motivate volunteers	D6.1 Engage volunteers appropriately in your organisation's activities D6.2 Enhance volunteers' experience of volunteering	Volunteer managers have to be able to involve and motivate their volunteers. This unit is about showing you can involve volunteers in all of your organisation's activities where their involvement would be appropriate, including the development of policies and strategies. You also need to show you can motivate volunteers by placing them in suitable volunteer roles, providing them with balanced feedback on the value of their contribution and helping them to meet their needs and expectations. You need well-developed skills in understanding and working with people to involve and motivate volunteers successfully.
D7. Maintain records of volunteers	D7.1 Record personal information about volunteers D7.1 Use personal information about volunteers in line with confidentiality requirements	This unit is about showing you can record the personal information you need about volunteers and use it in line with confidentiality requirements. Basic knowledge of data protection legislation and organisational confidentiality policies are essential for this unit.
D8. Manage volunteers' expenses	D8.1 Reimburse volunteer's expenses D8.2 Maintain records of expenses and deal with anomalies	This unit is about dealing with volunteers' expenses. You need to show you can identify expense claims that are valid under your organisation's policy and reimburse volunteers for them. You also need to be able to maintain records of expenses and deal with any anomalies that may occur (including suspected fraud). Volunteers are already giving their time to the organisation's goals and they may justifiably expect their out-of-pocket expenses to be reimbursed promptly. This can be a sensitive area which affects the volunteer's experience of working with your organisation. The volunteer manager's interpersonal skills can be important in smoothing over any sensitivities.

D9. Help address problems affecting volunteers	<p>D9.1 Help volunteers address problems affecting them</p> <p>D9.2 Help address problems with volunteers' performance and conduct</p>	<p>This unit is about showing you can help to address problems with volunteers. These may be work, personal or social problems that affect the volunteer, or problems with the volunteer's performance or conduct, or both. Whilst good volunteer management should help to avoid most of these problems they inevitably occur occasionally. Addressing them effectively requires a strong personality with sensitive interpersonal skills.</p>
D10. Conclude volunteering agreements	<p>D10.1 Identify when volunteers wish to change their contribution</p> <p>D10.2 Conclude agreements with volunteers</p>	<p>As a volunteer manager, you need to be able to conclude agreements with volunteers either when they are planned (eg at the end of a project or at a pre-arranged date) or when they are unplanned (eg for health or personal reasons or because the placement is no longer meeting the volunteers needs or expectations). This unit requires you to show that you can identify when volunteers wish to change their volunteering agreements as well as conclude agreements in such a way as to leave options for future volunteering open.</p>

Key Area E. Evaluate the contribution of volunteers and volunteering

Units	Elements	Notes
E1. Evaluate volunteers' contribution to the organisation's goals	<p>E1.1 Assess the contribution of volunteers to the organisation's goals</p> <p>E1.2 Communicate volunteers' contributions to stakeholders and the volunteers themselves</p>	<p>It is important that the contribution volunteers make to your organisation is known and understood by everyone involved in and with it. As a volunteer manager, you need to be able to assess the contribution that volunteers make to your work and communicate this information to the volunteers and other stakeholders. You need to use this information to emphasise and strengthen the perceived value of volunteering to the organisation and its beneficiaries and to enhance volunteer morale and self esteem.</p>
E2. Evaluate the effectiveness of volunteering strategies and policies	<p>E2.1 Identify criteria to evaluate volunteering strategies and policies</p> <p>E2.2 Evaluate the extent to which criteria have been met</p> <p>E2.3 Communicate the results and reasons for them to volunteers and other stakeholders</p>	<p>This unit is about evaluating whether your volunteering strategies and policies are effective.</p>

Key Area F. Provide support to volunteering

Units	Elements	Notes
F1. Manage and continuously develop your own capacity for managing volunteers	<p>F1.1 Identify and evaluate your own values, motivations and aspirations</p> <p>F1.2 Manage your own time and personal resources to achieve your objectives</p> <p>F1.3 Continuously develop your own knowledge, skills and competence in managing volunteers</p> <p>F1.4 Contribute to the development of the wider pool of knowledge about managing volunteers</p>	<p>This unit covers some of the essential features of being an effective manager in the voluntary sector. In particular you need to have a good understanding of yourself and the impact you have on others. You need to be able to manage yourself, your time and your resources. You also need to be able to identify and meet your own professional development needs. To improve volunteer management practice - your own and that of others - it is important that you share your knowledge about managing volunteers with your organisation and the wider sector and seek feedback on it.</p>
F2. Contribute to the maintenance of a healthy, safe and productive working environment	<p>F2.1 Monitor and maintain a safe, healthy and secure working environment</p> <p>F2.2 Monitor and maintain an effective and efficient working environment</p>	<p>Working as a manager of volunteers it is important that you monitor your working environment and make sure it meets the requirements for health, safety, security and effective working conditions.</p>
F3 Promote your organisation and its services to stakeholders	<p>F3.1 Plan to promote your organisation and its services</p> <p>F3.2 Communicate key messages to stakeholders</p> <p>F3.3 Evaluate the effectiveness of promotional activities</p>	<p>This unit is about showing you can promote your organisation and the services it provides to a range of stakeholders. These may include funders, commissioners, partners, people and agencies that refer volunteers to you, users, their families and friends, people who work for your agency and the wider community. It requires you to identify the stakeholders and the messages you want to send to them, to communicate with stakeholders through various means, and to evaluate how effective you are at promoting the organisation and its services.</p>

F4 Organise events	<p>F4.1 Plan events</p> <p>F4.2 Locate and arrange venues</p> <p>F4.3 Organise resources</p> <p>F4.4 Arrange attendance</p> <p>F4.5 Run events</p> <p>F4.6 Evaluate events</p>	This unit is about showing you can organise events: meetings, seminars, conferences, social events and other similar occasions. The unit emphasises effective planning, people and resource management and evaluation.
F5. Manage the use of physical resources	<p>F5.1 Plan the use of physical resources</p> <p>F5.2 Obtain physical resources</p> <p>F5.3 Ensure availability of supplies</p> <p>F5.4 Monitor the use of physical resources</p>	This unit is about showing you can efficiently manage the physical resources needed for the volunteering activities for which you are responsible. This involves identifying the resources you and your team will need for volunteering activities, obtaining those resources, ensuring the availability of suitable supplies, and monitoring the use of the resources.
F6 Manage the use of financial resources	<p>F6.1 Make recommendations for expenditure</p> <p>F6.2 Control expenditure</p>	This unit is about making sure you use financial resources in the most efficient way possible. It covers making recommendations for the use of financial resources and controlling expenditure against budgets.
F7 Negotiate and manage agreements for supply	<p>F7.1 Identify and select suppliers</p> <p>F7.2 Negotiate and agree terms with suppliers</p> <p>F7.3 Monitor the performance of suppliers</p>	This unit is about showing you can successfully obtain supplies. It covers materials, for example stationery and other consumables, and services such as printing, conference, travel or cleaning services.
F8. Manage projects involving volunteers	<p>F8.1 Plan and prepare projects involving volunteers</p> <p>F8.2 Manage the running of projects involving volunteers</p> <p>F8.3 Complete projects involving volunteers</p>	As a volunteer manager, you need to be able to plan, run and complete projects involving volunteers. It demands effective planning, people and resource management and evaluation skills as well as flexibility and innovation.

F9. Improve the quality of service provision	<p>F9.1 Set quality standards for service provision</p> <p>F9.2 Evaluate the effectiveness of service provision</p> <p>F9.3 Implement improvements to the quality of service provision</p>	<p>This unit is about showing you can set quality standards for and evaluate the effectiveness of service provision, as well as implement service provision quality improvements. It necessitates a range of knowledge including – organisational targets, setting standards, criteria for quality of service, establishing the causes of variances and discrepancies, procedures for implementing improvements and one's own limits of authority and responsibility.</p>
F10. Support the effective governance of your organisation	<p>F10.1 Identify your organisation's responsibilities and the legal and statutory requirements that apply</p> <p>F10.2 Monitor your organisation's compliance with responsibilities and legal and statutory requirements</p>	<p>This unit is about showing that you can assist your organisation to comply with its social, environmental and ethical responsibilities and the legal and regulatory requirements that apply. You need to be able to identify these responsibilities and requirements, monitor your organisation's compliance with them and provide advice and guidance to decision makers and other managers based on your findings.</p>
F11. Facilitate meetings	<p>F11.1 Lead meetings</p> <p>F11.2 Make contributions to meetings</p>	<p>This unit is about facilitating meetings so that objectives can be achieved. It covers leading meetings and making contributions to meetings.</p>
F12. Manage information and knowledge	<p>F12.1 Gather and store information</p> <p>F12.2 Analyse information to develop knowledge</p> <p>F12.3 Take decisions</p> <p>F12.4 Communicate information and knowledge</p>	<p>This unit is about showing that you can manage the information and knowledge that you and your organisation need to operate effectively. It requires you to gather, prioritise, analyse and disseminate information using a range of methods, including Information Communications Technology (ICT). It necessitates effective decision making and communication skills.</p>
F13. Report to external agencies	<p>F13.1 Identify and gather information required by external agencies</p> <p>F13.2 Report to external agencies in line with requirements</p>	<p>This unit is about showing you can gather and report information to external agencies – funding bodies, statutory and regulatory bodies. This involves ensuring that you have sound information gathering systems in place, that you engage volunteers and other stakeholders in the process and make sure you correctly meet external agency requirements.</p>