National Occupational Standards

for Managers of Volunteer Resources

HR Council
for the Nonprofit Sector

The HR Council takes action on nonprofit labour force issues.

As a **catalyst**, the HR Council sparks awareness and action on labour force issues. As a **convenor**, we bring together people, information and ideas in the spirit of collaborative action. As a **research instigator** we are building knowledge and improving our understanding of the nonprofit labour force.

Canada

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Introduction

> The National Occupational Standard provides a foundation for the further development of key human resource and career planning tools.

Development of National Occupational Standard

The HR Council for the Nonprofit Sector's (HR Council) *Skills and Leadership Development in Canada's Nonprofit Sector* initiative was a 27-month undertaking that involved three component projects. This project focused on developing and validating a National Occupational Standard (NOS) for the Manager of Volunteer Resources occupation. The NOS provides a foundation for the further development of key human resource and career planning tools including:

- Developing tools used to recruit Managers of Volunteer Resources and evaluate performance
- Developing tools for prospective employees and incumbents for career planning and management
- Developing the professional development resources used to upgrade skills over time

The development process began with occupational research about the Manager of Volunteer Resources position that was used to create an occupational profile, which was bolstered by key informant interviews. The occupational research also informed an implementation strategy for future distribution and use of the finalized NOS. The feedback of the advisory committee was incorporated into both the occupational profile and the implementation strategy.

Using the occupational profile as a base, a committee composed of Managers of Volunteer Resources from across the country met for 2.5 days in September 2011. This meeting produced a draft National Occupational Standard, which will be reviewed by the advisory committee. The approved NOS draft was then taken to four regional validation meetings across the country. In these meetings, committees composed of Managers of Volunteer Resources from across the country discussed, augmented, revised and validated the original NOS draft. This National Occupational Standard was approved and finalized by the advisory committee.

Scope of occupation

Managers of Volunteer Resources plan and implement initiatives and services to ensure the successful operation of volunteer-supported organizations in the nonprofit sector. Managers are responsible for defining the roles of volunteers, creating schedules and matching volunteer job tasks to organizational needs. They recruit and screen volunteers and provide them with ongoing training, supervision and support. They retain existing volunteer participation through effective management, team-building strategies and the recognition of individual volunteer accomplishments. They create policies and procedures to protect clients, organizations and volunteers from risk. They may develop operating budgets, and maintain office records and databases. Managers of Volunteer Resources actively seek opportunities to enhance the lives of clients, community groups and volunteers, in addition to fulfilling the goals of the organization. They may support fundraising activities or collaborate with other groups to accomplish goals and meet growing financial demands. Managers must have a positive, caring attitude, be effective problem solvers, have a familiarity with changing technologies and employ effective communication and leadership skills to manage the continually changing needs of the organization.

About the HR Council

The HR Council for the Nonprofit Sector is a national, nonprofit organization committed to the enhancement and development of a highly skilled workforce that is focused on building better communities and improving the lives of Canadians. It addresses labour force issues in the nonprofit sector. As a convener, research instigator and information-sharing body, the HR Council's priorities are:

- Strengthening human resource management practices
- Supporting skills development and work-related learning
- Promoting a culture of diversity and inclusion
- Fostering leadership development and succession
- Building and sharing knowledge

Occupational environment

The tremendous diversity of organizations that employ Managers of Volunteer Resources gives rise to different working environments.

Working environment

Managers of Volunteer Resources work in public and private sector companies, health care facilities, service providers, social service agencies, organizations focusing on sports and recreation, religious institutions and a wide range of other organizations that require volunteers on a regular basis. These settings include registered charities and voluntary organizations.

The tremendous diversity of organizations that employ Managers of Volunteer Resources gives rise to different working environments. They may find themselves working indoors, outdoors, on various sites, or in urban or rural areas. Their work location depends on the nonprofit's mission, programs and services, ongoing projects, and clients or beneficiaries. From time to time, Managers of Volunteer Resources may be required to attend volunteer recruiting events or participate in fundraisers and other charity functions in a support role.

The noise levels, ventilation, safety hazards and other working conditions will also vary, based on the location where they supervise volunteers or visit them periodically to check on their work. In cases where workplace safety may be a concern, the use of personal protective gear and safety equipment is necessary to comply with occupational health and safety standards. Sufficient lighting should be provided in all work areas.

Physical requirements

This managerial position entails minimal manual labour in the exercise of regular functions. Duties such as planning, networking, advocacy, human resources management, supervisory oversight, and administrative tasks involve sitting at their desk jobs, walking around to conduct inspections, and getting in touch with people at work or outside. Some travel may be called for to attend events, conferences and workshops, so ability to drive and to take trips is a consideration.

With increasing dependence on online and mobile technology, Managers of Volunteer Resources may also spend more time at the computer or on their cell phone. Those who are tech-savvy may augment the traditional methods of meeting people, communicating and advertising with virtual networking. For example, they may use online social media sites to recruit volunteers and promote events.

Managers of Volunteer Resources may shuttle between office work and daily rounds to interact with volunteers and staff, or go out to attend events or meetings with stakeholders. They should be able to monitor sites of operations to observe volunteers and evaluate their performance. Occasionally, they may perform hands-on activities when supervising, coaching, mentoring, or demonstrating certain tasks on the job or during training sessions.

Human interactions

The functions of Managers of Volunteer Resources place them at the hub of the programs and services offered by their nonprofit organizations. They work behind the scenes in an administrative capacity; on the other hand, they directly supervise volunteer service operations. Their position also brings them to the forefront of outreach and networking activities. They actively promote the organization's mission and its benefits to the public in order to increase volunteer participation.

Managers of Volunteer Resources initiate and cultivate internal and external relationships. Acting as intermediaries between volunteers and staff/management, they arrange training, volunteer placements and work schedules; conduct performance evaluation and volunteer recognition; and attend meetings. While they interact with volunteers, co-workers and management on a regular basis, they also find time to socialize with stakeholders and the larger community. They establish new contacts to explore new avenues for volunteer recruitment. Engaging in public relations is essential to form beneficial partnerships and broaden their base of associates.

Major categories

Category A   Develop Volunteer Services

TASK A1	
Assess organizational volunteer needs and opportunities *Managers of Volunteer Resources identify gaps and volunteer needs within the organization. They consult with colleagues regarding roles for volunteers; they also target volunteers for new positions.*	
Subtasks	**Supporting knowledge and abilities**
1.1 Identify where volunteers exist in organization 1.2 Identify strengths in organization 1.3 Identify where gaps are in organization 1.4 Consult with staff 1.5 Identify roles for volunteers 1.6 Identify target volunteers	Knowledge of: • Needs assessment • Gap analysis • Organization • Community Ability to: • Communicate • Analyze • Research

TASK A2

Research related programs and services

Managers of Volunteer Resources research related organizations and compare the programs and services of these organizations with their own. They maintain contact with colleagues in related organizations.

Subtasks	Supporting knowledge and abilities
2.1 Identify other related programs and services 2.2 Perform primary and secondary research 2.3 Establish contacts within related organizations 2.4 Identify differences and similarities between your programs/services/partners and others 2.5 Conduct initial risk assessment	Knowledge of: • Community • Sector • Research methods • Analysis methods • Computer skills Ability to: • Research • Analyze • Communicate

TASK A3

Develop goals and objectives for volunteer services

Managers of Volunteer Resources ensure that the objectives of volunteer services align with those of the organization. They consult with stakeholders during strategic planning in order to determine the objectives to guide the operation of volunteer services.

Subtasks	Supporting knowledge and abilities
3.1 Review mission and vision of organization 3.2 Align volunteer services' goals with mission statement 3.3 Consult with stakeholders (e.g., senior management, staff, existing volunteers) 3.4 Participate in strategic planning, if applicable	Knowledge of: • Organization • Resource materials • Strategic planning process • Goal setting/writing Ability to: • Analyze

TASK A4

Develop policies and procedures for volunteer services

Managers of Volunteer Resources consult with stakeholders to review, refine and approve the organization's policies and procedures according to best practices. They distribute finalized policies and procedures to colleagues and volunteers.

Subtasks	Supporting knowledge and abilities
4.1 Identify which policies and procedures are needed	Knowledge of:
4.2 Consult with stakeholders on policies and procedures	• Communities • Organization • Policy and procedure writing • Appropriate distribution channels
4.3 Review existing organizational policies and procedures	
4.4 Research best practices and existing policies and procedures from similar organizations	Ability to: • Research • Consult • Write
4.5 Write policies and procedures	
4.6 Submit for review and approval	
4.7 Finalize based on feedback	
4.8 Disseminate new policies and procedures	
4.9 Arrange training for staff and volunteers on the policies and procedures	

TASK A5

Develop supporting tools and resources for volunteer services (e.g., forms, databases, manuals, I.D. badges)

Managers of Volunteer Resources evaluate existing tools and resources according to feedback in order to identify any additional tool or resource needs. They distribute these tools and resources and are responsible for arranging any related training.

Subtasks	Supporting knowledge and abilities
5.1 Research required tools and resources	Knowledge of:
5.2 Determine information needed for particular tool and resource development	• Policies and procedures • Organization • Information required by various stakeholders
5.3 Research and evaluate existing tools and resources	• Community • Distribution channels
5.4 Develop required tools and resources	• How tools will be used
5.5 Obtain feedback on developed tools and resources	• Computer applications (e.g., database development)
5.6 Revise based on feedback	
5.7 Distribute supporting tools and resources	Ability to: • Research • Consult • Write
5.8 Arrange training regarding the use of developed tools and resources	

TASK A6

Develop evaluation plan for volunteer services

Managers of Volunteer Resources establish a baseline measurement to gauge the performance of volunteer services against its objectives. They develop evaluation tools to aid in this comparison and revise the tools based on stakeholder feedback.

Subtasks	Supporting knowledge and abilities
6.1 Determine goals and objectives 6.2 Determine the information needed 6.3 Determine frequency of evaluation 6.4 Establish baseline measurement 6.5 Determine evaluation methods (e.g., surveys) 6.6 Develop evaluation tools required 6.7 Obtain feedback on tool 6.8 Revise tool based on feedback 6.9 Distribute tool, as required 6.10 Reassess tool based on changes in organizational need 6.11 Determine communication plan for the evaluation	Knowledge of: • Organization • Information required by various stakeholders • Distribution channels • How tools will be used • Computer applications • Data analysis Ability to: • Research • Consult • Write • Conduct formative and summative evaluation • Communicate

TASK A7

Implement evaluation plan for volunteer services

Managers of Volunteer Resources determine the purpose and process of evaluation plans by consulting with stakeholders. They decide how the evaluation results will be presented and communicated to stakeholders. They determine how the organization will respond to the reported results.

Subtasks	Supporting knowledge and abilities
7.1 Identify purpose of evaluation 7.2 Identify process to be evaluated 7.3 Research tool most appropriate for that evaluation 7.4 Consult with appropriate stakeholders 7.5 Determine evaluation timelines 7.6 Determine communication of evaluation process and results 7.7 Compile evaluation report 7.8 Analyze evaluation data 7.9 Communicate results 7.10 Determine appropriate course of action	Knowledge of: • Organization • Information required by various stakeholders • Distribution channels • How tools will be used • Computer applications • Data analysis Ability to: • Research • Consult • Write • Analyze • Communicate

TASK A8

Develop volunteer orientation and training plan

Managers of Volunteer Resources determine the details of volunteer orientation and training. They decide which training formats, content, facilitators and schedules will be used in orientation and training programs. They communicate this information to stakeholders. Managers of Volunteer Resources also evaluate the effectiveness of orientation and training plans.

Subtasks	Supporting knowledge and abilities
8.1 Determine components of orientation and training 8.2 Determine how orientation and training will be delivered (i.e., format) 8.3 Design materials for orientation and training (e.g., presentation, workshop) 8.4 Determine who will deliver orientation and training 8.5 Determine frequency of orientation and training delivery 8.6 Evaluate orientation and training plan and revise as necessary 8.7 Communicate orientation and training plan	Knowledge of: • Organization • Information required by various stakeholders • Distribution channels • How tools will be used • Computer applications • Data analysis Ability to: • Research • Consult • Write • Conduct formative and summative evaluation • Communicate

Category B   Promote Volunteer Services

TASK B1

Inform stakeholders of volunteer services

Managers of Volunteer Resources prepare information about volunteer services, identifying opportunities to share this information. They present this information to stakeholders and follow up as necessary.

Subtasks	Supporting knowledge and abilities
1.1 Identify stakeholders 1.2 Determine information to be delivered 1.3 Identify or create opportunities to deliver information 1.4 Prepare information to be delivered 1.5 Communicate information to stakeholders 1.6 Follow up on information delivered	Knowledge of: • Stakeholders • Organization • Community Ability to: • Facilitate • Use different delivery channels

TASK B2

Advocate for volunteer services to stakeholders

Managers of Volunteer Resources identify the value and impact of volunteers within the organization and for the public. Capitalizing on opportunities for communication, they share this information with stakeholders.

Subtasks	Supporting knowledge and abilities
2.1 Identify value and impact of volunteers to the organization 2.2 Communicate value and impact of volunteering to the public 2.3 Identify advocates within the organization to collaborate with 2.4 Identify stakeholders and collaborators 2.5 Identify or create opportunities to advocate 2.6 Prepare information to be delivered 2.7 Communicate information 2.8 Follow up on information delivered	Knowledge of: • Stakeholders • Organization • Community • Volunteers Ability to: • Facilitate • Persuade • Speak to audience's needs • Use different delivery channels

TASK B3

Design communication plan for volunteer services

Managers of Volunteer Resources design communication plans that are informed by organizational goals, existing communication channels and research of existing communication plans. They submit communication plans to stakeholders for review on a regular basis and revise them as required.

Subtasks	Supporting knowledge and abilities
3.1 Determine desired outcomes 3.2 Identify communication channels 3.3 Research existing communication plans 3.4 Identify audiences and how to reach them 3.5 Identify stakeholders (e.g., volunteers, clients, management) to review plan 3.6 Determine frequency of review 3.7 Disseminate draft plan for review 3.8 Revise based on feedback	Knowledge of: • Stakeholders • Organization • Community • Volunteers • Delivery channels (e.g., PSA*, social media) • Computer applications • *public service announcement Ability to: • Speak to audience's needs • Use different delivery channels • Communicate • Persuade • Create effective messaging • Collaborate

TASK B4

Implement communication plan for volunteer services

Managers of Volunteer Resources design and produce promotional materials to communicate information about volunteer services. They revise materials according to stakeholder feedback as necessary.

Subtasks	Supporting knowledge and abilities
4.1 Design materials (e.g., newsletters, promotional materials, social media) 4.2 Produce materials 4.3 Obtain feedback on materials 4.4 Revise materials based on feedback 4.5 Communicate materials accordingly	Knowledge of: • Computer applications • Promotional material businesses • Delivery channels • Policies and procedures Ability to: • Be creative • Create effective messaging

TASK B5

Cultivate stakeholder and partner relationships

Managers of Volunteer Resources keep track of communications with stakeholders and partners. They aim to engage and/or collaborate with these groups.

Subtasks	Supporting knowledge and abilities
5.1 Identify stakeholders and partners 5.2 Identify frequency of contact with stakeholders partners 5.3 Identify methods of engagement and collaboration opportunities (e.g., attend events, annual general meetings, share training opportunities) 5.4 Identify cross-marketing opportunities (e.g., use their logo on your materials, have them use your logo on their materials) 5.5 Explore opportunities to recognize stakeholder and partner contributions	Knowledge of: • Stakeholder groups • Methods of engagement • Cross-marketing opportunities Ability to: • Collaborate with stakeholders • Build relationships • Communicate

TASK B6
Review communication plan
Managers of Volunteer Resources consult with stakeholders as they review the volunteer services' communication plans to identify gaps or possible changes, adjusting the plans as necessary.

Subtasks	Supporting knowledge and abilities
6.1 Review current communications practices 6.2 Consult with stakeholders 6.3 Identify gaps or changes 6.4 Adjust plan	Knowledge of: • Stakeholders • Organization • Community Ability to: • Facilitate • Analyze

Category C   Conduct Volunteer Recruitment

TASK C1
Assess need for volunteers
Managers of Volunteer Resources consult with other staff to identify organizational needs, aligning individual volunteer positions with these needs. They identify the specific volunteer and training needs of volunteer services.

Subtasks	Supporting knowledge and abilities
1.1 Consult with staff to perform collaborative needs analysis 1.2 Identify placement-related risk 1.3 Align volunteer position with organizational requirements 1.4 Identify program-specific training needs 1.5 Identify number of volunteers needed for each program 1.6 Identify program schedule(s)	Knowledge of: • Needs analysis • Programs • Organization • Scope of volunteer activities • Risks Ability to: • Schedule • Collaborate • Communicate • Assess risk

TASK C2

Develop volunteer position description

Managers of Volunteer Resources identify the specifics of individual volunteer positions. They determine the responsibilities, qualifications and time commitment required from volunteer applicants.

Subtasks	Supporting knowledge and abilities
2.1 Identify title and purpose of position 2.2 Identify supervisor 2.3 Identify shift 2.4 Identify time commitment 2.5 Identify responsibilities and boundaries 2.6 Identify qualifications 2.7 Identify benefits of position 2.8 Consult with stakeholders 2.9 Determine screening criteria 2.10 Create volunteer position description 2.11 Review with appropriate program staff 2.12 Revise based on feedback	Knowledge of: • Needs analysis • Programs • Organization • Scope of volunteer activities • Risks Ability to: • Schedule • Collaborate • Be creative • Communicate • Assess risk • Write a position description

TASK C3

Design recruitment strategy for volunteers

Managers of Volunteer Resources create recruitment strategies to attract new volunteers. They communicate information about the benefits of volunteering in a way that reaches the target audience.

Subtasks	Supporting knowledge and abilities
3.1 Identify benefits of being a volunteer 3.2 Identify if a particular group needs to be targeted (e.g., youth, professionals, baby boomers) 3.3 Identify target specific recruitment channels	Knowledge of: • Targeted groups • Benefits to volunteers • Delivery channels • How to contact targeted groups Ability to: • Be creative • Communicate • Inspire • Design materials

TASK C4

Implement recruitment strategy for volunteers

Managers of Volunteer Resources create promotional material that is directed to the target audience for specific volunteer positions. They decide how to communicate with potential volunteers about the application process.

Subtasks	Supporting knowledge and abilities
4.1 Create promotional material specific to volunteer placement and target audience 4.2 Determine application process, including criteria necessary for acceptance or rejection 4.3 Identify and attend promotional opportunities 4.4 Disseminate promotional material (e.g., posters, postings) 4.5. Collect applications	Knowledge of: • Targeted groups • Benefits to volunteers • Delivery channels • How to contact targeted groups Ability to: • Be creative • Communicate • Inspire • Persuade • Design materials

TASK C5

Select applicants for interviews

Managers of Volunteer Resources use the organization's established criteria to select volunteer applicants for interviews. They are responsible for arranging the schedule for the interviews.

Subtasks	Supporting knowledge and abilities
5.1 Review applications according to established criteria and clarify information with applicant, if necessary 5.2 Consult with appropriate staff 5.2 Create list of candidates 5.3 Schedule interviews 5.4 Offer alternative volunteer opportunities for candidates not chosen for current opportunity	Knowledge of: • Screening criteria • Screening process • Programs Ability to: • Select suitable candidates • Make decisions • Communicate • Create schedule

TASK C6

Conduct applicant interviews

Managers of Volunteer Resources conduct volunteer position interviews with selected candidates. During this time, they introduce volunteer applicants to the organization; they also engage applicants with questions about the applicants' qualifications. Managers of Volunteer Resources explain any further steps in the process to the applicants.

Subtasks	Supporting knowledge and abilities
6.1 Select appropriate interview tool (e.g., form) 6.2 Welcome candidate 6.3 Explain organization and placement 6.4 Ask candidate questions 6.5 Record candidate responses 6.6. Provide opportunity for candidate to ask questions 6.7 Explain next steps (e.g., ask for references if not provided, perform reference check)	Knowledge of: • Policies and procedures (e.g., who conducts interview and number of interviewers) • Cultural differences • Programs • Local labour legislation Ability to: • Use interview tool effectively • Conduct interviews (e.g., rephrase question if necessary) • Listen • Interpret cultural differences

TASK C7

Administer third-party screening (references, criminal records)

Managers of Volunteer Resources run third-party screenings on new volunteer applicants. Based on the screening results, they determine whether applicants are suitable for available volunteer positions. They contact the applicants with the results of the screening review.

Subtasks	Supporting knowledge and abilities
7.1 Conduct third-party checks (e.g., references, police check, driver's abstract) 7.2 Follow up with applicant if necessary 7.3 Determine applicant suitability 7.4 Contact applicant to accept or reject application 7.5 Document all information	Knowledge of: • Risk • Policies and procedures • Programs • Legislation • How to obtain third-party checks Ability to: • Inform candidate of how to obtain checks • Read police check • Read driver's abstract • Communicate

Category D   Provide Volunteer Orientation

TASK D1	
Arrange orientation for volunteers	

Arrange orientation for volunteers

Managers of Volunteer Resources consult with other staff to identify organizational needs, aligning individual volunteer positions with these needs. They identify the specific volunteer and training needs of volunteer services.

Subtasks	Supporting knowledge and abilities
1.1 Schedule orientation 1.2 Book facilities (e.g., room, food, AV equipment) 1.3 Arrange for facilitator and other speakers 1.4 Compile materials 1.5 Invite candidates to attend 1.6 Confirm agenda and participants	Knowledge of: • How to conduct an orientation session • How to reserve facility • Scheduling • Policies and procedures • Organization Ability to: • Organize • Plan • Communicate

TASK D2

Conduct orientation for volunteers

Managers of Volunteer Resources conduct volunteer orientation. During orientation, they provide new volunteers with an introduction to the organization and a review of applicable policies and procedures.

Subtasks	Supporting knowledge and abilities
2.1 Welcome volunteers 2.2 Review agenda 2.3 Provide overview of organization and program 2.4 Review policies and procedures, relevant legislation and regulations, and safety guidelines 2.5 Provide other relevant details (e.g., where to park) 2.6 Provide tour of facility, if applicable 2.7 Revise orientation based on evaluation	Knowledge of: • How to conduct an orientation session • How to reserve facility • Scheduling • Policies and procedures • Facility layout • Organization • Adult learning principles Ability to: • Facilitate • Organize • Plan • Communicate • Problem solve • Troubleshoot

TASK D3

Confirm volunteer placement(s)

Managers of Volunteer Resources confirm the details of volunteers' placements. They schedule volunteers who have assigned positions and arrange for volunteers to receive and complete all required materials and forms according to policies and procedures.

Subtasks	Supporting knowledge and abilities
3.1 Formally accept your volunteer 3.2 Match volunteers with appropriate position 3.3 Communicate selection with staff 3.4 Schedule volunteer for first shift 3.5 Identify supervisor for volunteer 3.6 Arrange for someone to meet with new volunteer on first day (e.g., staff member, volunteer) 3.7 Distribute materials (e.g., forms, manuals, name tags, pass cards, uniforms) 3.8 Distribute and collect forms (including evaluation) and other signed materials 3.9 Communicate need and purpose for training to volunteer	Knowledge of: • Personality traits of existing staff and volunteers • Policies and procedures • Program Ability to: • Communicate • Make decisions • Schedule • Match

TASK D4	
Provide for placement-specific training	
Managers of Volunteer Resources communicate to volunteers the need for appropriate training. They arrange for and organize volunteer training.	
Subtasks	**Supporting knowledge and abilities**
4.1 Determine need for training	Knowledge of:
4.2 Communicate training	• How to reserve facility
4.3 Research training alternatives	• Scheduling
	• Policies and procedures
4.4 Select appropriate training	• Organization
4.5 Schedule training	• Adult learning principles
4.6 Book facilities (e.g., room, food, AV equipment)	• Placement requirements
4.7 Arrange for facilitator	Ability to:
4.8 Compile materials	• Facilitate
	• Organize
4.9 Invite volunteers to attend	• Plan
4.10 Conduct training, if applicable	• Communicate
	• Problem solve
4.11 Record training completion	• Troubleshoot
4.12 Evaluate and revise training, if required	

Category E   Maintain Volunteer Services Records

TASK E1	
Establish secure storage for volunteer records	
Managers of Volunteer Resources determine which volunteer services records should be maintained and what storage will be required to house these records. They also determine the level of access other staff members will have to these records.	
Subtasks	**Supporting knowledge and abilities**
1.1 Determine records to be maintained (e.g., records, timeframes)	Knowledge of:
	• Policies and procedures
1.2 Identify requirements of secure storage location for paper and/or electronic records	• Organization
	• Storage methods
	• Relevant regulations
1.3 Identify location of storage	• Best practices
1.4 Create storage location, if not existing	Ability to:
1.5 Identify staff access levels for secure files	• Research
	• Analyze

TASK E2

Create volunteer files (e.g., paper and electronic)

Managers of Volunteer Resources create volunteer records based on required information. They ensure that these records are filed in a cohesive system according to policies and procedures.

Subtasks	Supporting knowledge and abilities
2.1 Establish volunteer file checklist 2.2 Acquire necessary materials (e.g., folders, tabs) 2.3 Establish method of filing (e.g., alphabetical, per program) 2.4 Ensure all documents are in file (e.g., application, confidentiality forms) 2.5 Transfer data from paper file to database 2.6 Ensure secure storage	Knowledge of: • Policies and procedures • Organization Ability to: • Research • Analyze • Attend to detail

TASK E3

Update volunteer records (e.g., hours, personal information)

Managers of Volunteer Resources update and verify volunteer records to reflect actual volunteer hours worked. They also ensure that volunteers' contact information is current.

Subtasks	Supporting knowledge and abilities
3.1 Determine how data will be captured (e.g., timesheets, computer system) 3.2 Collect volunteer hours 3.3 Enter data into volunteer record (i.e., either from paper or computer) 3.4 Reconcile hours with schedules to verify hours are correct 3.5 Follow up with volunteer or staff to clarify discrepancies, if applicable 3.6 Ensure personal information is up to date 3.7 Determine authorized user access 3.8 Place updates in volunteer files 3.9 Ensure secure storage	Knowledge of: • Policies and procedures • Organization • Storage methods Ability to: • Research • Analyze • Communicate • Attend to detail

TASK E4

Update third-party screening (e.g., criminal, credit, driver's abstract etc.)

Managers of Volunteer Resources review policies and procedures to determine need for third-party screening updates. If new screenings are required, they contact volunteers to make arrangements and monitor the completion of these screenings.

Subtasks	Supporting knowledge and abilities
4.1 Determine need for updating third-party screening	Knowledge of: - Policies and procedures - Organization - Screening methods Ability to: - Research - Analyze - Communicate
4.2 Review relevant policies, regulations, and legislation	
4.3 Contact volunteers to request updating of third-party screening	
4.4 Provide information to volunteers, if required	
4.5 Follow up to ensure third-party screening is complete	
4.6 Update personal file	

TASK E5

Generate statistical reports (e.g., hours, demographics)

Managers of Volunteer Resources create statistical reports according to organizational requirements and stakeholder requests. They ensure that information is correct before sharing statistical analyses with stakeholders.

Subtasks	Supporting knowledge and abilities
5.1 Establish reporting needs	Knowledge of: - Policies and procedures - Organization - Reporting Ability to: - Research - Analyze - Communicate
5.2 Determine frequency of reporting	
5.3 Respond to reporting requests, as required	
5.4 Produce reports	
5.5 Review report for accuracy and revise as necessary	
5.6 Analyze report	
5.7 Distribute reports accordingly	

TASK E6

Archive volunteer records
Managers of Volunteer Resources keep volunteer records in accordance with policies and procedures. They keep records current by archiving older information to secure storage.

Subtasks	Supporting knowledge and abilities
6.1 Review relevant policies, regulations or legislation 6.2 Obtain file 6.3 File in archive section of secure storage 6.4 Close file in database	Knowledge of: • Policies and procedures • Organization • Storage methods Ability to: • Attend to detail

TASK E7

Destroy or delete volunteer records
Managers of Volunteer Resources securely destroy volunteer records in accordance with policies and procedures.

Subtasks	Supporting knowledge and abilities
7.1 Identify which records to destroy according to policies and procedures 7.2 Destroy in a secure manner (i.e., shred, remove from database) 7.3 Update report of destroyed files	Knowledge of: • Policies and procedures • Organization Ability to: • Research • Analyze

Category F   Perform Administrative Tasks

TASK F1
Respond to inquiries (e.g., email, phone)
Managers of Volunteer Resources listen and respond to volunteer services inquiries according to the organization's communications protocol.

Subtasks	Supporting knowledge and abilities
1.1 Read/listen to inquiry 1.2 Determine response 1.3 Send response	Knowledge of: • Organization • Volunteer services • Computer applications • Organizational communication protocol Ability to: • Communicate • Write

TASK F2

Contribute to budget process

Managers of Volunteer Resources submit financial expenditure and revenue information to appropriate staff members. They provide explanation for budget variances, if necessary. They also negotiate budget requests for volunteer services.

Subtasks	Supporting knowledge and abilities
2.1 Collect appropriate information 2.2 Research potential expenditures 2.3 Substantiate budget requests 2.4 Negotiate budget requests 2.5 Submit materials 2.6 Identify sources of revenue and collaboration 2.7 Monitor and reconcile budget expenditures 2.8 Communicate rationale for budget variances	Knowledge of: • Organization • Budgets Ability to: • Research • Communicate • Perform calculations

TASK F3

Reconcile volunteer services petty cash

Managers of Volunteer Resources reconcile records of volunteer services petty cash. They verify expenses and cash amounts, requesting reimbursements as necessary.

Subtasks	Supporting knowledge and abilities
3.1 Collect receipts and appropriate documentation 3.2 Verify expenses 3.3 Count cash 3.4 Balance ledger 3.5 Request reimbursements	Knowledge of: • Basic bookkeeping • Organizational policies on expenses Ability to: • Perform calculations • Attend to detail

TASK F4

Monitor supplies and equipment

Managers of Volunteer Resources determine the supply and/or equipment needs of volunteer services and ensure that these needs are met. They monitor supplies and/or equipment for any needed repairs or replacement.

Subtasks	Supporting knowledge and abilities
4.1 Determine what supplies and equipment are required 4.2 Determine equipment tracking process 4.3 Check to ensure adequate supply 4.4 Check to ensure equipment is in good working order 4.5 Consult equipment budget 4.6 Order supplies 4.7 Plan for repairs 4.8 Plan for supplies or equipment replacement	Knowledge of: • Organizational needs • Equipment maintenance • How to access supplies • Vendors Ability to: • Observe • Analyze

TASK F5

Submit expense claims

Managers of Volunteer Resources determine and report expenses of volunteer services to stakeholders.

Subtasks	Supporting knowledge and abilities
5.1 Determine expenses 5.2 Collect receipts 5.3 Complete report 5.4 Submit report	Knowledge of: • Organizational policies • Report procedure Ability to: • Perform calculations • Attend to detail

TASK F6

Participate in administrative communication (e.g., internal memos, external emails)

Managers of Volunteer Resources decide on the methods, messages and recipients of internal and external communications. They initiate contact and evaluate their communications approach as necessary.

Subtasks	Supporting knowledge and abilities
6.1 Determine communication requirement 6.2 Determine method 6.3 Determine message 6.4 Determine recipients 6.5 Initiate communication 6.6 Evaluate communication method and message 6.7 Make adjustments, if necessary	Knowledge of: • Organization • Communication etiquette • Computer applications Ability to: • Communicate • Write

TASK F7

Update office records

Managers of Volunteer Resources determine if office records require an update. They participate in information audits and communicate any records updates according to policies and procedures.

Subtasks	Supporting knowledge and abilities
7.1 Determine required update 7.2 Access record 7.3 Make updates 7.4 Communicate updates as required 7.5 Participate in volunteer record audits	Knowledge of: • Policies and procedures • Organization • Reporting format • Computer applications Ability to: • Communicate • Attend to detail

TASK F8

Respond to incidents

Managers of Volunteer Resources reconcile volunteer services incidents by listening to all concerned parties before deciding on a response to be communicated to all concerned parties and stakeholders. They evaluate and document the resolution process and its outcome.

Subtasks	Supporting knowledge and abilities
8.1 Review the incident 8.2 Determine appropriate responder 8.3 Consult with all concerned parties 8.4 Determine options 8.5 Consult with appropriate personnel 8.6 Formulate response 8.7 Communicate response to concerned parties 8.8 Communicate response to stakeholders as required 8.9 Determine any further action required 8.10 Document entire process and resolution	Knowledge of: • Policies and procedures • Organizational culture • Legal requirements Ability to: • Communicate • Write • Analyze • Mediate

TASK F9

Contribute to funding initiatives

Managers of Volunteer Resources evaluate funding opportunities and contribute any applicable resources to the funding process. They follow up on funding opportunities.

Subtasks	Supporting knowledge and abilities
9.1 Evaluate volunteer services' role in the funding initiatives 9.2 Contribute to assessing appropriateness of funding opportunity 9.3 Identify funding sources 9.4 Gather required resources 9.5 Contribute applicable resources 9.6 Follow up on funding initiative	Knowledge of: • Organization • Fundraising • Organizational culture Ability to: • Research • Plan • Collaborate • Communicate

TASK F10

Participate in meetings (e.g., staff, stakeholder, etc.)

Managers of Volunteer Resources plan and prepare for a variety of meetings. They attend meetings and contribute to the discussion as required.

Subtasks	Supporting knowledge and abilities
10.1 Initiate and respond to meeting requests 10.2 Plan to attend meetings 10.3 Schedule meetings 10.4 Prepare for meetings 10.5 Attend meetings 10.6 Contribute to meetings as required 10.7 Follow up as required	Knowledge of: • Organization • Meeting etiquette • Conflict resolution Ability to: • Manage time • Collaborate • Communicate • Analyze

Category G   Manage Volunteer Performance

TASK G1

Manage volunteer performance objectives

Managers of Volunteer Resources manage the performance requirements of volunteer positions. They document the performance objectives and share these requirements with stakeholders and volunteers.

Subtasks	Supporting knowledge and abilities
1.1 Manage objectives per position description 1.2 Consult with appropriate staff 1.3 Share information with volunteer 1.4 Document objectives	Knowledge of: • Organization • Policies and procedures Ability to: • Communicate • Manage people

TASK G2

Conduct volunteer performance review

Managers of Volunteer Resources gather information about volunteers' performances from colleagues and provide volunteers with feedback. They discuss this feedback with volunteers and plan to follow up as required.

Subtasks	Supporting knowledge and abilities
2.1 Gather required information 2.2 Consult with individuals who interact with the volunteer 2.3 Complete evaluation tool as required 2.4 Communicate with volunteer 2.5 Provide feedback 2.6 Solicit feedback from volunteer 2.7 Document discussion 2.8 Make follow up plan if necessary	Knowledge of: • Organization • Policies and procedures • Volunteers • Volunteer roles Ability to: • Communicate • Write • Evaluate

TASK G3

Provide feedback to volunteers

Managers of Volunteer Resources observe volunteers at work to determine if feedback is required. If it is necessary, they decide on the best way to share this information. They provide feedback and plan to follow up with the volunteers as required.

Subtasks	Supporting knowledge and abilities
3.1 Observe volunteer 3.2 Determine when feedback is required 3.3 Determine feedback resource 3.4 Determine appropriate feedback resources 3.5 Provide feedback 3.6 Solicit feedback from supervisory source and volunteer 3.7 Determine next course of action	Knowledge of: • Organization • Policies and procedures • Assessment of skills Ability to: • Communicate • Attend to detail • Manage people

TASK G4

Provide volunteer development opportunities

Managers of Volunteer Resources determine organizational needs and identify opportunities for volunteer development. They decide to communicate these volunteer opportunities internally and/or externally.

Subtasks	Supporting knowledge and abilities
4.1 Identify needs (e.g., organizational, volunteer) 4.2 Determine available budget 4.3 Research available opportunities 4.4 Determine course of action (i.e., internal, external) 4.5 Communicate development opportunities to volunteers 4.6 Solicit feedback	Knowledge of: • Organization • Policies and procedures • Professional development • Community • Adult education principles Ability to: • Research • Facilitate • Plan • Communicate

TASK G5

Conduct corrective action procedures

Managers of Volunteer Resources analyze volunteer conduct in the context of policies and procedures, consulting with appropriate staff as necessary. They raise conduct concerns with the involved volunteers and take action according to policies and procedures. They document the resolution process and its outcome.

Subtasks	Supporting knowledge and abilities
5.1 Revisit policies and procedures 5.2 Gather information 5.3 Consult with appropriate staff 5.4 Compare conduct to policy 5.5 Communicate concern to volunteer 5.6 Follow applicable organizational procedures 5.7 Document process and resolution	Knowledge of: • Organization • Policies and procedures • Conflict resolution Ability to: • Manage people • Communicate

TASK G6

Conduct exit interviews/surveys

Managers of Volunteer Resources arrange for and conduct exit interviews and/or surveys with outgoing volunteers. They document the results of these interviews and recognize the contribution of volunteers.

Subtasks	Supporting knowledge and abilities
6.1 Arrange interview/survey 6.2 Conduct interview/survey 6.3 Document results 6.4 Recognize volunteer contribution, if applicable	Knowledge of: • Organization • Policies and procedures Ability to: • Communicate

TASK G7

Engage with volunteers

Managers of Volunteer Resources engage volunteers with formal and informal communications and follow up on any discussions that arise from communication.

Subtasks	Supporting knowledge and abilities
7.1 Create opportunities for engagement 7.2 Engage formal and informal communication 7.3 Follow up on any discussions as required	Knowledge of: • Organization • Policies and procedures • Volunteer roles • Volunteers • Volunteer schedules Ability to: • Communicate

TASK G8

Provide ongoing education to staff on working with volunteers

Managers of Volunteer Resources provide staff members with educational information about working with and supervising volunteers, addressing any concerns as they arise. They promote the role of volunteers in the organization to colleagues and advocate for the support of volunteer engagement.

Subtasks	Supporting knowledge and abilities
8.1 Advocate for staff education on working with volunteers	Knowledge of: • Organization • Policies and procedures • Organizational culture • Adult learning principles Ability to: • Communicate • Mentor • Facilitate
8.2 Provide education to staff where possible	
8.3 Include information about volunteers in organizational communication	
8.4 Provide opportunities for staff and volunteers to share feedback	
8.5 Address staff and volunteer concerns promptly	
8.6 Promote the value of volunteer services to the organization	
8.7 Provide training to staff on how to manage or supervise volunteers	
8.8 Help staff and volunteers working in the organization to understand each other's roles.	
8.9 Communicate to staff the importance of recognizing volunteers.	
8.10 Advocate for organizational leadership support of staff/volunteers engagement	
8.11 Promote staff and volunteer social interaction	

TASK G9

Implement retention strategy

Managers of Volunteer Resources evaluate the organization's volunteer retention rate and conduct research into possible retention improvements. They make changes to volunteer services to enhance volunteer satisfaction.

Subtasks	Supporting knowledge and abilities
9.1 Conduct research into possible retention methods	Knowledge of: • Retention techniques • Organization • Volunteer experiences Ability to: • Research • Communicate
9.2 Evaluate historical retention data	
9.3 Consider volunteer motivations	
9.4 Monitor volunteer satisfaction	
9.5 Implement changes for the purposes of retention	

TASK G10	
Provide volunteer references	
Managers of Volunteer Resources offer references for volunteers based on a review of the volunteers' files and a consultation with supervisory staff.	
Subtasks	**Supporting knowledge and abilities**
10.1 Inform volunteers of reference availability 10.2 Receive reference requests 10.3 Review volunteer file 10.4 Consult with supervisory staff 10.5 Provide reference	Knowledge of: • Policies and procedures • Volunteer records Ability to: • Communicate

Category H   Recognize Volunteer Contribution

TASK H1	
Develop volunteer recognition plan	
Managers of Volunteer Resources consult with stakeholders when planning for volunteer recognition. They then implement the recognition plans within the organization and communicate the details to all relevant parties.	
Subtasks	**Supporting knowledge and abilities**
1.1 Determine recognition philosophy 1.2 Consult with stakeholders 1.3 Plan for resources 1.4 Write the plan 1.5 Share the plan for feedback 1.6 Incorporate feedback 1.7 Implement plan 1.8 Communicate plan	Knowledge of: • Organization • Policies and procedures • Planning • Volunteer motivations Ability to: • Communicate • Attend to detail • Write

TASK H2

Explore recognition methods

Managers of Volunteer Resources explore options for volunteer recognition based on the feasibility of the plans and the suitability of volunteers. They consult with stakeholders to discuss possible recognition options.

Subtasks	Supporting knowledge and abilities
2.1 Conduct research into possible recognition methods 2.2 Consult stakeholders 2.3 Evaluate feasibility of recognition methods (i.e., budget, risk) 2.4 Evaluate volunteer suitability for awards 2.5 Create list of possible options (i.e., internal or external)	Knowledge of: • Volunteer motivations • Recognition plans • Other organizations with volunteering components Ability to: • Research • Analyze

TASK H3

Choose specific recognition method

Managers of Volunteer Resources determine the best method of volunteer recognition based on organizational needs and resources.

Subtasks	Supporting knowledge and abilities
3.1 Match options with organizational circumstances 3.2 Determine best recognition method(s)	Knowledge of: • Recognition methods • Volunteer motivations Ability to: • Analyze • Communicate

TASK H4

Consult with volunteers about preferred types of recognition
Managers of Volunteer Resources solicit feedback from volunteers about what type of recognition they prefer. They analyze the results of the feedback and share the findings with stakeholders.

Subtasks	Supporting knowledge and abilities
4.1 Present possible options 4.2 Solicit volunteer feedback 4.3 Collect that feedback 4.4 Analyze results 4.5 Share the results 4.6 Communicate recognition methods	Knowledge of: • Volunteer motivations Ability to: • Communicate • Analyze • Attend to detail

TASK H5

Organize volunteer recognition events
Managers of Volunteer Resources organize the budget, schedule and location of volunteer recognition events. They oversee the communication of event details and confirm volunteers' attendance. They evaluate and report event outcomes to stakeholders.

Subtasks	Supporting knowledge and abilities
5.1 Determine budget 5.2 Determine location 5.3 Determine date and time 5.4 Book a venue 5.5 Communicate event (e.g., invitations, newsletter, etc.) 5.6 Track and confirm attendance 5.7 Carry out logistics 5.8 Evaluate event 5.9 Report event outcomes	Knowledge of: • Budgets • Event planning • Logistical planning • Evaluation methods Ability to: • Perform calculations • Communicate

TASK H6

Publicize volunteer contributions

Managers of Volunteer Resources determine the level of volunteer participation in public events and promotional materials according to policies and procedures. They share volunteer contributions through the organization's prescribed communication channels.

Subtasks	Supporting knowledge and abilities
4.1 Present possible options 4.2 Solicit volunteer feedback 4.3 Collect that feedback 4.4 Analyze results 4.5 Share the results 4.6 Communicate recognition methods	Knowledge of: • Volunteer motivations Ability to: • Communicate • Analyze • Attend to detail

TASK H7

Review volunteer recognition methods

Managers of Volunteer Resources evaluate the organization's volunteer recognition plans on an ongoing basis. They adjust the recognition plans based on evaluation findings, if necessary.

Subtasks	Supporting knowledge and abilities
7.1 Create review methods 7.2 Administer evaluations on ongoing basis 7.3 Collect data 7.4 Analyze data 7.5 Adjust recognition methods accordingly 7.6 Communicate changes, if any	Knowledge of: • Evaluation methods • Volunteer motivations Ability to: • Analyze • Communicate • Attention to detail

Category I   Engage in professional development

TASK I1
Participate in professional associations

Managers of Volunteer Resources determine which volunteer services records should be maintained and what storage will be required to house these records. They also determine the level of access other staff members will have to these records.

Subtasks	Supporting knowledge and abilities
1.1 Research professional associations 1.2 Check to ensure your participation is within budget 1.3 Contact selected organization(s) 1.4 Determine organization(s) that is the best fit 1.5 Complete membership criteria 1.6 Attend association-specific meetings/online gatherings 1.7 Explore opportunities for involvement in the association 1.8 Advocate the benefits of professional associations	Knowledge of: • Professional associations • Organization • Professional development opportunities Ability to: • Research • Analyze • Communicate

TASK 12

Participate in professional development opportunities

Managers of Volunteer Resources identify and participate in relevant professional development opportunities. They communicate the material they learned to colleagues.

Subtasks	Supporting knowledge and abilities
2.1 Research possible development opportunities (e.g., conferences, online, volunteering yourself etc) 2.2 Determine opportunities to pursue 2.3 Check to ensure your participation is within budget 2.4 Submit for approval if required 2.5 Register if required 2.6 Attend or participate in opportunity 2.7 Communicate learning	Knowledge of: • Professional associations • Organization • Professional development opportunities Ability to: • Research • Analyze • Communicate

TASK 13

Obtain professional certification

Managers of Volunteer Resources review professional certification programs. They complete and submit the requirements for certification and re-certify as required.

Subtasks	Supporting knowledge and abilities
3.1 Research certifying bodies 3.2 Review certification criteria 3.3 Submit for approval if required 3.4 Complete requirements 3.5 Submit requirements 3.6 Receive notification of certification 3.7 Re-certify as required	Knowledge of: • Professional associations • Organization • Professional development opportunities • Available certifications Ability to: • Research • Analyze • Communicate

TASK 14

Share professional knowledge with others
Managers of Volunteer Resources identify opportunities to prepare and share professional knowledge with colleagues.

Subtasks	Supporting knowledge and abilities
4.1 Seek out/accept opportunities to share knowledge 4.2 Prepare to present information 4.3 Present information	Knowledge of: • Profession • Interested parties Ability to: • Communicate • Network

TASK 15

Research current trends in volunteerism
Managers of Volunteer Resources keep abreast of current trends in volunteer management by attending relevant events and networking with colleagues.

Subtasks	Supporting knowledge and abilities
5.1 Read professional journals, articles, newsletters, research reports 5.2 Network with others working in volunteer services 5.3 Attend conferences/workshops	Knowledge of: • Relevant publications • Professional development opportunities Ability to: • Research • Analyze • Network • Communicate

Tools, equipment, supplies and materials

- Physical space
- Private room for meeting and interviewing
- Storage space for volunteer belongings
- Office furniture and furnishings (e.g., desk, chair, locking file cabinets, bookcase)
- Computer, related hardware and accessories (e.g., login and touch screen, printer)
- Software (e.g., volunteer database and other database systems)
- Internet/Intranet
- Email
- Social media tools
- Telephone, cell phone, smartphone
- Fax machine
- Scanner
- Photocopier
- AV equipment (e.g., monitors)
- Flip charts
- Presentation board
- Bulletin board
- Digital cameras, recorders
- Laminator
- Embosser
- Collater

- Paper cutter
- Paper shredder
- Hole punch
- Name tag maker
- Office supplies (e.g., notepad, calendar, binders, etc.)
- First aid kit
- Local labour regulations
- Reference materials (e.g., books, manuals)
- Recruitment materials
- Security passes

Knowledge, abilities and skills

- Knowledge of programs and services
- Experience in the field
- Knowledge of organization, staff and volunteers
- Knowledge of financial statements
- Knowledge of occupational health and safety and other regulations
- Knowledge of relevant legislation
- Knowledge of best practices
- Knowledge of national and provincial volunteer organizations
- Knowledge of Canadian trends
- Knowledge of demographics, citizenship and cultural diversity
- Knowledge of volunteer motivations
- Software and computer knowledge
- Scheduling
- Planning
- Conducting research
- Conducting analysis
- Developing policies, procedures, plans, supporting tools
- Training, coaching, mentoring, supervising, evaluating performance
- Managing human resources

- Managing risk
- Organizational skills
- Time management skills
- Change management skills
- Expectation management skills
- People skills
- Networking skills
- Marketing skills
- Communication skills
- Public speaking skills
- Public relations skills
- Motivational skills
- Negotiation skills
- Advocacy skills
- Leadership skills
- Conflict resolution skills
- Problem-solving skills
- Writing skills
- Math skills
- Design skills

Behaviours, attitudes and personal characteristics

- Respectful
- Compassionate
- Patient
- Inspirational
- Influential
- Passionate
- Dedicated
- Motivated
- Creative
- Articulate
- Inclusive
- Flexible
- Positive attitude
- Ethical
- Professional
- Committed to professional development
- Customer service-oriented
- Needs-focused
- Detail-oriented
- Organized
- Analytical
- Able to manage stress

- Able to work independently
- Visionary
- Problem solver
- Multitasker
- Team player
- Leadership skills
- Interpersonal communication
- Tact and diplomacy
- Empathy
- Enthusiasm
- Commitment to anti-oppression principles
- Commitment to civic engagement
- Commitment to organization
- Loyalty

Appendix

Manager of Volunteer Resources DACUM chart

Develop Volunteer Services	**A1** Assess organizational volunteer needs and opportunities	**A2** Research related programs and services	**A3** Develop goals and objectives for volunteer services	**A4** Develop policies for volunteer services
	A5 Develop supporting tools for volunteer services (e.g., forms, databases, manuals, ID badges)	**A6** Develop evaluation plan for volunteer services	**A7** Implement evaluation plan for volunteer services	**A8** Develop volunteer orientation and training plan

Promote Volunteer Services	**B1** Inform stakeholders of volunteer services	**B2** Advocate for volunteer services to stakeholders	**B3** Design communication plan for volunteer services
	B4 Implement communication plan for volunteer services	**B5** Cultivate stakeholder and partner relationships	**B6** Review communication plan

Conduct Volunteer Recruitment	**C1** Assess need for volunteers	**C2** Develop volunteer position description	**C3** Design recruitment strategy for volunteers	**C4** Implement recruitment strategy for volunteers
	C5 Select applicants for interviews	**C6** Conduct applicant interviews	**C7** Administer third-party screening (references, criminal records)	

Provide Volunteer Orientation	**D1** Arrange orientation for volunteers	**D2** Conduct orientation for volunteers	**D3** Confirm volunteer placement(s)	**D4** Provide for placement-specific training

Maintain Volunteers Services Records	**E1** Establish secure storage for volunteer records	**E2** Create volunteer files (e.g., paper and electronic)	**E3** Update volunteer records (e.g., hours, personal information)	**E4** Update third-party screening (criminal, credit, driver's abstract)
	E5 Generate statistical reports (e.g., hours, demographics)	**E6** Archive volunteer records	**E7** Destroy or delete volunteer records	

Manager of Volunteer Resources DACUM chart (cont)

Perform Administrative Tasks	**F1** Respond to inquiries (e.g., email, phone)	**F2** Contribute to budget process	**F3** Reconcile volunteer services petty cash	**F4** Monitor supplies and equipment	**F5** Submit expense claims
	F6 Participate in administrative communication (e.g., internal memos, external emails)	**F7** Update office records	**F8** Respond to incidents	**F9** Contribute to funding initiatives	**F10** Participate in meetings (e.g., staff, stakeholder, etc.)

Manage Volunteer Performance	**G1** Manage volunteer performance objectives	**G2** Conduct volunteer performance review	**G3** Provide feedback to volunteers	**G4** Provide volunteer development opportunities	**G5** Conduct corrective action procedures
	G6 Conduct exit interviews/surveys	**G7** Engage with volunteers	**G8** Provide ongoing education to staff working with volunteers	**G9** Implement retention strategy	**G10** Provide volunteer references

Recognize Volunteer Contribution	**H1** Develop volunteer recognition plan	**H2** Explore recognition methods	**H3** Choose specific recognition methods	**H4** Consult with volunteers about preferred types of recognition
	H5 Organize volunteer recognition events	**H6** Publicize volunteer contributions	**H7** Review volunteer recognition methods	

Engage in Professional Development	**I1** Participate in professional associations	**I2** Participate in professional development opportunities	**I3** Obtain professional certification	**I4** Share professional knowledge with others	**I5** Research current trends in volunteerism

The Competency Group
building workplace skills for great results

The Competency Group (TCG) was commissioned by the HR Council to develop this report.

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