

PLANNING & PREPARATION

It can be a real whirlwind to get all the pieces in place for an event or festival. One day you have months until your event, and then, all of a sudden it's only a couple of weeks away! Ideally, you are sitting at your desk, calm, cool and collected, but we all know that last minute changes occur, so making sure you have a plan is the key difference between calm, cool and collected and frantic and frazzled.

Setting Goals/Creating a Critical Path

First things first, you need to create goals to achieve, come up with objectives to reach those goals and convert all that into a plan. Call it what you like—action plan, critical path, timeline—the basics should all be there:

- Actions or tasks that need to happen in order to reach your goal
- How long each task should take to complete
- People responsible for each task or action
- Materials or resources that are needed to complete the action or task
- A way to measure your success when the action or task is completed

The format of your critical path is up to you. A basic Excel spreadsheet can work wonders, and there are some fancier software products out there, like Trello or Smartsheet, to help you plan. Depending on the length of the contract, you can plan out when crucial tasks need to be completed to give you enough time to develop or amend the resources you will need. If the volunteer department exists for only part of the year, most contracts last anywhere from two or three months up until five or six months. A typical three-month critical path (Appendix A) generally works for smaller organizations looking to recruit around 100 volunteers, while a five-month critical path (Appendix B) can be developed for mid-sized organizations looking to recruit a few hundred volunteers.

If you are fortunate enough to step into a role where the critical path is already established, it is crucial to review and amend that document in the first week of your position to ensure that any new goals are reflected in the current path, and that realistic timelines are set. To ensure your success, it's crucial to identify parts of the critical path that require resources and other departments to complete tasks. Starting communication with different departments early on will guarantee those tasks are on their radar; identifying what resources you will need to budget for may give you some time to look into free options by working out sponsorship or in-kind exchanges. Your budget can go a long way if you invest time into building favourable relationships with other like-minded organizations.

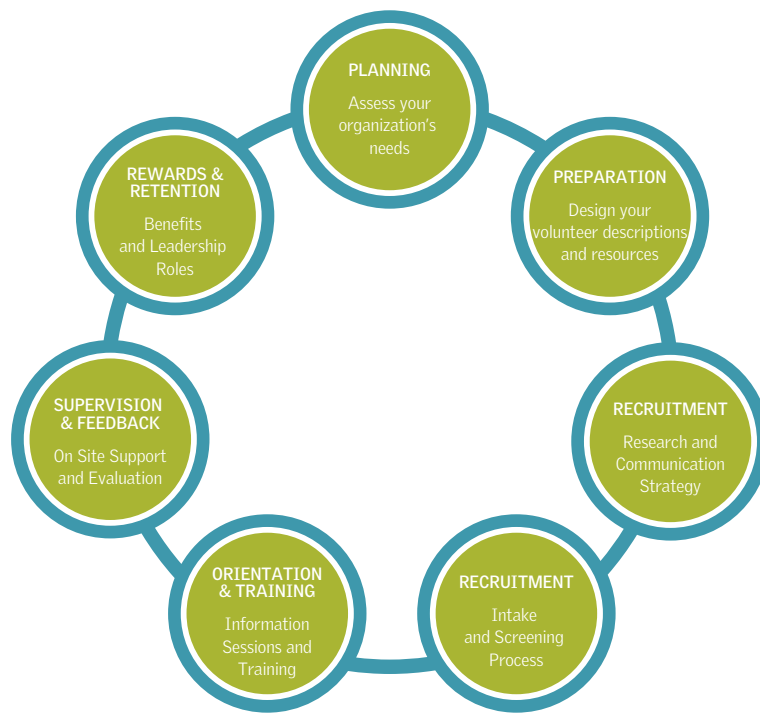
When determining your goals, make sure that they are realistic in relation to your time, the support you require from your staff, your budget and promoting your organization's mission. Often volunteer programs are overlooked in the overall planning—sad but true. So taking a critical look at the program to ensure that it still reflects your organization's aim and mission will guarantee that your planning will substantiate your efforts. Keeping track of your goals and objectives through measurable deliverables (e.g. number of applicants, overall volunteer number, volunteer hours, etc.) is especially handy if you plan on approaching future donors or are seeking local funding to grow the volunteer program.

Your goals for your volunteer department should revolve around the Volunteer Life Cycle (Figure 4). The model was created by Helen Bussell and Deborah Forbes in 2003 to identify the four stages of volunteer behaviour:

- Determinants of volunteering (Planning & Prep)
- The decision to volunteer (Recruitment)
- Volunteer activity (Orientation & Training, Feedback)
- The committed volunteer (Rewards & Retention)

These four stages can further be broken down.

FIGURE 4: VOLUNTEER LIFE CYCLE



Your plan depends, of course, on your length of contract, but keep in mind that some of the planning can begin before your first day. It's important to identify what tasks can be started before a contract begins and that you communicate with your supervisor about what tasks can get started without you, leaving you with the implementation and execution.

Take the first week to get familiar with documents and resources that may already exist. This will get you acquainted with volunteer job descriptions that may need to be amended with current information and should give you a good idea of what staff member is responsible for each volunteer request. Getting started on creating (or hopefully amending) past years' orientation manuals and training manuals will help in your marketing recruitment strategy by allowing you to identify the types of roles, venues, hours, benefits and finally, volunteers, you may need to target to get the job done. Start thinking about the materials you will need to get ready for each stage of the above cycle. Reading over the post-mortems from the last two years will provide great insight into some of the challenges and successes that you or previous managers had in the past. All of this preparation may sound like a lot, but creating a critical path with these objectives will ensure that you are meeting your goals on time.

Assessing Your Needs

Early on in planning, assessing the volunteer needs in your organization may take a little while, as your coworkers may not be thinking about what support they need on hand for an event that may be months away. It is the responsibility of the volunteer department to work with staff in determining needs they may not even know they will have, as well as providing guidance into what is an appropriate task versus one that a volunteer cannot do. Open communication with staff at meetings, via email and telephone about your deadline to collect this information will help limit changes further down the road and will ensure that your time will not be spent chasing people down for that information.

Your first step should be to create a volunteer request form (Appendix C) that staff can fill out and return back to the volunteer department. This can be through an online form (e.g. free Google Forms) or through a Word document like the one shown in the Appendices; as long as the information is easily retrieved and accessed, it doesn't matter how you collect it. The first portion of the form should be dedicated to tips and guidelines when requesting volunteers and possibly include:

- Determining the length of a shift. Generally, a volunteer shift should at least be three hours long. If the shift contains lots of repetitive work, consider splitting a longer shift into two shorter shifts
- Breaks for volunteers. Check out your local employment standards acts and make sure that the same standards are applied to volunteers as well
- Details on what should be included in a job description and what legally must be noted
- Performance evaluation and feedback. Make a point to ask staff and supervisors to note exceptional volunteers as well as volunteers who are experiencing performance issues. This little task will go a long way in making your job easier by immediately finding the superstars in your group and will also build a rapport between your staff and volunteers
- Contact information of the volunteer department staff and who to contact if they have any questions
- A big thank you to staff filling out the form. Without even knowing it, they are aiding the volunteer department in achieving its goals by helping you prepare for recruitment

Best practices for supporting diversity also include:

- Being more flexible in considering what usable skills volunteers bring, not just the skills you think you need
- Creating different volunteer role descriptions for the same role to attract a different audience

If you would like to take it a step further, beyond the form, create a quick 15- to 20-minute session on working with volunteers, which outlines:

- What types of individuals make up your volunteer base
- A reiteration of your organization's commitment to diversity, including any values statements or policies you have
- Volunteer statistics including the number of volunteers your organization engages annually and the number of volunteer hours that contributes to your organization's operations
- Information on the volunteer management team including other staff and contacts
- Tasks a volunteer can be asked to complete on duty
- Tasks a volunteer should not be asked to complete on duty
- Details of tasks that are required in a job description (any lifting involved, cash handling, standing for long periods of time, length of volunteer shift, etc.)
- Determining whether further training is needed for volunteers or if training will be provided on site
- Conflict resolution techniques and examples

- How to provide feedback to volunteers on shift and to the volunteer management team; overview on how performance evaluation is tracked and why it is useful
- The type of feedback you are looking for from your staff or supervisors. This should be related to goals you devised for the volunteer program, which ultimately leads back to the organization's mission and aim
- Showing appreciation to volunteers on shift and appreciation events organized by the volunteer department
- Administering benefits

This session can come in the form of a PowerPoint presentation that you can deliver in an upcoming meeting or that you can circulate via email with your coworkers. It's a great resource that your coworkers can share with their staff, especially those who will be working directly with volunteers.

Make sure you are up to date on your current demographics, so that you can assess if you are serving your communities well and if your volunteers reflect the communities you serve. Maybe you think you have a diverse organization already. But how can you tell? You can start by drawing up a brief survey to use as a guide to give you an overall picture of what sections of the community may be missing. This doesn't mean you have to go find them just for the sake of being able to tick more boxes. You are looking for people with the right skills/experience, rather than people from a certain group.



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Job Descriptions & Scheduling

Once you have received your volunteer requests from your fellow coworkers, you will have a good idea of the types of volunteers you are looking for, plus the total number of volunteers that you will need to recruit. Both pieces of information will be very helpful in establishing a marketing strategy for recruitment, which we will get into in the next section.

At this point, you want to ensure that all of the job descriptions that exist are up to date and ready to share. It is important to ensure that expectations are set for potential volunteers with these descriptions, so take your time when creating the descriptions and make sure that any requirements are listed (Appendix D). Posting the descriptions clearly outlines your expectations for volunteers and provides them with information they need before making the decision to commit to your organization (Appendix E). Outlining your expectations gives your volunteers a chance to make arrangements in their schedule and accommodate the time commitment needed. This is especially important for any volunteer leadership roles that you have within your team (Appendix F). It's wise to include Orientation and Training session dates, as well as any interviews associated with the position, in addition to laying out the time commitment, especially if the sessions and interviews are mandatory. We talked about preparing yourself adequately for your volunteers, but consider this, too: volunteers need to figure out their personal schedule before dedicating time to your organization. By giving your volunteers adequate time to prepare for and attend orientation, training and interviews, your volunteer team will be better informed and ready when it comes to achieving your goals.

This is a great time to start the process of building a volunteer schedule and planning out how many volunteers you will need for each task. Using Excel to map out the shifts is great prep for uploading the schedule to volunteer management software like Volgistics, Volunteer Impact, Volunteer Matters, etc. If your organization currently does not use volunteer management software, you should absolutely look into investing in a product that will significantly cut down on time dedicated to scheduling volunteers, so that you can continue to strengthen and grow your volunteer program. There are a few free trials of software out there; take a bit of time to assess what you need to help you with your workload. If your organization is a not-for-profit or charity, consider registering with Tech Soup Canada, a team of eight people dedicated to empowering charities, non-profits and libraries with the effective use of technology. That's the great news—the resources are out there. It just takes some time to start investigating and registering.

Barriers to Volunteering

Even at the early planning stages, you may want to think about what keeps people from volunteering and how your organization can make itself more accessible and open. Issues (and solutions) may include:

- Timing of shifts: Is there evening work for those who work full time?
- Child care: Are there tasks that can be done from home?
- Concerns about English fluency: Are there tasks where language isn't important that volunteers can work at until their English improves?
- Lack of a vehicle or driver's licence: If transit isn't an option, can you facilitate carpooling or offer a task that can be done from home?
- Lack of skills: Can you offer simple tasks and stress that they will build needed skills, both on the job and through any training you offer?