

Slide 1: My name is Heidi Elliott and I am currently the volunteer engagement manager at community support connections. Community support connections, which is located in Breslau, Ontario, is a not-for-profit charity organization whose mission is to help adults with different abilities and seniors live independently with dignity. Community support connections, offer services under four areas: nutrition, physical health, social wellbeing, and help at home. I oversee volunteers that assist with meals on wheels, transportation, shopping, lead exercise classes, provide friendly visits just to name a few. Before coming to community support connections, my background was mostly in long-term care as a program manager who also oversaw volunteers. I have a degree in recreation and leisure from the University of Waterloo, specifically in therapeutic recreation. Currently my role includes overseeing around 500 volunteers. Our volunteer team of two is responsible for all onboarding, screening, and training of new volunteers. We also have developed and implemented a recognition and retention plan. We conduct presentations in the community to recruit new volunteers and hold volunteer events throughout the year.

Slide 2: In this module, you'll be introduced to the intersectionality of human resources and how this can both mirror and differ for volunteer management. You will gain awareness and be able to determine how to create a welcoming culture for your volunteers. You will be able to name the varied ways in which volunteers like to be recognized, which is similar to recognizing staff. And be introduced on how to track volunteers and the importance of this. You will be able to recognize the benefits of volunteering for both the organization and the volunteer. By knowing why volunteers want to help, this allows organizations to advertise positions better and to target their key demographics. We will also cover the cycle of the volunteer from start to finish, which is similar to the staff cycle. We will discuss the differences between unionized and non-unionized environments. You will be able to describe some of the risks volunteers bring to organizations and ways to minimize them. Lastly, you will have an understanding of how to better retain your volunteers so that you will need to recruit less often.

Slide 3: Here are the presentation topics we will cover to meet those objectives. How to make your organization welcoming, creating that ideal culture, recognizing and retaining your volunteers, benefits of volunteering for both the organization and for the volunteer, volunteer demographics and their motivations, volunteer roadmap, unionized environments, risk management, and then lastly, we'll go over some key takeaways.

Slide 4: So first we will discuss how to make your organization welcoming to your volunteers. As with staff, you want to create an environment where your volunteers feel safe, valued, and useful. You can shape this environment by educating your own staff on how to treat your volunteers. By conducting ambassador training, like we do at community support connections, this can empower staff to be volunteer coordinators where it's common practice to say hi to all volunteers and ask them if they need help with whatever task it is they're doing to create a more inclusive and welcoming environment. Volunteers need to feel as if they're part of the larger team. We can do this by having open and ongoing communication, whether it be face-to-face or through emails, phone calls. We also try to ask for their feedback, wherever possible. We have done this countless times throughout the course of the pandemic. Whether it was

asking if they felt safe with current protocols or just to keep them engaged until we could return in person. Many times your volunteers are the eyes and ears of the organization, and they can be vital in making decisions that impact everyone. Recruitment will likely be ongoing especially for organizations that rely heavily on volunteers. You will need to have a multifaceted approach where you not only conduct presentations at churches, service clubs, festivals, but also use social media and word of mouth from your own volunteers and staff to influence participation. Training will be discussed throughout this presentation, but having a very, not a one size fits all way of training your volunteers is key. Not everyone can learn the role efficiently through a zoom call or online training. You might need to have an in-person option for them as well. You could also offer, add on education sessions that might, might not have a direct impact on their role, but could be of interest to them. We have offered several mental health zoom sessions that not only benefited volunteers, but also staff. Next step, we'll take a deeper look at how you can recognize your volunteers in meaningful ways.

Slide 5: As we were interested in revamping our retention plan, we decided to survey our volunteers to see how they actually liked to be recognized. In February 2021, we received feedback from 144 volunteers on the different ways they like to be thanked. Many actually said no thanks was needed or low, no-cost was preferred. If you take a look at that bar graph, this depicts what volunteers preferred the most, which was verbal thank-you's. Higher cost items, such as events, awards, or swag items, were rated the lowest.

Slide 6: If we were looking at retaining volunteers for the long haul, we need to ensure our culture is welcoming. For volunteers to feel safe, we need to be thinking about protocols and with a pandemic this has been heightened. Volunteers need adequate training for their role so they can feel prepared especially when they're in situations where they are unsupervised. Having emergency training, which includes a point person and a number to call is very helpful. You will need to be checking in with your volunteers just as you would your staff. To ensure they are happy and fulfilled in their role, you need to have a plan that includes regular communication and possibly face time. We want to ultimately set up volunteers for success. And so, this might mean finding another position or modifying a position if things are not going smoothly. As seen here is Mary a meals on wheels volunteer driver who had regularly had a runner volunteer, who she was teamed up with. Some of our volunteers work together as one. So, one person would be the navigator and the other person would be the driver. This makes for a more enjoyable experience with less stress. So, they're not in a situation alone.

Slide 7: Now that we have looked at what our volunteers need. Let's dive in deeper to see who we are actually targeting to help our organization. Likely you will have a variety of volunteers with a varied background, socio-economic status, culture, religious backgrounds, age, sexual orientation, et cetera. But it would be helpful to possibly know a few demographic indicators to ensure you are speaking to the right audience. We found for instance, that during the pandemic, the average age of our volunteer dropped by seven years. We all of a sudden had younger, middle-aged people focusing on us, wanting to help out in any way they could. As for keeping track of statistics, it's helpful to know quarter to quarter, year after year, your busy times for recruitment, screening, and onboarding. For community support connections, we

know that the summer months are quite slow with new applications as many people are on holidays and students are out of town. But come September, we will be competing with various organizations to recruit new volunteers as people start thinking about filling spare time, enhancing their resume. Your volunteers might not just be your volunteers. They are your link to the greater community and can also become, or be, your donors.

Slide 8: Along with knowing who our target audiences, we should also be able to speak to their motivations for volunteering. Volunteers could be looking at your organization for a variety of reasons. Wanting to develop new skills that will help them with future employment. With the pandemic, we have seen a surge in volunteers just wanting to help out and get out of their home especially if they live alone. Many have felt a sense of urgency to help those in need in their community by giving back. Some may be new to the area or to the country and want to practice speaking in another language to also help with future employment. Volunteers also may reach out for a second chance and needing community service. When we asked our volunteers in February, 2021 in an experience survey, 96% indicated that the top two motivations were to give back to their community and to fulfill a need by helping and supporting others.

Slide 9: There are also many advantages to having volunteers at your organization. Volunteers, although take time to recruit, onboard, and train, can also offer a substantial benefit to your organization for the following reasons- there may be roles that could easily be filled by volunteers that help support staff in the roles that they do. For instance, we have a kitchen where meals are prepared each day and then delivered by our volunteers to our clients. To keep costs down and the meals affordable, we have volunteers deliver the meals. Volunteers also come with a diverse background with networks across your community. This helps you reach your clients easier as you will already have buy-in from volunteers. Volunteers come with a diverse range of skills, experience, and expertise, which expands beyond your staff members. They also often are on the front lines and have firsthand knowledge of how to improve processes. And as previously mentioned, your volunteers also could become donors. In 2020, our volunteers represented 34% of our donor base. We recently added a 50/50 split for mileage, making it more affordable to some volunteers to donate their mileage.

Slide 10: The volunteer roadmap looks similar to that of a staff person. I would argue that as an organization needing the support of volunteers, we need to do a lot of recruiting to sustain a healthy volunteer pool. As opposed to when you need to hire, it is usually done through an online posting and a few job boards. Volunteers can be found through your local volunteer hub, school portals, such as university and colleges, people searching your website, word of mouth. Ensure that you have made it easy for them to apply. We have constantly altered our online application to make sure it's not too lengthy, but covers just enough to get a snapshot of our perspective volunteer. We have utilized the automated system for booking interviews through Calendly. This makes it very easy for the volunteer to book at a time that works in their schedule and they can cancel or rebook as well. Once you've had the interview and the volunteer has a good idea of the position. You will start the screening and training process. You will likely want to offer an overview of your agency, your mission and vision, what to do in an

emergency, who their contact person will be, et cetera. There might also be some training that you can do at this step as well. We have all of our volunteers complete AODA training. Accessibilities for Ontarians with disabilities act before they can begin. This is also something every staff member has to complete. For a meals on wheels position for instance, you might have them complete a client falls training or how to establish healthy boundaries especially if they're in a client facing and unsupervised role. Once they have completed their screening for us, it would be, they would also need to do a vulnerable sector police check, have two references, and any program specific requirements, like having an appropriate amount of car insurance or a clean driver's abstract. They would, these items would be required for the job specific training. This could be done through a training video or in-person. Prior to the pandemic, all our trainings were in person, which took a significant amount of staff time. Approximately an hour per volunteer. Once we were forced to make training videos, they were not only a time-saver, but they ensured that the same information was being passed along to volunteers every time. Ensuring volunteers are in the right position means keeping open communication with them and checking in to see how things are going. You will also want to process for when a volunteer leaves you, hopefully on a good note.

Slide 11: So, what about unionized environments? Most organizations won't be working with unions, but if you do, you will want to develop a strong relationship with them. Unions just really add another layer to your organization. As stated in the quote on this slide, when you are developing a new volunteer role, it would be advisable to have the union review it to ensure the position isn't too closely mirrored to that of someone in the bargaining unit. This partnership and mutual respect is key and will reduce conflict. Currently, there is no union at community support connections. In the non-unionized environment, you don't want to ever replace a staff role with the volunteer role, but there may be times staff need to backup their role. In our meals on wheels example, we have about 20 routes per day that need to be delivered. We can usually cover about a hundred percent with volunteer drivers, but there are times when we need to send out a staff, if say a volunteer cancels last minute. In non-unionized environments, you'll be able to create more overlap between staff and volunteer roles. However, the same premise does apply that volunteers should never do a staff role, but obviously there are some exceptions.

Slide 12: When developing position descriptions, it's important to recognize what risks are inherent with the role. For instance, if someone was delivering meals on wheels, risks could include injury to back if meal bags are too heavy, accident while driving, coming upon a client who has fallen, et cetera. There are ways in which we can minimize these risks. You will need to have clear up-to-date job descriptions. As with alterations for staff routines during COVID, volunteer roles also need to be safe. Volunteers have hearts of gold. This is obvious as most are in it just to help out their neighbour, but there can also be boundaries broken due to their desire to help. We try and outline the importance of, the importance upfront of not breaking those boundaries. For instance, if a meals on wheels volunteer accepts a Christmas card with \$50 in it because they don't want to seem rude or ungrateful, the volunteer could also be setting a precedent for other delivery drivers. So, what might seem harmless could be putting a client at financial risk as they may not be able to afford that amount to be gifted. Ensure you

have strong policies in place and communicate those up front. Volunteers also may need annual reminders and training on your policies and procedures. Just as you have staff complete training, like infection, prevention, and control, you will also want to offer this training to volunteers. For staff, this is easier to control. You can withhold work or pay, pay them the extra time it takes to complete the training. Volunteers and staff should also sign a declaration each year that they have not had anything come up in their vulnerable sector police check. Training becomes really important and offering it once isn't enough. We look at incident reports to see if there are trends we need to address. Not only with staff and volunteers. Having staff and volunteers report near misses can ensure risks are managed and do not become incidents. An example of this might be, if a volunteer was delivering a meal and slipped on Mr. Smith's driveway, they almost fell, but were able to catch themselves. This needs to be reported as the next volunteer might not be so lucky.

Slide 13: Now that we have covered the ways in which we can minimize those risks, you need to be aware of those that we can't do much about. There might be risks that you are willing to accept to fulfill your mission. At community support connections, we know that if we want to deliver meals at an affordable cost to our clients, we need to utilize volunteers to do that. When situations come up where the risks are high and a volunteer has made an incorrect decision, as volunteer managers, you will need to address them with care and understanding. Offer alternatives for the next time they are in an unsafe position. There are roles that you, that might have to be unsupervised. These need to have more communication so that the volunteer feels a part of the team. We also have our volunteers sign a code of conduct when they join the organization. This can cover an array of items or situations that might come up in their role, such as reporting abuse, ensuring client's privacy and confidentiality, job attire, communication flow through, et cetera.

Slide 14: In summary, there are a lot of ways in which the volunteer path mirrors that of staff. We want to ensure we are treating our volunteers well. Remember you are competing against other organizations for them. Verbal and written appreciation goes a long way so do it often and have a plan and then it's intentional and not forgotten. You want to create a culture where volunteers feel valued, safe, and part of the team. If you have a volunteer who isn't thriving in their role, it's just like having a staff member who is unhappy. We want to ensure our volunteer feel productive. It can be frustrating for everyone when the position they are in just isn't a fit. If and when your volunteers leave, ensure they leave on a happy note. Exit interviews and a written or verbal thank-you can be appropriate. Surveys can be a powerful way to engage your volunteers. Ask them, but also be prepared to act on their advice. Finally, communication is key. Throughout the pandemic, many organizations just didn't have the answers. But even when we say we're working on it, volunteers feel like they're not left in the dark so communicate with them as much as possible. Thank you for your time.