

**A Standards Framework for Managing Volunteers**

**A Report to  
the Voluntary Sector National Training Organisation  
from The Management Standards Consultancy**

**June 2002**

## Preface

This report has been prepared by Trevor Boutall of The Management Standards Consultancy with help from consultants Alasdair Cant, Geoff Carroll, Rekha Wadhvani and Colin Wright. We would like to thank the officers of the Voluntary Sector National Training Organisation, Jo Machin, Sarah Pollet and Bridie Sullivan for their committed support to the project.

We would also like to thank all those who have demonstrated their interest in managing volunteers by participating in the Project Steering Group, the Technical Working Groups, the Focus Groups, the postal consultation or contributing in other ways to this project. You will find you are named in the various annexes to this report (except where this information was given confidentially)!

Most of all we would like to thank you for the energy, enthusiasm and directness with which you have participated. This, above all, has convinced us that there is a real need for a UK-wide framework for training and qualifications for those who manage volunteers. You express this better than we ever could:

*I have always felt I was busy, but it wasn't until I saw the functional map that I realised just how busy! When I looked at the map I could only identify one task which I do not become involved with. The work of volunteer managers is very much under-rated and under-valued and I welcome any initiative which would identify the skills needed to manage volunteers.*

*The role of volunteer co-ordinator/manager varies from organisation to organisation. In [a large national children's charity] I take no part in strategic development as it is a hierarchical culture. However, whilst working in [a smaller women's action group] as a volunteer co-ordinator the opposite was the case. As part of the collective system, I had an equal input into all levels of planning and reviewing through quite formal processes.*

*I support a small team who are constantly engaged in volunteer management. [A training organisation] has developed a number of learning modules that are mapped to NVOs and Social Care Standards. While aimed at all staff within the organisation, the priority is to ensure the staff employed to care for deaf blind people are sufficiently trained and the care they provide is of sufficient quality. NOS in managing volunteers would enable [the training organisation] to map its own learning modules to external qualifications relevant to volunteer work and add to the professional development of all our staff.*

*I agree that training should be available to those who manage volunteers as it improves good practice. However, I would fear that volunteer management would become "professionalised" which may exclude competent and able people from doing the job.*

*I welcome the move to provide standards for volunteer managers. I feel this is a field of work which is often seen as marginal within a large organisation such as the local authority for which I work.*

*It is excellent. We commend the work. We're delighted you've produced this, and look forward to future joint work with VSNTO to promote this. We consider there is a good link to be made with the Active Communities strategy and the need to develop a strong infrastructure for volunteering.*

Trevor Boutall  
June 2002

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## Introduction

### Background

There are approximately 141,000 registered voluntary and community organisations in the UK, with over 3 million volunteer staff contributing in excess of 90 million hours of time each year (Annex 8, Ref 22, 32).

Since the appointment of the first voluntary services organisers and co-ordinators in the early 1960s, the management of volunteers has become increasingly formalised, with over 80% of volunteer-involving organisations having a volunteer manager (Annex 8, Ref 22). "Volunteer managers are key players on the volunteering stage. It is they who recruit, train and support the volunteers, and enable them to deliver myriad services to countless thousands of people. Less tangibly, they can create the environment in which volunteering can flourish and expand." (Annex 8, Ref 2)

The 1997 National Survey of Volunteering found that 71% of respondents agreed that "things could be better organised" and a third of respondents "sometimes got bored or lost interest" (Annex 8, Ref 2). Volunteer managers clearly have the leverage to use the resources of volunteer staff more effectively, to help volunteers meet their individual motivations for volunteering and to retain the services of volunteers at a time when high levels of employment and Government schemes like the New Deal are making it more difficult to recruit and retain volunteers.

The Voluntary Sector National Training Organisation (VSNTO) is responsible for ensuring the availability of appropriate training and qualifications for all those who work in the voluntary sector in the four nations of the UK. In its publication *Skills Matter: A skills foresight for the voluntary sector across England, Scotland and Wales, February 2000* (Annex 8, Ref 4), VSNTO identified that three quarters of voluntary organisations need to improve their management skills. VSNTO has therefore made the development of National Occupational Standards and relevant qualifications for those who manage volunteers one of its three priority areas for development (together with fundraising and trustees).

Following an application for funding to the Project and Standards Approval Group (PSAG) of the Education Regulatory Authorities (ERAs), The Management Standards Consultancy was appointed in January 2002 to undertake the first phase of a project to develop an occupational and functional map for the recruitment and management of volunteers, prior to the development of appropriate National Occupational Standards and qualifications (for which approval has been given in principle).

### Project Objectives

Phase 1 of the project, covered in this report, has these objectives:

1. Research and develop a detailed occupational map for the recruitment and management of volunteers
2. Review existing relevant materials including the LANTRA work and the work of the National Centre for Volunteering
3. Develop a detailed functional map for Managing Volunteers
4. Consult the sector on the accuracy and validity of the occupational and functional maps including all four home countries
5. Carry out a detailed gap analysis of existing National Occupational Standards
6. Produce a final report including recommendations for the development of any new standards required to cover the functions of recruitment and management of volunteers.

### Project Deliverables

The deliverables from Phase 1 on the project are:

1. An occupational map of the domain of the recruitment and management of volunteers
2. A functional map for the recruitment and management of volunteers
3. A matrix mapping existing National Occupational Standards to the functions in the functional map and identifying any gaps
4. A report of Phase 1.

This introduction is the *report on Phase 1*. The main body of the report contains the *occupational map* of the recruitment and management of volunteers. An overview of the *functional map* is given in Section 3 of this document, with the detail contained in Annex 1. The relevance of existing *National Occupational Standards* is discussed in Section 7 of this document, with the mapping matrix provided in Annex 2.

### Occupational and Functional Maps

An “occupational map” provides a picture of the occupational area to be covered by National Occupational Standards and qualifications, and defines its scope and boundaries. It identifies which standards and qualifications need to be developed and how these relate to each other within the National Vocational Qualification/Scottish Vocational Qualification (NVQ/SVQ) framework. In particular, an occupational map describes:

- the types of occupations within the sector and any anticipated changes in employment patterns
- opportunities for progression and clarification of the typical career routes open to individuals including the role played by qualifications
- the links between the sector and other related sectors, including opportunities to work with other standards setting bodies to identify common competencies
- the relationship between the standards and the main roles and responsibilities of occupations identified within the sector
- the role played by key organisations including trade unions and any professional or statutory bodies within the sector
- the information sources that have been used to make the analysis which might contribute to further development of NOS.

A “functional map” is an intrinsic part of an occupational map and is the basis for identifying which National Occupational Standards are relevant and/or need to be developed. The functional map starts with an agreed *Key Purpose* (“What is the key purpose of volunteer management? How can we describe concisely what it is that all volunteer managers are trying to achieve?”) and identifies the key areas of activity and main functions of volunteer management 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 functional statement)?”

Taken together, the occupational and functional maps should provide a clear picture of the occupational area as a whole, identify the functions carried out and the relevant National Occupational Standards, and highlight where standards and qualifications may need to be developed. The consultants have approached this project without any preconceptions about its outcomes. We have read the available literature and listened carefully to what volunteer managers, stakeholders and experts in volunteer management have been telling us. This report summarises our findings.

## Project Methodology

There is already a considerable body of research on volunteer managers and their functions on which to draw, as well as good practice guidance and sets of standards developed to meet local needs or the needs of particular sectors. The methodology adopted was designed to build on the existing information, draw this together into a UK-wide picture of volunteer management, and iteratively test the emerging picture with volunteer managers, their representative bodies and other key stakeholder groups.

### *1. Focusing the research*

In order to focus the field of research and ensure that the occupational and functional maps contained all the information required to make decisions about the adoption, tailoring and/or development of National Occupational Standards and qualifications, a set of questions was developed, discussed and agreed with the Project Steering Group.

These questions covered:

1. Who is involved in managing volunteers, at what levels, and in what numbers?
2. What differences are there in the types of people managing volunteers according to the size of the organisation, the type of the organisation, whether it is local, regional, national, international etc?
3. What are the different sectors in which managers of volunteers work?
4. How do people become managers of volunteers, and where do they go on to from managing volunteers?
5. What types of qualifications do managers of volunteers hold, what training have they received?
6. What are the trends and emerging skills needs within the sector?
7. What training opportunities and qualifications are available for those managing volunteers?
8. Should any potential qualification structure contain sector-specific units as well as managing volunteers units?
9. What generic competencies for management (eg. MCI standards) are available and how relevant are these to the sector?
10. What standards for managing volunteers have been developed by particular sectors?
11. What other standards/competencies for managing volunteers are available?
12. What are the special features about managing volunteers that makes the function different to managing paid employees?
13. What functions are core, that all managers of volunteers do, and what are optional?

### *2. Stakeholder Consultation*

Many of the key stakeholders are represented on the project Steering Group (Annex 3). Contact was also made with a much wider range of stakeholders including representative organisations (councils, associations, institutes etc), major volunteer-involving organisations, training providers and relevant national training organisations (NTOs) in order to brief them on the project, identify relevant research carried out in this area, invite their contributions to, and get their views on, the project. A list of other stakeholders contacted is included (Annex 7).

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### *3. Literature Review*

A considerable body of relevant literature was identified, abstracted and analysed according to its contribution to answering the focus questions listed above. A full list of the literature studied is included (Annex 8).

### *4. Technical Working Group*

A Technical Working Group (TWG) of experts in the field of volunteer management was formed to provide technical guidance to the consultants. A list of members of the TWG is included (Annex 4).

A first meeting of the TWG was held on 18 February 2002 to structure and understand the information emerging from the desk research, build a first model of the occupational area of volunteer management and develop a first draft functional map of the work of volunteer managers. A second meeting of the TWG was held on 13 May to consider responses to the consultation and advise the consultants on how to finalise the occupational and functional maps.

### *5. Focus Groups with Volunteer Managers*

Seven focus group workshops were held in Manchester, London (2), Cardiff, Belfast, Edinburgh and Birmingham with a total of 78 participants including volunteer managers and those involved in training and supporting volunteer managers. Participants were invited through the VSNT0's database and the databases of Volunteer Development Scotland (VDS), the Volunteer Development Agency in Northern Ireland (VDANI) and the Welsh Council for Voluntary Action (WCVA) and through personal referral by Project Steering Group members. A list of participants at the focus group is included (Annex 5).

These focus groups were designed to obtain first hand evidence from volunteer managers about their work, the functions they carry out, the qualifications they hold, the training and development they have received, the routes their careers have taken to date and will take in the future. They also provided the opportunity to discuss issues of common concern, consider the future direction of volunteer management and carry out functional analysis. These focus groups were supplemented by a number of telephone interviews with volunteer managers who were unable to attend the focus groups on the scheduled dates.

### *6. Consultation*

The functional map, together with a questionnaire, was sent to all those who had contributed to the project to date and to those who expressed interest in the project, in order to check whether they recognised their role as volunteer managers within the draft functional map and to gather further quantitative data for the occupational map. These consultation documents were also posted on the VSNT0 website to allow much fuller consultation.

A total of 125 responses were received, 57% from England, 23% from Scotland and 10% each from Wales and Northern Ireland. 74% of the respondents were female and only 8% came from black or ethnic minority backgrounds. 86% worked in the voluntary sector, 12% in the public sector and 2% in the private sector. Their organisations employ over 85,000 paid staff and manage over half a million volunteers.

A list of respondents' organisations is included (Annex 7).

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### 7. Project Steering Group

This project was overseen by a Project Steering Group whose remit was

- to bring expert knowledge and experience to inform the project
- to maintain a strategic overview of the project
- to support VSNT0 and the project consultants in achieving project outcomes on time and within budget
- to ensure membership of the Steering Group includes representation from key stakeholders
- to ensure key stakeholders are identified and consulted for participation in the project
- to help ensure final standards are robust and have relevance for practitioners
- to be advocates and to help publicise the project through own organisation, other networks and the wider voluntary sector
- to set up sub-groups to work on specific issues as agreed by the Steering Group
- to ensure a succession plan is in place to carry forward the project outcomes

The Project Steering group met on 24 January, 2002 to approve the project methodology, has been involved in all stages of the project and met again on 17 June, 2002 to consider and approve the project deliverables.

A list of members of the Project Steering Group is included (Annex 3).

### Key Findings

1. The **voluntary sector** is important to the UK's economy and social fabric, with 141,000 organisations, 550,000 employees and a turnover of over £15 billion (Annex 8, Ref 22, 32). There are a few very large voluntary organisations with significant numbers of employees and volunteers in formal structures, but thousands of small organisations, most of them without any paid staff. Voluntary organisations operate mainly in the health care, social care, housing, arts and culture, sports and recreation, environment, education and training, justice, religious groups, political action and advocacy and small business promotion sectors. Voluntary organisations are distinctively different from public and privately-run organisations. They have a strong sense of purpose to which both staff and volunteers are committed, they value diversity, involve users, volunteers and staff in decision-making and recognise the importance of motivation as the key to results. Government policy in particular, but also the increasing expectations of clients, volunteers and funders, have increased the profile of the voluntary sector over the last few years and with it the demand for accountability and professionalism in the sector.
2. There over 100,000 paid **volunteer managers** in the UK, working in both voluntary organisations and public or private organisations which involve volunteers (Annex 8, Ref 22). There are probably at least as many unpaid volunteer managers. In the larger organisations there is a clear distinction between *volunteering strategy* and *volunteer management* with different individuals fulfilling these roles. In most voluntary organisations, however, volunteer managers work at strategic, operational and tactical levels and also carry out myriad other tasks. The definition of volunteer manager has been adapted from that used in the "Bright Future" report (Annex 8, Ref 34): *anyone, paid or unpaid, who as a routine part of their work regularly recruits, selects and supports volunteers.*

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3. The **key purpose** of managing volunteers is defined as *to enable volunteers to make their full contribution to the organisation's goals and provide opportunities for them to develop related skills and interests*. The **functional map** of managing volunteers covers six key areas of activity:
  - A. Develop strategies and policies that support volunteering
  - B. Promote volunteering
  - C. Recruit volunteers and support them in developing related skills and interests
  - D. Manage the work of volunteers to meet organisational goals
  - E. Evaluate the contribution of volunteers and volunteering
  - F. Provide support to volunteering.However, it is recognised that volunteer managers also carry out many other generic management functions and functions specific to the sector in which they are working that fall outside the scope of this functional analysis.
4. There are numerous different routes to becoming a volunteer manager, but a common thread is that most have had considerable previous experience of volunteering. A typical **career progression** route is to be a volunteer, become an unpaid leader of volunteers, then a paid volunteer manager before moving on to a training, specialist or senior management role in the same or a similar organisation. Other volunteer managers are recruited from specialist roles within the same organisation or from management roles in other organisations. Qualifications play little part in the recruitment and career progression process, experience and interpersonal skills being considered more important, but the lack of training and qualifications for volunteer managers is felt to be a factor in limiting their opportunities for developing their future careers.
5. Most **training and development** in the voluntary sector takes place in-house. The majority of volunteer managers have had no specific training or preparation for their role; many do not even have a job description. There are, however, many short courses offered by the Directory of Social Change, the National Centre for Volunteering, Volunteer Development Scotland, the Volunteer Development Agency in Northern Ireland, the Welsh Council for Voluntary Action, Community Service Volunteers, local Volunteer Bureaux, the Scottish Network of Volunteer Centres and others of relevance to volunteer managers and more generally to those managing voluntary organisations. The demand for training specific to the role of managing volunteers can be seen in the burgeoning of university and college-based courses, linked to voluntary organisations, offering certificates, diplomas and degrees. However, there is a clear demand for a national framework to be able to understand the relative value of the various qualifications and how the pieces of the training jig-saw fit together.
6. With the growing demand for accountability in the sector, comes a recognition of the need for greater **professionalism** of volunteer managers. At the international level the lead is taken by the Association of Volunteer Administration with their Universal Declaration on the Profession of Leading and Managing Volunteers. In England, the National Centre for Volunteering and the National Volunteer Managers Forum have launched the **professionalVM** project to set up a professional body or association that will:
  - a. set and promote national volunteers management standards
  - b. create a university certificate or diploma in volunteer management
  - c. promote the continuing professional development of its members.The Scottish Association of Volunteer Managers is also considering the professionalisation issue and a project looking at the feasibility of a professional association for volunteer managers is underway in Northern Ireland.
7. There are many sets of **standards** that are relevant to volunteer managers, including generic management and small business standards, personnel, learning and development, health and safety, and administration standards, and standards specific to the various sectors in which

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voluntary organisations operate. There are also individual units of standards developed for the care and community justice sector that specifically deal with recruiting and managing volunteers, but there is no suite of standards that adequately covers the functions described in the Functional Map of Managing Volunteers. LANTRA's draft NOS for Volunteer Leaders address the needs of voluntary volunteer leaders in their sector and The Volunteer Development Agency in Northern Ireland's Competence Standards for the Management of Volunteers provide non-accredited standards to meet the needs of volunteer managers in Northern Ireland.

8. There is a strong demand from the sector for the development of *a suite of National Occupational Standards for Managing Volunteers* to help volunteer managers understand their roles, provide them with best practice guidance and a structure for their continuing professional and career development, and also provide a national framework to make sense of locally-delivered training and qualifications. This suite of NOS would also support the professionalisation agenda. There is strong support for training delivered by local universities, colleges and specialist training providers, benchmarked to the national standards framework. NVQs and SVQs are seen as part of a flexible approach to qualifications for volunteer managers which would also include Higher Education degrees and diplomas.

## Section 1: The Voluntary Sector

### Some Definitions

What do we mean by the voluntary sector? What do we mean by volunteering? What do we mean by volunteer managers?

These are some of the fundamental questions that we have had to address in our research in order to develop a clear picture and definition of the occupational area and functions carried out by volunteer managers. Naturally, there is no consensus around the answers to these questions.

The National Council for Voluntary Organisations (NCVO) in England defines voluntary organisations as those organisations which have voluntary governance and do not distribute profits to shareholders. There are 141,000 general charities in the UK which meet this definition with a gross income of £15.6 billion, 550,000 paid staff and perhaps 3,000,000 volunteers (Annex 8, Ref 22, 32).

However, this is only part of the story. In June 1998, the UK Volunteering Forum agreed the following definition: *Volunteering is an important expression of citizenship and is an essential component of democracy. It is the commitment of time and energy for the benefit of society and the community and can take many forms. It is undertaken freely and by choice, without concern or financial gain.* This definition includes the many hundreds of thousands of individuals who give up part of their time to work without pay as trustees, school governors, lay magistrates, church wardens, football coaches, hospital visitors, telephone counsellors, fundraisers for local schools or community groups or members of committees of various kinds. The list of examples of volunteering activity is endless and up to 50% of the adult population devote some of their time to volunteering each year. This equates to a volunteer population of over 20,000,000 in the UK.

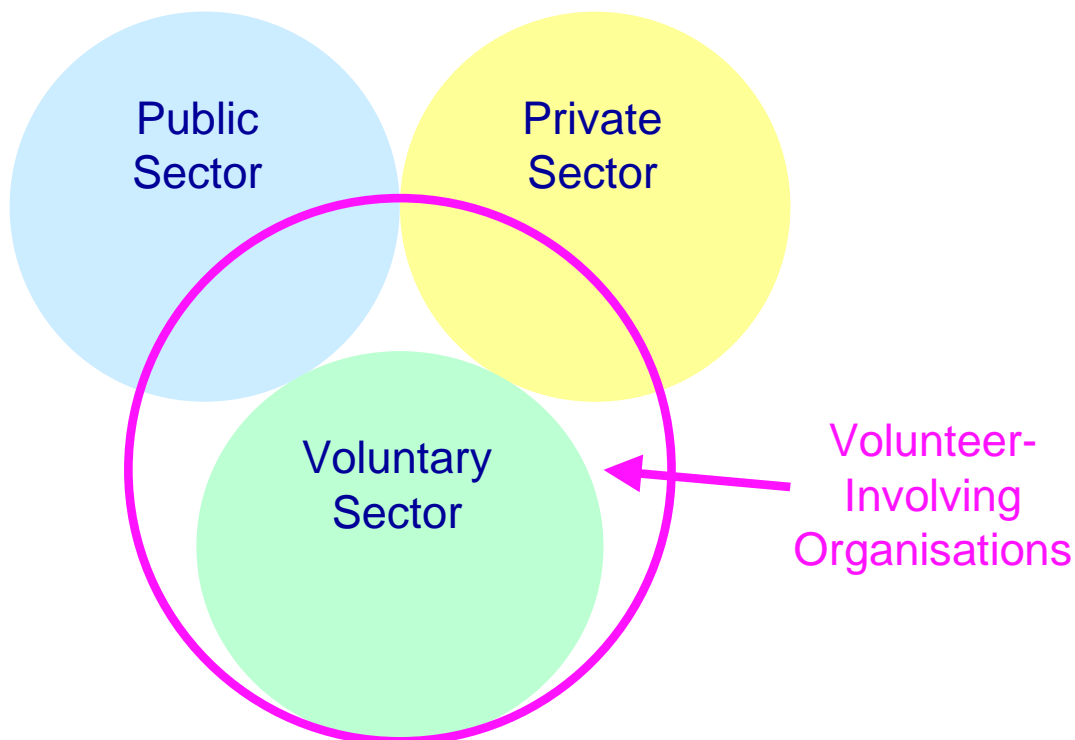


Figure 1: Volunteer-Involving Organisations

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Formal volunteering, defined as “unpaid work carried out with or under the auspices of an organisation” (Annex 8, Ref 32), takes place not only in the voluntary sector, but also within the private and the public sector, particularly in areas of education, sport, leisure, environment, health, social care and criminal justice. Formal volunteering is usually “managed”, although this may not be in a very structured way.

Informal volunteering, “unpaid voluntary work carried out outside organisations, often at neighbourhood level, but outside the immediate family” (Annex 8, Ref 32), is usually self-managed and therefore falls outside the scope of this project.

### The Importance of the Sector

What people are agreed on is the importance of volunteering to the UK’s economy and social fabric. With nearly 50% of the population involved, the effect of volunteering is almost certain to touch us all on a weekly, if not daily basis. If we are not involved as volunteers ourselves, we will reap the benefits through our contact with educational, health and recreational institutions (many of which are managed by boards of volunteer trustees or governors), our attendance at sports or arts events (organised and/or stewarded by volunteers), our contributions to raffles, collections and fund-raising events (again organised by volunteers) and the care given to frailer members of our families by volunteer carers.

The voluntary sector makes a significant contribution to the UK’s Gross Domestic Product, larger than the agricultural, textile or car manufacturing industries. It is also a significant provider of work and career opportunities. The sector has been growing in size and importance over the last decade or so, mainly as a result of Government policies to contract out the provision of many services, particularly in the housing and care areas, to third parties. In the Compact on relations between the Government and the Voluntary and Community Sector in England (November 1998), the Government recognises the importance of the voluntary sector and sets out its undertakings in the areas of independence, funding, policy development and consultation and better government (Annex 8, Ref 35). The Scottish Executive makes similar commitments through the Scottish Compact (October 1998) which also spells out the shared values framework (Annex 8, Ref 36). The statutory Voluntary Sector Scheme in Wales again specifies the shared values and a code of practice for funding the voluntary sector (Annex 8, Ref 37).

### The Structure of the Voluntary Sector

The Voluntary Sector comprises 141,000 organisations with 550,000 employees spread across the UK, but with a concentration of activity in London where a disproportionately high number of charities’ head offices are located (Annex 8, Ref 22, 32).

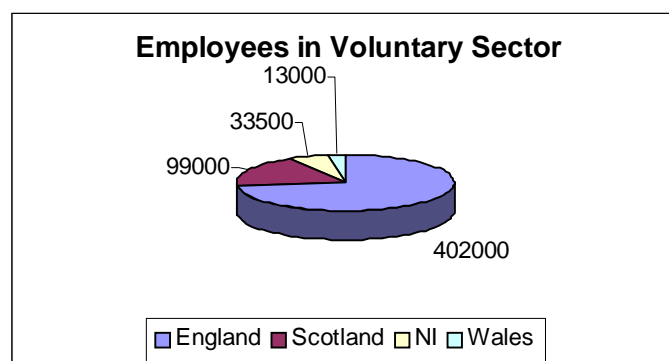


Figure 2: Employees in the Voluntary Sector

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However, the majority of these organisations are very small: 75% do not employ any staff at all. On the other hand, the largest 10% of organisations in the sector account for 88% of all the sectors revenues (Annex 8, Ref 22, 32).

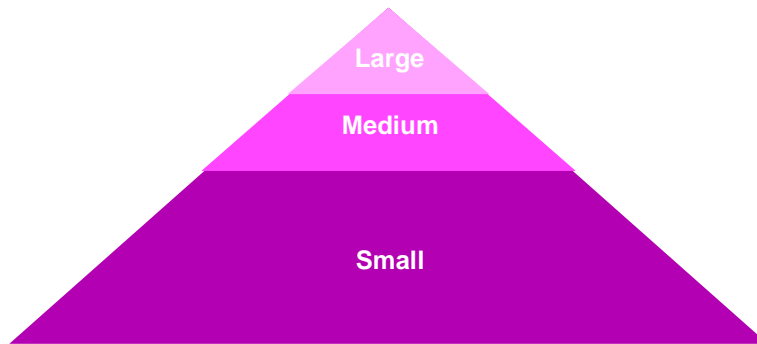


Figure 3: Proportions of Organisations in the Voluntary Sector

The large organisations have well-developed systems and structures, often analogous to effective organisations in the private sector, with regional structures for management, consultation, fundraising and the delivery of services, and a central Human Resource function which develops, implements and monitors the application of policies and guidance throughout the organisation. The medium-sized organisations emulate the larger organisations, but limited budgets often constrain their ability to apply good practice in a consistent way. The smallest organisations are informally run and focus all their energies on delivering services and acquiring the funding to do so.

Voluntary organisations cross many traditional vertical sectors of the economy. A volunteer, or manager of volunteers, is far more likely to say “I work for a housing association”, “I work for a sports club”, “I work in a care home”, or “I work on an environmental conservation project” than to say “I work in the voluntary sector”. This interaction between the voluntary sector and many other occupational areas is particularly relevant when considering appropriate National Occupational Standards and the mix between standards for managing volunteers and sector specific standards in any job role or qualification. The figure below shows the main areas of volunteer activity.



Figure 4: Interaction of the Voluntary Sector with Other Sectors

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The voluntary sector then is very diverse, ranging from very large national organisations which organise their thousands of staff and hundreds of thousands of volunteers in a relatively formal way, to small local bodies - hardly "organisations" in the true sense of the word - operating in a myriad of different sectors with a few committed volunteers and no employed staff at all.

Such diversity provides real challenges for developing a set of National Occupational Standards, describing agreed best practice for managing volunteers across the sector as a whole. Necessarily such standards will tend to focus on the "organised" or more formally-structured part of the sector where the management of volunteers is a function that is recognised and can be observed. One contributor to this project has observed that this may "limit opportunities for groups led and developed entirely by volunteers and (lead to) the establishment of 'professional' or 'qualification' criteria, to marginalise the credibility of volunteer work which is not within the remit of professional management. This has the effect of reducing the diversity of creative voluntary input."

### The Distinctive Nature of the Voluntary Sector

Although the voluntary sector is so diverse, it is possible to make some broad generalisations about what makes the sector distinctive and provides common and particular challenges to those managing volunteers.



Figure 5: The Distinctive Nature of the Voluntary Sector

Voluntary organisations are organisations with a very strong sense of purpose. People are working for the organisation primarily because they share its values and believe strongly in its mission and want to help the organisation to achieve it. External pressures, particularly the conditions associated with contract funding, may sometimes be in conflict with the organisation's values and purpose, and it is a challenge for management to protect its ethical position, or at least to strike a balance in order to serve its client group without compromising its integrity.

One of the values of voluntary organisations tends to be a profound respect for diversity; volunteers often volunteer their services to the organisation where they are accepted for who they are, and feel comfortable in an environment where unorthodox or idiosyncratic behaviour is accepted without comment. Another value consistently found in voluntary organisations is user-focused service, and a conscious effort to involve users, as well as staff, volunteers, funders and other stakeholders, in decision-making processes.

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People working for voluntary organisations tend to be personally highly motivated to work and claim that they get a high level of job satisfaction. However, in a sector where most workers are volunteers and the others are comparatively low paid, motivation is the key tool used to enable people to perform effectively and deliver results. Managers need to spend time helping volunteers understand and articulate their motivation, and ensure the work that they are doing delivers their expectations. Because there is no contract of employment with volunteers (although they may well be other forms of agreement), if they are dissatisfied, they can quickly “vote with their feet”.

Many voluntary organisations view volunteers as customers with needs to be met. They make conscious efforts to understand volunteers' needs and what they hope to experience or gain from working with the organisation. Volunteer managers then try to find suitable placements, either within their own or other organisations, to meet the volunteers' expectations and make effective use of the skills and competence these voluntary resources can offer. This is significantly different from the recruitment of paid staff for an organisation, where the key priority is to fill a vacancy with a qualified applicant, and little thought may be given to the opportunities that may be available for other applicants which are not suited to the advertised post.

Organisations with successful volunteer policies also have systems and practices which take full account of the nature of volunteering. Volunteers may be giving a few hours, days or weeks of their time to the cause and clients of the organisation. They do not want to spend time on bureaucratic form filling, training, and meetings unrelated to their purpose for volunteering. However, their credentials do need to be checked (quite rigorously, sometimes, particularly when dealing with vulnerable groups), they do need to be properly inducted into the organisation, its procedures and health and safety requirements, and they do need to be made to feel part of the organisation's decision-making process, not a expendable afterthought. This requires creative thinking to get the balance right and flexible scheduling so that volunteers can be effectively involved in the decisions affecting the organisation.

Working with volunteers can be more risky than working with paid staff in a number of ways. The same legal and professional safeguards are not in place (apart from Health and Safety legislation). There is no contract of employment and so there is limited legal redress in the event of a gross breach of conduct or other misdemeanour by the volunteer, or if the volunteer leaves without notice seriously jeopardising their clients. Volunteers may not have the same professional qualifications and work to the same professional codes of ethics as their paid colleagues. To minimise the exposure, volunteer managers need to ensure that volunteering agreements, codes of practice and custom-made disciplinary and grievance procedures are in place.

In the voluntary sector, partnership working, as opposed to competitive activity, is the norm. This is partly a function of the sectors voluntary organisations work in (such as health or social care with the need to provide integrated services for clients) partly a funding imperative (not having enough cash to do everything), and partly a result of Government policy promoting partnership working particularly at local community level.

While there are as many organisational structures as there are organisations in the voluntary sector, it is fair to say that, apart from the very large charities, they have flat structures meaning that managers have a very broad span of control, a wide variety of responsibilities to meet and little opportunity for career progression within the same organisation. All these factors provide challenges to volunteer managers, as does the need to work with management committees, most of the members of which will be volunteers themselves, often with a limited grasp of the day-to-day exigencies of delivering services.

## Key Challenges in the Voluntary Sector

Current trends and developments are providing a range of new and stretching challenges that must be addressed by those in management positions today and for the foreseeable future.



Figure 6: Key Challenges in the Voluntary Sector

Government policy has had a major impact on the voluntary sector in the last decade and will continue to do so if its undertakings in the Compact, Scottish Compact and Welsh Voluntary Sector Scheme are to be delivered. Legislation, particularly the NHS and Community Care Act has led to a massive expansion of voluntary sector care provision, accounting for virtually all the increase in the sector over the last decade. Legislation, however, is also placing additional burdens on the voluntary sector, with compulsory registration of care homes, minimum standards and the undertaking to include volunteers in future legislation on a par with paid employees. The New Deal has had an adverse effect on the recruitment of volunteers in some areas, but the Government's commitment to volunteering and the citizenship curriculum in schools should provide a fertile ground for recruiting volunteers in the future.

There has been a marked change in the way voluntary organisations are funded, with a greater proportion of funding coming through lottery, European Union and other sources of project funding, with a slight decline in voluntary contributions through fundraising activities. Voluntary sector managers have needed to hone their skills on seeking alternative sources of funding, developing partnerships, preparing bids, managing projects and monitoring activities and expenditure in order to meet the diverse accounting and audit requirements of different funding bodies. The new demands of funders, the constraints of legislation and the increasing expectations of both clients and volunteers have meant that many (though by no means all) voluntary sector organisations have had to become more business-like, more accountable, more skilled and more professional.

Looking to the future, managers of volunteers will need to adapt flexibly to the opportunities and challenges of new patterns of volunteering. An ageing population and increased leisure time of those of

## A Standards Framework for Managing Volunteers

working age provide opportunities, but there is the challenge of how to capture the imagination and commitment of young people, whose involvement in volunteering has waned in recent years. How do you gain the commitment of voluntary resources to deliver on specific projects as well as utilise the availability of people on an ad hoc basis and seize the opportunities offered by new technology?

The voluntary sector faces many challenges, but it has a bright future. Its political importance has been recognised and more and more organisations are viewing volunteering as a central part of their strategy rather than a nebulous area left to a single volunteer co-ordinator to sort out. Volunteer managers in the UK are working with their colleagues internationally to establish the status and professionalism of their work and provide an evidence base for good practice in managing volunteers.

### Section 2: Volunteer Managers

So who are these volunteer managers? How many are there and what do they do?

Since the first appointment of volunteer co-ordinators in the UK in the 1960's the role of volunteer management has increased dramatically due to the increase in numbers of volunteers, the greater complexity of the functions volunteers carry out, the heavier demands of legislation and the greater accountability demanded by project funders. The role now includes formalised recruitment, selection, vetting and induction procedures, appropriate deployment of volunteers to tasks, and the provision of support, training and development and mentoring to volunteers on personal and career matters.

Of the 550,000 employees working for general charities, approximately 112,000 (20%) are in management positions (Annex 8, Ref 22, 32). With 3,000,000 volunteers this gives a ratio of volunteers to managers of 27:1, but only a proportion of these are volunteer managers. It is not unusual to find that one volunteer manager is responsible for well over 100 volunteers. When the volunteer-involving organisations in the public and private sectors are also taken into account, the number of *paid* volunteer managers in the UK is estimated to be in excess of 100,000. There are no statistics to indicate how many *unpaid* volunteer managers there are, but the number could easily double to nearly a quarter of a million. However, not all of these will adopt the same formal management techniques.

In a small organisation, one person, perhaps a volunteer herself or himself, may run the whole show, getting the funding, recruiting and managing the volunteers, supervising service delivery and keeping the accounts. As a delegate at one of the focus groups said: "In a small agency, the Volunteer Manager might do anything from changing the spark plugs on the van to making a lottery bid application, then meeting the Queen...and all in one day." The time that can be spent on formal volunteer management will be minimal.

In a larger organisation, the volunteer manager's role may be more closely defined and indeed there may be layers of management with voluntary "volunteer leaders" working closely with a small team, reporting to a volunteer manager who is responsible for recruitment, resourcing and rostering, who in turn reports to a regional manager or senior manager with more of a strategic responsibility for volunteering. Clearer job descriptions and performance management systems become evident as the organisations become larger.

Figure 7 on the next page attempts to summarise the various different roles and responsibilities that might be involved in volunteer management, **in organisations where the function of volunteer management exists**. It is recognised that in many voluntary sector organisations, volunteers are delivering services without any formal management processes.

All members of the organisation, be they volunteers, paid staff, managers or trustees, will be working towards the organisation's purpose, the delivery of services to clients or other beneficiaries (including animals and the environment where relevant).

Figure 7, and the scope of this project, is only concerned with the management of the delivery of these services, and raising funds for the delivery of these services, through volunteers. These may be co-ordinated locally by unpaid volunteer leaders, who in turn are managed by paid or unpaid volunteer managers. Alternatively the volunteers may be managed directly by paid or unpaid volunteer managers. All these activities are referred to as "Volunteer Management".

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However, organisations also have responsibilities for determining volunteering strategy (“Why should we be using volunteers to help deliver our corporate objectives?”) and volunteering policy (“How should we be using volunteers?”). In small and medium-sized organisations, these may be carried out by the same individuals who are directly managing volunteers, or they may be carried out by others such as trustees, chief executives, directors or other senior managers with titles such as Volunteering Manager or Volunteer Development Manager.

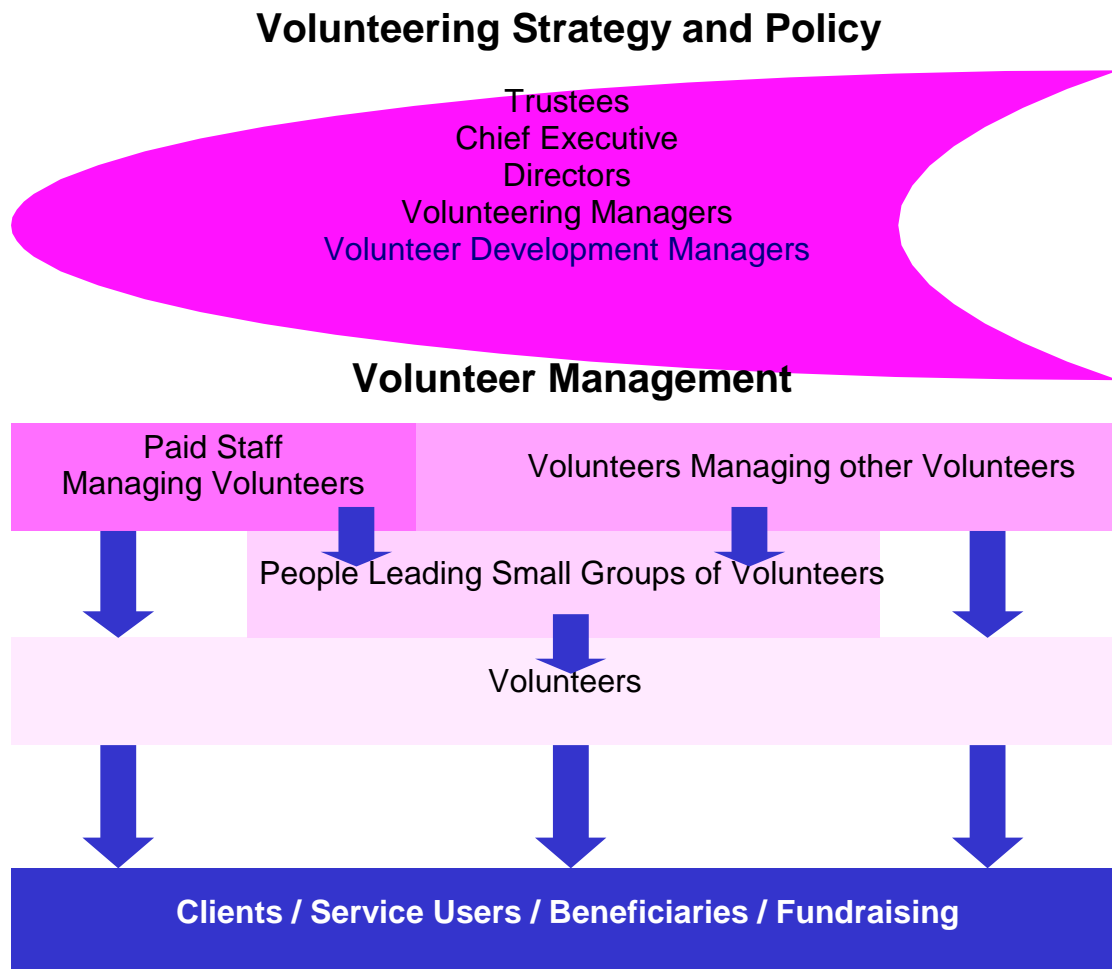


Figure 7: Roles in Volunteer Management

We have defined the scope of the occupational map and functional map of volunteer management as covering all those, paid or unpaid, who as a routine part of their work regularly recruit, select and support volunteers. Individual roles will vary significantly and may include strategic and policy making functions as well as service delivery functions.

One respondent to the postal consultation succinctly expressed her experience of different volunteer manager roles: *The role of volunteer co-ordinator/manager varies from organisation to organisation. In [a large national children's charity] I take no part in strategic development as it is a hierarchical culture. However, whilst working in [a smaller women's action group] as a volunteer co-ordinator the opposite was the case. As part of the collective system, I had an equal input into all levels of planning and reviewing through quite formal processes.*

## Section 3: The Functions of Volunteer Managers

An analysis of the functions performed by volunteer managers was carried out based on:

- 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
- 125 responses to the postal questionnaire on the draft functional map.

The Technical Working Group developed the first draft of a *Key Purpose of Managing Volunteers*, a concise statement which attempted to define the essence of managing volunteers, which 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 tested with the various focus groups around the country who felt it was too cold, remote and bureaucratic and did not include all stakeholders, such as funders. Various alternative wordings were proposed, including the definition from the Universal Declaration on the Profession of Leading and Managing Volunteers,

*Directors of Volunteers mobilize and support volunteers to engage in effective action that addresses specified needs.*

This was felt to be a directive rather than the empowering model of volunteer management more common in the UK, and it failed to recognise the importance of volunteer management also meeting the needs of volunteers themselves. A third option for the *Key Purpose of Managing Volunteers* was therefore tested through the postal consultation:

*Enable volunteers to address the needs of the organisation's beneficiaries and the expectations of other stakeholders whilst satisfying their own motivations.*

In this statement, the word *enable* was selected to convey the sense of volunteer managers creating the conditions to support volunteers in creatively carrying out their voluntary activities for the benefit of others, rather than directing a corps of voluntary resources. *Empower* and *facilitate* are alternative words that were considered. The statement recognised that volunteer managers are also responsible for helping volunteers satisfy their own particular motivations, needs and expectations through their volunteering activities, and fulfil the expectations of other stakeholders, such as funders.

This key purpose statement had the support of 74% of respondent to the postal consultation, although many still found the wording cold, remote and inaccessible. The final version seeks to keep the spirit but adapt the language of the key purpose statement:

*Enable volunteers to make their full contribution to the organisation's goals and provide opportunities for them to develop related skills and interests.*

To complete the functional analysis, the question was asked: *What has to happen to enable volunteers to address the needs of the organisation's beneficiaries and the expectations of other stakeholders whilst satisfying their own motivations?* This led to the identification of six Key Areas of activity. If you are a volunteer managers you must:

- A. Develop strategies and policies that support volunteering
- B. Promote volunteering

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- C. Recruit volunteers and support them in developing related skills and interests
- D. Manage the work of volunteers to meet organisational goals
- E. Evaluate the contribution of volunteers and volunteering
- F. Provide support to volunteering.

For each of these Key Areas, the question was asked: *What has to happen for this outcome to be achieved?* This led to the development of the units and elements titles within the Functional Map of Managing Volunteers (Annex 1).

The functions described in the Functional map of Managing Volunteers are at strategic, operational and tactical levels. Volunteer managers in large organisations may be working at only one of these levels and therefore only a small range of the units described may be relevant. However, volunteer managers in medium and small organisations are likely to be working at a number of different levels and so a wider range of units may be required.

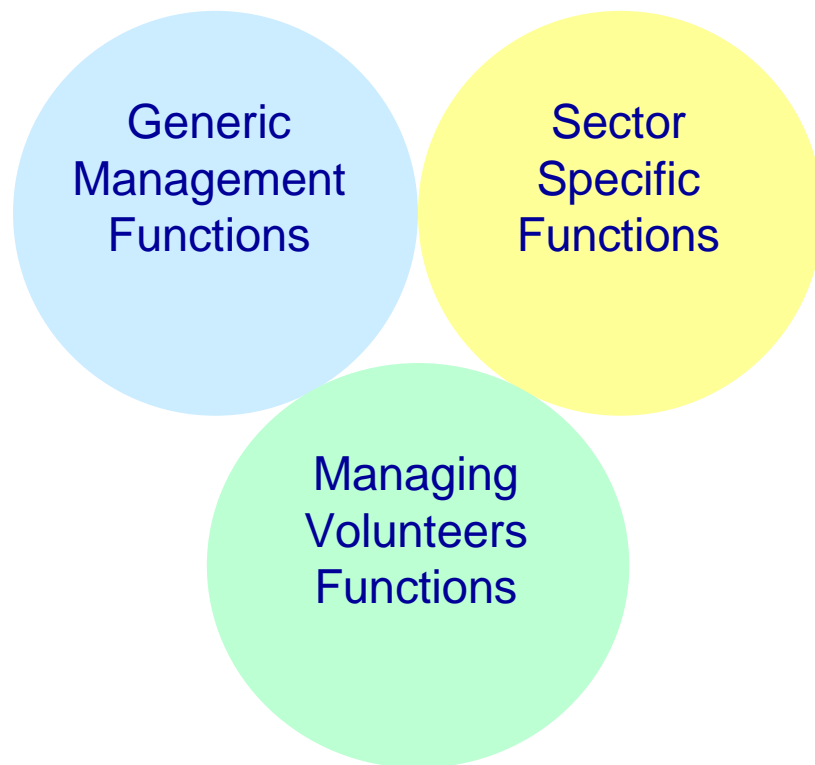


Figure 8: Functions Performed by Volunteer Managers

It is also recognised that, in their work roles, most volunteer managers do not just *manage volunteers*. Many of them have much wider management briefs which cover generic management functions such as managing resources, managing information, managing projects, assuring quality, running events, promoting their organisations and general administration and maintenance. They may also carry out a range of functions which are specific to their sector such as caring for clients, refereeing matches, providing legal advice or lighting a theatrical production.

The scope of this project is volunteer management. Whilst recognising the range of other work volunteer managers do, sector specific functions have been excluded from the Functional Map of Managing Volunteers; its scope, otherwise, would be infinite.

## Section 4: Career Progression

How do people become volunteer managers? Once they are volunteer managers, do they stay in that job? If not where are they likely to move on to?

Ask any volunteer manager how they got into the job and you will get a different answer. Each volunteer manager has a unique story to tell.

Volunteer Manager A: *"I began volunteering as a student and became involved in disability play schemes. Then I was a volunteer family support worker and did bar work and factory work to support my voluntary career. Eventually I gained a social work qualification and became a paid social worker in child protection."*

Volunteer Manager B *"I was a research ecologist, followed by a stint as a conservation volunteer, then a voluntary volunteer manager, then a paid volunteer manager, I have considered moving to another sector, but I enjoy the freedom for creativity and innovation in the voluntary sector."*

Volunteer Manager C *"I worked in plastics for ICI and was seconded for a short time to a voluntary sector organisation. I saw the benefits the organisation was delivering and became assistant manager of a holiday and respite centre for disabled people and carers."*

Volunteer Manager D *"I worked for an art auction house in the press office and then in customer service and marketing, where I came into contact with British Red Cross. When I was made redundant I gained a post with them in corporate fund raising. I have also had experience volunteering with the Samaritans. I can foresee a future career in the commercial sector working in community affairs."*

Volunteer Manager E *"I have been involved in voluntary sector housing for a long time. I worked as a volunteer in a hostel in London, then worked as a paid worker and became an adviser with responsibility for volunteers."*

Volunteer Manager F *"I have been the secretary of an archaeological society, then became involved as a mother in school play groups and football teams. I became a play leader then a trainer. I decided to take a social work qualification and move into social work."*

Although the stories are all different, there are some key themes.

An analysis of the questionnaire responses shows that most volunteer managers have had some experience as volunteers before becoming volunteer managers. There are a lot of cases of volunteers becoming unpaid volunteer leaders, then paid volunteer managers, often moving to more specialist or senior posts in the same organisation. There are many cases of volunteer managers developing their careers by moving to other organisations in the same part of the voluntary sector, within housing or social care for example.

The majority of volunteer managers intend to remain in the voluntary sector as they derive great satisfaction from doing a job which can really "make a difference". However, there is some dissatisfaction amongst volunteer managers that their work is not well-understood, their skills are not

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recognised (either within their own organisation and sector, or outside), and that they are poorly rewarded in financial terms for the work they do (they do not complain about this, they just state it as a fact). Many hope to progress eventually to a specialist, strategic or more senior role in their own organisation, but they recognise that the opportunities are limited. They feel it is more likely that they will move to a more senior role in a similar voluntary sector organisation when a vacancy arises.

Volunteer managers also feel disadvantaged when applying for more senior posts outside the voluntary sector. The voluntary sector does not offer the same level of training and qualifications enjoyed by their colleagues in the public and private sectors, they feel that the commercial sector considers that the management of volunteers is not serious management, and that voluntary sector managers are well-meaning amateurs, rather than true professionals (“What? You get paid for managing volunteers?”). Volunteer managers feel a strong need to improve the status and public understanding of their profession. There is evidence that the lack of formal qualifications and consistent and well-understood training structures can limit volunteer managers’ opportunities for career progression.

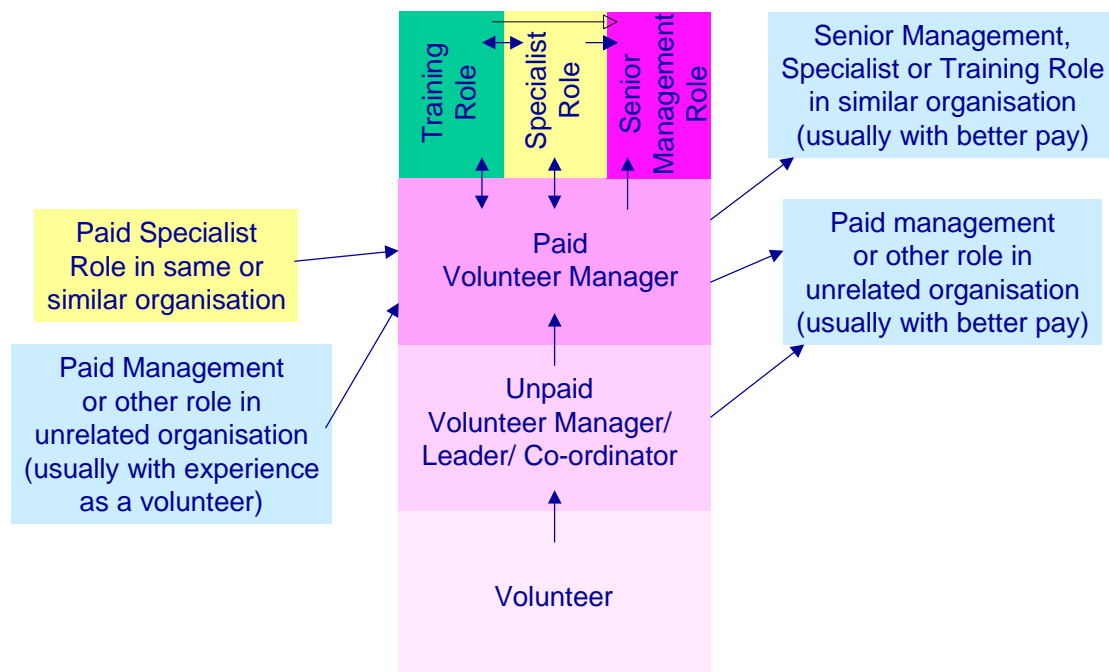


Figure 9: Career Progression Routes for Volunteer Managers

Figure 9 provides an indicative model of the various ways volunteer managers typically move through their careers. The central column shows how a volunteer may become an unpaid volunteer leader, then a paid volunteer manager before moving into a training, specialist or senior management role. On the left-hand side, we can see how people also become paid volunteer managers from paid employment in a different organisation or another paid role in the same organisation. On the right-hand side, we can see how they may move on to more senior, and better paid, vacancies in other organisations, perhaps within the same sector or possibly in an entirely unrelated sector.

## Section 5: Training and Qualifications

Staff in the voluntary sector are qualified to a high level. 25% of employees are educated to degree level or above, compared to 23% in the public sector and just 10% in the private sector (Annex 8, Ref 22, 32). Amongst volunteer managers the percentages are even higher with over 50% of questionnaire respondents holding a degree or professional qualification such as a Diploma in Social Work, nursing qualification, Post Graduate Certificate in Education or membership of the Institute of Personnel and Development. These professional qualifications may be important in the sector in which they are working, but volunteer managers regard their academic qualifications as largely irrelevant to their duties of managing the volunteer workforce. They value their life experience, their experience as a volunteer and their interpersonal skills far more highly than any academic qualification.

Most volunteer managers have little or no specific training or preparation to take on the job. Many do not even have a job description to tell them what they should be doing. They learn on the job, relying heavily on both their interpersonal and administrative skills. Many volunteer managers are quite isolated and there is a real hunger for a structured training and qualification system so that they know whether they are doing their job effectively.

*"The only preparation I had was my A-Z of Liverpool and the telephone book. Besides that I relied on my knowledge of where to find volunteers and my drive for the project to make an impact."*



Figure 10: Volunteer Managers' Development Opportunities

There are examples of structured approaches to preparing volunteer managers around the UK, for example the Effective Management of Volunteers programme run by the Northern Ireland Volunteer Development Agency in Northern Ireland and accredited by the University of Ulster, Glasgow Caledonian University's Certificate in Management, Voluntary Sector, run in conjunction with the Scottish Council for Voluntary Organisations, Volunteer Development Scotland/University of Dundee's Certificate in Volunteering Management, Training Volunteer Managers run by the Hampshire Open College Network, Norfolk City College's Certificate in Voluntary Sector Management and Exeter

## A Standards Framework for Managing Volunteers

College's Foundation Degree in Management with a voluntary sector pathway. (A list of training and qualification opportunities for volunteer managers is given in Annex 9.) Where such programmes are offered they are well subscribed and the participants benefit greatly from the opportunity to learn, benchmark their activities and network with colleagues from other voluntary sector organisations. However, the number of places on offer each year is limited and they only reach a small proportion of the volunteer manager population.

Valuable as these volunteer managers' training programmes, and the wide range of other shorter courses offered nationally by the Directory for Social Change, the National Centre for Volunteering, Volunteer Development Scotland, the Volunteer Development Agency in Northern Ireland and the Welsh Council for Voluntary Action and locally by Community Service Volunteers, Volunteer Bureaux, the Scottish Network of Volunteer Centres and others, are, volunteer managers and their organisations find it difficult to understand how they fit into a holistic framework of the skills volunteer managers need. A common national framework of training and qualifications is seen as important to:

- help individuals understand their roles and the knowledge and understanding they need
- show how individual pieces of the training jig-saw fit together
- provide a framework for the Accreditation of Prior Experience and Learning
- give credibility to the qualifications
- increase the prestige of the volunteer manager role.

Sharing Credit/Project 2001 makes a start on this national framework with its identification of typical progression routes for developing management skills in voluntary organisations, shown in Figure 11.

Level 4/5	Management NVQ Levels 4 & 5 Open University Certificate in Management South Bank University/ University of Sussex: Certificate in Management of Voluntary and Community Organisations
Level 3	NEBSM Certificate in Supervisory Management NOCN Advanced qualifications in Managing Volunteers Local OCN Management programmes Management NVQ Level 3
Level 2	Community work NVQ OCN Community work programmes DoSC/OCN National Management Programme
Level 1	Non-accredited workshops/short courses on fundraising, working with communities, the role of trustees, organised by CVS, local college or training organisation, Directory of Social Change etc

Figure 11: Progression Routes for Developing Management Skills in Voluntary Organisations

However, many of these programmes are related to the core business (eg community work) or managing voluntary organisations rather than managing volunteers and they are not formally mapped

## A Standards Framework for Managing Volunteers

to any common benchmark, such as National Occupational Standards, so the equivalencies can only be approximate. One focus group participant summed up the requirement as “a national standard with the flexibility to meet local needs”.

Volunteer managers have raised a number of other issues relating to training, development and qualifications which are summarised in Figure 12.



Figure 12: Issues in Volunteer Managers' Training and Qualifications

Many volunteer managers feel isolated in their work and put a high value on opportunities to network and benchmark what they do with their colleagues in other organisations. This has implications for the mode of delivery of training which should encourage group working and the sharing of experience. Many volunteer managers appear to favour an experiential learning style where they can reflect on, and learn from, their own and others' experiences. Action learning is a favoured approach and, because of volunteer managers' wide-ranging experience in other contexts, the ability to accredit prior experience and learning is seen as crucial.

There is a conflict of views about qualifications. On the one hand there is a growing need to be able to measure competence and have mechanisms to demonstrate the parity of competence of volunteer managers with their colleagues in the private and public sector. On the other hand there is a natural antipathy to qualifications in a sector whose purpose is to serve its clients rather than indulge in a bureaucratic paper chase. However, 58% of questionnaire respondents supported the development of an NVQ/SVQ in Volunteer Management, many (73%) as a practical stepping-stone to an academic qualification such as a university diploma or degree.

In *Bright Future: Developing Volunteer Management* (Annex 8, Ref 34), Pat Gay highlights the concern that the acquisition of “bits of paper” would come to dominate the work, but notes that most volunteer managers acknowledge that accreditation would assist those who wish to gain recognition and pursue their careers outside the voluntary sector. In this respect “some approval was given to NVQs at the right level as the way out of the ‘bits of paper’ versus ‘experience’ dilemma”.

## A Standards Framework for Managing Volunteers

The final issue on training and qualifications is an organisational one. Many voluntary organisations, particularly the small and medium-sized ones, do not have the organisational structures or systems in place to support a consistent and sustained approach to human resource development or sophisticated continuous assessment-type accreditation processes. Nor do they have the budgets to fund training and accreditation, or release workers from their front-line duties for significant periods of time. These are issues which will need to be addressed when designing training and qualifications and planning their implementation across the sector.

### Section 6: Professionalism

The growth of volunteering in the UK and internationally has led gradually to a more formal, structured and professional approach to managing volunteers. This growing professionalism has accelerated over the last decade or so, stimulated by Government policy which has opened up more opportunities for voluntary organisations, and driven by the higher expectations of clients and volunteers and the increased demand for accountability from those who directly fund projects involving volunteers.

The international Association for Volunteer Administration (AVA) has recognised that “as volunteering has expanded globally, the need has emerged for strong leadership and management of volunteers. Increasingly this is recognised as a professional role”.

In their Universal Declaration on the Profession of Leading and Managing Volunteers, the AVA state that the role of volunteer managers, or “Directors of Volunteers” is to “mobilise and support volunteers to engage in effective action that addresses specified needs. Directors of Volunteers strive to:

- be innovative agents for change and progress
- be passionate advocates for volunteering
- welcome diverse contributions and ideas
- develop trusting and positive work environments in which volunteers and other resources are effectively engaged and empowered
- ensure the safety and security of volunteers
- develop networks and facilitate partnerships to achieve desired results
- be guided by, and committed to, the goals and ideals of the cause/mission towards which they are working and to continually expand our knowledge and skills
- communicate sensitively and accurately in the context, rationale, and purpose of the work we are doing
- learn from volunteers and others in order to improve the quality of our work.”

In England, the National Volunteer Managers Forum and the National Centre for Volunteering have taken up the cause of “professionalising” volunteer managers through the National Lottery-funded *professional/VM* project. This project plans to set up a professional body or association that will:

- set and promote national volunteers management standards
- create a university certificate or diploma in volunteer management
- promote the continuing professional development of its members.

The *professional/VM* project is currently working on all these fronts, for example with VSNTO on the development of National Occupational Standards for volunteer managers, and reports that “embracing professionalism will help organisations meet (the challenges they face) by:

- increasing the quantity, diversity and retention of volunteers
- broadening the contribution that volunteers can make
- better training of volunteers
- strengthening funding applications by guaranteeing professional management of volunteering
- achieving the Investing in Volunteers Award
- achieving Quality Standards through competently trained and managed volunteers”.

## A Standards Framework for Managing Volunteers

Similar initiatives are underway in Northern Ireland and in Scotland through the Scottish Association of Volunteer Managers.

There is strong support from across the sector for the formalisation of the volunteer manager role and related training and qualifications through the development of National Occupational Standards. However, there is also a kind of nostalgic regret in some quarters that the formalisation and structuring of volunteering may challenge the core values of volunteering and inhibit the diversity and creativity that make the voluntary sector unique.

One respondent articulates this effectively when he comments: "The establishment of 'agreed standards' for volunteers acts to increase, rather than decrease, factors which reinforce social exclusion. The introduction of standards for volunteers establishes a barrier to inclusion of the already marginalised, who (arguably) are a target group for volunteering and who in subsequent experiential social contact can benefit from that experience and extend that to peer-group members. The exclusion of the more difficult end of the human spectrum from volunteer work through this agenda might make the life of paid volunteer 'managers' simpler, but in practice is likely to reduce the flexibility and growth of human skills necessary in the sector."

## Section 7: Standards for Volunteer Managers

There are many sets of National Occupational Standards, and other sets of standards, that may be relevant to some of the functions performed by volunteer managers, but few which accurately describe the functions of recruiting, managing and retaining volunteers. Figure 13 illustrates the range of standards available.



Figure 13: Standards for Volunteer Managers

The national Management Standards developed by the Management Charter Initiative (MCI) describe the generic functions of management (managing activities, resources, people, information, energy, quality, projects and environmental impact) and make specific reference to managing "paid and unpaid staff". These national Management Standards are currently under review. The findings in this report should inform the review of the Management Standards in order, where possible, to have common standards that describe good practice in the recruitment and management of both staff and volunteers.

The national Owner Manager Standards developed by the Small Firms Enterprise Development Initiative (SFEDI) describe the functions of planning, managing and developing a small business and reflect many issues which are felt strongly by small voluntary organisations. Both the MCI and the SFEDI standards have been contextualised by voluntary organisations for use by their own managers.

Many sets of cross-sectoral standards, particularly the national Standards for Administration developed by the Council for Administration and the National Occupational Standards developed by the Employment National Training Organisation covering the generic areas of health and safety, personnel and learning and development, are relevant to those providing safe environments for volunteers to work in, managing the personnel functions and providing appropriate training, development and assessment opportunities.

## A Standards Framework for Managing Volunteers

Depending on the sector the volunteer manager is working in, different sets of National Occupational Standards describing the specific functions of that sector, such as care, community work, counselling or environmental conservation will be relevant.

However, there is no complete set of National Occupational Standards that fully describes the range of functions involved in managing volunteers. The Care Standards contain a single unit *D13101 Select, develop and co-ordinate volunteers* which may be appropriate for staff who have the management of volunteers as a small part of their work role. The Community Justice Standards contain two units *A201 Develop, implement and evaluate strategies and policies for recruiting and managing volunteers* and *A202 Contribute to the development, implementation and evaluation of strategies and policies for recruiting and managing volunteers* designed respectively for those who develop volunteer strategies and those who directly manage volunteers. However, these units are based on the premise that "once an agency has set up its strategies and policies for working with volunteers then the management of those volunteers can take place in a similar way to those of paid workers but within the context of the agency's strategy and policy". Many volunteer managers may wish to take issue with this!

There have been recent successful attempts to develop sets of standards specifically for those involved in managing volunteers. LANTRA, in conjunction with key volunteer-involving organisations such as the National Trust, RSPB and BCTV and other national training organisations including the Cultural Heritage NTO, VSNT0 and the Local Government NTO has developed draft National Occupational Standards for Volunteer Leaders in the Land-Based Sector. These cover:

1. Motivate and recognise voluntary effort
2. Organise and lead the work of volunteers
3. Organise and communicate information
4. Work effectively
5. Implement environment good practice at work
6. Monitor and maintain the health and safety of individuals in the workplace.

This set of standards well reflects the mix of managing volunteers functions, generic management functions and sector specific functions involved in leading volunteers.

The Northern Ireland Volunteer Development Agency also discovered that, whilst many of the MCI Management Standards are applicable to managing volunteers, "the (MCI) key purpose fails to recognise the other side of the role - to address the diverse needs of volunteers". They have developed their Competence Standards for the Management of Volunteers which provides the competence framework for their Effective Management of Volunteers programme, accredited by the University of Ulster. There are six units in this framework:

1. Recruit volunteers
2. Select volunteers
3. Manage volunteers
4. Manage volunteer training
5. Evaluate volunteer involvement
6. Develop and review volunteer policies.

The questionnaire consultation responses provide overwhelming support for the development of National Occupational Standards for Volunteer Managers; 83% fully support the initiative, 15% partly

## A Standards Framework for Managing Volunteers

and only two respondents were opposed. Respondents were clear about the potential benefits of the standards:

*"A consistent standard is essential. The voluntary sector is seen as somehow less business-like than the statutory sector. In order to attract the calibre of employees we need to have a set standard."*

*"It will help define the profession more clearly and raise awareness outside the sector. It will help define a career path for volunteers."*

*"NOS would raise the profile and value of volunteering provide the opportunity to recognise and accredit existing skills, knowledge and experience while developing new ones - all to the benefit of the organisation and individuals."*

When making its proposal to develop a set of National Occupational Standards for managing volunteers, VSNT0 will follow the guidance of the Educational Regulatory Authorities that "wherever possible, National Occupational Standards should be adopted without variation" and may also adopt other appropriate standards which are not National Occupational Standards. The Gap Analysis (Annex 2) identifies National Occupational Standards and other standards that are candidates for being adopted, either without variation or tailored, to meet the needs of volunteer managers.

### Section 8: A Standards Framework for Managing Volunteers

There are those within the voluntary sector who are wary of the danger that formalisation, standardisation and professionalisation of volunteer management may inhibit creativity and flexibility and exclude those who do not conform to a standard.

However, the groundswell of opinion in the sector is that there is a strong and urgent need for a national framework of standards for managing volunteers. This national framework should:

- provide a comprehensive and comprehensible picture of what is involved in managing volunteers
- help individual volunteer managers understand their roles and the knowledge and skills they need
- provide a model of good practice that individual volunteer managers can follow
- be capable of being applied flexibly to meet local, sectoral and organisational needs
- increase the status and prestige of volunteer management through benchmarking with standards in other sectors
- allow training providers to design learning programmes to meet the knowledge, skills and competence needs of volunteer managers
- provide a common national framework to benchmark local training provision and qualifications
- allow those selecting learning programmes and resources to understand how they contribute to developing competent performance
- provide a structure for the continuing professional development and career development of volunteer managers
- have clear links to the national framework applicable in other sectors.

The success of qualifications in volunteer management offered by universities and further education colleges, often in association with voluntary sector organisations, is evidence of the demand for structured training and accreditation. This local delivery of training and qualifications is able to respond individually and effectively to local needs. Benchmarking these locally delivered qualifications to a national framework would give them UK-wide currency, permit credit accumulation and transfer, and provide the basis for recognition for membership of professional bodies. An NVQ/SVQ in volunteer management, supported by 58% of questionnaire respondents, could form part of this national framework, offering a practical route to accreditation and professionalism which fully recognises volunteer managers' diverse career routes and work and life experiences.

### Annex 1: Functional Map of Managing Volunteers

#### Introduction

A functional map attempts to describe succinctly all the functions carried out by workers in a specific occupational area. This is the second 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.

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 and provide opportunities for them to develop related skills and interests.**

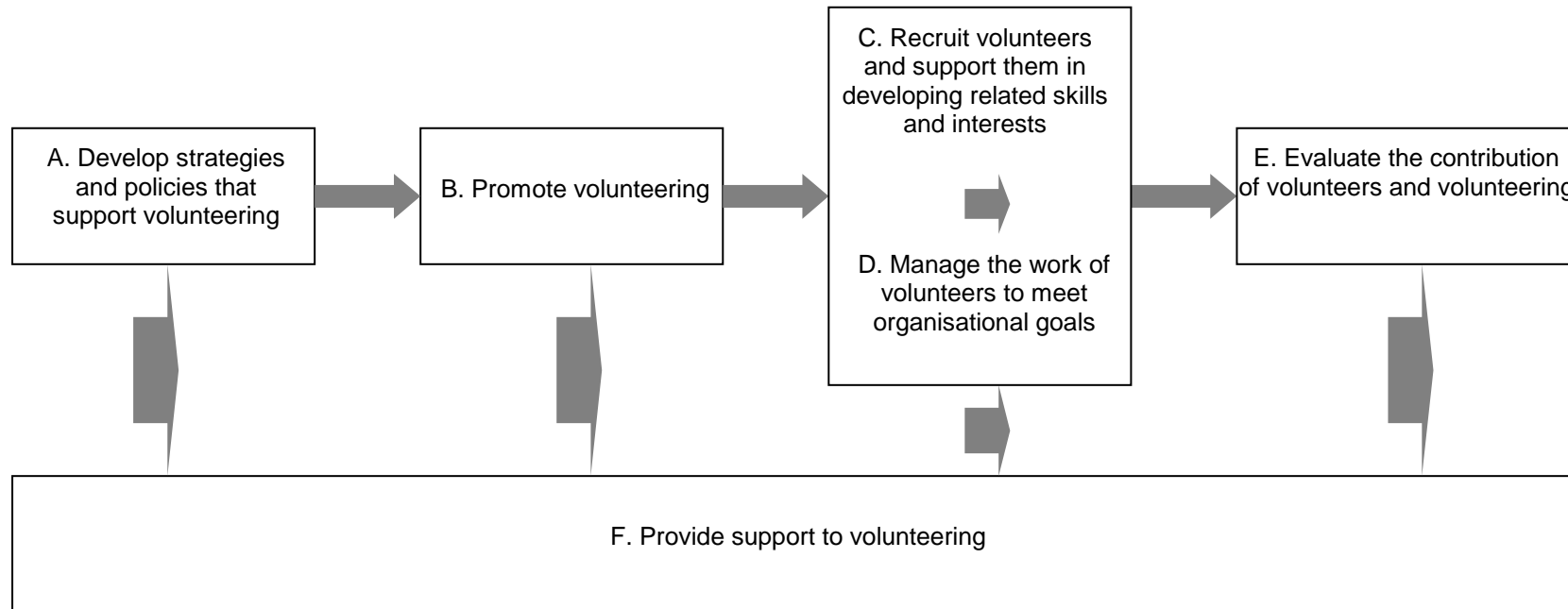
## A Standards Framework for Managing Volunteers

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 and provide opportunities for them to develop related 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.

## A Standards Framework for Managing Volunteers



Functional Map of Managing Volunteers

## A Standards Framework for 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 the definition of your organisation's strategic direction</p> <p>A1.2 Contribute to identifying your organisation's beneficiaries and other stakeholders and their needs</p> <p>A1.3 Contribute to the development of your organisation's objectives</p>	This unit is about making an important contribution to developing organisational strategies, whilst not having overall responsibility for defining the organisation's strategic direction and purpose.
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>	This is about developing plans to achieve the organisation's goals. It may be carried out at a number of different levels within an organisation.
A3. Develop your organisation's volunteering strategy and policy	<p>A3.1 Identify how volunteers can contribute to your organisation's goals</p> <p>A3.2 Develop strategies for enabling volunteers to contribute to your organisation's goals</p> <p>A3.3 Develop policies for integrating volunteers within your organisation's plans</p> <p>A3.4 Gain understanding and support for your volunteering strategy and policy</p>	This unit is specifically about developing your organisation's <i>volunteering</i> strategy and policies.

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<p>A4. Develop organisational structures and systems to support volunteering</p>	<p>A4.1 Identify organisational structures and systems to support volunteering</p> <p>A4.2 Design and implement organisational structures and systems that support volunteering</p> <p>A4.3 Review organisational structures and systems to support volunteering</p>	<p>This unit describes the function carried out by those who put systems and structures in place for recruiting and managing volunteers. It is important that these systems and structures are <i>volunteer-friendly</i> and recognise the particular needs of volunteer workers.</p>
<p>A5. Obtain funds to realise your organisation's volunteering strategies and plans</p>	<p>A5.1 Identify sources of funding to implement volunteering strategies and plans</p> <p>A5.2 Prepare bids and tenders to acquire funding to implement volunteering strategies and plans</p> <p>A5.3 Negotiate and agree funding to implement volunteering strategies and plans</p>	<p>This unit is about securing significant funds for the organisation's work involving volunteers. It may be carried out at various levels within an organisation. Although this function is not performed by all volunteer managers, it is an important function for those who do carried it out.</p>

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### Key Area B. Promote volunteering

Units	Elements	Notes
B1. Champion volunteering within your organisation	<p>B1.1 Promote the benefits of volunteering to your organisation</p> <p>B1.2 Identify and take forward opportunities for volunteering in your organisation</p> <p>B1.3 Identify and reduce barriers to volunteering in your organisation</p>	This unit is about acting as a champion for volunteering throughout your organisation. It covers making people aware of the strategic role volunteers can play, proactively seeking volunteering opportunities and removing unnecessary obstacles to volunteering.
B2. Develop a culture that values the contribution of volunteers	<p>B2.1 Articulate the value of the contribution volunteers can make</p> <p>B2.2 Identify and communicate how staff and other stakeholders can help volunteers make effective contributions</p> <p>B2.3 Monitor and take action to enhance a culture that is supportive of volunteering</p>	This unit is about developing a culture throughout the organisation that really values volunteers. It covers making all members of the organisation aware of the contribution volunteers can make, encouraging people to help volunteers and monitoring the culture and climate for volunteering.
B3 Promote people's equality, diversity and rights	<p>B3.1 Promote people's rights and responsibilities</p> <p>B3.2 Promote equality and diversity of people</p> <p>B3.3 Promote people's right to the confidentiality of information</p>	This unit is about promoting people's rights and responsibilities, the benefits of diversity and anti-discriminatory practice. It also has a special focus on the right to confidentiality of information.

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<p>B4. Develop relationships with volunteers</p>	<p>B4.1 Develop relationships with individuals and groups of potential volunteers</p> <p>B4.2 Develop effective relationships with volunteers in your organisation</p> <p>B4.3 Manage conflict amongst volunteers and between volunteers and staff</p> <p>B4.4 Maintain relationships with individuals who no longer volunteer with your organisation</p>	<p>This unit covers developing relationships with the volunteers themselves, from before they become volunteers, through their time as volunteers, to maintaining contact with them afterwards. It also covers taking action to manage any conflict that may occur between volunteers and staff.</p>
<p>B5. Develop relationships with colleagues within your organisation</p>	<p>B5.1 Establish productive working relationships with colleagues within your organisation</p> <p>B5.2 Provide support to colleagues in achieving their objectives</p> <p>B5.3 Manage conflict within the working environment</p>	<p>This unit is about developing productive working relationships with your colleagues in your own organisation. It also covers giving colleagues your support and managing conflict at work.</p>
<p>B6. Develop relationships with individuals and organisations which can support your volunteering strategy</p>	<p>B6.1 Identify individuals and organisations which can support your volunteering strategy</p> <p>B6.2 Agree mutual expectations and protocols for working with individuals and organisations</p> <p>B6.3 Review relationships with individuals and organisations</p>	<p>This unit is about networking with other organisations and people outside your organisation who can support your volunteering strategy. It also covers formalising networking arrangements into working partnerships.</p>

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### Key Area C. Recruit volunteers and support them in developing related skills and interests

Units	Elements	Notes
C1. Identify volunteer placements	<p>C1.1 Identify suitable roles and activities for volunteer placements</p> <p>C1.2 Specify the knowledge, skills and experience required for volunteer placements</p>	This unit is about identifying suitable placements for volunteers, and the type of volunteers required for them, either inside your own organisation or in other organisations with which you work.
C2. Promote volunteering to potential volunteers	<p>C2.1 Identify potential volunteers and their motivations for volunteering</p> <p>C2.2 Select methods to promote the benefits of volunteering to potential volunteers</p> <p>C2.3 Promote the benefits of volunteering to potential volunteers</p> <p>C2.4 Encourage people to volunteer their services</p>	This unit is about 'marketing' volunteering, using a range of different promotional techniques to get people to volunteer with your organisation, or other organisations with which you work.
C3. Advertise for volunteers	<p>C3.1 Select advertising media</p> <p>C3.2 Draw up and place advertisements</p>	This unit is specifically about using commercial advertising methods to recruit volunteers.
C4. Recruit volunteers	<p>C4.1 Identify the suitability of people for specific volunteer roles</p> <p>C4.2 Check references and assess prospective volunteers</p> <p>C4.3 Enter into volunteering agreements with volunteers</p>	This unit covers the recruitment process, assessing whether people are suitable for specific volunteering roles, checking references etc according to your organisation's requirements, and agreeing with volunteers what they and your organisation can expect of each other.
C5. Place volunteers	<p>C5.1 Match volunteers to suitable volunteer placements</p> <p>C5.2 Refer volunteers to more suitable volunteer placements</p>	This unit is about 'deploying' volunteers to suitable placements either in your organisation or in other organisations, in order to meet everybody's expectations.

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C6. Induct volunteers into the organisation	<p>C6.1 Identify volunteers' induction requirements</p> <p>C6.2 Prepare guidance materials for volunteers</p> <p>C6.3 Prepare induction plans for volunteers</p> <p>C6.4 Provide induction training to volunteers</p>	This unit is about providing sufficient, structured induction training to empower volunteers to make an effective contribution.
C7. Train volunteers to carry out specific activities	<p>C7.1 Demonstrate methods and skills to volunteers</p> <p>C7.2 Provide instructions to volunteers to carry out specific activities</p>	This unit is about giving appropriate on-the-job training to volunteers so they are able to carry out specific activities effectively.
C8. Support the development of volunteers' knowledge, skills and competence	<p>C8.1 Identify volunteers' development needs and aspirations</p> <p>C8.2 Help volunteers plan their development</p> <p>C8.3 Provide suitable development opportunities for volunteers</p> <p>C8.4 Assess volunteers' knowledge, skills and competence</p> <p>C8.5 Help volunteers evaluate their development</p>	This unit is about supporting the development of volunteers' knowledge, skills and competence to meet both the requirements of their placements and their own personal expectations and aspirations.
C9. Involve and motivate volunteers	<p>C9.1 Establish volunteers' individual motivations for volunteering</p> <p>C9.2 Provide opportunities for volunteers to contribute their ideas and energies</p> <p>C9.3 Help volunteers get the most out of the volunteering experience</p> <p>C9.4 Establish volunteers' perceptions of their experience of volunteering</p> <p>C9.5 Encourage volunteer involvement in the development of the organisation's volunteering strategy</p>	This is a fundamental unit for all those who directly manage volunteers. It is about understanding volunteers' motivations, empowering them to make a real difference, and getting feedback from them on their experience. It also covers involving volunteers in developing the organisation's strategy.

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C10. Maintain records of volunteers	<p>C10.1 Record information about volunteers, their experience and competence and their work for your organisation</p> <p>C10.1 Maintain and use information about volunteers in line with confidentiality requirements</p>	This unit is about maintaining basic 'personnel' records on volunteers and complying with legal and organisational confidentiality requirements.
C11. Manage volunteers' expenses	<p>C11.1 Maintain records of expenditure</p> <p>C11.2 Reimburse volunteers' expenses</p>	This unit is about reimbursing volunteer's out-of-pocket expenses.
C12. Help volunteers address problems affecting them	<p>C12.1 Identify when volunteers need help to address problems affecting them</p> <p>C12.2 Provide support to volunteers in addressing problems affecting them</p> <p>C12.3 Refer volunteers to other services to help them address problems affecting them</p>	This unit is about providing informal 'counselling' to volunteers to help them understand and address problems affecting them and referring them to other services if the problems are beyond your level of competence to deal with. Problems may be simple, everyday issues which can be addressed over a cup of tea, or more complex, long-term problems which require specialist intervention.
C13. Conclude volunteering agreements with volunteers	<p>C13.1 Identify when volunteers wish to cease their contribution</p> <p>C13.2 Conduct exit interviews with volunteers</p>	This unit is about ending the volunteering relationship on a positive note and getting feedback from volunteers who are leaving.

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### Key Area D. Manage the work of volunteers to meet organisational goals

Units	Elements	Notes
D1. Provide healthy, safe, secure and productive conditions for volunteers to work in	D1.1 Assess risks to health, safety and security D1.2 Take action to minimise risks to health, safety and security D1.3 Provide physical conditions that allow volunteers to make an effective contribution	This unit is about ensuring that volunteers work in healthy, safe and secure conditions. It covers both your health and safety responsibilities and other responsibilities regarding preparing the physical environment which apply to your particular work context.
D2. Manage the performance of volunteers	D2.1 Brief volunteers on their role and requirements D2.2 Supervise the work of volunteers D2.3 Evaluate the work of volunteers D2.4 Give volunteers feedback on their actions and their contribution D2.5 Deal with situations where volunteers' actions are not in line with organisational objectives or policies	This unit is about performance management in the volunteer context, where it is important to give clear briefings, sound supervision, and accurate feedback based on objective evaluation, but where the levers for developing performance may be different than in the employee context. It also covers dealing with basic disciplinary issues.
D3. Solve problems during volunteering activities	D3.1 Identify problems arising during volunteering activities D3.2 Take action to resolve problems during volunteering activities	This unit is about identifying and dealing with the many and varied problems that may arise during volunteering activities.

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### 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 Calculate the contribution of volunteers to the organisation's goals</p> <p>E1.2 Communicate the findings to volunteers and other stakeholders</p>	This unit is about evaluating the contribution of individuals, groups and volunteers as a whole to the organisation and providing feedback.
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>	This unit is about evaluating how effective your volunteering strategies and policies have been – have they met their stated objectives? – and feeding back. The findings from this unit will inform the development of strategy in Unit A3.

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### 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 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>	This is about managing yourself, understanding yourself, organising yourself, and developing yourself. It also covers using your knowledge to contribute to the benefit of others, either in your organisation or the sector as a whole.
F2 Promote your organisation and its services to stakeholders	<p>F2.1 Plan to promote your organisation and its services</p> <p>F2.2 Communicate key messages to stakeholders</p> <p>F2.3 Evaluate the effectiveness of promotional activities</p>	This unit is about basic marketing and public relations for the organisation. It is designed for a manager who is not a specialist marketer, but is required to promote the organisation as part of a much wider range of duties.
F3 Organise events	<p>F3.1 Plan events</p> <p>F3.2 Locate and arrange venues</p> <p>F3.3 Organise resources</p> <p>F3.4 Arrange attendance</p> <p>F3.5 Run events</p> <p>F3.6 Evaluate events</p>	This unit is about running any kind of event, from social gatherings for volunteers to national conferences for the organisation.
F4. Manage physical resources for volunteering activities	<p>F4.1 Identify the resources needed for volunteering activities</p> <p>F4.2 Obtain the resources needed for volunteering activities</p> <p>F4.3 Monitor the use of resources for volunteering activities</p>	This unit is about planning, obtaining and monitoring the physical resources you need to carry out volunteering activities. This may happen at different levels within an organisation.

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F5 Manage financial resources for volunteering activities	<p>F5.1 Prepare budgets for volunteering activities</p> <p>F5.2 Negotiate and agree financial resources for volunteering activities</p> <p>F5.3 Monitor and control expenditure against budgets</p>	This unit is about budgeting for volunteering activities, negotiating funding and monitoring expenditure against budgets.
F6 Negotiate and manage the supply of resources	<p>F6.1 Identify and select suppliers</p> <p>F6.2 Negotiate and agree terms with suppliers</p> <p>F6.3 Monitor the performance of suppliers</p>	This unit is about purchasing or procurement. Some volunteer managers, particularly in smaller organisations, have to organise the purchasing of the products and services need for volunteering activities.
F7. Manage projects involving volunteers	<p>F7.1 Plan and prepare projects involving volunteers</p> <p>F7.2 Manage the running of projects involving volunteers</p> <p>F7.3 Complete projects involving volunteers</p>	This unit is about managing projects, with the special feature of project team members being volunteers.
F8. Assure the quality of services provided by volunteers	<p>F8.1 Establish the quality of service required</p> <p>F8.2 Monitor the quality of services provided by volunteers</p> <p>F8.3 Take action to ensure service quality meets specified requirements</p>	This unit is about assuring quality and monitoring the work of volunteers to ensure it meets required standards.
F9. Support effective governance of your organisation	<p>F9.1 Identify the requirements of your organisation's governing body for information and support</p> <p>F9.2 Provide required information and support to your organisation's governing body</p>	This unit is about providing the many support services and information that your organisation's governing body may require.
F10. Work with others in meetings	<p>F10.1 Lead meetings</p> <p>F10.2 Participate in meetings</p>	This unit is about leading meetings, at various different levels, and being an active participant in meetings, often representing your organisation or other people at the meeting.

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<p>F11. Manage information</p>	<p>F11.1 Gather information            F11.2 Analyse information            F11.3 Make recommendations based on the analysis of information            F11.4 Take decisions            F11.5 Communicate information</p>	<p>This unit covers the information management and decision-making process, which may happen at many different levels in an organisation.</p>
<p>F12. Report to external agencies</p>	<p>F12.1 Identify the requirements of external agencies for information            F12.2 Report to external agencies in line with requirements</p>	<p>This unit is about providing information in the required formats to external organisations, such as statutory, regulatory or funding bodies.</p>

## Annex 2: Gap Analysis Mapping the Functional Map of Managing Volunteers to Standards

### Introduction

This document maps the functions identified in the Functional Map of Managing Volunteers to existing or developing units of National Occupational Standards (described as “candidate units”).

It identifies:

- where units exist which *may* accurately describe the function carried out and the standard of performance required (in green)
- where units exist which *in part* describe the function carried out, and could therefore be used as source material for developing a new unit (in yellow)
- where no units exist which accurately describe the function (in red).

## A Standards Framework for Managing Volunteers

### Key Area A. Develop strategies and policies that support volunteering

Units	Elements	Candidate Units
A1. Contribute to the development of your organisation's strategy	<p>A1.1 Contribute to the definition of your organisation's strategic direction</p> <p>A1.2 Contribute to identifying your organisation's beneficiaries and other stakeholders and their needs</p> <p>A1.3 Contribute to the development of your organisation's objectives</p>	<p>CJ5 Contribute to the development of agency policy and practice (Care)</p> <p>5A1 Contribute to developing and reviewing the organisation's strategy and plans (Personnel)</p> <p>S1 Contribute to the formulation of policy (Sport and Recreation)</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>	A3 Manage activities to meet customer requirements (Management)
A3. Develop your organisation's volunteering strategy and policy	<p>A3.1 Identify how volunteers can contribute to your organisation's goals</p> <p>A3.2 Develop strategies for enabling volunteers to contribute to your organisation's goals</p> <p>A3.3 Develop policies for integrating volunteers within your organisation's plans</p> <p>A3.4 Gain understanding and support for your volunteering strategy and policy</p>	A201 Develop, implement and evaluate strategies and policies for recruiting and managing volunteers (Community Justice)

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<p>A4. Develop organisational structures and systems to support volunteering</p>	<p>A4.1 Identify organisational structures and systems to support volunteering</p> <p>A4.2 Design and implement organisational structures and systems that support volunteering</p> <p>A4.3 Review organisational structures and systems to support volunteering</p>	<p>None available</p>
<p>A5. Obtain funds to realise your organisation's volunteering strategies and plans</p>	<p>A5.1 Identify sources of funding to implement volunteering strategies and plans</p> <p>A5.2 Prepare bids and tenders to acquire funding to implement volunteering strategies and plans</p> <p>A5.3 Negotiate and agree funding to implement volunteering strategies and plans</p>	<p>H53 Identify and access funding (Housing)</p> <p>H56 Produce bids for projects (Housing)</p> <p>D1201 Assess, negotiate and secure sources of funding (Plants, Animals and Land Sector Consortium)</p> <p>D1203 Develop, negotiate and agree proposals to offer services and products (Plants, Animals and Land Sector Consortium)</p>

## A Standards Framework for Managing Volunteers

### Key Area B. Promote volunteering

Units	Elements	Candidate Units
B1. Champion volunteering within your organisation	<p>B1.1 Promote the benefits of volunteering to your organisation</p> <p>B1.2 Identify and take forward opportunities for volunteering in your organisation</p> <p>B1.3 Identify and reduce barriers to volunteering in your organisation</p>	None available
B2. Develop a culture that values the contribution of volunteers	<p>B2.1 Articulate the value of the contribution volunteers can make</p> <p>B2.2 Identify and communicate how staff and other stakeholders can help volunteers make effective contributions</p> <p>B2.3 Monitor and take action to enhance a culture that is supportive of volunteering</p>	None available
B3 Promote people's equality, diversity and rights	<p>B3.1 Promote people's rights and responsibilities</p> <p>B3.2 Promote equality and diversity of people</p> <p>B3.3 Promote people's right to the confidentiality of information</p>	O2 Promote people's equality, diversity and rights (Care)

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<p>B4. Develop relationships with volunteers</p>	<p>B4.1 Develop relationships with individuals and groups of potential volunteers</p> <p>B4.2 Develop effective relationships with volunteers in your organisation</p> <p>B4.3 Manage conflict amongst volunteers and between volunteers and staff</p> <p>B4.4 Maintain relationships with individuals who no longer volunteer with your organisation</p>	<p>None available</p>
<p>B5. Develop relationships with colleagues within your organisation</p>	<p>B5.1 Establish productive working relationships with colleagues within your organisation</p> <p>B5.2 Provide support to colleagues in achieving their objectives</p> <p>B5.3 Manage conflict within the working environment</p>	<p>C5 Develop productive working relationships (Management)</p> <p>CL01 Promote effective communication and relationships (Care)</p>
<p>B6. Develop relationships with individuals and organisations which can support your volunteering strategy</p>	<p>B6.1 Identify individuals and organisations which can support your volunteering strategy</p> <p>B6.2 Agree mutual expectations and protocols for working with individuals and organisations</p> <p>B6.3 Review relationships with individuals and organisations</p>	<p>H32 Develop and maintain joint-working to meet individual customer needs (Housing)</p> <p>H41 Develop and maintain open and honest relationships with interested parties (Housing)</p> <p>A54 Contribute to joint working with other organisations (Sport and Recreation)</p> <p>SC15 Develop and sustain arrangements for joint working between workers and agencies (Care)</p>

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### Key Area C. Recruit volunteers and support them in developing related skills and interests

Units	Elements	Candidate Units
C1. Identify volunteer placements	<p>C1.1 Identify suitable roles and activities for volunteer placements</p> <p>C1.2 Specify the knowledge, skills and experience required for volunteer placements</p>	<p>C8 Select personnel for activities (Management)</p> <p>1 Recruit volunteers (Volunteer Development Agency)</p>
C2. Promote volunteering to potential volunteers	<p>C2.1 Identify potential volunteers and their motivations for volunteering</p> <p>C2.2 Select methods to promote the benefits of volunteering to potential volunteers</p> <p>C2.3 Promote the benefits of volunteering to potential volunteers</p> <p>C2.4 Encourage people to volunteer their services</p>	<p>1 Recruit volunteers (Volunteer Development Agency)</p>
C3. Advertise for volunteers	<p>C3.1 Select advertising media</p> <p>C3.2 Draw up and place advertisements</p>	<p>3B2 Recruit into the organisation (Personnel)</p> <p>4B2 Develop and implement recruitment programmes (Personnel)</p>
C4. Recruit volunteers	<p>C4.1 Identify the suitability of people for specific volunteer roles</p> <p>C4.2 Check references and assess prospective volunteers</p> <p>C4.3 Enter into volunteering agreements with volunteers</p>	<p>3B2 Recruit into the organisation (Personnel)</p> <p>4B2 Develop and implement recruitment programmes (Personnel)</p> <p>C8 Select personnel for activities (Management)</p> <p>D13101 Select, develop and co-ordinate volunteers (Care)</p> <p>2. Select volunteers (Volunteer Development Agency)</p>
C5. Place volunteers	<p>C5.1 Match volunteers to suitable volunteer placements</p> <p>C5.2 Refer volunteers to more suitable volunteer placements</p>	<p>None available</p>

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C6. Induct volunteers into the organisation	<p>C6.1 Identify volunteers' induction requirements</p> <p>C6.2 Prepare guidance materials for volunteers</p> <p>C6.3 Prepare induction plans for volunteers</p> <p>C6.4 Provide induction training to volunteers</p>	<p>F404 Support the induction and transfer of staff on secondment (Community Justice)</p> <p>C20 Help your team members to develop their performance (Management)</p>
C7. Train volunteers to carry out specific activities	<p>C7.1 Demonstrate methods and skills to volunteers</p> <p>C7.2 Provide instructions to volunteers to carry out specific activities</p>	<p>L11 Facilitate learning through demonstration and instruction (Learning and Development)</p> <p>C20 Help your team members to develop their performance (Management)</p>
C8. Support the development of volunteers' knowledge, skills and competence	<p>C8.1 Identify volunteers' development needs and aspirations</p> <p>C8.2 Help volunteers plan their development</p> <p>C8.3 Provide suitable development opportunities for volunteers</p> <p>C8.4 Assess volunteers' knowledge, skills and competence</p> <p>C8.5 Help volunteers evaluate their development</p>	<p>C10 Develop teams and individuals to improve their performance (Management)</p> <p>D13101 Select, develop and co-ordinate volunteers (Care)</p> <p>4 Manage volunteer training (Volunteer Development Agency)</p>
C9. Involve and motivate volunteers	<p>C9.1 Establish volunteers' individual motivations for volunteering</p> <p>C9.2 Provide opportunities for volunteers to contribute their ideas and energies</p> <p>C9.3 Help volunteers get the most out of the volunteering experience</p> <p>C9.4 Establish volunteers' perceptions of their experience of volunteering</p> <p>C9.5 Encourage volunteer involvement in the development of the organisation's volunteering strategy</p>	<p>1. Motivate and recognise voluntary effort (LANTRA)</p> <p>5 Evaluate volunteer involvement (Volunteer Development Agency)</p>

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C10. Maintain records of volunteers	<p>C10.1 Record information about volunteers, their experience and competence and their work for your organisation</p> <p>C10.1 Maintain and use information about volunteers in line with confidentiality requirements</p>	3A1 Use and evaluate computerised personnel information (Personnel)
C11. Manage volunteers' expenses	<p>C11.1 Maintain records of expenditure</p> <p>C11.2 Reimburse volunteers' expenses</p>	None available
C12. Help volunteers address problems affecting them	<p>C12.1 Identify when volunteers need help to address problems affecting them</p> <p>C12.2 Provide support to volunteers in addressing problems affecting them</p> <p>C12.3 Refer volunteers to other services to help them address problems affecting them</p>	None available
C13. Conclude volunteering agreements with volunteers	<p>C13.1 Identify when volunteers wish to cease their contribution</p> <p>C13.2 Conduct exit interviews with volunteers</p>	4B4 Release employees from the organisation (Personnel)

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### Key Area D. Manage the work of volunteers to meet organisational goals

Units	Elements	Candidate Units
D1. Provide healthy, safe, secure and productive conditions for volunteers to work in	D1.1 Assess risks to health, safety and security D1.2 Take action to minimise risks to health, safety and security D1.3 Provide physical conditions that allow volunteers to make an effective contribution	302 Contribute to the maintenance of a healthy, safe and productive working environment (Administration) 4E4 Manage health and safety provisions (Personnel)
D2. Manage the performance of volunteers	D2.1 Brief volunteers on their role and requirements D2.2 Supervise the work of volunteers D2.3 Evaluate the work of volunteers D2.4 Give volunteers feedback on their actions and their contribution D2.5 Deal with situations where volunteers' actions are not in line with organisational objectives or policies	C13 Manage the performance of teams and individuals (Management) C15 Respond to poor performance in the team (Management) D13101 Select, develop and co-ordinate volunteers (Care) 2 Organise and lead the work of volunteers (LANTRA) 3 Manage volunteers (Volunteer Development Agency)
D3. Solve problems during volunteering activities	D3.1 Identify problems arising during volunteering activities D3.2 Take action to resolve problems during volunteering activities	None available

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### Key Area E. Evaluate the contribution of volunteers and volunteering

Units	Elements	Candidate Units
E1. Evaluate volunteers' contribution to the organisation's goals	<p>E1.1 Calculate the contribution of volunteers to the organisation's goals</p> <p>E1.2 Communicate the findings to volunteers and other stakeholders</p>	5 Evaluate volunteer involvement (Volunteer Development Agency)
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>	A201 Develop, implement and evaluate strategies and policies for recruiting and managing volunteers (Community Justice)

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### Key Area F. Provide support to volunteering

Units	Elements	Candidate Units
F1. Manage and continuously develop your own capacity for managing volunteers	<p>F1.1 Identify 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>C2 Develop your own resources (Management)</p> <p>F3 Develop own practice, knowledge and values (Care)</p>
F2 Promote your organisation and its services to stakeholders	<p>F2.1 Plan to promote your organisation and its services</p> <p>F2.2 Communicate key messages to stakeholders</p> <p>F2.3 Evaluate the effectiveness of promotional activities</p>	<p>BB1 Promote your organisation and its services to stakeholders (Drugs and Alcohol)</p>
F3 Organise events	<p>F3.1 Plan events</p> <p>F3.2 Locate and arrange venues</p> <p>F3.3 Organise resources</p> <p>F3.4 Arrange attendance</p> <p>F3.5 Run events</p> <p>F3.6 Evaluate events</p>	<p>311 Contribute to organising events (Administration)</p> <p>EVE4A6 Define events (Travel, Tourism Services and Events)</p> <p>EVE4A7 Evaluate the overall performance of events (Travel, Tourism Services and Events)</p> <p>EVE4C2 Develop and agree plans to implement events (Travel, Tourism Services and Events)</p>
F4. Manage physical resources for volunteering activities	<p>F4.1 Identify the resources needed for volunteering activities</p> <p>F4.2 Obtain the resources needed for volunteering activities</p> <p>F4.3 Monitor the use of resources for volunteering activities</p>	<p>B2 Manage the use of physical resources (Management)</p>

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F5 Manage financial resources for volunteering activities	F5.1 Prepare budgets for volunteering activities F5.2 Negotiate and agree financial resources for volunteering activities F5.3 Monitor and control expenditure against budgets	B3 Manage the use of financial resources (Management)
F6 Negotiate and manage the supply of resources	F6.1 Identify and select suppliers F6.2 Negotiate and agree terms with suppliers F6.3 Monitor the performance of suppliers	409 Negotiate and manage agreements for supplies (Administration)
F7. Manage projects involving volunteers	F7.1 Plan and prepare projects involving volunteers F7.2 Manage the running of projects involving volunteers F7.3 Complete projects involving volunteers	G4 Plan and prepare projects (Management) G5 Manage the running of projects (Management) G6 Complete projects (Management)
F8. Assure the quality of services provided by volunteers	F8.1 Establish the quality of service required F8.2 Monitor the quality of services provided by volunteers F8.3 Take action to ensure service quality meets specified requirements	BMES5 Implement quality assurance systems (Construction) F4 Implement quality assurance systems (Management) F7 Carry out quality audits MAN47 Improve the quality of service provision (e-skills)
F9. Support effective governance of your organisation	F9.1 Identify the requirements of your organisation's governing body for information and support F9.2 Provide required information and support to your organisation's governing body	BA5 Support effective governance (Drugs and Alcohol)
F10. Work with others in meetings	F10.1 Lead meetings F10.2 Participate in meetings	D2 Facilitate meetings (Management)

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<p>F11. Manage information</p>	<p>F11.1 Gather information            F11.2 Analyse information            F11.3 Make recommendations based on the analysis of information            F11.4 Take decisions            F11.5 Communicate information</p>	<p>D4 Provide information to support decision making (Management)            D6 Use information to take critical decisions (Management)</p>
<p>F12. Report to external agencies</p>	<p>F12.1 Identify the requirements of external agencies for information            F12.2 Report to external agencies in line with requirements</p>	<p>6 Preparing reports and returns (Accountancy)</p>

## Annex 3: Project Steering Group Membership

Name	Organisation
Jim Aberdein	British Trust for Conservation Volunteers (BTCV)
Sandra Adair	Volunteer Development Agency (Northern Ireland)
John Byrne	Scottish Qualifications Authority (SQA)
Roger Coyle	Qualification Curriculum Authority (QCA)
Phil Denning	PAULO
Manon Ellis Williams	WCVA
Bob Fryer	NHS University
Pat Gay	Institute of Volunteering Research
Lesley Greenaway	Volunteer Development Scotland
Steve Harper	ASDAN
Carla Harrison	Cultural Heritage NTO
Finbar Lillis	National Open College Network
Sharon McGuigan	Scottish Qualifications Authority (SQA)
Alan Murray	Royal Society for Protection of Birds & National Volunteers Managers Forum
Doug Musgrove	St Mungo's
Tammy Parlour	National Centre for Volunteering
Sue Pickavance	WCVA
John Plummer	Audax Enterprise
Keith Steven	Encephalitis Support Group
Saskia Taylor	Island Volunteers
Trevor Boutall	The Management Standards Consultancy
Felicy Dwyer	Voluntary Sector NTO
Sarah Pollet	Voluntary Sector NTO
Bridie Sullivan	Voluntary Sector NTO
Colin Wright	The Management Standards Consultancy

## Annex 4: Technical Working Group Membership

Name	Organisation
Jim Aberdein	BTCV
Trevor Boutall	The Management Standards Consultancy
Alasdair Cant	The Management Standards Consultancy
Geoff Carroll	The Management Standards Consultancy
Kate Chalk	Help the Aged
Manon Ellis Williams	WCVA
Pat Gay	Institute of Volunteering Research
Rob Jackson	Royal National Institute for the Blind
Ann Kirkwood	Volunteer Development Scotland
Doug Musgrove	St Mungos
Grainne Maginnis	Volunteer Development Agency
Tammy Parlour	National Centre for Volunteering
Sarah Pollet	Voluntary Sector NTO
Jacqui Quemades	The ATC
Bridie Sullivan	Voluntary Sector NTO
Rekha Wadhvani	The Management Standards Consultancy
Cherry White	Island Volunteers
Colin Wright	The Management Standards Consultancy

## Annex 5: Focus Group Participants

Name	Organisation
Jenny Airey	YWCA Scotland
Ann Bain	Volunteering Fife Development Agency
Richard Baldwin	Macmillan Cancer Relief
Bryan Bannerman	South Glasgow University Hospitals NHS Trust
Heather Blakeley	NACC
Hester Blewitt	Training for All Foundation
Julie Brown	SCVS (Involve)
Celia Carson	SCVO
Bob Chambers	Portsmouth Council of Community Service
Dave Clough	Winged Fellowship Trust
Suzanne Crouch	City College Norwich
Violet Dalton	SAVM Capability
Linda Davies	Sure Start Chelmsley Wood
David Deighton	Humbercare
John Diamond	Centre for Local Policy Studies Edgehill HE
Rebecca Dixon	Duke of Edinburgh's Award
Manon Ellis Williams	WCVA
Sarah Gaunt	The Children's Society
Linda George	Headway Group
Susan Greenhalgh	Trefoil House
Antonia Harmer	Sports Council for Wales
Amanda Hawkes	Housing Services Agency
Helene Hayes	National Association of Citizens Advice Bureaux
Karen Hickmore	St. Rocco's Hospice
Kate Hookham	BTCV Scotland
Clare Hopkins	Swansea Council for Vol Services (Involve)
Chris Hoyle	CSV Volunteering Partners (Cymru)
Honufa Islam	Tower Hamlets College
Clare Johnson	Lantra
Andrew Jones	BRV

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Name	Organisation
Hannah Kalmanowitz	Immune Development Trust
Karen Kendall	Exeter CVS
Vivienne Kincaid	Carmarthenshire County Council
Gareth Kingston	FIAC
Jane Kirby	Torfaen Voluntary Alliance
Jackie Lacey	Cancer Research UK
Anne Layzell	Centrepoint
Nigel Leach	Voluntary Action Manchester
Helen Lee	The Martlets Hospice
Elaine Lennon	Special Needs Volunteering Project
Edith Macquirrie	GCVS
Lis Martin	CAFOD
Steve Massey	New Ventures RPS Rainer
Susi Miller	Federation of Community Work Training Groups
Joe Mulligan	British Red Cross
Tony Newby	BTCV
Sarah Paltenghi	Active Community Unit, Home Office
Cath Parrish	Commitment Plus
Ian Patient	The Blue Cross
Penny Paterson	Cam Sight
Martyn Pengilley	CSV-RSVP
John Plummer	Audax Enterprises
Marilyn Preen	Training for All Foundation
Jonathan Reeve	Employment & Regeneration Partnership Ltd
Wendy Richards	Voluntary Action Merthyr Tydfil
Caroline Rogers	Student Volunteering UK
Joanne Sabin	Sure Start Chelmsley Wood
Rosalind Scott	Children's Hospice Information Centre
Brian Shawdale	Community Transport Assoc
Helen Smith	Metropolitan Police Service
Vivian Smith	City Roads Crisis Intervention
Alison Steere	Voluntary Action Merthyr Tydfil

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Name	Organisation
Bridie Sullivan	VSNTO
Kate Tilsley	Derbyshire Housing Aid
Margaret Tomay	ODACA
Carola Vorlop	Bristol Zoo Gardens
Katharine Walters	Voluntary Action Merthyr Tydfil
Jan Williams	Torfaen Voluntary Alliance

## Annex 6: Consultation Respondents

Organisation	Location
Age Concern Aberystwyth	Aberystwyth
Age Concern Ceredigion	Ceredigion
Age Concern Cookstown	Cookstown
Age Concern Orkney	Orkney
Anti-Slavery International	London
Armagh & Duneannon Volunteer Bureau	Armagh
Association of Voluntary Organisations in Wrexham	Wrexham
Barnardo's Denbighshire Disability Project	Colwyn Bay
Belfast Women's Aid	Belfast
Ben View Centre	Dumbarton
Bristol Zoo Gardens	Bristol
British Red Cross	Aberdeen
British Red Cross	Glasgow
British Red Cross	Glasgow
British Red Cross	Maidstone
British Trust for Conservation Volunteers (BTCV)	London
Broads Authority	Obey
Bryson House	Belfast
BTCV Scotland	Stirling
CAFOD	London
CAFOD	London
Cam Sight	Cambridge
Cambridgeshire Acre	Littleport
Cardigan Citizens Advice Bureau	Ceredigion
Causeway Volunteer Bureau	Coleraine
Check Point - The Children's Society	Torquay
Childline Cymru	Rhyl
Children's Hospice Information Centre	Kinross
Children's Information Center	Reading
CIPD Hereford / Worcester Branch	Wellington

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Organisation	Location
City College Norwich	Norwich
Clydebank LHCC	Clydebank
Community First	Malvern
Connect	London
Coventry IV Project	Coventry
Depaul Trust	Bexley
Depaul Trust	London
Depaul Trust	London
Depaul Trust	London
Depaul Trust	London
Depaul Trust	London
Depaul Trust	London
Depaul Trust	London
Depaul Trust	London
Depaul Trust	London
Derbyshire Housing Aid	Derby
Duxford Imperial War Museum	Cambridge
Dyslexia Scotwest	Glasgow
Enable Scotland	Orkney
Gartnave Royal Hospital	Glasgow
Green Park Health Care Trust	Belfast
Greenway Womens Centre	Belfast
Harrogate Hospital & Community Friends	Harrogate
High Moorland Community Action Ltd	Princetown
HomeStart Orkney	Kirwall
HumberCare	Hull
Independent Advocacy	Hartlepool
Lanarkshire Primary Care NHS Trust	Bothwell
Lead Scotland	Glasgow
Leicester & Rutland Headway	Leicester
Leonard Cheshire Scotland	Edinburgh
Llangollen International Musical Eisteddfod	Llangollen

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Organisation	Location
Llanidloes Resource Centre	Llanidloes
Marwell Zoological Park	Winchester
Mental Health Volunteer Project	Swansea
Merton Volunteer Bureau	Mitcham
Metropolitan Police Service	London
MS Society	London
National Centre for Volunteering	London
National Osteoporosis Society	Wrexham
NCH	Birmingham
NCH	Newcastle Upon Tyne
NCH	Sutton in Ashfield
NCH, Leaming Parents Centre	Lillington
Newport County Borough Council	Newport
Nidd Gorge Local Heritage Initiative	Harrogate
North Northumberland Voluntary Action	Northumberland
Northlands	Derry
Orkney Blide Trust	Orkney
Personal Service Society	Liverpool
Praxis Mental Health	Belfast
Royal National Institute for the Blind	London
RSPA	Cambridge
RSPB	Sandy
RSPB	Sandy
SAVM	Scotland
SAVM Capability	Edinburgh
Self-employed	Fife
Sense	London
South Glasgow University Hospitals NHS Trust	Glasgow
South Montgomeryshire Volunteer Bureau	Newtown
Special Needs Volunteering Project	Edinburgh
Springfield Charitable Association	Belfast
Springfield Charitable Association	Belfast

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Organisation	Location
St John Ambulance	Nottingham
St John Ambulance	Ossett
St Rocco's Hospice	Warrington
Step Ahead	Manchester
Stepping Stones	Lisburn
Swansea Student Community Action	Swansea
Swansea Student Community Action	Swansea
Swansea Student Community Action	Swansea
Tearfund	Glasgow
The Blue Cross	Burford
The Camden Society	London
The Children's Society	Manchester
The Children's Society	Widnes
The Duke of Edinburgh's Award	Windsor
The Guide Association	London
The Guide Dogs for the Blind Association	Reading
The Martlets Hospice	Hove
The Princes Scottish Youth Business Trust	Glasgow
The Rainbow Project	Belfast
The Share Centre	Co.Fermanagh
The Woodland Trust	Brightlingsea
Trefoil House	Edinburgh
Voluntary Action	Giffnock
Volunteer Centre Edinburgh	Edinburgh
Volunteer Centre Edinburgh	Edinburgh
Volunteer Centre Stirling	Stirling
Volunteer Development Scotland	Stirling
Volunteering Highland	Inverness
Warrington District CAB	Warrington
Weston Hospice Care	Weston Super Mare
Woodland Trust	Grantham
Wrexham Volunteer Bureau	Wrexham

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Organisation	Location
WRVS	Newent
Yate Sodbury & District Community Transport	Yate

## Annex 7: Other Stakeholders Contacted

The following stakeholders were also contacted during the project and supplied information, documentation, contacts or opportunities for wider consultation during the course of the project.

Name	Organisation
Stephen Bubb	Association of Chief Executives of Voluntary Organisations (ACEVO)
Kara Gillespie	Association of Chief Officers of Scottish Voluntary Organisations
Patsy Rawle	Black Voluntary Sector Network
Peter Walton	British Association of Friend of Museums
Liz Brennan	British Quality Foundation
Andrew Millard	BTCV
John Varley	BTCV
Richard Williams	BTCV
Luke Tiller	Charities Finance Directors Group (CFDG)
Penelope Seager	Community Justice NTO
Jane Haywood	Connexions Service
Travis Merrill	CSV Wales
Rhian Dafydd	Cynllum Estyn Llaw
Phyllis Thompson	Development Education Association
Richard Dowrance	Early Years NTO
Sheila Hawkins	Employment NTO
Alannah Gooding	Federation of Community Work Training Groups
David Sutcliffe	Greater Manchester Centre for Voluntary Organisations
Fiona Turton	Local Government NTO
Pauline Gibson	Metier (Arts and Entertainment NTO)
Irene Allen	National Assembly for Wales
Sean Ridsdale	National Centre for Volunteering
Nick Byrne	National Trust
Alan Murray	National Volunteer Managers Forum
Chris Penberthy	National Volunteer UK Forum
Jan Bird	Neighbourhood Renewal Unit
Cheryl Turner	NIACE
Phil Collier	Sport England

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Name	Organisation
Harry Harrison	The Prince's Trust
Andrea Rowe	TOPSS (Training Organisation for Personal and Social Services)
Nick Frost	University of Leeds School of Continuing Education
Colin Rochester	University of Surrey, Roehampton
Alister Murphy	Voluntary Issues Unit
Stefan Kuchar	Wandsworth Volunteer Bureau
Kate Thomas	WCVA
Kevin Brady	Youth Service Unit (DfES)

## Annex 8: Literature Reviewed

Ref.	Title/Author	Source	Date
1	2001 Events & Publications Catalogue	NCVO	2001
2	Delivering the goods: The work and future direction of volunteer management (Pat Gay, Freelance Researcher)	The National Centre for Volunteering	2000
3	Draft National Occupational Standards for Volunteer Leaders in the Land-Based Sector	Lantra	June 2000
4	Skills Matter: A skills foresight for the voluntary sector across England, Scotland and Wales	VSNTO	February 2000
5	NCVO National Report (UK)	NCVO	1998
6	Job Roles and Salaries in the Voluntary Sector	NCVO	1997/1998
7	Issues in volunteer management – A report of a survey	Institute for Volunteering Research	1998
8	Workforce Development Plan 2001	VSNTO	2001
9	Professional Volunteer Managers Briefing	National Volunteer Managers Forum	March 2001
10	Key Issues for Human Resource Development	VSNTO	January 1999
11	1997 National Survey of Volunteering in the UK	Institute for Volunteering Research	1997
12	Opportunity, Work and Competitiveness: Voluntary Organisations in a Changing Labour Market	NCVO Web site download	1999
13	Credit for Learning: A report on the use of S/NVQs in the voluntary sector	VSNTO	March 2000
14	Would you credit it? A guide on Scottish and National Vocational Qualifications for the voluntary sector	VSNTO	March 2001
15	Leading Managers: A guide to management development in the voluntary sector	VSNTO	February 2001
16	Valuing Volunteers in UK Sport	English Sports Council	October 1996
17	Working for a better world	VSNTO	
18	Press Release: UK Voluntary Sector Almanac	VSNTO	January 2002
19	Learning Matters newsletter	VSNTO	Autumn 2001

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Ref.	Title/Author	Source	Date
20	Pathfinder: An accreditation and networking guide	VSNTO	2001
21	Summary of "Working with volunteers - The Good Practice Guide"	The National Centre for Volunteering	1998
22	Some Key Facts on the Voluntary Sector Workforce	VSNTO	August 2001
23	Professional VM One Year On: Professionalising the management of volunteers	NCV & NVMF	
24	Volunteering: A Code of Good Practice	Compact	2001
25	Pilot Competence Standards for Managers of Volunteers	Volunteer Development Agency NI	
26	Volunteering in Northern Ireland – Summary Report	Volunteer Development Agency NI	2001
27	Volunteering in Organisations	Volunteer Development Agency NI	2001
28	Training Accreditation Survey Report	Volunteer Development Agency NI	
29	Training Accreditation Project Evaluation	Volunteer Development Agency NI	2001
30	Scoping paper on volunteer management	Volunteer Development Agency NI	1999
31	Mapping our Field – what is volunteer management at the start of the 21 <sup>st</sup> century – Rob Jackson	RNIB	2001
32	UK Voluntary Sector Almanac 2002	NCVO	2002
33	Meeting the Challenge: The final report of the Voluntary Sector Continuing Professional Development Research Project	City College Norwich	Sept 2001
34	Bright Future: Developing Volunteer Management, Pat Gay	IVR	2001
35	The Scottish Compact	Scottish Office	1998
36	Compact: Getting It Right	Home Office	1998
37	Voluntary Sector Scheme	Welsh Assembly	2000

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### Other documents reviewed but not abstracted:

Title/Author	Source	Date
Survival Guide for new Volunteer Managers	Coventry Volunteer Co-ordinators Forum	
The National Centre for Volunteering Annual Review	NCV	2001
Issues of Recruitment of Volunteers in the Voluntary Sector	VSNT0	August 2001
The Professionalisation of Volunteering Management in England (Phase 2)	NCV	2000
Volunteers – A Valuable Asset? An investigation into the Role of Volunteers in Museums of the Yorkshire Region	Yorkshire Museums Council	July 2001
Towards Volunteer Learning Centre for Scotland	Volunteer Development Scotland	June 2001
The Right Stuff: New Ways of Thinking About Managing Volunteers, Meta Zimmeck	IVR	2001
The Handbook for Heritage and Volunteer Managers and Administrators	British Association of Friends of Museums	March 1999

## Annex 9: Training and Qualification Opportunities for Volunteer Managers

The following programmes are relevant specifically to the recruitment and management of volunteers.

Qualification	Provider
<p><i>Professional Development Certificate in Voluntary Sector Management</i></p> <p>Unit 1 Voluntary Organisations in Context</p> <p>Unit 2 Personal and Professional development</p> <p>Unit 3 Managing People in a Voluntary Organisation</p> <p>Unit 4 Voluntary Sector Organisational Skills</p> <p>Unit 5 Financial Skills in a Voluntary Organisation</p> <p>Unit 6 Marketing in a Voluntary Organisation</p>	<p><i>City College, Norwich</i></p> <p>Awarding Body: Edexcel</p>
<p><i>Postgraduate MSc/Diploma in Voluntary Sector Management.</i></p> <p>Also occasional short courses.</p>	<p><i>City University Business School</i></p> <p>Frobisher Crescent, Barbican Centre, London, EC2Y 8HB, phone 020 7040 8667 (changed Apr 01), email: g.m.harris@city.ac.uk</p>
<p><i>Institute for Advanced Volunteer Management</i></p> <p>4 day course – cost £400- £500</p>	<p><i>Community Service Volunteers</i></p>
<p><i>Foundation Degree in Management (Voluntary pathway)</i></p> <p>F/T or P/T</p> <p>Content includes: Selecting and recruiting; Managing; Training; Volunteers and the law; Core values and strategic planning; Funding.</p>	<p><i>Exeter College/Plymouth University</i></p>
<p><i>Certificate in Management, Voluntary Sector</i></p>	<p><i>Glasgow Caledonian University in partnership with SCVO</i></p> <p>0141 331 3872</p>
<p><i>Training Volunteer Managers</i></p>	<p><i>Hampshire Open College Network</i></p> <p>Contact Bob Chambers, Portsmouth Council of Community Service, phone 023 9282 7110</p>
<p><i>Higher Certificate in Volunteer Management</i></p>	<p><i>Meri Huws, University of Wales, Bangor</i></p> <p>Gwynedd</p> <p>01248 383667</p>

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Qualification	Provider
<p><i>Programme in Volunteers Management</i></p> <p>A competency based programme for VMs, recognised as part of the BA in Professional Development.</p> <p>The programme forms part of a series of modules leading to a Certificate in Volunteering Management.</p> <p>To date the VM programme has almost completed its fourth year, with 38 successful "graduates" out of an original 44.</p>	<p><i>University of Dundee</i></p>
<p><i>Postgraduate Certificate in Management in the Public and Voluntary Sector</i> involving 4 modules, one day a week over the academic year</p>	<p><i>University of Leeds School of Continuing Education</i></p> <p>Contact Nick Frost, phone 0113 233 3204, email: N.Frost@leeds.ac.uk</p>
<p><i>Effective Management of Volunteers</i></p> <p>One-year part-time programme (40 CATS points at level B).</p> <p>Content includes concepts and values in volunteering; management and learning theory; attracting and selecting volunteers; managing and motivating volunteers; managing volunteer training; volunteers and the organisation; evaluation; policy development.</p>	<p><i>Volunteer Development Agency in Northern Ireland accredited by University of Ulster</i></p>

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The following programmes are more generally relevant to managing in the voluntary sector.

Qualification	Provider
<i>BA Hons, Voluntary Sector Management</i> - full time or part time	<i>Anglia Polytechnic University</i>
<i>Public Services Management MSc and MBA</i> , for people working in the public and voluntary sectors. There is one half module on 'working with the voluntary sector' which is specifically focused on the voluntary sector and partnerships between the public and voluntary sectors.	<i>Aston University (Birmingham)</i> Public Services Management Group, Aston Business School, phone 0121 359 3011
<i>Postgraduate Certificate/Diploma/MA in Managing Change in the Community</i>	<i>Bradford and Ilkley Community College</i> Ilkley Campus, Wells Road, Ilkley, W Yorks, LS29 9RD, phone 01943 609010
<i>MSc in Voluntary Sector Organisation</i>	<i>Centre for Civil Society, London School of Economics</i> Houghton Street, London, WC2A 2AE, phone 020 7955 7375, email: ccs@lse.ac.uk.
<i>Certificate in Interpersonal Skills for Volunteers</i> <i>BA in Voluntary Sector Studies</i> (a future development) <i>Advanced Certificate in Client-based Voluntary Practice</i>	<i>Centre for Educational Development, University of Wales</i> Lampeter, Ceredigion, SA48 7ED 01570 424785
<i>MA/Post Grad Certificate/Post Grad Diploma in Voluntary Sector Studies</i> <i>MSc Public and Community Service</i> <i>MBA Capacity Building for Ethnic Minority Voluntary Organisations</i> <i>MA/PgDip/Certificate in Social Enterprise.</i>	<i>Centre for Institutional Studies, University of East London</i> Maryland House, Manbey Park Road, London, E15 1EY, phone 020 8223 4290, email: cis@uel.ac.uk
<i>Postgraduate MSc/Diploma in Voluntary Sector Management.</i> Also occasional short courses.	<i>City University Business School</i> Frobisher Crescent, Barbican Centre, London, EC2Y 8HB, phone 020 7040 8667 (changed Apr 01), email: g.m.harris@city.ac.uk
<i>Foundation Degree in Public Sector Administration</i>	<i>City University with City and Islington College</i> City & Islington College, phone 020 7700 8693, email: isterling@candi.ac.uk
A range of courses including: Managing a Refugee Organisation Managing Call Centres	<i>Federation of Information and Advice Centres</i>

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Qualification	Provider
<p><i>Certificate in Fund-raising Management</i></p> <p>The ICFM Certificate in Fundraising Management is a post-graduate professional qualification for fundraisers. It is a competence-based programme linked to the Institute's membership structure.</p> <p>The competencies contained within the Certificate framework are management focused and generic in nature.</p> <p>This means that those completing the Certificate will have demonstrated their ability to successfully manage the fundraising process rather than having demonstrated knowledge of any particular fundraising technique or techniques.</p> <p>There are two modules: Fundraising Practice <i>And</i> Managing Fundraising</p>	<p><i>Institute of Charity Fund-raising Managers (ICFM)</i></p>
<p><i>Professional Diploma, Managing in the Community</i></p> <p><i>BA in Managing in Health &amp; Social Care Organisations</i></p>	<p><i>Leeds Metropolitan University</i></p> <p>School of Applied Social Sciences, LMU, Calverley St, Leeds, LS1 3HE, phone 0113 283 6756, email: v.ward@lmu.ac.uk</p>
<p><i>Postgraduate research opportunities in Charity Law Unit. They also run bi-monthly seminars on various issues</i></p>	<p><i>Liverpool Law School, University of Liverpool</i></p> <p>phone 0151 794 3086, email: boardman@liverpool.ac.uk</p>
<p><i>Certificate in Charity Management</i></p>	<p><i>Loughborough University Management Development Centre</i></p> <p>Business School, Loughborough University. Loughborough, Leics, LE11 3TU, phone 01509 223140,</p>
<p><i>Higher Certificate in Volunteer Management</i></p>	<p><i>Meri Huws, University of Wales, Bangor</i></p> <p>Gwynedd</p> <p>01248 383667</p>
<p><i>MA Social Policy</i></p> <p>2 year part-time (2 evenings a week) or one year full-time.</p>	<p><i>Middlesex University School of Social Science</i></p>
<p><i>Management Certificate programme tailored to the voluntary sector, which can become part of Diploma or MBA. The course programme has been completely revamped (Sept 00) and can be done online</i></p>	<p><i>Open University Business School</i></p> <p>PO Box 625, Milton Keynes, MK7 6AA, phone 01908 858585</p>

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Qualification	Provider
<i>Voluntary Action Management MSc/Postgraduate Diploma. 2 days a week placement (min 20 weeks) and 2 days a week taught.</i>	<i>Roehampton University of Surrey Centre for Non-Profit and Voluntary Sector Management</i>
<i>Advanced Diploma in the Organisation of Community Groups</i>	<i>RSA (OCR)</i>
<p>Run modular short courses (2 day blocks) in such areas as Charity Accounting, Charity Investment, Charity Taxation</p> <p><i>Postgraduate Certificate or Diploma in Charity Accounting and Financial Management (can be extended to MSc)</i></p> <p><i>Certificate in Charity Management</i></p> <p><i>Postgraduate Certificate/Diploma/MSc in Charity Marketing &amp; Fundraising</i></p> <p>The Business School also offers a specialist <i>MBA (Charity Management)</i>.</p>	<p><i>South Bank University Business School, Centre for Charity &amp; Trust Research</i></p> <p>South Bank University, 103 Borough Road, London, SE1 0AA, phone 020 7815 7821</p>
<p><i>HNC Communication and Organisation for the Voluntary Sector</i></p> <p>(over 2 years by 'open learning')</p>	<i>Telford College, Edinburgh</i>
<i>Certificate of Higher Education in Quality Management Systems for Non-Profit Organisations</i>	<i>University of Birmingham and the Birmingham Voluntary Service Council</i>
<i>Public Service MBA, with specific voluntary sector management option. Full or part-time options, and MSc/postgrad certificate programmes</i>	<p><i>University of Birmingham School of Public Policy</i></p> <p>Edgbaston, Birmingham, B15 2TT, phone 0121 414 5006, email: m.furamera@bham.ac.uk</p>
<i>MSc in Management Development and Social Responsibility** fully integrates concern with social values in its content and learning processes, and is intended to equip students with the knowledge, skills and awareness necessary for them to operate as reflective, competent and socially informed managers in a changing environment." 2 year, part-time</i>	<p><i>University of Bristol School for Policy Studies</i></p> <p>0117 954 6755, email: sps-enquiries@bristol.ac.uk</p>
<i>MSc Public Management</i>	<p><i>University of Glamorgan</i></p> <p>0800 716925 enquiries@glam.ac.uk</p>
<i>Postgraduate Certificate in Management in the Public and Voluntary Sector involving 4 modules, one day a week over the academic year</i>	<p><i>University of Leeds School of Continuing Education</i></p> <p>Contact Nick Frost, phone 0113 233 3204, email: N.Frost@leeds.ac.uk</p>

## A Standards Framework for Managing Volunteers

Qualification	Provider
<i>Public Services MBA Programme - Voluntary Sector. Full or part time</i>	<i>University of Nottingham Business School</i>
<i>Voluntary Sector and Community Work Pathway</i>	<i>University of Wales College, Newport</i> course tutor: 01633 432160
<i>Certificate in Charity Administration by distance learning.</i>	<i>West Suffolk College School of Business Administration</i>

### *Search of Learndirect web site for courses in Volunteer Management across the UK produced 1 result:*

Title: "Volunteer Management: Best Practice"  
 Provider: National Association of Councils For Voluntary Service, Bedford  
 Duration: 1 day  
 Price: £20

### *Search of Trainingzone web site for courses in Volunteer Management across the UK produced 1 result:*

Title: "Volunteer Support and Supervision: Developing good practice to improve performance and promote retention"  
 Provider: The National Centre for Volunteering, Regents Wharf, London  
 Duration: 2 day  
 Price: £185

### *The Directory for Social Change*

The Directory for Social Change offers a range of short courses in:

- Fundraising
- Organisational Development
- Management
- Finance & Law
- Skills Development

The Management courses include:

- Operational Management
- Managing Human Resources
- Supervision
- Volunteer Management

Volunteer Management courses are as follows:

Title: An Overview of Volunteer Management  
 Duration 1 day  
 Cost £100

## A Standards Framework for Managing Volunteers

Title: Managing Volunteers Level 1  
Duration 2 days  
Cost £100

Title: Managing Volunteers Level 2  
Duration 2 days  
Cost £175

Title: Recruiting Volunteers Level 1  
Duration 1 day  
Cost £100

Title: Developing Your Volunteers Skills Level 1  
Duration 1 day  
Cost £100

Title: Volunteers and the Law  
Duration 2 days  
Cost £100

### *National Open College Network (NOCN)*

NOCN represents and licenses the work of 29 Open College Networks operating in England, Wales and Northern Ireland. NOCN is also a nationally recognised qualifications awarding body

Open College Networks do 4 main things:

- They approve locally or nationally designed programmes of learning submitted to them
- They award OCN credit certificates to learners for their assessed achievements on these recognised programmes
- They develop National Qualifications, approved by the QCA
- They offer networking and staff development opportunities and consultative advice on accreditation issues

(Ref: Doc 20 Pathfinder, p.22)

#### *Managing Voluntary Organisations – Advanced Certificate*

The qualification is designed for those working in voluntary organisations who perform a role as managers, co-ordinators, leaders or committee members, or those who wish to develop the skills to undertake paid work in the voluntary sector or to improve their own performance as volunteers. The certificate demonstrates that a wide range of key management functions have been understood and applied independently within the voluntary sector context.

NOCN Qualification No.: AB8ACA0085 FEFC Code: 00234096

#### *Volunteer Training – Intermediate Award*

The qualification is designed for volunteers working in a wide range of contexts and would be appropriate for those participating in the voluntary strand of the New Deal. Units within the qualification cover the essential knowledge and practical and vocational skills required of volunteers. Learners may select units appropriate to progression requirements and the context in which they are working or are wishing to work as volunteers.

NOCN Qualification No.: PN1IAA0159 FEFC Code: 00234170

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### *Volunteer Training – Advanced Award*

The qualification is designed for volunteers who already have a broad base of skills and experience in volunteering and covers the understandings, practical skills and consideration of values and attitudes required to work effectively as a volunteer. It is likely that learners accessing the qualification are fulfilling, or wish to fulfil, roles which involve management or leadership within a voluntary or community group

NOCN Qualification No.: PN1AAA0160 FEFC Code: 00234171

### *Volunteer Training (With MENCAP) – Intermediate Award*

The qualification is particularly suitable for those working with people with a learning disability, or their families, and who require essential training in key volunteering skills in this particular context. The transferable skills developed through the award include essential knowledge about learning disabilities and disability services available and knowledge of the legal frameworks linked to anti-discriminatory practice. A programme based on materials developed by MENCAP supports the qualification.

NOCN Qualification No.: PN5IAA0161 FEFC Code: 00234172

### *Volunteer Training (With MENCAP) – Advanced Award*

The qualification aims to develop a range of generic volunteer skills that can be used when working with people with a learning disability or their families. The programme supporting the award is based on materials developed for the training of MENCAP volunteers and includes knowledge and understanding of disability legislation and anti-discriminatory practice. Those accessing the qualification gain transferable skills appropriate to both the employment and voluntary sectors in a range of contexts and environments.

NOCN Qualification No.: PN5AAA0162 FEFC Code: 00234173

### *Working in Voluntary Organisations – Intermediate Certificate*

The qualification is designed for volunteers and paid workers in the voluntary sector; it is particularly suitable for those involved with small community-based organisations. The core skills include marketing, finance and an understanding of equal opportunities issues, but the qualification is structured to allow learners to select units appropriate to their own individual requirements and the context in which they are volunteering.

NOCN Qualification No.: PN1ICA0163 FEFC Code: 00234174

### *Working in Voluntary Organisations – Advanced Certificate*

The qualification is designed for people working in voluntary sector organisations that have, or wish to have, responsibilities for management and leadership within the organisation. The structure of the qualification is flexible to allow a selection of appropriate units by individuals, to reflect their own developmental and progression requirements.

NOCN Qualification No.: PN1ACA0164 FEFC Code: 00234175

### *NOCN Qualifications in Managing Volunteers (Advanced Award, Advanced Certificate, Advanced Diploma)*

New government initiatives such as the Neighbourhood Renewal Strategy and Sure Start emphasise the role of the voluntary and community sectors in a wide range of social and economic regeneration initiatives. These qualifications will support the development of skills necessary in managing volunteers and will enhance the ability of organisations to engage with these government initiatives and provide high quality volunteering experiences.

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The qualifications have also been developed in response to the Voluntary Sector National Training Organisation's (VSNTO) identification of skill gaps in managing volunteers and will complement the work planned by VSNTO to develop national occupational standards for volunteer managers. They will equip learners with the skills, knowledge and understanding to promote good working practices and offer opportunities for personal development for those who manage volunteers.

*NOCN Qualifications in Managing Voluntary and Community Organisations (Advanced Certificate, Advanced Award)*

The Voluntary Sector National Training Organisation (VSNTO) has highlighted a need for improved skills in the management of voluntary and community organisations. NOCN's qualifications have been developed in response to this and are designed to complement work within the voluntary and community sectors to develop and support management competencies and benchmarks. The qualifications have particular relevance to the development of occupational standards and the use of QA systems and standards. Linked with other NOCN initiatives such as the Volunteer Management and Community Work qualifications, these qualifications form part of a core framework for managers in these sectors.

*Volunteer Development Scotland offer a range of short courses for VMs:*

*The Volunteer Managers Start-Up programme*

- Planning for Volunteer Involvement
- Effective Recruitment of Volunteers
- Selection and Interviewing
- An Introduction to Training Volunteers
- An Introduction to Support and Supervision

*CPD for VMs*

- Developing Support and Supervision Strategies
- Motivation, Retention and Development of Volunteers
- Developing On-going training for Volunteers
- Developing Volunteer Portfolios
- Volunteer – Staff Relations

*Towards the Certificate in Volunteering Management*

- The programme in Volunteers Management
- The programme in LVDA Development
- A programme on monitoring and evaluation
- NVQ Assessor (D32/D33)

Volunteer Development Scotland is also developing an on-line learning resource.

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*Volunteer Development Agency in Northern Ireland offer a range of short courses for VMs:*

### *Basic level courses*

- Finding and keeping volunteers
- Recruitment and selection of volunteers
- Managing volunteers through support and supervision
- Volunteers, the law and expenses

### *Higher level courses*

- Developing volunteer policy
- Assessment and accreditation of volunteers
- Managing diversity in volunteering

### *Courses accredited by NIOCN*

- Training the trainers of volunteers
- Attracting and selecting volunteers
- Hands-on volunteer management
- Volunteers and the wider organisation