



## **Toolbox for Organizations** to enlist Best Agers as volunteers

Developed by Forschungsverbund Mecklenburg-  
Vorpommern e.V. - *Research Association Mecklen-  
burg-Western Pomerania* -  
within the project "Best Agers"



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Forschungsverbund Mecklenburg-Vorpommern e.V.

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## 0. Using the Toolbox

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### **Initial situation:**

Your organization plans to integrate Best Agers as volunteers within their structures.

### **Goals:**

This toolbox is intended to support organizations and associations seeking Best Agers as volunteers to work with or who are already working with volunteers, and it serves as the basis for a qualified management of volunteers.

In addition, the toolbox should encourage, provide transparent ways of access, and help to attract new volunteers.

Furthermore, the toolbox may guide future volunteer managers in their daily work.

### **Activities:**

To meet its goals, the toolbox provides detailed basic principles for enlisting, training, and dealing with Best Agers as volunteers. The toolbox should support volunteer managers in their daily work and resolve any pending issues in dealing with volunteers quickly and easily. This clearly shows that a successful integration of volunteers cannot be obtained by the way.

In terms of volunteer work, a planned, invented, designed, and evaluated structural change within the organization is necessary. This is based on a qualified management of volunteers.

This book shows the most important tools of a volunteer management process.

Many practical hints are given on the implementation of an initial interview with potential volunteers to the exclusion of volunteers. The toolbox allows starting with volunteering directly.

### **Links:**

[Developing of a strategy for working with volunteers](#)

[Rules and standards for working with volunteers](#)

[Enlisting volunteers](#)

## 1. Developing a strategy for working with Best Agers as volunteers

### Initial situation:

You are dealing with the topic of working with Best Agers as volunteers for the first time. The project *integration of volunteers* into your organization is going to be initiated.

### Goals:

With the help of the shown options and methods, the topic of voluntary work can start.

### Activities:

At the beginning, it is important to analyse the initial situation in which the organization acts. A SWOT matrix helps to clearly structure internal and external factors.

On this basis, it is recommended to plan the project integration of volunteers. It is very important to create an action plan.

Organization-specific guidelines serve as a basis for cooperation with Best Agers as volunteers and provide a first orientation for interested volunteers. A volunteer should be able to identify him- or herself with these guidelines - if not, the integration should be checked again.

### Links:

[Analysis of organization - SWOT](#)

[Action plan](#)

[Task scheduling and project planning](#)

[Guidelines for working with volunteers](#)

## 1.1. Analysis of organization - SWOT

### Initial situation:

An organization wants to re-orientate strategically and/ or integrate Best Agers as volunteers within its structure.

### Goals:

A SWOT-Analysis follows the goal of scrutinizing the whole organization, single processes and offers. Furthermore, possibilities of improvements should be developed and accepted by all members of the organization. As a result, the prevailing situation may be evaluated properly in order to develop an [action plan](#) in the on-going process of volunteer integration.

### Activities:

It is recommendable to elaborate a SWOT-Analysis in team work using ideas and generating synergies. A *SWOT-matrix* helps to visualise internal and external influencing factors which are relevant for the organization. Specialised questions support finding those facts (see figure below).

	Presence Internal influencing factors	Future External influencing factors
positive	<b>S</b> Strengths	<b>O</b> Opportunities
negative	<b>W</b> Weaknesses	<b>T</b> Threats
<b>Internal influencing factors -</b> direct influence by the organization itself, opportunity to change:		<b>External influencing factors -</b> no direct influence by the organization itself possible:
<p style="text-align: center;"><b>Strengths (S)</b></p> <p>What is going well? What are our core competencies? Any commanding leads in performance and efficiency? What are our resources? What is our current status?</p>		<p style="text-align: center;"><b>Opportunities (O)</b></p> <p>Where to are we capable of? What are our chances in future? Which opportunities do we have? What may we expand? What is useful out of our network? Which possibilities of improvements do we have?</p>
<p style="text-align: center;"><b>Weaknesses (W)</b></p> <p>What are weak points? Which barriers, restrictions and pitfalls exist? Which defects interfere with our work? What is missing?</p>		<p style="text-align: center;"><b>Threats (T)</b></p> <p>Which difficulties arise in future? Where are hazards? What are our apprehensions? What are critical facts? What do we have to expect?</p>
<p style="text-align: center;"><b>Important aspects:</b></p> <ul style="list-style-type: none"> <li>• Individuals &amp; skills, resources &amp; capacities: employees, volunteers, actors (= team &amp; activities)</li> <li>• Management &amp; organizational structure, guidelines</li> <li>• Availability of funds</li> <li>• Action plan</li> <li>• Network, connections &amp; partnerships</li> <li>• Quality of internal processes (how does the internal flow of information and decision-making works)</li> </ul>		<p style="text-align: center;"><b>Important aspects:</b></p> <ul style="list-style-type: none"> <li>• Environmental facts: social, political, legal, administrative, economical</li> <li>• Market volume</li> <li>• Market structure (offers for volunteers, existing organizations)</li> <li>• Acceptance and demand of own offers</li> <li>• Segments</li> <li>• External influencer</li> <li>• Motivation &amp; facts</li> </ul>

### Links:

[Action plan](#)

## 1.2. Task scheduling and project planning

### Initial situation:

Project planning and task scheduling becomes necessary in order to implement projects with Best Agers as volunteers best possible.

### Goals:

Project planning helps to structure necessary activities and considers chances and risks in advance.

### Activities:

Project planning is a very broad area. It is important particularly develop

- a work breakdown structure (task scheduling)
- a project effort estimation
- scheduling
- planning resources
- financial planning
- a proper risk management
- other project plans

Furthermore, several checklists are added regarding

- a kick-off meeting
- an action plan
- project planning in practise.

### Links:

[Kick-off-Meeting](#)

[Action plan](#)

[Checklist Project planning](#)

## 1.2.1. Project kick-off meeting

### Initial situation:

You want to introduce a new project or project stage.

### Goals:

A kick-off meeting provides precise information about goals, contents, scheduling, responsibilities, approaches, and procedures as well as the significance of the planned project. A kick-off meeting provides orientation and motivates all involved parties – this is the basis for successful teamwork and close collaboration.

### Activities:

Potential project members should be attracted as early as possible to enlist them for project participation. The invitation may be formal or informal – depending on the situation. Nonetheless, a friendly manner and mailing in time are self-evident. The main important fact for a successful kick-off meeting is the attendance of ALL involved project parties.

#### *Suggestions for a kick-off agenda:*

- Welcome and introduction: presentation of importance, relevance and utilisation of the project by the management, board, project manager, and/ or project principal etc.
- Get to know each other, 2 min. presentation for everyone
- Demonstration of project goals, project stages, procedure, and results to be expected by the project manager
- Introduction of the project team, working packages, and schedule by the project manager
- Workshops done by the project team and involved parties in order to structure tasks (scheduling and mile stones)
- Setting rules for cooperation
- Planning of next steps

It is recommended to plan a half or whole day workshop for the kick-off meeting. Especially large projects may require more than one whole day and include an overnight stay.

## 1.2.2. Action plan

### Initial situation:

The organization lacks in decision making and meeting results, which have been developed within the organization or in teamwork.

### Goals:

Generally, an action plan is an image of an implementation plan. A document in tabular form shows all on-going and planned tasks in addition to priorities, deadlines, and responsibilities.

The action plan ensures that planned activities and reached goals are going to be put into practise.

### Activities:

Action plans must be coordinated with all involved parties. Furthermore, those need to be available for everyone at any time.

Action plans may consist out of five columns:

Number	Action? What?	Who? With whom?	How? Whereby?	By when?
1				
2	Task(s) in hand, by priority, maybe further separation of a complex task into simpler ones	Responsible persons(s), for each action, involved team members	Milestones & tools, sub-goals, necessary resources (like time, financial aspects, external support ...)	Point of time, allocation of realistic time allowance for each single action
3				
4				
...				

### 1.2.3. Checklist project planning

#### Initial situation:

Your task is to plan a complex project.

#### Goals:

A project plan helps to map all possible circumstances and occurrences which may be crucial in the later course of the project. An adequate and comprehensive project planning is one of the most important tasks whilst managing a project. It is the basis for the subsequent implementation and management of the project besides controlling the progress of the project.

The project team will be organized (*norming stage*, for reference see Tuckmann) and detailed plans are going to be prepared – especially task scheduling, flow charts, follow up charts, capacity planning, communication planning, cost planning, quality planning, and sufficient risk management.

#### Activities:

A project planning CHECKLIST is a suitable instrument in order to conceptualize a project properly.

<b>Why?</b>	Initial situation/ background, target context, need	What is the reason of project implementation? • Motivation, benefit
<b>Wherefore?</b>	Goals	What is going to be changed and improved by the project? What are the goals?
<b>For whom?</b>	Target group	Who is going to be addressed by the project?
<b>How?</b>	Project content, Project tasks	What should be done? Which activities are necessary to reach the goals? • Work breakdown structure: subtasks, work packages
<b>Who?</b>	Involved ones	Who implements the project? Who has which competencies? • Project manager, project team, staff, external support, decision bodies ...
<b>Whereby?</b>	Financial capital, non-monetary resources	Which financial and non-monetary resources are available?
<b>When?</b>	Time scheduling (exact beginning and end)	When does the project start and end? Which project stages exist? What temporal resources are available?
<b>Where?</b>	location	Where, in which environment, facilities, and rooms shall the project take place?
<b>Success?</b>	Verifiable facts & evidence	How can we measure the success of the project?
<b>Future?</b>	Outlook, forecast	What is next?

## 1.3. Guidelines for working with volunteers

### Initial situation:

Volunteers do not have the same privileges as full-timers. It is particularly important to create a set of guidelines for active volunteers on which they can orient themselves.

### Goals:

The guidelines are intended as a recommendation for cooperation between honorary and full-time paid staff. Those offer a comprehensive guide for actions and decisions that affect the cooperation.

### Activities:

The integration of and work with Best Agers as volunteers into an organization is a process with several stages. Therefore, five stages are relevant (5 X B model according to Heinz Janning, Netherlands):

<b>Reflect &amp; Think (garner support)</b>	<b>Accompany</b>	<b>Keep (retain)</b>	<b>Reward (acknowledge)</b>	<b>End (conclude)</b>
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#### ***Reflect, think and garner volunteer support***

Within the organization, it is important to assign a person who is responsible for volunteer management. He or she helps to find out more about the motivation of volunteers and of those who are interested in voluntary work. Consequently, it is possible to realize targeted campaigns to attract and hopefully win people over. Volunteering is a living solidarity, and no self-purpose – the organization has to convey the emotion of a valuable and useful job.

#### ***Accompany volunteers continuously***

The entry and training of Best Agers as volunteers into the organization are supported by a significant introduction and orientation phase. Volunteers receive comprehensive information applicable in the organization (e. g. mission statement, goals, structures, rules and regulations, mode of practice and contact person). Furthermore, precise instructions and regulations about work content, working time, and overall duration of cooperation are set and written down in a [volunteering agreement](#). Volunteers should be insured during working time (especially for accidents and liability) and should get reimbursement for travel expenses, costs for phone and/ or postal charge. Volunteering workers are colleagues like full-time staff in terms of rights and obligations. They have the right to be integrated into the existing team and structures. Additionally, they held the right of care (like occupational health and safety), instructions, and equality as well as the obligations to protect confidentiality, secrecy and data protection. Volunteers should be fully prepared for meaningful activities and accompanied in the following professionally.

#### ***Keep and retain volunteers***

Similarly, volunteers should not only be accompanied during training, but also during their whole working time. The person in charge for volunteers serves as a contact person, especially if the volunteer is having questions, problems, or other concerns. This person will also be able to recognize motivational changes and develop-

ment needs of the volunteers and should respond accordingly. Cooperation is significantly supported by regular given feedbacks and discussions for further development.

The tasks should be meaningful and meet individual qualifications, skills, own needs and inclinations. In any case, a partnership between full-time staff and volunteers enriches an organization. Volunteers do not replace full-time, paid staff. Volunteers should also have the rights of consultation and participation. They enrich the organization through their variety of skills, experience and expectations so that a voice is desirable in any case. Thus, new ideas and impulses as well as critique and suggestions by volunteers may be very helpful. The possibility of flexible integration in terms of time and space should be given. Besides long-term projects and opportunities, short-term occasions and projects offer the possibility for integration. To retain volunteering co-workers, it is important to guarantee reimbursement of expenses of agreed costs in any case in an unbureaucratic way. Meaningful tasks, individual support, encouragement, and assistance, such as further education and training opportunities, contribute to keep volunteers long-term and facilitate the feeling that they are really needed in the organizational structure.

### ***Reward and acknowledgement***

Volunteer work is unpaid. The feeling counts to do something good. Nevertheless, each organization should maintain an appropriate culture of recognition and a respectful interaction. Forms of recognition and reward (see [appreciation interview](#)) should be defined, established and aligned with an organization's objectives and culture in order to lend the organization credence. In each case, volunteers are entitled to appreciation in terms of a qualified certificate. Small, in cash or in-cash gifts (e. g. 10 € / month or flowers) may be possible donations occasionally. If possible, the commitment will be rewarded by incentives. The hearing and, if possible, implementation of change proposals being communicated by volunteers, and participation in decision-making significantly contributes to the feeling of recognition. Proof of social skills such as teamwork, initiative, and communication skills is another option of recognition and may increase professional qualifications of the volunteers. In summary, it is important to permanently integrate a good flow of information, an automatic expense reimbursement, consulting, and training into the organization. It supports the work with volunteers and expresses a feeling of appreciation, recognition of their work, and gratitude from the beginning.

### ***End and conclusion***

The exit of volunteers should not be a taboo, but rather a farewell culture should be introduced. It is supported by (for example) an evaluation of the work together, a farewell meeting and feedback, and [certification](#) as well as [a qualified certificate](#) if requested (including more detailed information about type of tasks, duration, scope, evidence regarding the performance assessment). The retiring volunteer should get reassured that he or she can leave the organization without feeling guilty – and he is welcome at any time again. Pointing out contact details such as membership, newsletter subscription, alumni network, or events are also important. For the organization, it is helpful to incorporate given feedbacks of former volunteers back into the organization for the purpose of continuous improvements.

### **Links:**

[Checklist initial meeting](#), [query form for volunteers interested](#), [form for organizational monitoring](#), [volunteering agreement](#), [appreciation interview](#), [proof of commitment and certification](#)

## 2. Rules and standards for working with Best Agers as volunteers

### Initial situation:

As an organization, you have chosen to work together with Best Agers as volunteers. You already analysed the organization, planned the project for cooperation, and wrote guidelines for working with volunteers.

### Goals:

The present guideline deals with various aspects of working with Best Agers as volunteers and it simplifies the daily work of the volunteer manager. Attached templates and checklists support this process.

### Activities:

It is of utmost importance to examine the financial and human resource situation of the organization, which is necessary when working with Best Agers as volunteers – because voluntary work is not "free".

In cooperation with volunteers, a series of activities, roles and responsibilities is necessary. In the following, a detailed list of files is attached.

### Links:

[Financial and personnel resources of volunteering](#)  
[Activities, tasks and responsibilities for working with volunteers](#)

## 2.1. Financial and personnel resources for volunteering

### Initial situation:

Volunteering is not for free. Cooperating with volunteers requires funds and other resources. Therefore, it is necessary to calculate those *before* a volunteer starts working.

### Goals:

For an effective and efficient collaboration with Best Agers as voluntary workers, it is necessary to consider human, material, and financial aspects critically and realistically.

### Activities:

It is necessary to determine needed time scope being essential for volunteering management and which financial and non-monetary funds are available.

The following aspects should be considered within resource planning:

- Volunteers have to become acquainted, supported, and accompanied professionally  
→ Reconsideration of financial, personnel, and time resources
- If needed, provision of compensation expenses or other non-cash recognition (like flowers, events, special concessions ...)  
→ Calculation and budgeting of costs, to ensure possibilities of cost coverage
- Volunteers should be insured against accidents and liability  
→ Check warranty of title
- Full-time staff enrich their assignment by volunteering  
→ Being aware of the extended volume of work and different contents of work
- Raised expenditures for non-monetary resources for volunteers: additional room, working place, computer, phone, business cards ...  
→ Check and guarantee availability
- Volunteers need professional companionship as well as training and further development if needed  
→ Calculation of needed time and financial expenses, check if named resources are available

## 2.2. Activities, tasks, and responsibilities for working with volunteers

### Initial situation:

Certain basic conditions should be determined in order to ensure a successful partnership from the very first when cooperating with Best Agers as volunteers.

### Goals:

The following activities contribute to making cooperation best possible. It is important to consider personal desires, skills, abilities, and skills of volunteers. He or she has the right of competent collaboration in order to minimize and to avoid any misunderstanding and conflicts.

### Activities:

At the beginning, a first interview ([checklist initial meeting](#)) between the organization and volunteer should take place.

The given information should include a portrait of the organization itself and possible fields for volunteering activities. In preparation, the organization has to check the actual need for volunteers. The [form for organizational monitoring](#) offers guidance to elaborate more detailed information (such as clear tasks, scope of work, and necessary/ needed skills).

Within the discussion, the [query form for volunteers interested](#) should be integrated, too, to figure out personal interests and know-how of the volunteer. In comparison to the form for organizational monitoring, a proper job and task profile may be worked out. In this context, the [general checklist of tasks and job description for volunteers](#) has to be used like instructions to get familiar with contents of those checklists.

The recently collected information forms should be used as basis for a [volunteering agreement](#).

In the context of working with volunteers, it is helpful to develop a recognition culture within the organization. Regular, but well-measured [appreciation interviews](#) and recognition conversations contribute significantly to a cooperation and motivation of volunteers.

At any time – during or after any termination of cooperation – volunteers should have the opportunity to sustain a [proof of commitment and certification](#) on request. An agreement on voluntary commitment can be terminated for various reasons - both, organization or volunteers can have reasons for dismissal. The templates for [voluntary withdrawal and exclusion form participation](#), and [dismissal of volunteers by the organization](#) can serve as guidance.

### Links:

[Checklist initial meeting](#), [form for organizational monitoring](#), [query form for volunteers interested](#), [general checklist of tasks and job description for volunteers](#), [volunteering agreement](#), [example of volunteering agreement](#), [appreciation interview](#), [proof of commitment and certification](#), [voluntary withdrawal and exclusion form participation](#), [dismissal of volunteers by the organization](#)

## 2.2.1. Checklist initial meeting

### Initial situation:

You are going to hold a first meeting with potential Best Agers as volunteers. He or she is interested in a volunteer commitment in your organization.

### Goals:

The central key to successfully integrated volunteers in an organization is a well-managed initial interview. Therefore, you – as contact person for volunteer management in your organization – should provide a comfortable atmosphere for discussion and be able to fully and competently find out about the particular activity the interested Best Ager wants to work. Furthermore, the volunteer should be asked appropriate questions, but, respectively, he or she should also have the opportunity to ask questions. The aim should always be to interchange mutual expectations (of volunteers and organization) and to characterize the possible cooperation as a common task.

### Activities:

- Welcome
- Introduction of the organization (history, goals, target groups, on-going projects ...)
- Introduction of the volunteer (motivation, know-how, experience, desires, skills ...)
- Naming of potential fields of work (in cooperation with the [form for organizational monitoring](#)) within the organization (kind of work, size, current need ...)
- Illustration of general conditions (introduction, companionship, contact person, insurance, reimbursement of expenses, training opportunities, further rules, and regulations if needed)
- Clarification of interest of the volunteer
- Agreement of working conditions (naming the tasks, probation, desired start, available time, general duration of volunteering, representation of contact person if needed ... to be fixed in the [volunteering agreement](#))
- Introduction of all employees (and already working volunteers) of the organization and round tour if needed
- Matching of data (with the help of [query form for volunteers interested](#): contact details, name, address, phone, e-Mail, birthday, existing health insurance if relevant ...)
- Agreement and coordination on further steps (day of start of work, appointment for additional meeting and discussion ...)
- Saying goodbye, thanks for interest

### Links:

[form for organizational monitoring](#)  
[volunteering agreement](#)  
[query form for volunteers interested](#)

## 2.2.2. Query form for volunteers interested

### Initial situation:

A query of the volunteers is carried out in the first interview. Thus, important and personal information about the Best Agers as volunteers, former volunteer tasks, and areas of interest become obvious.

### Goals:

The query helps the organization to get a first impression of the volunteer interested. Completed forms should be filed like questionnaires for staff. In the result, it is possible to receive a comprehensive picture of prior knowledge and skills of the interested volunteer. The data may also be helpful for addressing potential volunteers for future campaigns.

### Activities:

Request received on	
Last name, first name; age	
Address	
E-mail	
Phone, Fax	
Have you been volunteering already?	
In which fields do you want to work?	
What skills do you have?	
How many hours a week?	
Certain days?	
How many months?	
Starting date?	
Preferred district (if applicable)?	
How did you hear about us?	
Comments	
Detection date & name of interrogator	
Assessment of possible fields of work	
Mediation date & name of middleman	
To begin in organization and field(s) of work	

### 2.2.3. Form for organizational monitoring

#### Initial situation:

If certain areas or departments within an organization have a need for volunteers, a query form helps to get a first impression about the given situation.

#### Goals:

The query form provides comprehensive information of possible working areas, hours required, and necessary skills a potential volunteer has to have. In combination with the [query form for volunteers interested](#), an area of activity could match the need.

#### Activities:

Contact person, maybe department, address	
E-mail	
Phone, Fax	
Staffing available	
Reason for request	
Which tasks should be transferred to the volunteer?	
Which competencies and skills are needed?	
How many working hours per week?	
Certain days?	
How many months?	
Starting date?	
Comments	
Date, Name	
Name of volunteer, working fields, tasks	

#### Links:

[Query form for volunteers interested](#)

## 2.2.4. General checklist for task and job description

### Initial situation:

For full-time employees, it is understood to act on a specific job description. Also, volunteers will be subject to such formulated terms of reference.

### Goals:

A specific task description is a summary of carried out and necessary actions and it pursues the following objectives and benefits:

- with the help of such a document, the involved parties in the organization clearly understand what they may expect from working with volunteers
- potential volunteers can even consider and decide for or against certain tasks
- diffuse expectations cannot come up, any negotiation processes and conflicts as well as frustrations are minimized
- it offers support for volunteers, if tasks are demanded that should not be taken over
- protection for volunteers in order not to be overloaded with tasks and responsibilities

### Activities:

A job description summarizes activities Best Agers as volunteers are required to do and who he is answerable over his duties. It is important to notice that not every principal official is authorized to instruct volunteers.

A job description form is the basis for cooperation between the organization and volunteers and should be as detailed as possible. The following points are of contextual relevance:

#### *1. Define the aim of the job offer*

What are the goals of the organization in cooperation with the labour supply of volunteers? Does it correspond with the objectives of the volunteers?

#### *2. Content and nature of tasks*

Description of main tasks and associated activities. Which activities can be fulfilled and undertaken by the volunteer on demand and as far as possible? The main tasks have to be - particularly for the volunteers - very clear and emphasized.

#### *3. Requirements and qualifications*

Which personal and professional skills as well as requirements are necessary? Definition of time needed (e.g. 3-5 hours per week), when and how often (e.g. in the afternoon, on the weekend, three times a month, weekly etc.). Minimal and maximum duration of voluntary work (for example, 3 months, 2 years) should, if possible, be determined.

#### *4. Responsibilities*

A volunteer has to know the person in charge within the specific area of work and the contact person (e.g. to discuss problems and find solutions). Volunteering re-

sponsibilities have to be clearly defined by the main decision-making powers in charge. The volunteer needs to know who holds the responsibility in specific matters. Staff must be aware that they are on duty to report and they are instructed to pass on information. This includes the information and disclosure about communicable diseases or mental limitations that restrict delegated tasks (such as depression which is not agreeable with psychosocial support as a volunteering task).

The responsible contact person for volunteers must be clearly defined.

#### *5. Organization of work*

Volunteers need to know exactly with whom they work with and with whom they have to make arrangements about implementation of tasks. Binding time schedules and events - that do not fit into the actual activities of the volunteers - should be formulated and written down (e.g. team meetings, annual meetings, staff meetings, mandatory trainings, and continuing education). Information channels within the organization should be transparent and comprehensible for all participants, especially for volunteers. Best Agers as volunteers should know the person in charge to get expert information. Furthermore, the volunteer needs to know the contact person for addressing ideas, criticism, and suggestions as well as for complaints.

#### *6. Qualification / training / probationary period*

Particularly at the beginning, volunteers should get time for orientation, training, and for further qualification. The job description clarifies what types of training and qualifications are necessary and how long the phase of training or probationary period is.

#### *7. Appreciation of work*

Volunteers should know how their work is recognized - though they may expect a monetary allowance, a differentiated product, free training, or other benefits and services (e.g. free association membership).

#### *8. Protection*

Volunteers should be informed about their legal situation. They have to know about function and content of discretion. They should be informed about insurance coverage during working time and what is necessary to do in case of an accident.

## 2.2.5. Volunteering agreement

### Initial situation:

Volunteering is no lifelong commitment. Nowadays, volunteering offers must therefore be flexible. A resolution of the cooperation between volunteer and organization should be no problem at any time.

### Goals:

Framework conditions need to be established to allow the volunteers to end the collaboration "without a guilty conscience" at any time.

### Activities:

A person-oriented volunteer management supports the conclusion of a [volunteering agreement](#). This agreement helps to create a possible exit already in the beginning. The possibility of a withdrawal by a volunteer should be discussed in the initial phase and written down in the commitment agreement - including the following factors:

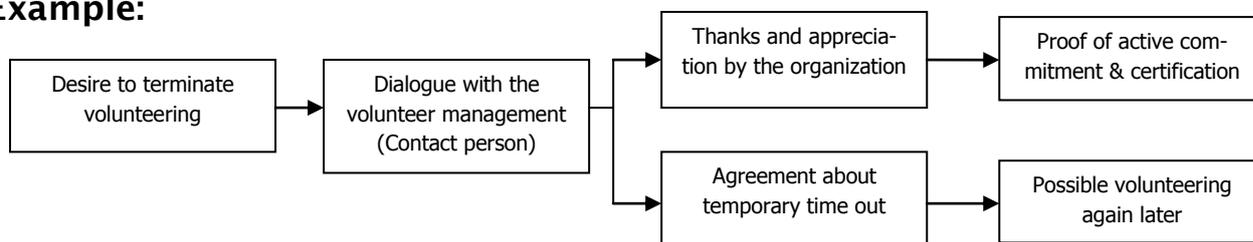
- A withdrawal by the volunteer is possible at any time and without "bad conscience"
- the desire to exit should be discussed with the volunteer management
- the withdrawal form and necessary lead time (deadline) should be recorded in written or oral form (written for example in the volunteering agreement or [guidelines](#) of the organization)

If a volunteer expresses the desire to withdrawal, the "termination" should be positively formulated and designed. Formal and informal thanks are of particular importance. The outgoing volunteer should receive a respectful appreciation about his willingness of commitment.

If the voluntary calls for a temporary time out, a new employment at a later date should be discussed and agreed.

In addition, [a proof of commitment and certification](#) about work he has done needs to be given. If desired, with a detailed assessment.

### Example:



### Links:

[Guidelines for working with volunteers](#)  
[Proof of active commitment and certification & example](#)  
[Example of volunteering agreement](#)

### 2.2.5.1. Example of a volunteering agreement

Name of organization

Logo

Address

#### Agreement

Between

-----  
 -----  
 -----

and

Last name, first name: -----  
 Street: -----  
 Postal code, City: -----  
 Phone: ----- Fax: -----  
 E-mail: -----

#### §1 Field(s) of work

Ms/ Mrs ----- agrees to work in the field(s) of ----- on a voluntary level. The volunteer agrees to act according to the organizational goals.

#### §2 Task(s)

Ms/ Mrs ----- is integrated into the organization beginning at ----- as a volunteer and is responsible for the following:

-----  
 -----

In case of any content-wise questions according to the above agreed task(s), the following contact person may help (including contact information like name, e-mail and phone number):-----.

In case of general questions about volunteer management the contact person is (including contact information)

-----

#### §3 Expenditure of time

The time exposure to be agreed includes extensive time of once/ weekly/ monthly approx. ----- hours.

The volunteer prefers the following days ----- and times ----- to work during the week.

In case of short-time volunteering, the commitment is planned until \_\_\_\_\_ . Alterations are possible at any time and need to be agreed by both parties.

#### **§4 Reimbursement of expenses**

Expenses for travels, phone or postal charges have to be reimbursed by the organization if those are directly linked to any task of the volunteer. Nevertheless, the issue of expenses should be discussed by the responsible person with the volunteer.

#### **§5 Training, further qualification, other services**

Basically, involved volunteers are free of charge. Smaller monetary allocations (such as 10 € / month; Attention: internally defined by each organization) or any monetary gifts (like flowers) are possible within certain limits. The above-mentioned organization offers continuing and further training and education. The volunteer can participate by agreement. The costs are paid by the organization. If external training courses and seminars want to be taken by the volunteers, a defrayal of cost by the organization might be possible (but need to be discussed beforehand).

#### **§6 Insurance coverage**

Volunteers obtain insurance against accidents and liability during their working time. Further information can be given by (contact person including contact details):

\_\_\_\_\_

#### **§7 Proof of commitment & qualified certification**

Upon request, volunteers will receive proof of active commitment and qualified certification including areas of responsibility, content of work, duration and gained social skills. In addition, participation in further training may be certified.

#### **§8 Discretion**

Volunteers are required to keep concealed internal organizational matters that are not meant for the public – during and after commitment. By signing below, discretion is confirmed.

#### **§9 End of volunteering**

If the volunteer wants to withdrawal, it is asked for written information addressed to the responsible person within the organization. Respectively, the organization may use the right of dismissal if any reasonable matter exists. A common and evaluative discussions and feedback is sought by the organization.

Place, Date \_\_\_\_\_

Volunteer \_\_\_\_\_

Contact person, volunteer management \_\_\_\_\_

## 2.2.6. Appreciation interview

### Initial situation:

Appreciation interviews should honour volunteers and be an integrated part of the organization's recognition culture. Through recognition, the volunteer manager recognizes the commitment and achievements of volunteers, and gives them the same respect. A positive feedback is used as a management tool for employee motivation.

### Goals:

Appreciation interviews and positive feedbacks respectively are motivational interviews at the same time. Motivational interviews should be implemented cautiously and credibly. Appreciation interviews should take place if a real reason is given. By the utterance of recognition, the motivation of volunteers is maintained additionally to raise satisfaction of the individual.

### Activities:

Supporting hints for successful discussions about recognition:

- One-to-one conversation : no delegation of the interview to other employees of the organization – should be done by volunteer management
- Place & time: agreement about fixed time and place within the organization
- In private or in front of others: in private guarantees that other employees do not feel envy or resentment occurs; praise of group / team as a whole possible if consequently involving all
- "Earned" recognition: exceptional achievements are not naturally, pay attention to recognizable achievements (e.g. more effort has been performed than expected)
- Fair recognition: recognition for good performance - regardless of personal sympathy for deserved recognition
- Precise wording: accurate descriptions of achievements, reached goals, or implementation of social skills; to talk about specific characteristics necessary for volunteering such as organizational ability, team spirit, conviction, etc.; provision of a clear context to the organization; generalizations such as "business as usual" or "you did it quite well" need to be avoided
- Timely: effective recognition takes place immediately after successful implementation - otherwise positive effect disappears
- Comment partial success: increasing self-confidence and usefulness of volunteer's work indicates that you are convinced about the successful task completion
- No criticism: taboo during recognition (such as "I was very happy, but ...")
- No emotional recognition: only professional performance and personality based on factual level of volunteer
- Scope: repeat recognition not too often, this will reduce credibility

It is of paramount importance to clearly express the personal view. The following phrases are helpful for the volunteer manager:

- "I was lucky about/ to see ..." / "I am highly satisfied with ..."
- "I have to say that I highly appreciate your work" / "Your work is very important for us"
- "I am impressed by your persistence" ...

## 2.2.7. Proof of commitment and certification

### Initial situation:

Volunteering is personality-forming and expands personal expertise. Committed people expand their personal horizons through their work, abilities, and skills as well as strengthen their social skills. Many companies value volunteering, so it might be a competitive advantage in the job market. This is, in addition, to a recognition culture in the organization, another important aspect of why volunteering should be documented and certified.

### Goals:

Every organization is required to develop appropriate forms of recognition and appreciation for voluntary cooperation. Every volunteer should receive a qualified certificate with differentiated statements about the contents of work, duration, and scope of commitment.

### Activities:

A Volunteering agreement should include the following:

- Short description of the organization
- Description and kind of work
- Duration and scope of work
- Received training

Furthermore, it is possible to extend the certification with an assessment. The same rules apply also for full-time employees.

### Links:

[Example of proof of commitment](#)

## 2.2.7.1. Example of proof of commitment

### Certification of volunteering commitment

Proof of commitment acknowledges and recognizes voluntary work. Volunteering means responsibility and strengthens the civil society. This proof of commitment confirms activities and acquired skills within the framework of volunteer work for:

Ms/ Mrs XYZ  
Born at DD MM YYYY  
Street  
Postal code, city

#### Short description of the organization:

Short description – organization chart, goals, and tasks (scope: up to 5 lines).

#### Scope of work:

Ms/ Mrs XYZ is/ was actively involved as a volunteer since DD MM YYYY in XXX (name organization, place, department) to support XX for xx hours per month. The volunteering is still on-going/ ends on DD MM YYYY, desired by Ms/ Mrs XYZ.

#### Tasks (and assessment)

- 1
- 2
- 3...

With the help of his/ her education, Ms/ Mrs XYZ was able to work very professionally. Especially ... was helpful to get xxx organized. His/ her communicative character was helpful within teamwork. Mr/ Mrs had always the will to receive further training.

#### Participation in training and further education:

- Training A
- Training B
- Training C

Thank you for your commitment!

Organization ABC  
street 0  
12345 city  
phone: 0123/ 456789

[www.Homepageaddress.com](http://www.Homepageaddress.com)

-----  
place, date, signature, stamp

## 2.2.8. Voluntary withdrawal and exclusion from participation

### Initial situation:

Voluntary work can only be seen as a temporary decision. For potential Best Agers as volunteers, it is important to adapt commitments to different life stages. Volunteering has no dismissal protection. Both parties - the volunteer and the organization - have the opportunity to terminate the relationship at any time for no particular reason.

### Goals:

It is important to determine clear rules for an end of commitment - already in the recruitment stage, either written down in the [guidelines](#) or in the [volunteering agreement](#). Interested volunteers should not fear to enter into indissoluble obligations.

### Activities:

If a volunteer expresses the desire of withdrawal, the "termination" should be formulated positively. A formal and informal thank is of high importance. A leaving volunteer should receive an appreciative feeling about its willingness of commitment.

The certification should be assessed if the volunteer wants to.

### Links:

[Guidelines for working with volunteers](#)  
[Volunteering agreement](#)

## 2.2.9. Dismissal of volunteers by the organization

### Initial situation:

The topic of exclusion and dismissal of volunteers for legitimate reason by the organization is often a taboo issue. Volunteering is not subject to dismissal protection. Therefore, the organization always has – apart from the volunteer – the possibility to terminate the relation for no particular reason. Reasons for termination by the organization are often owed to serious breach by the volunteers. In general, an organization should always be interested in continuing collaboration.

The following examples of reasons may cause an exclusion from the organization. These must be known by all involved volunteers:

- Behaviour that damages a company's reputation
- The quality of work is not met
- The voluntary acts contrary to objectives, guidelines, and standards of the organization's philosophy
- Confidentiality and work agreements are ignored and / or is not complied with
- Basis rules and standards are violated ( such as drug use on duty, theft, physical assault)

### Goals:

Therefore, it is all the more important to establish clear rules for the end of a commitment - one for the termination by the volunteer, the other for the organization, written down into the [guidelines](#) or [volunteering agreement](#).

If eventually a dismissal and exclusion is needed, depends on the degree of breach and to which extent the quality of work and cooperation between committed and organization is affected. In order to prevent damages of employees and clients as well as the company's reputation, it is necessary to react immediately if rules and standards are violated (for example sexual assault and drug use). All employees – full-time and voluntary – should know the above-mentioned criteria - either in the guidelines of the organization or in the volunteering agreement.

Dismissals and exclusions can only be executed by employees who are authorized for such actions - at best, an appointed volunteer manager or executive.

### Activities:

Prior to the termination by the organization, all concerned parties should be heard. In the case of dismissal, the volunteering management is in charge. Nevertheless, the volunteer has the right of a [certification](#) about his/ her work and, if desired, with a detailed assessment – independently formulated from the exclusion and objectively about the job performance and quality of work.

### Links:

[Guidelines for working with volunteers](#)  
[Volunteering agreement](#)  
[Proof of commitment and certification](#)

### 3. Enlisting Best Agers as volunteers

#### Initial situation:

You want to attract Best Agers as volunteers to work in your organization.

#### Goals:

The above-listed possibilities and methods for enlisting volunteers will help you to plan and implement appropriate measures to promote volunteer involvement in your organization.

#### Activities:

Before starting actual activities, you should look over the following checklist.

- Which financial means are available for volunteer marketing?
- Which individuals/groups should be considered for the respective tasks; how would you describe the target group?
- Where are these individuals/groups?
- Which interests, habits and needs do these individuals/groups have?
- Should these individuals have certain knowledge; if yes, what kind?
- Which media do they use and which public places do they visit? Which networks do they use?

#### Links:

[Attracting volunteers using satisfied volunteers](#)  
[Attracting volunteers using in-house media and events](#)  
[Attracting volunteers using classic marketing](#)  
[Attracting volunteers using external media](#)  
[Attracting volunteers using the internet](#)

### 3.1. Attracting volunteers using satisfied volunteers

#### Initial situation:

There is no or almost no "natural inflow" of Best Agers as volunteers in your organization.

#### Goals:

Happy volunteers are the best marketing tool to attract new volunteers. They have the ability to excite others through their own experiences and opinions and motivate them to volunteer for the respective organization.

Former and current volunteers should know two highly effective and cost-saving marketing tools: "word-of-mouth propaganda" and "to ask around", to recruit volunteers.

#### Activities:

A prerequisite is that volunteers are satisfied. It is the organization's job to let them know that their work is valuable and truly needed.

What needs to be done?

- Preconditions :
  - Identify areas of involvement within the organization
  - Appoint attractive activities
  - Create interesting offers of involvement
- Motivate your current volunteers to use "word-of-mouth propaganda" in their personal networks by personal conversations and/or in form of a letter.

Spreading information and/or stories may occur in the context of:

  - family
  - circle of friends
  - work (colleagues and business partners)
- Selective approach of people who already participate in similar offers (customers, clients, guests, insiders, etc.).

## 3.2. Attracting volunteers using in-house media and events

### Initial situation:

You are already using media owned by the organization and organizing events to recruit volunteers, but there is a lack of structure.

### Goal:

The goal is to identify in-house opportunities, means and tools, and to use them to motivate people for volunteering in the organization.

### Activities:

- Your own internet presence
  - Creating contact opportunities via e-mail or online forms
  - Listing involvement opportunities on your website
  - Volunteer stories
  - Offering a newsletter for interested individuals
  - Event calendars
  - Providing a guest book and/or a wall
  - Recommendation and sharing option (volunteers can share the organization's website with friends and family)
  - Personal communication with present volunteers via a closed internal area
- Bulletins on bill-board and in shadow box
- In-house magazine (paper or online)
- Publications of the association
- Personal appeal during public events organized by your institution, e.g. during open day
- Contacting over telephone
- Photo displays showing volunteers in action (for example)
- Postings in online placement portals of volunteer organizations etc.
- Creating a database with active and potential volunteers

### 3.3. Attracting volunteers using classic marketing tools

#### Initial situation:

Only few Best Agers as volunteers find the way to your organization. You would like to increase the awareness level for your institution.

#### Goal:

When looking for volunteers, your organization must be present especially in the local but also in the national public. Every activity, every event, every location can be useful when trying to talk to people and letting them know that their help is needed.

#### Activities:

What can you do to raise awareness for your organization?

- Create advertising material: post cards, stickers, leaflets, flyers, brochures, posters, roll-ups, expo booths, calendars, in-house magazines, illuminated displays, newspaper/magazine inserts, etc.
- Send out advertising letters
- Info booths and/or speeches at events and expos, e.g. volunteer expos
- Organize sponsoring events
- Marketing by multipliers such as the staff of federations of enterprises, inter-trade organizations and chambers, but also through doctors, pastors, teachers etc.
- Targeted personal conversations during other events (business roundtables, events by chambers and associations, etc.), expos, press conferences, roundtable discussions, etc.
- Conversations with target groups in public places: supermarkets, sport clubs, schools and educational institutions, etc.
- Activating surveys (surveying a target group regarding opinions and attitudes PLUS parallel motivation to take action)
- Use national events (Volunteer Day or local volunteer days)
- Cooperation with local infrastructure institutions for the promotion of involvement (registry offices, volunteer service centres, volunteer agencies)

Their responsibilities include:

- Volunteer placement and counselling
- Making contact between organizations and persons interested in volunteer involvement
- Common development of job profiles and tasks for volunteers
- Organization of trainings
- Promotion of civic involvement in public matters
- Functioning as a local special interest group and lobby for active civic involvement

### 3.4. Attracting volunteers using external media

#### Initial situation:

Media offer unlimited presentation opportunities. However, in the midst of overwhelming information overload, it is becoming harder and harder for an organization to be recognized and noticed by the relevant public communities.

#### Goal:

In order to become known, local as well as national media are indispensable communication partners. The aim is to create targeted media contacts, even on a low budget, and to develop and implement publicity that is both tailored to the organization and promising.

#### Activities:

What can you do?

- Develop a strategy for dealing with media companies
- Establish a press distribution list with relevant contacts
- Create and maintain contacts with journalists
- Partner with media companies, media relationship activities
- Publish advertisements and press releases in local newspapers / magazines / specialized media (use offers: fill adverts of charitable organizations)
- Publish editorial articles in newspapers / advertisers and Sunday papers / city event guides / specialized media (e.g. portraits of volunteers and persons celebrating a jubilee, volunteer stories, etc.)
- Respond to press enquiries
- Give interviews
- Create radio ads
- Produce TV commercials (for local and national TV stations) and cinema trailers
  - (e.g. video participation appeals: [www.ehrenamts-videothek.de](http://www.ehrenamts-videothek.de))

### 3.5. Attracting volunteers using the internet

#### Initial situation:

You would like to utilize the internet as an effective marketing tool in order to attract new interested, potential volunteers for your organization.

#### Goal:

You look into the opportunities and risks of using social media and other internet tools and choose the most suitable instruments for recruiting new volunteers for your organization.

#### Activities:

- Well-structured, significant and current internet presence
- Carry out e-mail promotions (important: obtain consent of the addressees prior to e-mailing)
- Regular newsletters (e.g. weekly, monthly, quarterly, etc.)
- Subscribe and read newsletters of other organizations
- Use appropriate social media tools
  - Doodle (scheduling, surveys)
  - Skype (phone calls, conferences)
  - Blogs
  - Twitter (micro blogging)
  - Social networks (e.g. Facebook, Twitter, XING, LinkedIn, etc.)
  - Podcasts
  - Photo platforms (web albums)
  - Video platforms
  - Forums
  - etc.
- Use social bookmarking
- Subscribe to RSS feeds
- Look into SEO (search engine optimisation) web monitoring tools
  - Analysis tools, e.g. Google Analytics