

# Policy Development for your Volunteer Program

## Why Policies?

Policies guide the operation and decision-making process within your volunteer program. Many organizations do not have written policies but have standard practices they follow. If written down, these practices could become a policy.

## Policies are important because:

- ✓ They provide the basic framework for how your organization involves volunteers
- ✓ They are a risk management tool
- ✓ They provide your program with consistency and eliminate guesswork in decision making
- ✓ They can help guide decisions for difficult situations and provide support to justify the decision when needed

## What is a policy?

A policy is a formal documented statement that *tells us **what*** to do. Policies can be a statement of belief, a statement of principle, or a statement of action.

A **statement of belief** is a policy that tells us how our organization sees things or what is important to the organization. Examples of this type of policy would be: diversity policy or involvement of volunteer's policy.

A **statement of principle** is a policy that tells us what is and what is not safe. Examples of this type of policy would be: a standard of care policy, use of waivers policy or standard of conduct policy.

A **statement of action** is a policy that helps your organization run effectively. Examples would be all those policies that are directly related to the management of volunteers in your organization: orientation & training policy, supervision policy, recruitment policy or recognition policy.

## What is a procedure?

A procedure is a set of formally documented steps that guide you through implementation of your policy. A procedure tells us **who** will do the work and **how** it will be done.

## Who should be involved in developing policy for your volunteer program?

When adopting policies for your volunteer program or reviewing existing policies, it is important to secure support and help from others connected to your organization. By bringing others in to assist you, you create the buy-in and support to begin implementing new policies or to change your existing policies. Others who may be able to assist you include:

**Other Staff:** those connected to your volunteer program, those with an interest in involving volunteers, or those who have had experience writing policies and procedures.

**Volunteers:** often the very people for whom we are writing policies are not consulted. You may have volunteers within your organization that would be able to contribute to developing or redeveloping policies for your program. Long term volunteers may be able to bring the experience you need and the perspective of a volunteer to the table.

**Member(s) of your board of directors:** if the board of directors of your organization is responsible for adopting or approving policy, it would be advantageous to include them in the development of new or revision of existing policies. Even if they are not responsible for approving the policy within your volunteer program, they may be able to bring a 'big picture' perspective to the policies you are developing.

**Lawyers or insurance agents connected to your organization:** they may be able to provide input into policy development. Policies related to or tied into risk management may benefit from having the perspective of lawyers or insurance agents.

**Clients:** as with volunteers, clients are often overlooked. Depending on the nature and mandate of your organization, clients may be able to provide assistance with the development of policies for your volunteer program.

## How do you write effective policies?

When developing policies for your volunteer program, consider the following steps:

1. **Get help.** Ensure that you secure help and support. Consider the people you may wish to involve.
2. **Organize.** What policies do you currently have? Review these. What policies do other organizations have that may operate similar yours? Review these as well. A word of caution: although it is beneficial to review policies from other organizations, you should never just adopt them as they are. Make sure you consider the needs, risk management strategies and outcomes required by your own organization.
3. **Define needs.** What are the needs of your volunteer program? Ask yourself:
  - ✓ Are there issues, problems or opportunities that exist?
  - ✓ Would a policy statement assist in alleviating issues or problems or in enhancing opportunities?
  - ✓ What area of your volunteer program is least effective and what rules need clarifying?
4. **Write the policy.** You want to ensure that it is written in plain language and easily understood by everyone in your organization. By using the present tense, a direct one and active words, your policy statement will read like a 'what to do' statement. Although you want

the statement to be as brief as possible, ensure that what you need to say can be understood.

5. **Approve the policy.** Once you have written the policy, you need to ensure it goes through the proper approval process in your organization. Find out how your approval process works. Some organizations need to have the board approve the policy; in other organizations, senior management may be able to provide approval.
6. **Implement and communicate the policy.** Once approved, you need to begin implementing the policy. Part of implementation is communicating to those in your organization – staff, volunteers, clients and others, the nature and purpose of the policy.
7. **Evaluate the policy (review).** Once written, approved, and implemented, policies must be reviewed on a regular basis. As trends change and new legislation or practices come into effect, you may find your policy statement needs updating.

## Resources

Graff, L.G. (1997). *By Definition: Policies for Volunteer Programs: A Manual for Executive Directors, Board Members, and Managers of Volunteers*. Dundas, ON: Graff & Associates.

Davies, Mary (2000) *Developing Your Policies & Procedures Manual: The Basics*, Toronto, Ontario. Ontario Community Support Association

Fletcher, Kathleen (2000) *The Policy Sampler: A Resource for Nonprofit Boards*, Washington, DC. BoardSource.

## Acknowledgement

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