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Creating a Volunteer Handbook

A volunteer handbook serves three major purposes: relaying crucial organizational information, establishing clear expectations, and emphasizing the importance of volunteers to your organization. By sharing this information with your volunteers upfront, you are both welcoming them to your organization and ensuring that they fully understand their role and responsibilities.

This template offers a proposed outline for a volunteer handbook. Each section contains information about why the section is important, suggestions for what should be included, and tips on how to write the section. Examples of individual sections and complete volunteer handbooks have also been provided. The best handbooks are succinct and easy to understand. Your completed handbook should be no longer than fifteen pages, excluding appendices. Consider sharing this handbook with your volunteers as part of a training session, orientation, or welcome meeting where they will have opportunities to ask questions and seek clarification.

Before you begin, it may be helpful to gather organizational documents, staff handbooks, grant proposals, volunteer policies and procedures, or other items that could help you to answer the following questions:

- Why are volunteers important to your organization? What is their role?
- What does your organization do? What are your mission, values, and goals?
- What rights and responsibilities do volunteers have in your organization? What are you expecting from them? What benefits will they receive in return?
- What are the policies and procedures for your volunteer program?
- How can you create a welcoming environment for your volunteers? What information do they need to know to feel like a part of your organization?

Section 1 - Welcome Letter

Why this section is important: The welcome letter is an opportunity for your organization to create an inviting environment for your volunteers and to explain their critical role in the fulfillment of your mission.

What the section includes:

- **Welcome to the Organization**
- **Personal Explanation of the Value of Volunteers to the Organization**
- **Introduction to the Handbook as an Important Tool**

How to write it: The welcome letter should be brief, engaging, and accessible to multiple audiences. Some tips:

- Keep it short. A half page is great
- Use plain English. Try to avoid technical terms, organizationally specific acronyms, or jargon.
- Consider having it come from your Executive Director or a member of your Board so that it's clear that your love of volunteers comes from the top. If more than one of your executive managers is interested in writing a letter, limit it to no more than two letters and keep the total length to one page or less.
- **Technology Tip:** Consider keeping this letter as an insert and using Microsoft Word's Mail Merge feature to personalize the letters for each volunteer.

Examples: See the examples below and the links to examples provided at the end of this document. Please keep in mind that every organization's needs are different and therefore your organization may state policies and procedures differently from the examples below.

Example 1: Texas Dept. of Human Services (n.d.).

From the Commissioner

Welcome to the Texas Department of Human Services (DHS)! For more than 20 years, volunteers have been a valuable resource for our clients and staff. By volunteering, you'll not only help your fellow Texans, but also strengthen our workplace and promote community involvement.

This guide will help you have the best possible experience as a volunteer. It answers frequently asked questions and gives information about the agency, our clients, and your role. Your supervisor can answer most of your other questions, but please feel free to contact the Volunteer Services office any time you need its assistance.

Thank you for volunteering. I'm glad you've chosen to be a member of the DHS team -- you're making a difference to Texans in need.

*Sincerely,
[DHS commissioner]*

Example 2: Beaverton School District (2007, p. 3).

Superintendent's Message
"Volunteerism strengthens the fabric of our schools"

Dear Volunteer,

On behalf of the School Board, staff and students, I want to thank you for your interest in and involvement with the Beaverton School District.

*Reaching the District goal of increased academic achievement for **each** student requires a community-wide effort. In addition to the commitment of our teachers, administrators, and support staff, we must have strong community partnerships. School volunteers play a critical role in this effort.*

The District's outstanding volunteer programs serve students in a variety of ways, from the pre-kindergarten level through high school. Volunteers are true partners in our schools. We cannot be successful without you.

Thank you in advance for helping us to increase the quality and effectiveness of education our children and young adults deserve. I look forward to working closely with you as we unite to serve our children and young adults.

Sincerely,
[Superintendent]

Optional Section – Table of Contents

Placement: You can put this section anywhere from before the welcome letter to after the purpose section. Just make sure it's early enough that it doesn't get lost. If your handbook is particularly short, you can choose to forgo this section.

Technology Tip: Microsoft Word has an automatic table of contents maker. You can choose to insert headings into your document and then Word will create the table of contents from your headings. To get directions on this feature, search for "table of contents" in Word's help section.

Section 2 – Purpose of the Handbook & How to Use It

Why this section is important: People won't read a long document unless they believe that it's going to be useful. This section is your chance to explain why the handbook is important and how to get the most out of it. This section may not be necessary if you have already covered this information in the welcome letter.

What the section includes:

- **What is in the Handbook**
- **How You Expect Volunteers to Use It**

How to write it: This section must be brief and easy to understand. Some tips:

- Stress the importance of reading the handbook and keeping it handy
- Encourage volunteers to ask questions

Examples: See the examples below and the links to examples provided at the end of this document. Please keep in mind that every organization's needs are different and therefore your organization may word or state policies and procedures differently from the examples below.

Example 1: An excerpt from *Model Volunteer Handbook* (Wittich, 2003, p. 10).

Purpose of the Handbook

This Handbook has been produced to help you become better Nonprofit Friend's volunteers. This book will share with you a little of our history, philosophy, practices, and policies, as well as all the benefits we will provide to you as a valued volunteer.

No volunteer handbook can answer all the questions you might have about our programs. It is in our person-to-person Boot Camp that we can better get to know each other, express our views, and volunteer together in a harmonious relationship.

We hope this Handbook will allow you to feel comfortable with us. We depend on you -- your success is our success. Please don't hesitate to ask questions. Your volunteer coordinator will gladly answer them. We believe you will enjoy your volunteer work and your fellow volunteers here. We also believe you will find Nonprofit Friends a good place to volunteer.

We ask that you read this Handbook carefully, and refer to it whenever questions arise. We also suggest that you take it home so your family can become familiar with Nonprofit Friends and our policies.

Example 2: The Red Cross South Plains Regional Chapter (2008, p. 1).

About This Handbook

Welcome to the American Red Cross. Thank you for joining our cadre of over 500 thousand American Red Cross volunteers.

This handbook was prepared to give you some essential information about the policies and expectations of the South Plains Regional Chapter. The handbook has been organized by topic to help you find information you need easily. You are also encouraged to talk with you supervisor and Volunteer Coordinator or Volunteer Chair if you have any questions about the content of this handbook.

The South Plains Regional Chapter reserves the right to modify the policies in this handbook without prior notice. The policies described in this handbook replace all prior policies, handbooks, or policy guidance provided.

Thank you for giving your time and talents to help others. We hope that you find volunteering with the American Red Cross a positive and rewarding experience.

Section 3 – Organizational Information

Why this section is important: In order for volunteers to feel like they are an important part of your organization, they need to know something about it. In this section, you will be describing the history, mission, and vision of your organization – where you’ve been, who you are, and what you’re planning to do next. The goal of this section is to encourage your volunteers to take ownership of your mission, vision, and goals.

What the section includes:

- **Organizational History and Background**
- **Mission**
- **Vision**
- **Core Values**

How to write it: This will be an easy section to write because chances are your organization already has experience communicating these components to a variety of audiences. Look to grant proposals or recruitment brochures that you have already written to capture this information.

Examples: See the examples below and the links to examples provided at the end of this document. Please keep in mind that every organization’s needs are different and therefore your organization may word or state policies and procedures differently from the examples below.

Example 1: An excerpt from The Royal Society for the Protection of Birds Volunteer Policies (Murray, 2009, p. 1-2), accessible at <http://www.oursharedresources.com/Resource/ViewResource/490>

The RSPB speaks out for birds and wildlife, tackling the problems that threaten our environment. We are the largest wildlife conservation charity in the UK. We have over a million members and together we speak out for nature. Wildlife and the environment face many threats. Our work is focused on the species and habitats that are in the greatest danger.

We save birds and wildlife - we're pulling threatened wildlife back from the brink. We're doing it for corncrakes, avocets, red kites, stone-curlews, white-tailed eagles, choughs and albatrosses, great yellow bumblebees, water voles...

We save special places - saving wildlife means saving the places where it lives. We protect special habitats and even recreate them where they've been lost. We've turned carrot fields into reedbeds and grown heathlands from seed.

We save the environment - we can't stop climate change, but we can do everything within our power to lessen its effects and to help wildlife adapt. Our conservation work helps, and we're also campaigning to influence policies on energy, agriculture, transport, planning, fisheries, climate and water use - which all affect the environment.

We connect people with nature - we believe that bringing people closer to nature enriches their lives. We create opportunities for people to experience wildlife at first hand. This is especially important with children - getting kids excited in the natural world is right up near the top of our priorities.

We have more than one million members, over 13,000 volunteers, 1,800 staff, over 200 nature reserves, 10 regional offices, four country offices... and one vision - to work for a better environment rich in birds and wildlife.

Section 4 – Volunteer Information

Why this section is important: Volunteers need to understand how they fit into your organization and how they can help to further your mission. It's also important for everyone to have the same, shared expectations about the volunteer process.

What the section includes:

- **Mission, Vision, Goals for Volunteer Involvement**
- **What the Volunteer Should Expect from the Organization**
- **What the Organization Should Expect from the Volunteer**

How to write it: Don't be afraid to expand more on this section because it is the core of your volunteer handbook. Just make sure that the section is easy to read and follow. Some tips:

- For the expectation sections, consider using bullet points.
- Keep expectations positive, realistic, and straightforward. Don't list anything that you can't follow through with. This section can be a helpful resource if you or one of your volunteers has concerns later on.
- Make sure that each of the three components in this section is a distinct portion of the handbook. Don't let this section get muddled.
- If you work with a sensitive population, you could include information on expectations for interacting with clients here or in policies and procedures
- You might consider including recognition or volunteer support in the expectations volunteers can have for your organization

Examples: See the examples below and the links to examples provided at the end of this document. Please keep in mind that every organization's needs are different and therefore your organization may word or state policies and procedures differently from the examples below.

Example 1: An excerpt from COTA Queensland Volunteer Handbook (2009, p. 14), accessible at <http://www.oursharedresources.com/Resource/ViewResource/547>

As a volunteer you have the right:

§ To work in a healthy and safe environment

§ To be interviewed and engaged in accordance with equal opportunity and anti-discrimination legislation

§ To be given accurate and truthful information about the organization for which you are volunteering

§ To be given a copy of the organizations volunteer policy and any other policy/procedures that affect your role

§ Not to fill a position previously held by a paid worker

§ To have a role description and agreed hours of contribution

§ To be provided with orientation to the organization and the role

§ To have your confidential and personal information dealt with in accordance with the principles of the Privacy Act 1988 and

§ To be provided with appropriate training and support to carry out your role.

As a volunteer you have the responsibility to:

§ Be reliable

§ Respect confidentiality

§ Carry out the specified position description according to the position description

§ Be accountable for your actions

§ Be committed to the organization

§ Undertake training as required by the organization

§ Ask for support when you need it

§ Let the organization know as early as possible if unable to attend

§ Be courteous to clients, staff and other volunteers

§ Raise any issues you may have with the organization and not denigrate the organization to clients, staff and other volunteers

§ Give notice before you leave the organization

§ Value and support other team members

Example 2: The Red Cross South Plains Regional Chapter (2008, p. 7-8).

What You Can Expect as a Red Cross Volunteer

Your responsibility as a volunteer:

1. Be realistic and candid in accepting your assignment, taking into consideration your interests, skills, and availability, as well as the needs of the South Plains Regional Chapter

2. Learn your volunteer assignment as well as you can by completing all required training, asking questions, and staying in touch with your supervisor.

3. Contribute to the Red Cross by being reliable and dependable in doing your job and working with your co-workers.

4. Follow all policies and guidelines of the South Plains Regional Chapter, sign a Code of Conduct, Intellectual Property and Confidential Information Agreement, and observe confidentiality when needed, and engage in appropriate public behavior at all times.

5. Participate in the feedback process by letting the chapter know how you feel about your volunteer experience and by giving constructive suggestions for improvement in any area.

6. Develop your skills as a volunteer by participating in training and development opportunities. Learn as much as you can to do the best job possible.

What You Can Expect the Chapter to Provide for You

- 1. A suitable assignment based upon your interests, skills and availability, as well as the South Plains Regional Chapter's needs.*
- 2. Orientation and training to help you perform your job.*
- 3. The opportunity to work as part of a team, to contribute to the welfare of the community and the organization, and to be recognized for your contribution.*
- 4. The support you need to do your job, including necessary equipment, supplies, workspace, and helpful supervision.*
- 5. The opportunity to give feedback about your Red Cross volunteer experience.*
- 6. The chance to grow and develop as a volunteer through participation in other South Plains Regional Chapter activities, special training events, meetings, and more responsible positions.*

Section 5 – Nuts and Bolts

Why this section is important: The nuts and bolts section of the handbook is your opportunity to advise incoming volunteers on how to work appropriately and effectively in your organization. It can include everything from legal concerns to best practices. Be careful to include only those regulations and processes that have been approved and implemented through appropriate organizational leadership. Please see the Policies and Procedures section of this document for more information on creating appropriate volunteer regulations.

What the section includes: This will vary significantly from organization to organization. See the table below for some ideas.

- **Eligibility Requirements**
- **Photo Releases**
- **What to Bring with You**
- **Performance Feedback or Evaluation Procedure**
- **Codes of Conduct, Behavior, or Ethics**
- **Dress Code**
- **Training and Orientation Information**
- **Reimbursement Policy**
- **Conflict of Interest Policy, Whistleblower Policy**
- **Substance Use Policy**
- **Background Checks**
- **Technology Policy**
- **Confidentiality Policy**
- **Safety and Security, Emergency Procedures, Emergency Contact**
- **Grievances or Dispute Resolution**
- **Attendance Policy**
- **Identification Policies**
- **Personal Vehicle Use Policy**
- **Representing the Organization, Media Inquiries**
- **Record Keeping, Timesheets**

How to write it: This section should reflect the volunteer policies and procedures provided to your staff, written in “volunteer friendly language”

Examples: See the example below and the links to examples provided at the end of this document. Please keep in mind that every organization’s needs are different and therefore your organization may word or state policies and procedures differently from the examples below.

Example 1: The Red Cross South Plains Regional Chapter (2008, p. 9-13).

** Please note – the content in this example is good, but the wording could be more welcoming. Handbooks should talk TO volunteers not ABOUT them**

Volunteer Time

Our volunteers donate something far more valuable than money... their time... so it's important that we track and recognize the amount of time our volunteers donate. This includes meetings, training, presentations, and office and fieldwork. Volunteers should record their time on one of the clipboard provided at the Chapter office.

Service at the Discretion of the Organization

The South Plains Regional Chapter accepts the service of all volunteers with the understanding that such service is at the sole discretion of the South Plains Regional Chapter. Volunteers agree that the organization may at any time, for whatever reason, decide to terminate the volunteer's relationship with the South Plains Regional Chapter or to make changes in the nature of their volunteer assignment.

Emergency Contact Information

It is the responsibility of each volunteer to regularly update their personal contact information and emergency contact information. This update can be made by contacting the Volunteer Coordinator or Director.

Clients and Relatives as Volunteers

Clients may be accepted as volunteers, where such service does not constitute an obstruction to or conflict with provision of services to the client or others. Relatives of clients may also serve as volunteers, but will not be placed in a position of direct service or relationship to members of their family who are receiving services.

Placement with At-Risk Clients

Where volunteers are to be placed in direct contact with at-risk clients, additional screening procedures may be instituted. These procedures may include reference checks, direct background investigations, criminal investigation, etc. Volunteers who refuse permission for conduct of these checks will not be accepted for placement with clients.

Example 2: The Alachua County Office of Waste Alternatives (2009, p. 11).

****Please note - this is just a small excerpt from a longer list of volunteer policies. Notice how the policy is addressed TO the volunteer.****

Identification

We hope that you will be proud to be identified as a volunteer with our department. We will provide you with a name badge and/or an official t-shirt to wear while volunteering. Long-term volunteers will be provided with a county picture ID.

Section 6 – Helpful Information About the Agency

Why this section is important: This section is a place to include additional information about working with your organization that is not covered in other sections. Every organization has its own culture or way of operating, volunteers will feel more comfortable if you are transparent about how things work

What the section includes: This will depend on your organization. Some possible sections include

- **Commonly Used Acronyms**
- **Job Titles, Staff Organization Chart**
- **Contact Information**
- **Parking, Building Access**
- **Maps**
- **Holidays and Office Hours, Yearly Calendar**
- **Frequently Asked Questions, Q&A**

How to write it: Think of what you wish you had known your first day on the job and share that information with your volunteers. Be careful not to give your volunteers information overload. Stick to relevant information/the most important items.

Examples See the example on the next page and the links to examples provided at the end of this document. Please keep in mind that every organization's needs are different and therefore your organization may word or state policies and procedures differently from the examples below.

Example 1: Texas Dept. of Human Services (n.d., p. 8).

What Do All the Letters and Numbers Mean?

Glossary of terms and acronyms

A&D: Services for the Aged and Disabled.

Adult foster care: Care provided to elderly and disabled people in a homelike setting.

Advisory committees or councils: Committees or councils mandated by state law or federal regulations or established by agency programs to advise and assist the Texas Board of Human Services and staff on issues and services.

ANH: Adopt-A-Nursing Home.

BJN: Budgeted job number.

BJST: Basic job skills training.

CBA: Community-based Alternatives.

CCAD: Community Care for the Aged and Disabled.

CLASS: Community Living Assistance and Support Services.

DAHS: Day Activity and Health Services.

EBT: Electronic benefit transfer.

EITC: Earned Income Tax Credit.

EOB: Explanation of benefits (medical).

Fair hearing: An appeal opportunity for an applicant or client who disagrees with or wants to appeal an action taken on the client's case.

FI: Finger imaging.

Fiscal year (FY): Annual period for which funds are appropriated. The state of Texas fiscal year is from Sept. 1 through Aug. 31; the federal government's fiscal year is from Oct. 1 through Sept. 30.

FSP: Food Stamp program.

FVP: Family Violence program.

GWS: Generic worksheet.

HCFA: Health Care Financing Administration; the federal government division that regulates Medicaid and Medicare.

HHS: U.S. Department of Health and Human Services.

Section 7 – Signed Volunteer Agreement/Acknowledgement of Receipt of Handbook

Placement: This section can also go at the front of the handbook. Just make sure it will be easy to locate.

Why this section is important: The purpose of this section is simple: accountability. A signed agreement or acknowledgement legitimizes the process of going over the handbook, makes it more likely that volunteers will take the handbook seriously, and gives you written proof that all parties understood expectations.

What the section includes: This section is a **one-page agreement between you and your volunteers**. You should have two copies included – one for the volunteer to keep and one for the organization to keep.

How to write it: This agreement must be brief and clear. Some tips:

- One page maximum
- Leave space for volunteer to sign and date. Volunteer manager may also want to sign and date.
- Volunteers should be acknowledging that they've read and understood the manual.
- You should specifically refer to the expectations listed for the volunteer and the organization, but you do not have to relist them.
- Have a policy for when you will collect this agreement and stick to it.

Examples: See the examples on the next page and the links to examples provided at the end of this document. Please keep in mind that every organization's needs are different and therefore your organization may word or state policies and procedures differently from the examples below.

Example 1: The Red Cross South Plains Regional Chapter (2008, p. 30).

American Red Cross

Effective November 1, 2008

Acknowledgement and Receipt

Receipt and Review of Policies Form

Signature on this receipt acknowledges that you have reviewed the South Plains Regional Chapters' volunteer handbook. Please sign and date the receipt.

Volunteer Handbook Statement of Certification

I, _____, certify that I have received and reviewed the South Plains Regional Chapter of the American Red Cross Volunteer Handbook.

I further understand that, by signing this statement as required I am indicating that I have read the Volunteer Handbook and understand its contents, or have discussed questions I have with the Volunteer Coordinator or Director. I also realize that this statement will become a permanent part of my volunteer personnel file.

Volunteer's Name (Please Print)

Signature

Date

Please return to the South Plains Regional Chapter, 2201 19th Street, Lubbock, TX 79401

Example 2: Hagley Museum and Library (n.d., p. 2).

Volunteer Agreement Signature Form

To be read, signed, and returned to the volunteer coordinator before beginning any volunteer activities.

I, _____,

(Please print your name)

have received a copy of the Hagley Volunteer Handbook and agree to follow the policies and procedures as listed in the handbook.

Signature

Date

Return to:

Angela Williamson
Coordinator of Volunteers
Hagley Museum and Library
P.O. Box 3630
Wilmington, DE 19807

Optional Section – Notes Page

You should review the handbook with your volunteers in person during a meeting or orientation. Leave space for your volunteers to take notes while you are going over the handbook.

Optional Section – Appendices

Try to keep your handbook between 10 and 15 pages. If you have additional information, add it in the form of an appendix at the end.

Please see the following links to examples of complete Volunteer Handbooks:

<http://www.oursharedresources.com/Resource/ViewResource/490>: This is a volunteer handbook posted by Alan Murray. It does a good job of describing the mission and goals of the organization and describing the role that volunteers play in that mission.

<http://www.oursharedresources.com/Resource/ViewResource/320>: A volunteer handbook posted by the Alachua County Office of Waste Alternatives. This is a colorful and well written handbook which does a great job of putting things in “volunteer friendly” language.

<http://www.oursharedresources.com/Resource/ViewResource/288>: This is a general volunteer handbook created by the Central Volunteer Managers Network in Adelaide Australia. It’s designed so that Volunteer Managers can modify it for their own programs. The strength of this document is how complete and well-organized it is. It also includes a section on working with aboriginal populations, which might be a useful resource if you need guidance on writing a section about working with a specific type of population.

Works Cited

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