

Consortium Organizations' Mapping Tools for Volunteer Management October 2021

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Table of Contents

Consortium Organizations’ Mapping Tools for Volunteer Management.....	1
List of Figures.....	3
Introduction.....	4
Consortium Organizations	5
Number of Projects prior to Covid.....	5
Impact of Covid on Volunteers Numbers in Organization projects.....	6
Guidelines currently provided by organizations for Volunteers	7
Volunteer Induction.....	9
Accessibility of Documents for Volunteer Management	11
Recommendations to Improve Volunteer Management Tools	15
Conclusion	16
Table of Development Organisation Guidelines	17

List of Tables

Table 1 Organization, Location and Volunteer Details

Table 5 Number of organizations with Accessible Guidelines

List of Figures

Figure 1: Number of volunteers sent by each organization

Introduction

Xchange “*Exchange of good practices and cooperation in humanitarian action to generate engagement*” is a capacity building project funded by EACEA in the framework of the EUAV Initiative (ref. 614766).

The [EU Aid Volunteers initiative](#) provides opportunities to European citizens and long-term residents, from a wide range of backgrounds and with a diversity of skills and professional experience, to get involved in humanitarian aid projects, support the provision of needs-based humanitarian aid in third countries and engage in volunteering opportunities, through deployment and online-volunteering.

The project involves 17 organisations coming from 10 countries of the world in a process aimed at improving internal procedures related to volunteer management so as to reach the standards required to send and/or host volunteers in the framework of the EUAV Initiative. Different kinds of actions are foreseen: online and residential training, networking, mapping and dissemination activities. All action is based on the exchange of good practices among participating organisations, with a view of enhancing local expertise and competence.

One of the actions of our Xchange project is directly implemented by an online EU Aid Volunteer (Eilidh Mc Ewan) who has been asked to map available online volunteer management resources as well as those related to volunteering in humanitarian aid contexts, in order to have a comprehensive digital library among associations, institutions and relevant stakeholders involved or interested in volunteer management.

To this end an internal survey has been conducted by Eilidh McEwan. The results of this report are thus referred to the survey and the needs emerged through it with respect to useful online resources to be included in the digital library.

The action has been directly supervised by ASPeM. Eilidh McEwan has been selected, trained and monitored in accordance with the rules set out for online volunteering in the framework of the EUAV Initiative.

In order to preserve the privacy of all the participants, their names will be substituted with numbers. A range of organizations within the Xchange Consortium act as send organizations, which allow national/international volunteers to participate in a volunteering project overseas. Other organizations host volunteers in resource-poor contexts to do a range of voluntary work on various international development projects. These projects range from humanitarian aid, education, medicine interventions, LRRD, and working alongside small farmers and rural communities to implement eco-friendly agriculture initiatives. All the organizations have been awarded with the EUAV certification (in 2020) which was one of the goals of the project. They’ve never participated in a EUAV deployment project.

Consortium Organizations

Table 1 Organization, Location and Volunteer Details

Code	Organization Type	Country	Volunteer Type (National or overseas/International)
R1	Send	Italy	Sends national Italian volunteers overseas
R2	Send	Italy	Sends national Italian volunteers overseas
R3	Host	Kenya	Hosts both national volunteers and international volunteers
R4	Send	Spain	Sends national Spanish volunteers overseas
R5	Host	Serbia	Hosts both national Serbian volunteers and international volunteers
R6	Host	Serbia	Hosts both national Serbian volunteers and international volunteers
R7	Host	Guatemala	Hosts both national and international volunteers
R8	Host	Peru	Hosts both national and international volunteers
R9	Host	Serbia	Hosts both national and international volunteers
R10	Send	Slovakia	Sends national and international volunteers overseas
R11	Host	Ethiopia	Hosts national and international volunteers
R12	Host	Guatemala	Hosts national and international volunteers
R13	Host	Colombia	Hosts national and international volunteers
R14	Host	Kenya	Hosts national volunteers
R15	Host	Mozambique	Hosts national volunteers
R16	Send	Italy	Send national and international volunteers
R17	Host	Peru	Hosts national and international volunteers

All the send organizations prepare volunteers prior to departure overseas in accordance with the rules set out in their respective volunteering initiatives. Host organizations play a great role in volunteer management during the deployment of volunteers in the field.

Number of Projects prior to Covid

There were responses from a total of 16 organizations of the 17 organizations who are part of the Xchange Consortium. The responses give some indication of the numbers of different projects and volunteers being sent and/or hosted by the Consortium organizations on an annual basis.

Number of Volunteer Projects

The data shows that some organizations ran many projects that were diverse in scope and multifaceted, while other organizations hosted national volunteers within their own country, in domestic as well as overseas projects. Other organizations were focused on one or two projects.

Impact of Covid on Volunteers Numbers in Organization projects

The organizations also indicated how many volunteers they were able to send or to receive on projects at three points in time: Before covid, prior to March 2020; During Covid-19, from March 2020 – September 2021; After Covid, after September 2021.

The chart below indicates that 6 organizations sent or hosted more volunteers before Covid-19 pandemic but saw a dip in the number of volunteers hosted or sent during the pandemic itself. For all 3 of these organizations, the number of volunteers increased again after September 2021.

For 7 organizations the Covid-19 pandemic did not have an effect on number of volunteers they sent or hosted, as numbers remained constant from before March 2021 until September 2021.

For 3 organizations the number of volunteers hosted or sent before covid and during covid remained the same, but these organizations are planning to increase the number of volunteers working on their projects after September 2021.

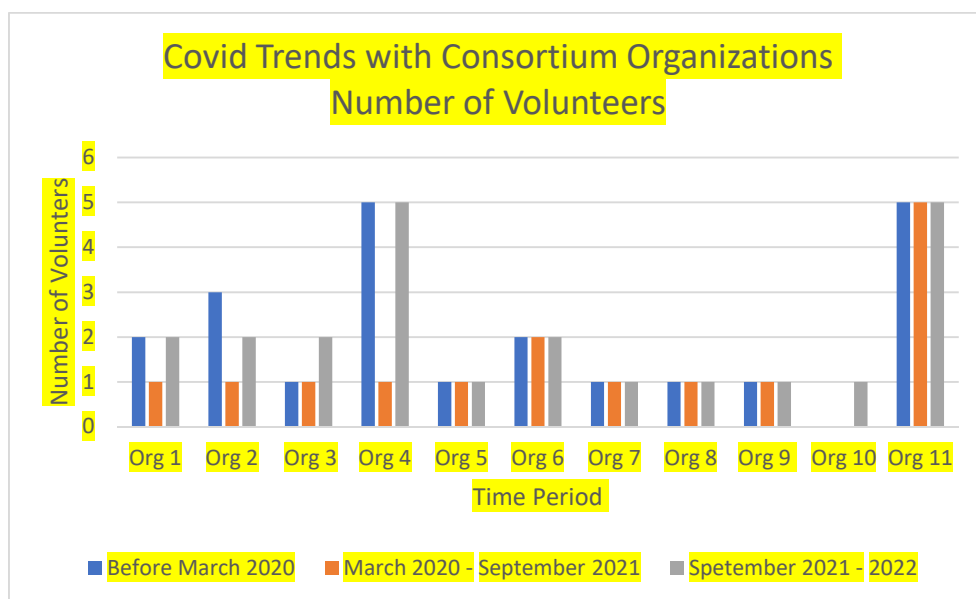


Figure 1: Number of volunteers sent by each organization

Y-AXIS SCALE TO READ 0=0, 1= 1-5, 2= 6-10, 3= 11-15, 4= 16-20, 5= More than 20 volunteers or add in a Key.

Guidelines currently provided by organizations for Volunteers

Organizations utilise their own internal guidelines and protocol for welcome inductions, volunteer preparation and volunteer training. After identifying documentation typically provided by send/host organizations for volunteers, the following list of guidelines were added to the questionnaire: welcome Booklet explaining volunteering, introduction video, guidelines for Safeguarding the persons Volunteers work with, guidelines for Security of Volunteers overseas, guidelines of Good Practice in Volunteer Programmes, code of Ethics for Volunteers, guidelines for Quality of Volunteer Management.

Number of Organizations with Listed Guideline Documents

These documents provide useful guidelines for volunteer management in addition to EU Aid Volunteers policies. It was suggested that 'policies were developed during the EUAV programme which has been implemented by consortium members ... policies are created in line with national and international laws regarding the volunteer management'.

The organizations provide an 'agreement signed with the sending organization and the volunteer; a description of the position, specifying the responsibilities of the position and with whom you will work; the Policy of transparency and protection of the NNJ; Contact telephone numbers and emergency telephone numbers and an Institution dossier', all of which provide the volunteer with essential support.

One organization commented that volunteer guidelines 'proved to be meaningful for comprehending the organization and operation's context, and very useful for understanding the duties and rights volunteers need to be aware of'.

Virtual Guidelines

Other organizations have experimented with provided guidelines for volunteers in an online format. Some organizations referred to virtual tools that were built alongside the project. These included 'Safety Management Plans, Volunteering, Health and Safety and Performance Management'. Volunteers are also given information such as organizations' annual reports and project framework. As these guidelines were online, they were available to volunteers to access before they travelled to the project site.

Other Guidelines

Some organizations developed internal guidelines that would only apply in their country. For instance, a host organization included a 'Safety leaflet for volunteers for EARTHQUAKE and SLIPPING'.

One organization claimed that their Quality Programming Guidelines were particularly essential as the 'document supports our volunteers to understand the they can participate in all our programs activities within a framework that ensures that quality standards of the programs are met and above that improved'. This document was not listed above but the organization respondent identified this tool as being important to building the capacity of both the organization and the volunteers over time.

Another organization identified the Safe Environment Policy Tool as a very important document that protected people participating in its projects from risk of abuse.

It is clear to see that organizations within the Consortium have provided clear guidelines, but this might not be true for many other organizations that do not participate in structured volunteer initiatives such as national and European programs. These organizations could benefit from improving the guideline documentation available for volunteers.

Volunteer Induction

The induction process of send/host organizations is another essential tool to manage and welcome a succession of volunteers into volunteer projects. Each organization discussed what information they provide. The induction is another essential tool to ensure volunteers understand what services are available in the local area, and understand local contexts during the project.

Information provided for Volunteer Induction

Some organizations that only send volunteers claimed they did not provide detailed information about the local area in the host country, although they were aware of the importance of this information but believe that it is best to leave local information to be shared by local experts such as the managers of the overseas project.

One organization provided detailed information about the induction, which involved an orientation “providing the volunteers a set of information related to their volunteering and acknowledgement of the setting where they arrive” and a training phase, “volunteers’ preparation for tasks’ performance and collaboration with stakeholders”. The organization stated that “Induction of volunteers is a high priority ... volunteers should feel welcome and valued when they enter our organization and, in this way, they know what is expected from them”. This organization provides a volunteer induction kit with many of the organization guidelines enclosed.

The volunteer induction process by an organization from Guatemala also appeared to be very thorough, as the respondent stated that “the association establishes the area of interest where the volunteer will carry out the activities, considering the thematic field (profession), geographic coverage (communities) and adequate space in the offices”.

Within the association “the tutor guides the volunteer in the first days about the safe spaces in the locality (municipality and/or department), communities to attend or people with whom the actions to be carried out will be coordinated, for all the above the mentor or tutor” with a guideline document “Broad brochure of welcome to volunteers”.

One organization highlighted a detailed induction programme for volunteers that included a “multi-approach induction”. This involved “learning about the organization and its programs; a presentation about the country and towns where volunteers are placed; providing all necessary technical information (settling in accommodation, information about purchasing basic items, local transportation modalities; the provision of cell phone and local cell phone number; meeting the mentor and sharing information on communication channels and modalities alongside other safety and security information”.

Setting out the parameters of the volunteer role at induction

A host organization from Serbia stated that “induction procedures are structured thoroughly in order to get relevant and effective level and avoid any kind of mismatching after the deployment phase”. The induction process seeks to avoid that volunteers may feel stressed, overworked, unsatisfied about their role or not connected to the other volunteers or paid staff.

Another host organization from Serbia mentioned that the induction process involves “a meeting where the send and host organizations meet, introduction to the mentor and line manager and introduction to the areas and projects in which the volunteer will be involved as well as what skills they will develop during the program”. On arrival, the volunteer is introduced to the area, the organization and their job role.

A host organization from Guatemala stated that tutors (or mentors) who work with volunteers seek to build their capacities in a variety of areas of expertise. The respondent highlighted that “it is important to clarify that volunteering does not replace the functions of the staff, because the objective is that professionals from different contexts meet to complement knowledge and experiences and thereby generate innovative proposals for the benefit of the communities associated with the organization”. This perspective that highlights the organization still seeks to utilize local knowledges and build on the expertise of local lived experience.

These comments all indicate that the Induction is a very important tool for Volunteer Management. Ensuring these guidelines are available across all the organizations as a kind of international standard could ensure that volunteers and host projects both benefit from the experience.

Accessibility of Documents for Volunteer Management

Some benefits of the initiation of new processes of volunteering online during the Covid-19 pandemic are that it can widen the pool of people who apply to become volunteers, whether this is because it increases affordability as people do not have to relocate; allows greater flexibility so people can work full-time alongside volunteering to build career experience; and allows people with a range of disabilities greater flexibility to access volunteering while staying at home.

Although volunteering online is no substitute for the opportunity to experience another country first-hand, it is a way to complement the traditional volunteering model in which host organizations send volunteers to live and work in project sites.

For people with disabilities, the option to volunteer and enhance one’s C.V., and to travel and experience a new country is exciting, but this is only possible for many people if the information provided by the host project is accessible.

The organisations in the EU Consortium gave the following reasons for their documents not being accessible. The researcher considered accessibility in the following terms: documents being translated into local languages; an international sign copy being available for deaf people; the font of documents being accessible by a screenreader or easy read versions.

Some of the reasons given by organisations included: lack of translators available for minority languages, lack of knowledge or training in accessibility, lack of training in formatting documents for accessibility, lack of training in creating accessible formats, lack of budget for interpreters and translators.

Table 5 Number of organizations with Accessible Guidelines

Volunteer Guidelines Accessibility	Number of organizations
Lack of translators available for minority languages	3
Lack of knowledge or training in accessibility	2
Lack of training in formatting documents for accessibility	4
Lack of training in creating accessible formats	1
Lack of budget for interpreters and translators	8

All documentation and guidelines could be formatted and improved to enhance accessibility of Volunteer Management Guidelines. The promotion of accessible formats, including audio versions, being readable by software such as easy-read and offering translations upon request could then encourage further consideration about the accessibility of volunteering for those with a range of disabilities or additional needs.

Volunteer Mentoring

All respondents in the Consortium discussed the importance of volunteer mentoring as a very central tool for volunteer management. The number of volunteers working with organisation mentors varied. Strategies utilised included frequent meetings, training analysis, review meetings to show progress over time, with some organisations producing a final report that detailed volunteers achievements.

Mentoring Processes

One organization stated that the “Mentoring process is made through reports and meetings among volunteers, mentors and volunteer manager...” and this organization usually has 1 mentor placed with 2 volunteers. In another organization each mentor was responsible for 2 or 3 volunteers and claimed that the mentoring process “is made through periodical meetings and workshops about the wellbeing of volunteers”. These meetings are made between volunteers and mentor. If there is a problem volunteers can ask to volunteers manager in send organization”.

Another organization developed a strategy where, “before a volunteer joins us, we do training needs analysis with a view of identifying her/his strengths and areas of weaknesses”. The organization claimed that after a training needs analysis has been completed, then “a focal point person who is more experienced is identified and paired with the volunteer for mentorship ... in between there are review meetings to review progress and areas that needs improvement”. This is a useful approach as it ensures that the volunteer progresses and builds skills throughout.

Another organization indicated the mentoring process included “5 staff experienced in coordinating and mentoring volunteers” who then “guides volunteer into the details of his/her task, discusses volunteer’s aspirations and skills, as well as learning perspectives that can be accompanied during his/her assignment”. Normally the “mentor is also in charge for developing final report on volunteer’s achievements”.

Frequency of Mentoring

One organisation did not have much direct contact with overseas projects and the mentoring was carried out only from time to time, with “semi-annual and annual evaluations are made and meets are kept whenever necessary” for the projects overseas.

In one organization based in Serbia, the respondent commented that factors that influenced how many volunteers one mentor was responsible for included “the length of time the volunteer had been active in the organization; what kind of volunteer project the volunteers were participating in; the location where the volunteer was assigned and how many volunteers were working with the organization projects at this point in time”.

In another organization “Two people are in charge of guiding the volunteers. The mentor is involved in the daily activities of the volunteers and holds meetings once a week. The line manager takes into account the goals set as well as the outcomes of volunteering”. Another positive aspect of the way this mentoring programme is structured is the implementation of evaluations at regular intervals. As the respondent pointed out “if the program lasts 12 months, the evaluation of the achievements of volunteers and mentors is organized for 6 months, as well as the evaluation of activities. If it turns out that the goals have not been met, they are modified”. At the end of the volunteering project, “the line manager participates in the final evaluation” and members of the Send organisation are also involved.

Organisations only recently certified

It has to be stressed that most of the organizations of the Xchange consortium only recently have obtained the EUAV Certification, so they’ve never send/host volunteers in the framework of the EUAV Initiative.

Despite this, an accurate process of mentoring is provided to volunteers. One of the organizations stated that in principle the organization “appoints the mentor for a volunteer who is deployed and the mentor follows up the whole process of integration, professional growth, improvement of skills and competencies of the volunteer, as well as the personal satisfaction level during the volunteer deployment”. The respondent stated that “The organization has experience in volunteer management at regional level considering direct humanitarian actions and inclusive participatory approach activities”.

Challenges that occurred with Mentoring

One of the respondent stated that some challenges mentors encountered were “when a volunteer requested technical support or a mentor with a certain speciality that we did not have within the organization and at the national level”.

One organization referred to a more challenging experience: mentoring a volunteer who had never flown overseas before. This meant that they had to use a wider skillset to introduce the volunteer to the country, and raise awareness of differences. Another was raising awareness of the specific local contexts for volunteers arriving from overseas, for example the houses in one project were not heated, and several of the projects were implemented in contexts high above sea level, where international volunteers might have a risk of altitude sickness.

A send organization mentioned that 1 mentor oversaw five to ten volunteers overseas who “appreciated that we keep this regular mentoring – monthly basis. They appreciate our sincere interest about their well-being and learning path. Monthly contact helps us to build trustworthiness”.

However, one consistent challenge that this organization faced as a Send organization was a consequence of the pandemic. The organization faced issues in the “context of conflict resolution, since we couldn’t be directly involved and get the direct information (we do need

to decide/support/help based on intermediated information, which might be biased by the particular party)".

In turn, one organization manages a lot of volunteers at a range of its offices. The organization has often "assigned a coordinator and mentor for volunteers from a broad range of development relationships between volunteers, organization staff and peers". The respondent believes that improvements to the mentoring process could involve "identification of the objectives and scope of the project volunteers have been assigned to". Another important factor to improve mentoring is "diagnosing the individual and organization circumstances promoting or interfering with effective mentoring". Finally, succinct and effective evaluation of the intervention with volunteers is important to assess what changes might be required. A lack of concrete objectives can hinder the experiences and aims of volunteers involved in these projects, which was fed back from the organisation.

Responding to Volunteer Requests as a Mentor

A send organization stated that they "do mentoring in the role of sending org. A prior monthly call we asked volunteers to send the written monthly report. We are at their disposal outside of this monthly regular framework, for urgent matter they can contact us whenever (24/7). We help them with conflict resolution, logistics, taking initiative, learning development process".

Recommendations to Improve Volunteer Management Tools

The volunteer management tools provide essential guidance for both volunteers and for project leads as they assist with structuring project work, the number of volunteers in a programme, programme timescales and other considerations.

An organization suggested that the role played by mentors “is fundamental”, suggesting that the training of mentors in the Consortium organizations is an important factor that could contribute to the development sector as a whole.

Another organization identified “preparation prior departure of the volunteers to the hosting organization” as being “very important”. The respondent claimed that during this time period is when the organization can “identify expectations from each, agree on the realistic deliverables and also objectively manage future expectations”. These discussions prior to volunteering are critical “if the whole process is to be fair, inclusive and work within a framework of transparency and accountability towards each other”. In this organization, volunteer feedback was actively encouraged, especially regarding the format of the guidelines.

A host organization strengthened its expertise by working to build experience with the sending organization in the EU and claimed this gave the organization valuable insight.

Another host organization pointed out that during one volunteer’s stay, the Covid-19 pandemic situation broke out. Due to good and timely management of the situation, the volunteer was able to return to their home country but there is a need for guidance in the event of similar situations in the future that might require volunteers to terminate the project before completion.

A send organization suggested that a transformation of the “systematic attitude” could improve organizational capacity. For instance, “do monthly/weekly or just regularly (and, in certain scale, often meetings’ as well as ‘track the progress, find the time for volunteers, work systematically – step by step, not “randomly” and in the light of present moment – but take it complexly”.

Some organizations pointed out that the systemization of documents addressing risk and detailing a response to risk is important, as well as the importance of following good practice and learning from past errors.

The findings from the questionnaires provided many suggestions to improve volunteer management, including the training provided by mentors, the preparation of volunteers prior to departure, systemic attitudes within the organisation towards volunteers’ experiences and learning from past practice. All of these suggestions provide guidance for the Consortium to build upon for the future.

Conclusion

The report offers some insights about the EU Consortium projects and how the Covid-19 pandemic reduced the number of volunteers sent to project sites. The report details the ways Volunteer Management Tools can enhance the experience of volunteers, as well as improve the ability of mentors to manage a variety of volunteers, especially across multiple projects.

One important finding from the questionnaires was the lack of accessibility awareness in the provision of Volunteer Management Tools disabilities amongst Consortium organisations. Arguably, ensuring volunteer guidance and mentor tools are accessible for people with a range of disabilities is an important first, initial step to widening the volunteer pool. This could then encourage more uptake of project work by those with disabilities too.

Table of Development Organisation Guidelines

Organisation/Institution	Document type	Website
1.EU – DG EAC	EU Aid Volunteers platform	https://webgate.ec.europa.eu/echo/eu-aid-volunteers_en/
2.EU - EACEA	General information about the European Solidarity Corps initiative	https://europa.eu/youth/solidarity/organisations/about_en
3.EU - EACEA	Specific information about the European Solidarity Corps Initiative (funding opportunities, legal basis, ESC guide)	https://www.eacea.ec.europa.eu/grants/2021-2027/european-solidarity-corps_en
5.Alianza por la Solidaridad, ActionAid, WeWorld-GVC Onlus, Volonteuropa	Information related to the EUAV Initiative. The website is available in English and Spanish. Guidelines offered in different languages. Topics covered: information and duties of volunteer and host organization in the framework of the EUAV Initiative; gender perspective; manual of volunteerism; safety and security practices.	https://www.aidvolunteers.org/#recursos
International Forum for Volunteering in Development	Global Standard Volunteering for Development	https://forum-ids.org/global-volunteering-standard/
International Forum for Volunteering in Development - CLIFF ALLUM, PETER DEVEREUX, BENJAMIN LOUGH, AND REBECCA TIESSEN, FORUM, 2020 - IVCO	Volunteering for climate action	https://forum-ids.org/ivco-2020-paper-3/
CBM	Disability Inclusive Development Toolkit	https://www.cbm.org/fileadmin/user_upload/Publications/CBM-DID-TOOLKIT-accessible.pdf
EDF – European	Digital accessibility –	https://www.edf-

Disability Forum (VIVID Project)	accessible video toolkit	feph.org/publications/accessible-video-toolkit-digital-accessibility-training-session-5/
EDF – European Disability Forum (VIVID Project)	Digital accessibility – accessible online meeting	https://www.edf-feph.org/publications/accessible-online-meeting-toolkit-digital-accessibility-training-session-4/
EDF – European Disability Forum (VIVID Project)	Digital accessibility – accessible social media	https://www.edf-feph.org/publications/accessible-social-media-toolkit/
EDF – European Disability Forum (VIVID Project)	Digital accessibility – power point	https://www.edf-feph.org/publications/accessible-powerpoint-toolkit/
EDF – European Disability Forum (VIVID Project)	Digital accessibility – word	https://www.edf-feph.org/publications/digital-accessibility-training-session-1-making-word-documents-accessible/
Viatres Christi (VIVID Project)	Inclusive online volunteering	https://www.edf-feph.org/publications/inclusive-online-volunteering-for-humanitarian-aid-research-by-viatres-christi/
CBM UK	Safeguarding Policy	https://www.cbmun.org.uk/wp-content/uploads/2019/07/001.3-CBM-UK-Safeguarding-Policy-2019-FINAL-Collated.pdf
Medicins Sans Frontiers	MSF UK’s commitment to Responsible Behaviour	https://msf.org.uk/msf-uks-commitment-responsible-behaviour
Medicins Sans Frontiers	MSF UK’s Safeguarding Policy	https://msf.org.uk/msf-uks-safeguarding-policy
Medicins Sans Frontiers	MSF UK’s commitment to addressing institutional racism	https://msf.org.uk/msf-uks-commitment-addressing-institutional-racism
Bond Network	Monitoring and Evaluation Guidelines Evidence Principles Checklist Choosing Appropriate Evaluation Methods Tools	https://www.bond.org.uk/monitoring-and-evaluation https://www.bond.org.uk/resources/evidence-principles

	Impact Evaluation Checklist A Guide for Commissioners and Managers	https://www.bond.org.uk/resources/evidence-principles https://www.bond.org.uk/sites/default/files/impact-evaluation-guide-0515.pdf
Intervol	Predeparture Training Sessions Video Learning Resources Recommended reading: Volunteer: A Traveller’s Guide to making a difference around the World Models of International Volunteering	https://intervol.org.uk/resources/training/ https://intervol.org.uk/videolearning/
UN Volunteers	Volunteerism and the Global Goals	https://www.unv.org/volunteerism-and-global-goals
UN Volunteers	Welcome to the UN Partners Toolkit for hosting UN Volunteers	https://toolkit.unv.org/