Volunteering in Canada:
Practical Findings from Research,
2000 – 2007

Reg Noble

Canada

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This review of volunteering research was produced during the last three months of operation of the Knowledge Development Centre at Imagine Canada in 2007. To bring this review to completion under such circumstances required tremendous effort, enthusiasm, and teamwork by staff of the Knowledge Development Centre and by the editors and translators from outside the Centre. Words cannot express sufficiently the thanks that are due to these people who made this review possible.

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INTRODUCTION

Volunteering and commitment to one's community is a deeply rooted tradition in Canada and a major factor in maintaining the vibrancy and well-being of Canadian society. As Janet Lautenschlager of Canadian Heritage emphasizes:

> Over the years, volunteering has mobilized enormous energy for
> the common good. While the direct effects of volunteer work are felt
> at the individual or community level, the cumulative action of many
> millions of ordinary citizens from every region of the country has had
> a profound impact on virtually every aspect of Canadian society -- and
> has, in fact, fostered its growth and development
> (Lautenschlager, 1998, p. 1).

In Canada, volunteers provide the energy that fuels the organizations that comprise the nonprofit and voluntary sector and make it the second largest in the world according to Michael Hall and his colleagues reporting in *The Canadian Nonprofit and Voluntary Sector in Comparative Perspective* (Hall, Barr, Easwaramoorthy, Sokolowski, & Salamon, 2005).[1] The authors also note that Canada's nonprofit and voluntary sector is dominated by service activities such as education, health, and housing. About 74% of all individuals working in the nonprofit and voluntary sector (including both staff and volunteers) are engaged in delivery of such services, compared with 64% internationally.

Given the focus on service delivery and the importance of volunteer effort in providing services, it is essential to understand what factors will sustain current volunteers and nurture future volunteerism within Canadian communities. Building this understanding is particularly important as many nonprofit organizations are facing major challenges in fulfilling their missions. These challenges were initially highlighted in a 2002 national study conducted by a consortium of research organizations led by the Canadian Centre for Philanthropy (now Imagine Canada). The consortium consulted more than 300 representatives of nonprofit and voluntary organizations and presents their findings in *The Capacity to Serve: A Qualitative Study of the Challenges Facing Canada's Nonprofit and Voluntary Organizations* (Hall, Androkov, Barr, Brock, de Wit, Embuldeniya, et al., 2003). In this study, nonprofit and voluntary organizations emphasized the value and importance of volunteer contributions to their programs. However, there were serious concerns about recruitment and retention of volunteers, volunteer management, and access to stable funding.

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1 Size is defined as the proportion of economically active population engaged in the nonprofit sector and by the absolute amount of volunteer effort contributed to the sector. The size of Canada's nonprofit sector exceeds the average for economically-rich countries and the overall international average (Hall et al., 2003, p. IV).

Across Canada, organizations are trying to address the challenge of enhancing volunteerism in many different ways with varying success. The knowledge they have gained in trying to meet these challenges needs to be gathered, summarized, and shared throughout the voluntary sector. This review of recent research on volunteering is a contribution towards building this collective bank of knowledge.

This review is the outcome of an Imagine Canada project funded by the Knowledge Development Centre. The project objectives were to determine how the body of knowledge on volunteers and volunteerism had evolved since 2000 and to identify research findings that had the most potential to provide practical benefits to nonprofit and voluntary organizations. Although the review does include a few resources from 2000, most of the focus is on research generated during the International Year of Volunteers in 2001 and research funded by the Canada Volunteer Initiative from 2002 to 2007.

The International Year of Volunteers (IYV) received significant attention in Canada, which increased interest in, and funding for, research on volunteering. The IYV Research Program funded 14 research projects and produced 24 information resources, which include fact sheets, short reports, and manuals (Canadian Centre for Philanthropy, 2002). Many projects funded by the IYV Research Program also produced other materials such as conference papers, newsletters, magazine articles, and journal articles.

In the wake of IYV, the Government of Canada created the Canada Volunteerism Initiative (CVI). One of the key components of the CVI was the Knowledge Development Centre (KDC), which funded research on volunteers and volunteerism and produced information resources based on this research. By the end of the five-year CVI program in March 2007, the Knowledge Development Centre had funded 61 projects and produced 104 information resources, including fact sheets, reports, manuals, guides, and a software application.

The origin of the CVI lies with the National Volunteerism Initiative Joint Table. This was comprised of voluntary sector and government sector participants, who developed proposals to sustain and enhance volunteerism in Canada that would also serve as a legacy of the International Year of Volunteers.

The National Volunteerism Initiative Joint Table was spurred on by the results of the 2000 National Survey of Giving, Volunteering and Participating (NSGVP). Michael Hall, Larry McKeown, and Karen Roberts reported in *Caring Canadians, Involved Canadians: Highlights from the 2000* National Survey of Giving, Volunteering and Participating (Hall, McKeown, & Roberts, 2001) that there were approximately one million fewer Canadians volunteering in 2000 than when the previous survey was done in 1997 and 73% of Canadians in 2000 were not volunteering at all.

To address these concerns, the National Volunteerism Initiative Joint Table conducted research, reviewed policy options, and consulted extensively with volunteers and voluntary organizations across Canada. On December 5, 2001, the Joint Table released its recommendations in a report entitled *The Canada Volunteerism Initiative: The Report of the National Volunteerism Initiative Joint Table* (National Volunteerism Initiative, 2001). On the same date, Prime Minister Jean Chrétien announced funding for the CVI.

The goals of the CVI were:

- to encourage Canadians to volunteer with organizations;
- to improve the capacity of organizations to involve volunteers; and
- to enhance the experience of volunteering.

As a result of the CVI, over 140 information resources have been produced from field research and reviews of volunteers and volunteerism (this figure includes the 104 KDC information resources). This important and valuable legacy of the CVI provides the core information resources for this review.

Organization of this review

In total, 139 information resources were reviewed or consulted to produce this review. The majority of these resources are from KDC–funded projects, but some are from other CVI projects and a few are from studies conducted outside of the CVI program.

When reviewing the resources, it became clear that they could be grouped into four general themes, which form the four parts of this review as follows:

- **Part 1:** Volunteer management, leadership, and governance
- **Part 2:** Diversity and inclusion
- **Part 3:** Youth volunteering
- **Part 4:** Employer-supported volunteering

Under each of these four themes, resources could be further grouped around particular topics.

Part 1: Volunteer management, leadership, and governance

This section brings a wide variety of information resources together, very few of which are narrowly focused except for those on risk and liability. In *Part 1*, information resources are grouped under the following topics:

- Managing volunteer resources
- Risk and liability
- Leadership and governance

Under *Managing volunteer resources*, there are five sub-sections:

- Core volunteers
- Recruitment
- Selection
- Orientation
- Training
- Retention
- Measuring the contribution of volunteers
- Managers of volunteers

For each of these sub-sections under *Managing volunteer resources*, findings from a collection of information resources have been summarized and integrated as a set of practical implications for nonprofit and voluntary organizations.

For the topics *Risk and liability* and *Leadership and governance*, a set of practical implications has been synthesized for each from the information resources grouped under each of these topics.

Part 2: Diversity and inclusion

Under this complex topic, information resources are grouped into two broad sub-themes: *Individual attributes* and *Group attributes*.

Under *Individual attributes*, there are four sub-sections on different types of volunteers:

- People with disabilities
- People with chronic diseases
- Ex-offenders
- Low-income volunteers

The *Group attributes* theme is divided into two sub-sections.

- Immigrants
- Aboriginal volunteers

In *Part 2*, almost all of the information resources from one research project are reviewed individually and practical implications are presented for each individual research study. The exception is the sub-section on Aboriginal volunteers where one set of practical implications has been synthesized from the findings from several different studies. The reason for this is that resources on Aboriginal volunteering overlapped in content and were not sufficiently different to warrant providing a separate set of practical implications for each one.

Part 3: Youth volunteerism

Under this theme, information resources are grouped into two sub-themes: *Youth's perspective on volunteering* and *Mandatory community service and service learning in Canada*.

Resources relating to *Youth's perspective on volunteering* are discussed under five topic headings:

- Volunteer experiences of youth aged 15 and older
- Volunteer experiences of youth aged 8 to 12
- Youth volunteer leadership and governance
- Guides on youth volunteering
- Family volunteering

Mandatory community service and service learning in Canada has three sub-sections:

- Studies of provincial community service programs
- National study of community service programs
- Volunteering and mandatory community service

A single set of practical implications is presented for each of the two sub-themes in Part 3.

Part 4: Employer-supported volunteering

This theme has three sections under which resources are grouped as follows:

- National survey of companies
- Case studies and guides
- Studies of employee volunteers

The final practical implications integrate the findings from all of the information resources in Part 4, as they all compliment each other and overlap in content.

VOLUNTEER MANAGEMENT, LEADERSHIP, AND GOVERNANCE

PART 1

All nonprofit organizations rely on volunteers to some extent. Nonprofit organizations are governed by volunteer boards of directors and, depending on the organization, volunteers carry out some or all of the organization's activities. The way in which nonprofit organizations approach volunteer management, leadership, and governance is therefore vitally important. Practices tend to vary according to the size of the organization, its finances, its geographical reach, and the number of paid staff.

Managing volunteer resources effectively is a major challenge for many organizations. The approach that organizations take to the recruitment, selection, and training of volunteers will influence how many volunteers they attract and how long these volunteers continue with the organization. The kind of environment that organizations create in terms of staff-volunteer relationships, leadership, and management, will also influence volunteer retention. The information resources reviewed in this section deal with various issues relating to volunteer recruitment, retention, and management.

An important aspect of creating a suitable volunteer environment is minimizing any risk associated with volunteer activities. Nonprofit organizations are increasingly concerned about issues of risk and liability, particularly if they provide services directly to vulnerable clients such as children, persons with disabilities or chronic illnesses, and seniors. A number of information resources explore these issues and provide recommendations on how to reduce risk and cope with liability.

Organizations need effective leadership to manage volunteers, raise funds, and design organizational frameworks to avoid liability, as well as to maintain their current programs and create new ones where appropriate. Some of the resources address the challenges of leadership and governance.

This section is divided into three parts:

    A. Managing volunteer resources
    B. Risk and liability
    C. Leadership and governance

A MANAGING VOLUNTEER RESOURCES

The challenge for many nonprofit organizations in running their programs is how to manage and coordinate the efforts of a socially complex mix of individuals (i.e., volunteers and paid staff) in order to fulfill the organization's goals. In addition, volunteers donate their time and are likely to continue doing so only if they feel they are accomplishing something tangible in an environment that values their contribution.

Many organizations struggle simply to recruit and retain enough volunteers to run their programs. This often leads to a competitive climate in which many nonprofit organizations are seeking volunteers from the same pool of people within a community. In this case, the challenge for organizations is how to expand the pool of individuals who are willing to consider volunteering.

Once organizations have identified potential volunteers, they must select, orient, and train the most suitable individuals and place them in volunteer positions. Their approach to these tasks will have a significant impact on the organization's programs and its ability to retain its volunteers for the long-term.

Once volunteer programs are underway, nonprofit organizations are being asked by their funders and supporters to demonstrate the value and effectiveness of their volunteer programs in tangible terms. Many organizations are unsure how to do this.

Several information resources dealing with volunteer management are discussed in this section under the following headings:

A.1 Core volunteers
A.2 Recruitment
A.3 Selection
A.4 Orientation
A.5 Training
A.6 Retention
A.7 Measuring volunteer contributions
A.8 Managers of volunteers

Practical implications for nonprofit and voluntary organizations are interpated under each of these headings.

A.1 Core volunteers

Two research reports, one by Lesley Gotlib Conn and Cathy Barr (2006), *Core Volunteers: Exploring the Values, Attitudes and Behaviours Underlying Sustained Volunteerism in Canada*, and one by Sean Kelly and Robert Case (2007), *The Overseas Experience: A Passport to Improved Volunteerism*, highlight the value of a dedicated group of volunteers to the nonprofit sector. Both of these reports have accompanying fact sheets (Conn, 2006; Kelly, 2006).

Conn and Barr conducted in-depth interviews with 26 core volunteers (defined as those who volunteer 188 hours or more per year) and 24 mainstream volunteers (defined as those who volunteer less than 188 hours per year) from across Canada.[1] Based on these interviews, they identify three types of core volunteers: new core volunteers, classic core volunteers, and full-time core volunteers. New core volunteers tend to be younger than those in the other categories and to volunteer between 188 and 1,000 hours per year for two or three organizations. Classic core volunteers generally serve more than three organizations and contribute between 1,000 to 1,400 hours a year. Full-time core volunteers are not usually in the work force, serve three or more organizations, and devote more than 1,400 hours a year to volunteering.

Core volunteers are very passionate about their volunteering and tend to offer their services to organizations with which they have had some former professional or personal connection. Often, they have long histories of volunteering. In contrast, mainstream volunteers are a diverse group with little in common except that they volunteer with only one or two organizations and volunteer for 187 hours or less per year.

In their report, Kelly and Case (2007) examine the volunteer activity of former overseas volunteers after their return to Canada and discuss the implications of their findings for nonprofit organizations. The returned volunteers in Kelly and Case's sample all fall into the category of "core" volunteers as defined by Conn and Barr (2006). On their return, the former overseas volunteers volunteered on average 241 hours per year, and the top 25% contributed 606 hours or more per year to volunteer activities. Returned overseas volunteers also tend to volunteer for more than one organization, with 85% offering their services to at least two organizations and 44% to three or more organizations. In addition, 63% of these volunteers volunteered as unpaid members of boards or committees.

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[1] This definition is based on the results of the *2000 National Survey of Giving, Volunteering, and Participating*, which found that the top 25% of volunteers in Canada contributed 188 or more hours a year to volunteer activities (Hall, McKeown, & Roberts, 2001).

The most important motivation for volunteering among returned overseas volunteers was a passionate belief in the cause and mission of the organizations for which they were volunteering. They tended to volunteer for organizations concerned with community development, poverty reduction, human rights, and global issues. This contrasts with the results of the 2004 Canada Survey of Giving, Volunteering, and Participating (Hall, Lasby, Gumulka, & Tyron, 2006), which found that the most common types of organizations supported by Canadian core and non-core volunteers were sports and recreation, social service, and religion organizations.

Practical implications

Based on their research, Conn and Barr (2006) and Kelly and Case (2007) offer several recommendations for recruiting and retaining core volunteers:

- Target people who are already active in the area that the organization works in. For example, health organizations might target local health professionals or the families of current or former patients. Such links provide a sound foundation for developing a passionate, long-term volunteer commitment.

- Make it known that volunteering offers opportunities to take on leadership roles. This is important because many core volunteers want to have a significant impact and they feel strongly that volunteering should be mutually beneficial for the organization and the volunteer.

- Check in regularly with core volunteers to see if they are having any problems or need any support. Watch for signs of burnout.

- Organizations that operate in Canada should consider forging links with organizations that send volunteers overseas. This would be particularly valuable for organizations with a focus on community development, poverty, or human rights.

- Organizations working on multicultural issues and addressing cultural divides in Canada should also consider targeting returned overseas volunteers because of their experience working in culturally diverse environments.

A.2 Recruitment

Several information resources provide detailed information on volunteer recruitment. These include Jane Baskwill's manual, *Expanding Volunteerism in Rural Schools in Nova Scotia: Promising Practice*s and an accompanying fact sheet of the same title (Baskwill, 2006a, 2006b); a recruitment guide, *Recruiting Volunteers*, by the Société franco-manitobaine (2005); and the Yukon Volunteer Bureau's guide, *Best Practices in Volunteer Management*, which covers recruitment and action planning for small and rural nonprofit organizations (Yukon Volunteer Bureau, 2005). Although these four information resources focus mainly on rural nonprofit organizations, their recommendations are applicable to many nonprofit organizations.

Other resources providing information on volunteer recruitment include the manual *Promising Practices for Volunteer Administration in Hospitals* by Femida Handy, Robert Mound, Lisa-Marie Vaccaro, and Karin Prochazka (2004); the report *Engaging Retired Leaders as Volunteers* by Har Singh, Dvora Levin, and John Forde (2005); and the report *Board Volunteers in Canada: Their Motivations and Challenges* by Elizabeth Ridley and Cathy Barr (2006).

The guides produced by the Société franco-manitobaine and the Yukon Volunteer Bureau are based on the *Canadian Code for Volunteer Involvement* (Volunteer Canada, 2001a) and these organizations' experience with these guides. Baskwill's manual (2006a) and the research reports of Handy et al. (2004), Ridley and Barr (2006), and Singh et al. (2005) are based on the findings from KDC-funded research projects.

Jane Baskwill (2006a) focuses on the issue of sustaining education programs in rural schools in Nova Scotia, but her findings will be of interest to many rural nonprofit organizations that are struggling to maintain their volunteers, as well as to schools and small nonprofit organizations in urban areas.

Volunteers in rural schools in Nova Scotia assist and augment the work of teachers and help build a strong link to the local community. The schools act as a centre for civic engagement, helping to maintain and build on rural traditions of informal volunteering and collaboration between neighbours, family, and friends who are trying to address their community's needs. Baskwill surveyed school administrators, parents, and other community members to gain an understanding of the constraints on volunteering and the promising practices for enhancing and expanding the volunteer base of rural schools.

Baskwill found that the most important barrier to volunteering was lack of time (95% of school administrators saw this as a major problem for volunteers as did 79% of parents).[2]

Other barriers reported by school administrators included:

- cumbersome policies and regulations for recruiting volunteers (54%);
- burnout and lack of incentives for volunteers to maintain involvement (33%);
- negative attitudes of staff in the recruiting process for volunteers (i.e., staff feel that having volunteers will be more work for them and are against having volunteers) (23%); and
- inadequate communication with volunteers once recruited (18%).

Barriers reported by parents included:

- being unsure about how to help (59%);
- lack of childcare (43%);
- feeling of having nothing to offer (38%);
- having no family connection to the school (37%); and
- lack of transportation (24%).

Nearly two thirds (65%) of the parent volunteers in Baskwill's survey indicated they would like to volunteer more and suggested steps that schools could take to encourage more volunteering. Schools could:

- better communicate the importance of volunteers (65%);
- provide more information on what volunteers can do to help schools (62%);
- provide orientation for volunteers (51%);
- be flexible in scheduling the times and locations of volunteer activities and consider offering opportunities for virtual volunteering (43%);
- provide childcare for volunteers (29%);
- develop a volunteer handbook (23%);
- provide skills-building workshops (23%); and
- hold regular meetings with volunteers (23%).

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2 Percentages are based on a survey of 179 parent volunteers and 49 school administrators.

School volunteers said that:

> ...open communication leading to positive working relationships contributes significantly to the success of school volunteerism (Baskwill, 2006a, p. 11).

The barriers to school volunteering highlighted by Baskwill's study are similar to those highlighted by other information resources that look at different kinds of volunteers. In their reports, Singh et al. (2005) and Ridley and Barr (2006) note that lack of time is a major barrier to volunteering. Other common barriers are uncertainty about being able to contribute effectively, the feeling of having nothing to offer, and a lack of effective communication by nonprofit organizations about their volunteer needs.

Practical implications

Nonprofit organizations need to go beyond simply saying, "We need help!" They must clearly communicate their needs to the public and emphasize that everyone has something to contribute. This is essential because many people do not think they have anything to give.

The resources described in this section recommend that organizations that are interested in recruiting more volunteers should do the following:

- Be clear on the organization's volunteer needs, and on the knowledge and skills required for each volunteer position, before starting a recruitment drive.

- Advertise the organization and its mission using posters, brochures, public service announcements, public information sessions, word of mouth, announcements in community and neighbourhood newspapers, information booths in malls, and bulletin boards in shops, churches, libraries, etc.

- Put a face on your volunteer program. In advertisements, brochures, reports, etc., include pictures of volunteers and short stories about their experiences and contributions.

- Know the demographics (i.e., age, ethnicity, sex, education, income, disabilities, etc.) of the community the organization serves. Make it a goal to develop a volunteer complement that reflects the diversity of that community.

- Be flexible when scheduling volunteer activities; because of shift work, childcare requirements, etc., not everyone can commit to volunteering on a regular basis.

- Design volunteer positions that are likely to produce tangible results within a short time. This will make volunteering more attractive to people who can volunteer only sporadically or for a limited time.

- Ideally, ask people personally if they are willing to volunteer. Personal requests have more impact than approaches through the Internet, by mail, etc.

- Target community groups and places where your ideal volunteers might be found. For example, for board and leadership positions, approach managers and executives of companies and government departments. Place requests for volunteers on suitable websites, e.g., on school websites if you are seeking parent volunteers. Seniors often have time to volunteer; approach them through seniors' clubs.

- Ensure that volunteer tasks match the interests, skills, and motivations of potential recruits. This will help to make the experience a positive one and will encourage new volunteers to continue volunteering.

A.3 Selection

Selection processes need to be efficient, transparent, and as stress-free as possible for prospective volunteers. As noted later in the sections on youth volunteering and volunteers from diverse backgrounds, poor selection processes deter potential recruits. Several information resources already cited comment on and/or make recommendations on selection procedures (e.g., Baskwill, 2006a; Handy et al., 2004; and Yukon Volunteer Bureau, 2005). Other resources that deal with this issue include: *Building Capacity to Attract and Retain Literacy Volunteers* by Sheryl Harrow, Mary Leggett, Susan Robertson, Lynne Townsend, and Sharla Daviduik (2005) and *The Canadian Code for Volunteer Involvement* by Volunteer Canada (2001a).

When advertising volunteer positions, it is important to make it clear that volunteers will be screened for suitability, particularly if they are to be in direct contact with vulnerable groups such as children, patients in hospitals, seniors, etc. This prepares people for the process. Volunteer Canada (2001a) emphasizes that a nonprofit organization should ensure that a:

> ...clearly communicated screening process is adopted and consistently applied by the organization" (Volunteer Canada, 2006, p. 5).

Jane Baskwill found that:

> both parents and school principals agree that screening, orienting, and training volunteers is important (Baskwill, 2006a, p. 16).

In their report on literacy volunteers, Sheryl Harrow and her colleagues at READ Saskatoon highlight the importance of properly selecting and screening volunteer tutors (Harrow et al., 2005). Screening is essential not just to ensure the safety of the client but also to ensure that clients are provided with a learning environment where they can successfully improve their literacy. Harrow et al. found, for example, that the performance of learners was closely linked to the volunteer tutor's approach to teaching. Successful learning was associated with volunteer tutors who acted as mentors and encouraged learners to collaborate in the design, content, and implementation of the literacy program.

Practical implications

Nonprofit organizations must decide what approach to selection and screening will help them find and place volunteers who will be able to fulfill their tasks effectively and not put themselves, the organization's clients, or the organization itself at risk.

Two approaches to selection are highlighted by Handy et al. (2004) in their study of volunteers in hospitals. Some organizations have potential volunteers fill out application forms first and then interview them to see if they are suitable. In other cases, potential volunteers are invited to an orientation session and, afterwards, those who are still interested in volunteering are interviewed. Each approach has its merits. The size of organization, its resources, and the types of volunteer tasks will determine which approach is most appropriate.

The resources described in this section make the following recommendations about screening volunteers:

- Inform potential volunteers of the organization's screening policy and its justification in easily understandable language.

- Designate someone to answer questions on the screening policy. This person should be easy to reach by phone and/or e-mail.

- Prepare an information sheet about the screening policy. Include "frequently asked questions" that cover the main concerns about screening procedures.

- Have a standard application form for each volunteer position that asks for contact information, skills, qualifications, previous experience, motivations for volunteering, and references. (Note: The application form cannot ask for the religion and age of applicants; in the case of minors, it cannot ask about criminal records. Review the *Human Rights and Employment Standards Act* before creating an application form.)

- Interview all candidates for volunteer positions that require direct contact between the volunteer and an organization's clients, particularly if the clients belong to vulnerable groups. A criminal record check should also be done in these cases. (Note: Some volunteer positions may require medical screening or a report from the volunteer's physician indicating he/she does not have a communicable disease.)

- Decide whether in-depth screening is necessary for one-time volunteer events or short-term volunteer assignments that are considered low-risk. At the very least, potential volunteers should provide references or be referred by someone your organization knows and respects.

A.4 Orientation

Several information resources provide recommendations on orientation and training. These include: Baskwill (2006a; 2006b); Harrow et al. (2005); Ridley and Barr (2006); Volunteer Canada (2006); and Yukon Volunteer Bureau (2005); as well as *Aboriginal Governance and Leadership: Volunteers in the Friendship Centres of Canada* by Doug Durst and Karen Martens Zimmerly (2006).

Unless organizations provide orientation on their history and mission and on how volunteer contributions have shaped them, new volunteers are unlikely to develop the necessary motivation to undertake and sustained volunteer activities. In their report on board volunteers, Ridley and Barr (2006) show that frustration can build up quickly among volunteer board members who have received no orientation but who are expected to contribute effectively to an organization's planning. In Jane Baskwill's study, 51% of parent volunteers said orientation was essential (Baskwill, 2006a).

Practical implications

Orientation should familiarize new volunteers with key aspects of the organization, the tasks they will be undertaking, and how these tasks contribute to the mission of the organization (Yukon Volunteer Bureau, 2005). According to Handy et al. (2004), a good orientation session should show volunteers why the organization is worth volunteering for, inform them of the organization's mission, and provide information on available volunteer positions. In addition, volunteers should know what is expected of them and what their responsibilities will be.

The resources described in this section suggest that organizations do the following when orienting new volunteers:

- Provide a handbook and/or information pamphlets about the organization (e.g., its history, mission, values, code of volunteer conduct, etc.) and its volunteer programs, including a description of the various volunteer activities.

- Explain how the organization works and any guidelines or rules on the use of the organization's facilities.

- Encourage a representative group of current volunteers to attend the orientation session to meet and share their experiences with new volunteers.

- Introduce new volunteers to as many people within the organization as possible; this will make them feel welcome.

A.5 Training

Whether a nonprofit organization is large or small, it should provide some training to ensure that volunteers feel confident in undertaking their tasks. Training is also important for managing risk and ensuring the health and safety of the volunteer and of any clients or staff with whom the volunteer may be working.

The information resources developed by Baskwill (2006a; 2006b), Handy et al. (2004), Harrow et al. (2005), and the Yukon Volunteer Bureau (2005) all provide recommendations on training. The particular training needs of board volunteers are discussed in *A Study of the Training Needs of Volunteers On the Boards of Nonprofit Organizations Serving Francophone and Acadian*

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Minority Communities in Canada (2006) by the Fédération des communautés francophones et acadienne (FCFA) du Canada.

Practical implications

The resources mentioned in this section suggest that organizations do the following when training volunteers:

- Identify the skills and knowledge volunteers will need to be effective in their tasks.

- Assess each volunteer's skills and decide what additional training each will need.

- Depending on the organization and the volunteer positions it has available, consider offering training on some or all of the following:
  - office procedures and use of office equipment;
  - effective communication;
  - working as part of a team;
  - understanding the boundaries of volunteer assignments;
  - managing the difficult situations that can arise when volunteers are working one-on-one with vulnerable clients;
  - creating a supportive environment for vulnerable clients; and
  - working with unions (important in large nonprofit organizations like universities, hospitals, schools, etc.).

- Check to see what types of training resources are available in your local area or online. Business or government training programs often provide spaces for volunteers either free or at a reduced price.

- Consider holding joint training sessions with other nonprofit organizations that have similar volunteer skills requirements.

- Assign staff members or experienced volunteers to act as mentors to new volunteers, providing morale support and helping them learn their tasks.

A.6 Retention

Low retention rates can increase recruitment costs as well as the costs associated with orienting, training, and supervising volunteers. They:

> ...can also reduce the overall experience level of your volunteer pool and may negatively impact the quality of your volunteer program (Handy et al., 2004, p. 20).

The resources developed by Baskwill (2006a), Conn and Barr (2006), Handy et al. (2004), and Harrow et al. (2005) provide insights into why volunteers drop out and recommendations on how to retain volunteers.

Volunteer retention is a problem for many nonprofit and voluntary organizations. Handy et al. (2004) found that 80% of the hospitals they surveyed had experienced a decline in the number of volunteers who remained involved for five years or more. However, 80% of these hospitals had also seen an increase in the number of volunteers who served for between three months and a year. In other words, the volunteer turnover rate was high. In their study of literacy volunteers, Harrow et al. (2005) found that high retention rates were only achieved when volunteer tutors enjoyed their tasks, could handle the demands of tutoring, and were appreciated by their clients. Baskwill (2006a) reported that schools have difficulties retaining volunteers if principals and staff did not engage in open communication and show respect and appreciation for volunteers and their contributions.

Conn and Barr (2006) found that, although core volunteers generally reported a high level of satisfaction, they can experience frustrations in their dealings with other volunteers and staff, and are vulnerable to burnout. Therefore, it is important that managers of volunteers not take core volunteers for granted. Rather, they need to check in with them regularly and address problems as they arise. Also, their motivations and interests change over time and if volunteer positions are not adjusted to accommodate these changes, core volunteers will leave.

Large nonprofit organizations can face major challenges in managing the relationships between volunteers and paid staff and, in the case of hospitals, between different categories of volunteers. Handy and Srinivasan (2004) surveyed chief executive officers, paid staff, and volunteers in several Toronto hospitals. Their report, *The View From the Top: How Hospital CEOs Perceive Volunteer Resources*, provides a detailed exploration of the hospital volunteer environment. The major personnel issues that require careful management are the relationships between program volunteers and union-based staff and between program volunteers and hospital auxiliaries. Managers of volunteers must be careful that program volunteers are not seen as replacing paid staff or overlapping in their function with hospital auxiliaries.

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Another valuable resource that deals with volunteer retention is the research report *"One Plank at a Time": Volunteer Harbour Management In Nova Scotia* by Dan MacInnes, Erica de Sousa, and Ishbel Munro (2006). Although the report focuses on the volunteer management of harbours on the Nova Scotia coast, some of the problems it discusses are common to many organizations. For example, the researchers found that lack of training (for general volunteer tasks, board tasks, etc.), lack of an effective organizational structure for harbour groups, too few volunteers for too many tasks, liability issues, and enforcement tasks related to harbour use led to burnout among volunteers. From the same study, the Coastal Community Network (2006) produced a practical workshop manual, *How to Organize Training Sessions for Harbour Authorities and Other Community-Based Organizations*, that describes how some of these problems might be addressed by bringing harbour groups together to share experiences. This approach could be useful for other types of nonprofit organizations, particularly smaller ones.

Practical implications

Many of the recommendations already presented on recruitment, selection, orientation, and training can also strengthen volunteer retention. However, there are additional steps that organizations can take to bolster retention. The resources discussed in this section suggest that organizations do the following to retain volunteers:

- Explain the organization's goals and the valuable role volunteer contributions make towards achieving them.

- Have clear goals for the volunteer program and well-defined activities to achieve those goals.

- Understand volunteers' motivations and expectations. Try to ensure that volunteer tasks meet those expectations and bolster volunteers' motivation to keep volunteering. For example, volunteers who wish to build their skills should be assigned tasks that will allow them to do so.

- Many volunteers want not only to make a meaningful contribution but also to meet people. Create a space where volunteers can socialize with each other and with staff.

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- Assign new volunteers tasks that will yield tangible results and provide a sense of achievement within a relatively short period of time. Initial successes build confidence and keep volunteers interested.

- As much as possible, allow volunteers to decide how they will do their tasks and the timeframe for their completion.

- Provide opportunities for change and advancement. Many volunteers want new challenges, more responsibility, and a chance to eventually make a significant contribution to an organization's strategic planning and management.

- Have an evaluation and supervision process that allows for assessment of volunteers' activities and that can quickly identify where support is needed to maintain volunteers' confidence and satisfaction.

- Hold a training workshop for staff on how to work with volunteers.

- Ensure that there is regular communication between the organization's board of directors and staff and its volunteers so that the volunteers do not feel left out of decision-making.

- Include volunteers in planning new volunteer programs and in redesigning existing programs.

- Involve volunteers in developing a process to monitor and evaluate volunteers and paid staff who work with volunteers.

- Develop a dispute resolution process to deal with problems that may arise between staff and volunteers or to address any other issues of concern.

- Ensure that volunteers receive the same respect and are given at least some of the same benefits as paid staff (e.g., access to training; reimbursement of travel expenses; office space; parking; etc.).

- Regularly recognize and celebrate the contributions of volunteers.

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A.7 Measuring volunteer contributions

An increasingly important part of program and project planning and evaluation is assessing the value of volunteer contributions. This information is useful when planning new programs, redesigning existing ones, and reporting on the tangible benefits of investing in volunteers. Nonprofit organizations are also being asked to provide this information to a variety of different stakeholder groups (i.e., boards, funders, donors, supporters, the general public, policy-makers, and even their volunteers).

Three information resources by Laurie Mook and Jack Quarter explore the extent to which nonprofit organizations estimate the economic value of volunteers and the practical steps they can take to arrive at these estimates. These information resources include a manual, *How to Assign a Monetary Value to Volunteer Contributions* (Mook & Quarter, 2003); a short report, *Estimating and Reporting the Value of Volunteer Contributions* (Mook & Quarter, 2004a); and a fact sheet, *Reporting the Value of Volunteer Contributions* (Mook & Quarter, 2004b).

In a survey of 608 nonprofit organizations, Mook and Quarter (2004a) found that just over one third (37%) kept records on the number of hours contributed by their volunteers, 7% estimated an economic value for that contribution, and only 3% actually reported the value in their accounting statements. Sixty percent of the nonprofit organizations in the sample reported that they did not report the value of their volunteers' contributions because it was not required by their funders, their accountants, or the tax authorities.

Mook and Quarter (2004a) note that some organizations have philosophical objections to placing a dollar value on volunteer activities. They prefer to emphasize the intangible psychological, spiritual, and social benefits of volunteering and feel that presenting the value of volunteering in economic terms debases volunteerism. However, translating those intangible benefits into a tangible measure often brings the importance of volunteer contributions to the attention of governments and the public. Requests for funding, for example, can be strengthened by showing that for each dollar contributed by the funder the organization will contribute one or five or ten dollars worth of volunteer labour.

Organizations in Mook and Quarter's survey were also reluctant to assess the economic value of volunteer contributions because they:

- lacked the resources to do so;
- faced time constraints;
- lacked credible data; or
- found it difficult to accurately assign a dollar value to volunteer contributions.

However, calculating the economic value of volunteer contributions allows organizations to:

- demonstrate and report on the value of their volunteer program;
- estimate the return on the money the organization invests in its volunteer program;
- evaluate the contribution of volunteers in a given program relative to the overall investment the organization or a funder makes in that program;
- show the general public and funders the value of volunteer activity and how it extends the human resources of the organization; and
- demonstrate the level of community support for the organization.

Organization can use the information in:

- funding proposals;
- reports to funders;
- annual reports;
- financial statements;
- reports to their board of directors; and
- fundraising and volunteer recruitment messages.

Practical implications

Assessing the economic value of volunteer contributions need not be difficult, time consuming, or a drain on resources. Michelle Goulbourne and Don Embuldeniya (2002) in their manual, *Assigning Economic Value to Volunteer Activity*: Eight Tools for Efficient Program Management, and the Canadian Centre for Philanthropy (2002) with its fact sheet, *Measuring the Economic Value of Volunteer Activity,* demonstrate how easy it is to estimate the value of volunteer contributions and express that value in monetary terms. The calculations featured in these resources can also be performed using the *Volunteer Value Calculator*, an online tool available at http://www.nonprofitscan.ca/page.asp?vvc_toolkit.

In order to calculate the economic value of a volunteer's contribution to a program, organizations should ensure they do the following:

- Categorize each volunteer task.
- Group similar tasks together, e.g., clerical tasks for different programs.

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- Record the time volunteers spend on different tasks by providing them with time sheets.
- Assign a market value (i.e., an hourly rate) to each volunteer task. The Volunteer Value Calculator can help you with this.
- Calculate the total economic value of each different task by multiplying the total numbers of hours spent on that task by its appropriate market rate.

A.8 Managers of volunteers

Organizations require experienced managers of volunteers and volunteer program budgets of sufficient size to support their management activities. In 2003, Fataneh Zarinpoush, Cathy Barr, and Jason Moreton undertook a national survey of managers of volunteers in Canada. They report their findings in *Managers of Volunteers: A Profile of the Profession* (Zarinpoush, Barr, & Moreton, 2004). Their objective was to find out who managers of volunteers were, where they worked, and what kind of management environment they had to contend with. From these findings, Zarinpoush and her colleagues were able to identify some of the major challenges facing managers of volunteers.

Managers of volunteers from 1,203 organizations were surveyed. Forty-four percent (44%) were from incorporated nonprofit organizations, 36% from registered charities, 9% from unincorporated nonprofit organizations, and 9% from publicly funded organizations. The largest percentage (36%) was from organizations active in the social service sector. Eighty-four percent of the managers in the survey were female and more than half (55%) were between the ages of 36 and 55. Almost two thirds (64%) had university degrees.

Using number of employees as an indicator of an organization's size, 55% of managers worked for relatively small organizations having nine or fewer paid staff and 44% worked for organizations having 10 or more staff. Twelve percent (12%) worked for large organizations having 100 or more employees. Almost one quarter (24%) of the organizations in the survey had 24 volunteers or less and just over one quarter (26%) had 200 volunteers or more.

A manager's position (part-time or full-time, size of salary, etc.) and the budget for volunteer programs were related to the size of the organization. For example, 62% of managers had full-time positions in organizations with four or fewer paid employees. The percentage of managers with such positions rose to 80% in organizations with 100 or more employees. In organizations that had no full-time budget, 57% of managers of volunteers had full-time paid positions. This

figure rose to 84% in organizations with program budgets of $50,000 or more. Size of the budget for volunteer programs also affects the salary a manager receives. Zarinpoush and her colleagues found that where volunteer program budgets were less than $11,000, 55% of managers earned less than $30,000 per year. In contrast, 54% of managers earned over $40,000 per year where program budgets were $50,000 or more.

When asked about the size of program budgets, 36% of those managers who replied said that they had no budget set aside by the organization, whereas 12% said they had a budget of $50,000 or more. Having no program budget was related to the size of the organization; 79% of organizations with no employees did not maintain a volunteer program budget. Managers working in organizations with 100 employees or more were most likely to report a program budget of between $11,000 and $49,999 (37%) or $50,000 or more (32%).

The key responsibilities of managers were volunteer recruitment (36%), assignment of volunteer tasks (10%), orientation and training (9%), interviewing, screening, and risk assessment (9%), and supervising volunteers (6%). These key responsibilities and their relative proportions were fairly consistent irrespective of the number of volunteers being managed, type of volunteer program, or size of organization.

The most frequently mentioned challenges for managers were volunteer recruitment (32%) and time constraints (14%). Recruitment was a major challenge for managers with no specific training in volunteer administration, those who worked for small organizations with no employees, and those whose volunteer program budget was under $2,000. Managers found that trying to manage diverse groups of people with varying skill sets, without the incentives available to managers of paid employees, was a daunting task. Although the majority of managers (72%) in the survey said they had completed some volunteer management training, many of them still felt that they needed to have more. Almost one third of managers (29%) wanted training in people management, volunteer management, and time management. More than one quarter (26%) said that they needed more skills in how to recruit, screen, and interview potential volunteers.

With regard to organizational support, almost one third of managers (32%) agreed that insufficient support was one of the biggest challenges they face. Over one third (37%) agreed that they frequently have to prove to others in their organization that the volunteer programs they manage are worthwhile. Even with all of these challenges, 94% of managers expressed satisfaction with their jobs. However, only 62% expressed satisfaction with their salaries.

Zarinpoush and her colleagues comment that:

> Overall, the survey paints a picture of volunteer management as a
> profession in transition. Although the majority of managers … hold full time
> positions, more than a quarter work part-time and more than one in ten
> are unpaid. In addition, more than one quarter of those in full-time paid
> positions earn less than $20,000 a year (Zarinpoush et al., 2004, p. 19).

They go on to conclude that as more volunteer-involving organizations realize the value of volunteers being managed professionally, more managers of volunteers will find themselves with full-time paid positions that have acceptable salaries. The impetus for these changes will also partly come from the growing acceptance of volunteer management and administration as a profession with accredited courses at university and college level.

Practical implications

The picture that emerges from this survey is that managers of volunteers are often underpaid and their program budgets under funded. This is possibly a reflection of lack of appreciation by many organizations of the professional skills needed to manage volunteers effectively. It could also reflect the challenge of finding sufficient funds to run programs. However, over a third of organizations (37%) also had to be reminded by their managers of the value of volunteer programs, which indicates they probably do not fully appreciate what volunteers were doing and possibly how they were being managed.

Managers of volunteers are also concerned with improving their skills. Although many of them have university degrees or diplomas, they still felt more training on management practice is necessary. This shows that the managers realize that volunteer management requires professional skills to handle complex groups of people of varying ages, backgrounds, and capacities. Managing individuals so they are willing to contribute their time unpaid to an organization is also very different to managing paid employees.

Certainly, the following sections of this report on diversity and inclusion, youth volunteering, and employer-supported volunteering demonstrate that managing volunteer programs is a complex issue. In addition, with risk and liability issues becoming of growing concern, the need for professional management of volunteers also grows. Therefore, nonprofit organizations should accept that if they want effective volunteer programs, they need to budget adequately for them,

hire managers with the appropriate professional skills, and pay salaries commensurate with those skills.

In summary, nonprofit organizations need to consider the following points:

- Budget adequately for volunteer programs.

- Understand that managers of volunteers are professionals dealing with complex management issues.

- Pay salaries that are commensurate with the professional skills needed to implement and manage volunteer programs.

- Provide time for managers of volunteers to train and improve their skills.

- Ensure that managers of volunteers are provided with the administrative backup to monitor and assess the value that volunteers bring to the organization's programs.

- Use the information from the valuation of volunteer contributions to show funders the value of the program and the need for a professional manager to run it.

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In recent years, risk and liability have become major concerns for nonprofit organizations in Canada. The concern over litigation stems from a landmark 1999 ruling by the Supreme Court of Canada on vicarious liability. The Court reviewed a case involving a charitable foundation serving children in which one of the foundation's staff had been convicted of child abuse. In their ruling, the Supreme Court Justices stated:

> There should not be an exemption for non-profit organizations. While non-profit organizations perform needed services on behalf of the community as a whole, the Foundation's institution, however meritorious, put the respondent in the intimate care of C and in a very real sense enhanced the risk of his being abused. From his perspective, it is fair that as between him and the institution that enhanced the risk, the institution should bear legal responsibility for his abuse and the harm that befell him (Bazley v. Curry, [1999] 2 S.C.R. 534, File No: 26013).

On the basis of this judgment, the law provides no special protection for nonprofit and charitable organizations with respect to the conduct of the individuals who act for the organization whether they are paid staff or volunteers. This means that nonprofit organizations face the same challenges of managing liability and risk as do for-profit organizations. The problem is that nonprofit organizations often do not have the financial or human resources to meet these challenges, nor is the insurance industry well attuned to the unique needs of nonprofit organizations. In fact, many insurance companies are unwilling to provide coverage for what they see as very high-risk activities.

Adding to the problem is the fact that, in recent years, provincial governments have downloaded many social services onto the nonprofit sector. These services often involve providing assistance to vulnerable clients, such as children, people with disabilities or chronic illnesses, and seniors. Moreover, funding levels have generally not kept pace with increased responsibilities or increased costs relating to risk management.

In response to the concerns over risk and liability in the nonprofit sector, the Knowledge Development Centre funded three research projects on these issues. In this section, we review the information resources resulting from these projects under the following headings:

B.1 Risk management
B.2 Insurance

Practical implications for both of these are synthesized at the end.

B.1 Risk management

Four resources focus on the general topic of risk management. *Risk Management: A Guide for Nonprofit and Charitable Organizations* (Bertrand & Brown, 2006) and an accompanying fact sheet, *Good Practices in Risk Management* (Bertrand & Brown, 2005), are the result of a survey of 81 nonprofit and charitable organizations across Canada. *Risky Business: An Exploration of Risk and Liability Issues Facing Volunteer Programs in the North Okanagan* (Six & Kowalski, 2006) and *Developing a Risk Management Strategy: Five Steps to Risk Management in Nonprofit and Charitable Organizations* (Six & Kowalski, 2005) are the result of a survey, interviews, and focus groups conducted in the North Okanagan region of British Columbia.

Bertrand and Brown (2006) use the results of their survey to set the stage for a discussion of the components of an effective risk management strategy. Only 46% of organizations that responded to the survey said that they understood risk management to mean adopting strategies to reduce risk and liability. The same percentage said that they had a risk management plan. Of those with a plan, 75% said it included procedures for financial reporting and accounting for use of funds. Other components of risk management programs were insurance (73%), ensuring good board governance and strategic planning (60%), sound orientation for board members and other volunteers (68%), and monitoring volunteer and staff performance (60%). Based on their findings, Bertrand and Brown review various risk management options, and provide some general guidelines for developing a risk management plan.

Six and Kowalski (2006) undertook their research because they were concerned about the increased demands and risk being transferred to nonprofit organizations, particularly volunteer programs, as a result of government restructuring. To their surprise, however their survey of nonprofit organizations in the North Okanagan revealed relatively little concern about the impact of restructuring. In addition, most organizations were confident that they had taken adequate measures to assess and manage risk. The results of their interviews with insurance agents, lawyers, and public servants, however, suggest that organizations may be too complacent about liability.

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Insurance agents

The insurance agents felt that knowledge of insurance needs and coverage is generally poor within the nonprofit sector. Organizations tend to focus on cost rather that the details of the coverage. The agents said that organizations should at least ensure they have directors' and officers' liability insurance, yet less than half of the organizations in Six and Kowalski's survey did. When asked for suggestions on what organizations could do to manage risk, the insurance agents said that the most useful tools were reference and criminal record checks of volunteers.

Lawyers

The lawyers who participated in the study commented that executive directors and boards of directors have a very poor understanding of liability and of the implications of their organization's by-laws and constitutions. This makes them very vulnerable to litigation. They felt that, because nonprofit organizations are playing a larger role in education, health, and social services, it is crucial that they improve their awareness and understanding of their legal responsibility to their clients. When asked to name the most valuable risk management tools, the lawyers chose volunteer supervision guidelines and client or informed-consent waiver forms.

Public servants

Five representatives of different government ministries were interviewed. Their general message was that the role of nonprofit organizations is essential in helping the government deliver services to communities, particularly to their more vulnerable members. The attitude of these ministry representatives concerning liability varied considerably. One representative viewed risk and liability as an overrated issue that was a subject of scaremongering by insurance companies, whereas another emphasized the need for a comprehensive system for risk management and insurance coverage. Six and Kowalski found that although government believes that nonprofit organizations should be contracted to help deliver community services, it provides little in the way of assistance for managing the risks inherent in these programs.

Volunteers' perception of risk and liability

Volunteers voiced many concerns about their activities from both a personal safety and an ethical viewpoint. They did not feel adequately covered in terms of liability in their direct one-on-one services to clients. They also said that they sometimes did work alone with clients that should have been done by two people. Because of increased workloads, volunteers were also taking over some of the work previously carried out by paid staff, which also raised concerns about liability.

B.2 Insurance

A key component of any risk management strategy is insurance coverage. However, insurance is a major problem for many nonprofit organizations because it is often difficult to find appropriate policies at a reasonable price or sometimes at any price. In *Island or Iceberg: Liability and Voluntary Organizations* (2006) Agnes Meinhard presents the results of a study of the insurance environment for nonprofit organizations. This research was done in collaboration with Easter Seals, which developed a toolkit, *How to Manage Insurance Costs in the Voluntary Sector: Tips and Checklist* (Pfaff, 2006) based on the study's findings.

A total of 1,163 charities and nonprofit organizations responded to an online survey on risk management and liability that was conducted between July 2004 and February 2005. Respondents came from all provinces and territories and were engaged in a wide range of activities. The vast majority of them (93%) said that they carried some form of insurance. Uninsured organizations were generally small; of all the organizations without insurance coverage, 74% had annual budgets of $50,000 or less. More than half (53%) of all uninsured organizations had been operating without insurance for five years or more.

The most common insurance carried by the organizations surveyed was general liability insurance; the second most common was directors', and officers' liability insurance. The percentage of organizations carrying general liability insurance ranged from a low of 50% in the Yukon to a high of 100% in Prince Edward Island, Nunavut, and the Northwest Territories. The percentage of organizations carrying directors' and officers' liability insurance ranged from a low of 50% in the Yukon to a high of 100% in Nunavut.

Most of the organizations in the survey (92%) had experienced an increase in insurance costs. The median[2] increase for both general liability insurance and directors' and officers' liability insurance over the three years prior to the survey was 25%. When asked how they dealt with rising insurance costs, 42% of organizations said they simply paid the increased premiums. The remaining organizations offset increased insurance costs in many different of ways. For example, they reducing other expenses, searched for cheaper insurance, or increased their deductible. In the future, many organizations were planning to implement new risk management strategies (57%) and increase fundraising to offset insurance costs (46%). Some were also considering pooling insurance costs with other organizations (35%).

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2 Median is the mid-point of a distribution, with half its sample less than or equal to the median, and half the sample greater than or equal to the median.

Practical implications

Nonprofit organizations appear to be somewhat complacent about risk and liability. Among organizations that do see these issues as matters of concern, there is uncertainty about what kind of strategies to employ to manage risk at a reasonable cost. There is also a general lack of understanding among boards of the legal implications of their role and particularly of their organization's by-laws and constitutions. This may indicate a need to educate boards and organizations about their legal obligations and to make them aware of the options at their disposal for managing risk and limiting their liability.

Six and Kowalski's (2005) booklet on risk management and Pfaff's (2006) toolkit provide detailed recommendations on risk assessment and on designing programs to manage risk and liability. These two resources suggest that organizations do the following to manage risk and limit liability.

Buy suitable insurance.

- All nonprofit organizations should, at a minimum, purchase directors' and officers' liability insurance.

- Nonprofit organizations should present an insurance broker with a description of their activities and accompanying risk management procedures and ask for a quote. Choose a broker who has links to many insurance companies.

- Nonprofit organization should explore the possibility of seeking partners to share the cost of insurance. One option is to join a national umbrella group that offers access to insurance with lower premiums (e.g., Volunteer Canada).

- Nonprofit organizations should include the cost of insurance premiums in funding proposals and explain why the insurance coverage is necessary.

Develop a plan to manage risk related to volunteers:

- Do a risk analysis for each volunteer activity to identify where extra care and vigilance is needed. For example, in cases where volunteers deal with vulnerable clients, examine what policies and procedures are needed to ensure the safety of both clients and volunteers.

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- Involve volunteers in risk assessment and in the design of safe procedures for their volunteer activities.

- Review procedures for exchanging personal information between clients and volunteers and for the handling of clients' personal affairs (e.g., banking).

- Develop precise volunteer position descriptions that clearly delineate the boundaries of volunteers' duties and explain what constitutes acceptable and unacceptable behaviour. This will protect volunteers, clients, and the organization.

- Hold policy sessions with staff and volunteers to clarify their roles and responsibilities towards each other and towards the organization's clients.

- Have clear procedures for supervising and monitoring volunteers who interact with clients.

- Keep records that document each volunteer's activity (i.e., when they volunteered, where, for how long, and with whom).

- Develop clear and precise position descriptions for volunteers involved in one-time volunteer events. These short-term volunteers should be assigned low-risk activities, should work in pairs or teams, and should be assigned a designated person to whom they can turn for back-up and advice.

- The organization's board of directors should ensure that all volunteer management policies and procedures are actually implemented. Boards should also regularly review these policies and procedures and readjust them as needed to ensure that risk and liability are minimized.

Develop a plan to manage financial risk.

As part of their risk management process, all organization should develop sound financial management and accounting policies and procedures, such as:

- a policy that identifies who manages the organization's finances, who signs cheques, etc.;

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- a provision that the board approves budget plans that show the intended allocation of funds;

- a monitoring system to track income and expenditures;

- bonding procedures for staff, board members, or volunteers who handle money;

- yearly, independent audits; and

- provision for an annual report and audit approved by the board and made available to the organization's stakeholders (i.e., funders, contributors, volunteers, clients, etc.).

LEADERSHIP AND GOVERNANCE C

Volunteer boards are vital to the operation of nonprofit organizations. Boards are responsible for setting goals for the organization and designing appropriate policies and actions to achieve them. According the National Survey of Nonprofit and Voluntary Organizations (Hall et al., 2005), there were 161,000 nonprofit and voluntary organizations operating in Canada in 2003. Nearly all of these organizations were governed by volunteer boards of directors and more than half (56%) reported that they were having difficulties obtaining board members. The percentage of organizations that reported problems in obtaining board members varied slightly from sector to sector, ranging from a high of 70% for law, advocacy, and politics organizations and 67% for health organizations to a low of 42% for religious organizations.

In this section presents information resources that provide insights into some of the issues concerning leadership and governance. Resources are discussed under the following headings:

C.1 Governance
C.2 Board volunteers
C.3 Training the needs of board volunteers
C.4 Aboriginal governance
C.5 Engaging retired leaders
C.6 Practical implications

C.1 Governance

Three information resources directly address issues of governance. They are the output of projects funded by the CVI's Community Support Centre. These resources are: *Building the Capacity of Governance Volunteers: Giving Meaning to Governance – A Review of Governance Literature* by Anita Angelini (2005); *Building the Capacity of Governance Volunteers: Giving Meaning to Governance – Leadership and Governance Literature Review* by Judith Fitzmaurice-Johnson (2006), and *Being a Governor: A Process for Board Development* by Keith Seel and Andrée Iffrig (2006).

Anita Angelini (2005) provides an in-depth review of governance divided into three sections. First, she explores the literature on comparisons between for-profit and nonprofit governance processes. Then, she focuses on ten perspectives through which governance may be interpreted. Finally, she reviews definitions and assumptions about governance, board members, and boards.

Angelini's review contributed to the 'Building the Capacity of Governance Volunteers' project, which developed a practical tool to explore governance issues. The focus of Angelini's review was:

- to understand the research conducted on governance volunteers in terms of how they give meaning to governance in nonprofit and charitable organizations;
- to review literature on other general topics such as governance, organizational development, and volunteer motivation; and
- to make recommendations for the process, themes, and structure for peer learning circles in the 'Building the Capacity of Governance Volunteers' project.

An important point to take note of in Angelini's review is that when comparing for-profit and nonprofit governance processes, she examined 33 pieces of literature. Only six out of the 33 explore what it means to actually govern. When she looked at what most of the other papers identified as activity areas for boards she found that the most common activities of boards mentioned in the literature are financial control and oversight (12 out of 33 papers) and defining and measuring fulfillment of mission and vision (10 out of 33 papers). Angelini comments:

> We do not find evidence of philosophical, ethical, purposive dimensions of governance. In effect, the literature emphasizes that boards should only address the who, what, where, when, and how questions of governance. The question of why the board exists is left unaddressed (Angelini, 2005, p.23).

In her in-depth review of governance, Judith Fitzmaurice-Johnson (2006) explores leadership and governance. She found that most of the literature she reviewed focused on the board as a whole or on executive directors and very little concerned leadership among board members. The qualities and contribution of board members to the governance of organizations apparently has not been widely studied. Fitzmaurice-Johnson comments that there is a need to hear from governance volunteers about their ideas on leadership, and what it means from their perspective to govern within the context of a nonprofit organization. Such research, she maintains, could enhance the capacity of governance volunteers to lead in strategic planning for their organizations.

Keith Seel and Andrée Iffrig (2006) have produced a very useful practical guide to becoming a governor in a nonprofit context. The guide is based on a peer learning circle approach. This is a process that involves sharing of knowledge, learning, reflection, and discovery. Seel and Iffrig comment in their introduction that most nonprofit boards tend to focus on their primary responsibility of financial oversight and stewardship and other fiduciary responsibilities. However, the researchers point out that these are not their only responsibilities:

> Our research on attitudes and approaches to governance…have
> convinced us that governance can and should be more than just an
> exercise in accountability and transparency. We've discovered that
> governance boards are more effective when members are willing to
> engage in a process of reflection, discussion, and discovery about what it
> means to govern (Seel & Iffrig, 2006, p.1).

Seel and Iffrig explain that when new members join boards, they quickly become embroiled in matters of 'balancing the books' and fundraising rather than exploring their roles in shaping the organization and its relationship to the community it serves. Boards should be exploring the values of their organization and how they relate to the services they offer as well as ensuring that the organization is financially sustainable.

Seel and Iffrig designed their guide for organizations that have annual budgets between $500,000 and $1.5 million. However, they maintain that other governance boards may benefit from using it. The guide is not designed for small organizations where board members not only govern but are also involved in implementing board decisions. The guide includes a questionnaire that board members fill in before and after the learning circle sessions so that they can see the impact of their collaborative learning experience on their understanding of governance. There are also worksheets that board members can use to explore their knowledge and understanding of governance issues.

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C.2 Board volunteers

Elizabeth Ridley and Cathy Barr (2006) present the findings from a study of board volunteers in their research report, *Board Volunteers in Canada: Their Motivations and Challenges*. Ridley and Barr conducted in-depth interviews with 33 board members representing 11 different service areas of the nonprofit sector. The annual revenues of the organizations represented in the study ranged from less than $30,000 to $10 million or more.

The board members who participated in the study held a variety of posts (e.g., chair, president, treasurer, member-at-large) and performed many different activities (e.g., strategic planning, policy development, financial management, public relations, and fundraising). Most (19 out of 33) volunteered five hours or less per week, although seven volunteered 16 hours or more. All of the board members interviewed felt that they brought important skills to their positions (e.g., leadership skills, conflict resolution skills, administration skills, public relations skills, policy and organizational development skills, etc.). They also said that serving on a board had allowed them to hone their skills and acquire new ones (particularly fundraising, financial management, and conflict resolution skills).

Most of the board members in the study had been personally asked to join a board and gave two main reasons for taking up the position:

- to give back to the community and fulfill their civic responsibility, and
- to affect the direction of an organization whose cause they strongly supported.

They also gave other reasons, such as to put their skills to use, to develop new skills, and to gain an interesting experience.

Most board members did not have particular goals in mind for themselves or the organization when they joined the board, but developed these once they had gained some experience. They were consistent in emphasizing that they were able to work towards achieving these goals.

The board members who were interviewed identified the following as the major challenges they faced as board members:

- time constraints, which can make it difficult to do a good job;
- unequal distribution of work among board members;

- poorly run meetings, which can be particularly frustrating given the limited amount of time most board members have to devote to their positions;
- conflict management, i.e., dealing with board conflicts and with personal agendas of board members;
- difficulty reaching consensus, exacerbated by the constantly changing composition of most boards and the difficulty some boards have in achieving quorum at meetings; and
- difficulty recruiting and developing enough volunteer leaders to sit on the board and on committees.

Most of the board volunteers in Ridley and Barr's study said that these challenges did not affect their desire to keep serving on their boards. As the authors point out:

In fact, these challenges motivated some of them to continue to work hard from within the organization to achieve their goals (Ridley & Barr, 2006, p. 17).

C.3 Training needs of board volunteers

The Fédération des communautés francophones et acadienne (FCFA) du Canada surveyed 170 francophone nonprofit organizations and present their findings in the report entitled *A Study of the Training Needs of Volunteers On the Boards of Nonprofit Organizations Serving Francophone and Acadian Minority Communities in Canada* (2006).

Survey respondents were asked to rate the importance of 73 specific types of training that were associated with eight training "themes." Their ratings indicate that the order of importance of the eight training themes is as follows:

- Concerns of minority francophone communities;
- Board operations;
- Professional and personal development;
- Financial management;
- Project management;
- Working with the community they serve;
- Board relationships with non-board personnel; and
- Information and communications.

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With regard to specific training needs, survey respondents identified the following as being the most important:

1. Powers, roles, and responsibilities of the board;
2. Orientation and training for new board members;
3. Legal obligations and responsibilities of the organization;
4. Developing and implementing a strategic plan;
5. Identity development of francophone communities; and
6. Knowledge about the organization, its background, mission, objectives.

Francophone organizations outside of Quebec have difficulty finding people and organizations that can provide training in French. To deal with this challenge, FCFA suggests that francophone organizations arrange joint training sessions for their board members. FCFA also emphasizes that training should be provided not just on board operations but also the special issues that must be addressed in minority francophone communities.

C.4 Aboriginal governance

Doug Durst and Karen Martens Zimmerly (2006) undertook a national study of the boards of directors of Canada's Aboriginal Friendship Centres. The results of the study are presented in a report entitled *Aboriginal Governance and Leadership: Volunteers in the Friendship Centres in Canada.*[3] Durst and Zimmerly identified seven dimensions of effective board governance, which they used to assess the governance structure of Friendship Centres. These dimensions are:

- **contextual:** the board understands and takes into account the culture, norms, and values of the organization it governs;

- **educational:** all board members are well versed in the board's role, the organization's mission, and the objectives of its programs;

- **interpersonal:** the board works to foster a sense of cohesiveness and desire to work as a team among all the organization's members;

- **analytical:** the board recognizes the complexities of the issues it must manage and brings multiple perspectives together to address them;

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[3] This report is discussed here rather than in the section on Aboriginal volunteers because it is primary focused on governance and leadership issues.

- **political:** the board sees that one of its primary roles is to develop and maintain positive relationships with key stakeholders in the community;

- **shapes direction/strategy:** the board undertakes long-term planning and sets an organization's goals and the actions to achieve them; and

- **Aboriginal values:** the board is egalitarian and practices leadership that is diffuse and voluntary; there is a tolerance of individual members, an emphasis on collective versus individual needs, avoidance of conflict, and a culture of sharing and reciprocal social obligations.

A survey focusing on these dimensions was distributed to 75 members of the boards of Friendship Centres. The respondents rated their boards very highly on all dimensions. For example, 84% of respondents agreed that their boards performed well with regard to the interpersonal and Aboriginal dimensions and 76% agreed that their boards performed well with regard to the contextual and education dimensions. The lowest level of agreement (66%) was regarding the political dimension.

Durst and Zimmerly also visited four Friendship Centres in Whitehorse, Victoria, Thunder Bay, and Halifax. They reviewed board operations at these centres and found the following:

- **Board selection and composition:** All centres ensured that youth were represented on boards and that board changes were staggered to maintain some continuity. New board members were chosen for their skills, knowledge, and network resources.

- **Procedures for meetings:** The centres held monthly meetings to maintain momentum of the centre's decision-making and activities. The meetings were also associated with informal socializing around meals to strengthen bonds between board members.

- **Decision-making process:** Surprisingly, the centres all adopted formal rules for discussion and decision-making based on *Robert's Rules of Order* rather than adhering to the Aboriginal tradition of informal consensus building.

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- **Leadership:** The boards of all four centres were clear on the demarcation between the role of the board and the role of the executive director. They all felt that the role of the board was to formulate policy and provide direction and the role of the executive director was to implement those decisions.

- **Management:** All centres had adopted an operational committee approach where the executive director brings the board decisions to a working group of staff and volunteers who collectively decide how to implement them.

- **Planning:** The centres usually do annual or biannual planning. Plans are initially drafted by the board and executive director, are fleshed out by key staff and volunteers, and are sent back to the board for approval.

- **Aboriginal practices and principles:** Because meetings tend to be formal, traditional consensus building occurs mostly in informal gatherings prior to meetings. However, some traditional practices were incorporated into board meetings, such as smudging (burning of sweet grass) and passing a talking stick when members wish to speak.

- **Board training:** Only two of the four centres provided orientation and training for new board members.

Based on their findings from the four centres, Durst and Martens Zimmerly provide a list of recommendations at the end of their report.

C.5 Engaging retired leaders

In the research report, *Engaging Retired Leaders as Volunteer Leaders*, Har Singh, Dvora Levin, and John Forde (2005) discuss the value of making leaders in government and the private sector aware of volunteering as a retirement activity. Singh and his colleagues did a survey of 71 retiring and retired leaders from the public, nonprofit, and private sectors. In addition, three focus groups were held with a total of 25 participants.

The researchers found that these leaders were willing to consider volunteering on retirement. However, they had been in leadership positions for long periods of time and did not want to commit to the amount of time or accept the level of stress that is associated with being a

volunteer leader or board member. The leaders said that they would much rather share their skills and knowledge with others than take up volunteer leadership positions. For example, 65% said they would be interested in sharing their experience on short-term projects; 59% would be willing to coach or mentor volunteer leaders; and 56% would like to share ideas on management.

These leaders commented that the main barriers to volunteering on retirement were the time commitment involved (51%) and the restriction volunteering would place on their other activities, such as traveling (38%). Some were also concerned that volunteer activities would not be meaningful (38%) or challenging (27%).

The purpose of the study was to create a profile of possible leaders for nonprofit organizations and come up with recommendations on recruitment. However, what is most useful about this information resource is that it highlights the value of the leaders as a potential pool of mentors and trainers and suggests that it might be more valuable for nonprofit organizations to explore using them as resource people to help build organizational skills and capacity.

C.6 Practical implications

The findings in these information resources show that board members are generally a dedicated group of individuals who serve their organization because of a passionate belief in its mission. However, boards also face many challenges. Although none of the resources in this section makes detailed recommendations on how to deal with these challenges, collectively they do provide a picture of the board environment from which one can draw some implications and make the following recommendations.

- Organizations should try to ensure that their board composition reflects the community they serve in terms of diversity, skills, and experience. For example, many boards tend to be composed of older individuals because organizations seek people with experience. However, it is also important to have youth (15 to 24 years) and younger adults (25 to 34 years) as members. They will help ensure that your organization is responsive to the needs of youth and young adults in the community. Simply the presence of young members on boards as role models is also likely to help attract youth to volunteering.

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- Many boards govern organizations that serve culturally diverse communities. It is important for boards to be sensitive to this diversity not only when recruiting new members but also in how they conduct themselves. For example, Aboriginal board members may have a specific approach to conducting meetings. Boards should try to accommodate these where appropriate.

- Boards should be honest with potential new members about the time commitment involved. This will help to ensure that all board members are willing to share the workload.

- Prospective board members should be made aware of how the board and its individual members contribute to the success of the organization.

- Orientation and training should be provided to new board members. This increases the efficiency and professionalism of boards and improves retention rates. An essential goal of board orientation should be to improve board members' understanding of governance and its importance in shaping the organization's response to the needs of a community.

- Organizations should explore the potential of using retired leaders from the public, private, and nonprofit sectors as volunteer mentors and trainers for board members.

- Training should be provided on the legal aspects of being a board member. This is important because board members are often not aware of the legal implications of their actions, particularly with regard to the by-laws and constitution of their organizations.

- Training should be provided on the board's role in working with funders, local government, provincial government, and other stakeholders who are partners in the delivery of services to the community.

- To maintain the effectiveness of both board meetings and board members, the board should agree on a process for monitoring and evaluating the impact of its decisions on the organization. The objective should be to reflect on results, identify what has worked and what has not, and adjust future decisions and actions accordingly.

- Boards should accept that their responsibilities encompass setting the values that determine the culture within the organization they oversee and the nature of the organization's relationship with its clients and the community at large. This being the case, it is important to ensure that board members understand their governance responsibilities in this area.

- Boards should endeavour to hold meetings that examine their governance role towards the organization and community they serve.

- Board meetings should be held regularly enough to maintain continuity in planning and other activities.

- Boards should have a plan for replacing board members that will ensure continuity of board experience so that accumulated knowledge and learning about the organization and its activities is not lost when board members retire.

- Although continuity of experience about organizational culture and board governance should be passed onto new board members, boards should also be open to fresh ideas. There should be processes in place that allow the board to review and change how it governs and set the values and mission for the organization.

DIVERSITY AND INCLUSION PART 2

Canada is rapidly becoming a more ethnically and culturally diverse country. This diversity increases further when one takes into account the variation that also exists at an individual level with regard to physical, psychological, and socioeconomic characteristics.

With such diversity come concerns about ensuring social justice and equity of access to the benefits of Canadian society for all members of diverse communities. Individuals are frequently marginalized or excluded from accessing these benefits because of language and/or the ethnic, cultural, or religious characteristics of their social group. Individuals are also sometimes excluded because of their individual physical, behavioural, and/or economic characteristics (e.g., health, age, gender, sexual orientation, income).

Many organizations in the nonprofit sector strive to counter this marginalization and increase the inclusion of diverse individuals and groups into the life of Canadian communities. To achieve this goal, nonprofit organizations must first address inclusion within their programs and activities. This is so they can lead by example and better reflect the composition of the communities they serve.

In this section, we review information resources that discuss how engaging diverse individuals and groups in volunteering can reduce their marginalization and facilitate their inclusion into Canadian society. These resources address the challenge of how to generate a sense of community in which differences are valued and everyone is able to contribute to enriching society and enjoying its benefits. The resources are divided into those that focus on:

    A. Individual attributes
    B. Group attributes

A INDIVIDUAL ATTRIBUTES

This section deals with volunteering among people who are marginalized because of their individual attributes, including:

A.1   Volunteers with disabilities (physical and intellectual)
A.2   Volunteers with chronic diseases (Alzheimer's disease and HIV/AIDS)
A.3   Previous history (ex-offenders)
A.4   Socio-economic status (low-income)

Each section includes a discussion of the practical implications of the research.

A.1 Volunteers with disabilities

When the general public thinks of someone with a disability, they tend to picture someone in a wheelchair who needs assistance and support to survive and thrive. However, disabilities can take many forms, such as impaired vision, impaired hearing, intellectual disability, etc. Although each disability places specific constraints on people, two characteristics are common among people with disabilities. First, many of them are unemployed and hence have low incomes. Second, they are often socially isolated because of public attitudes to their impairment. As a result, people with disabilities often feel that their skills, knowledge, and experience are undervalued by society.

The 2001 National Survey of People with Disabilities in Canada reported that 12% of Canadians (3.6 million people) had a disability (Cossette & Duclos, 2002). Nearly one third (32%) had mild disabilities and one quarter (25%) had moderate disabilities.[4] Engaging these individuals in volunteer activities is one way to help them make a contribution to their community while also increasing their independence and reducing their social isolation.

Two studies funded by the Knowledge Development Centre explored how organizations can make volunteering more accessible to people with disabilities. These studies suggest that the main challenge for organizations is overcoming the attitudes of staff and volunteers without disabilities. Once negative attitudes are overcome, other barriers that prevent people with disabilities from volunteering are relatively easy to address.

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4 Cossette and Duclos (2002) measure the severity of a disability using a point scale that described *intensity* and *frequency* of the activity limitations. Scores for intensity and frequency were standardized to provide a value between 0 and 1. Mild disabilities would have scores close to 0 and moderate, close to 0.5.

A.1.1 Physical disabilities

In his manual *Simple Solutions*, Barry Schmidl (2005) focuses on barriers that prevent people with physical disabilities from actively volunteering and on how easy it is to remove these barriers. He groups the barriers under five general categories:

- **accessibility barriers:** physical barriers such as stairs that make access impossible for people in wheelchairs;
- **external barriers:** snowy or icy sidewalks or lack of accessible public transportation;
- **disability-specific barriers:** visual impairment, limited mobility;
- **internalized barriers:** barriers that are specific to the individual with a disability, such as fear of rejection, reluctance to ask for help; and
- **attitudes and systems barriers:** the attitudes of staff or able-bodied volunteers in nonprofit organizations.

Schimdl organizes the manual so that each of the five general categories of barriers is subdivided into specific barriers. He then provides simple solutions to overcome each barrier, along with the cost implications and resource requirements. His recommendations about removing barriers are based on two surveys. One was an in-depth survey of 150 nonprofit organizations concerning what steps they are taking to remove barriers. The second was a survey of 550 people with disabilities who reported on the barriers that prevent them from volunteering and what should be done to remove them. Both surveys were done in Prince Edward Island.

Practical implications

Based on the results of the surveys, Schimdl recommends that nonprofit organizations that wish to engage the volunteers with disabilities should adopt a systematic approach to creating an environment that is welcoming, inclusive, empowering, and caring. He suggests the following planning steps:

- Ask a local disability organization to present information to people with disabilities about the range of possible volunteer contributions they could make.
- Identify volunteer activities for the disabled within your organization.

- Check for barriers that might prevent people with disabilities undertaking the activity (seek assistance from organizations for people with disabilities and their clients).
- Ask the local disability organization to do sensitivity training for staff and able-bodied volunteers in your organization.
- Discuss with staff and able-bodied volunteers how their roles may have to change to accommodate volunteers with disabilities.
- Whenever possible, simulate the disability of the people you hope to involve and try undertaking the volunteer activity you have identified for them.
- Get a person with disabilities to do a final check on barriers.

One of the most important barriers to focus on first is the attitudes of staff and able-bodied volunteers. Schimdl points out that often it is negative attitudes towards particular disabilities that have created barriers in the first place. Encouraging a disability organization to do sensitization workshops to demonstrate the value of people with disabilities can change attitudes. Once attitudes change, then other barriers become easier to overcome. Other accessibility issues that organizations should address include:

- physical accessibility to offices and washrooms;
- physical accessibility during winter conditions;
- availability of designated parking areas;
- accessibility of transportation to the organization;
- extra costs likely to be incurred by volunteers with disabilities;
- access for those with specific disabilities (e.g., hearing and/or visual impairment);
- designing appropriate volunteer activities;
- flexibility in scheduling volunteer activities; and
- training and support for volunteers with disabilities.

Having a physically accessible environment is only the first step in engaging volunteers with disabilities. There also has to be the will and the resources within the organization to provide these volunteers with the training, supervision, and social support they need. This will help build self-esteem and overcome the feelings of helplessness many people with disabilities feel from time to time. Organizations should also be flexible and open to 'virtual volunteering' whereby people with disabilities can undertake activities from their homes via computer.

A.1.2 Intellectual disabilities

Kelly Robinson and Barb Fanning's guide, *Stepping Forward: Including Volunteers with Intellectual Challenges* (Robinson & Fanning, 2006) and Ann Wheatley's fact sheet, *Step Forward and Volunteer* (Wheatley, 2006) demonstrate what happens if the barriers to volunteering for people with disabilities are overcome. These resources demonstrate:

- the value of volunteering for people with intellectual disabilities, and
- the value to the organization and the community it serves of having people with intellectual disabilities engage in volunteer activities.

Robinson and Fanning interviewed volunteers and staff members of organizations that have volunteers with intellectual disabilities. They had two goals: (1) to demonstrate to nonprofit organizations the feasibility and benefits of engaging individuals with intellectual disabilities as volunteers, and (2) to demonstrate how organizations can accommodate these volunteers.

Volunteers with intellectual disabilities volunteer for many different kinds of organizations: advocacy and justice groups, food banks, sports teams, churches, libraries, schools. They are also capable of doing a wide variety of tasks: serving on boards, administration, advocating, fundraising, helping seniors, preparing food.

The impact of these activities is profound and of great benefit to the volunteers. The benefits include:

- increased self-confidence and self-esteem;
- increased skills;
- opportunities for increased acceptance and inclusion by meeting new people and making new friends;
- opportunities to speak up and make people aware of the value of people with intellectual disabilities;
- opportunities to have fun;
- involvement in important community issues; and
- opportunities to travel on volunteer assignments.

Organizations also benefit from the contributions of volunteers with intellectual disabilities. In addition to getting practical help, organizations gain from the insight these volunteers provide on the importance of diversity and inclusion. Including these volunteers dispels myths and misconceptions among staff and volunteers without disabilities. Organizations can also educate the general public about the value of volunteers with intellectual disabilities by relating the experience of working with these volunteers and having them carry out volunteer activities in the community.

Practical implications

Nonprofit organizations interested in engaging volunteers with intellectual disabilities can begin by adopting the approach advocated by Schmidl (2005) concerning barriers to volunteering. People with intellectual disabilities are more likely to face social and economic barriers than physical barriers. In addition, Robinson and Fanning (2006) state that organizations must take care identifying and organizing appropriate volunteer activities for people with intellectual disabilities. They suggest the following:

- Seek advice from other organizations that have engaged volunteers with intellectual disabilities.
- Identify activities that have a clear job description and that match individual abilities, comfort level, and interest.
- Provide a thorough volunteer orientation.
- Break volunteer activities down into simple steps.
- Provide a 'buddy' or mentor to work with the volunteer, if necessary.
- Ensure the volunteer has easy access to the activity (e.g., transportation).

Many volunteers with intellectual disabilities serve on boards of nonprofit organizations. Special measures need to be taken to accommodate these volunteers:

- Use plain language in meetings.
- Make the meeting process understandable and ensure that time is spent explaining what will be discussed.
- Pair up a board member without disabilities with a member who has intellectual disabilities.
- Do not assume everyone can read, and ensure that written information can be transferred to an audio format if necessary.
- Ensure that respect is given to the volunteer board member and they have adequate time to participate in discussions.
- Ensure that there is a system to contact the volunteer to inform her or him of meetings.

A.2. Volunteers with chronic diseases

With medical advances, many health problems and diseases that were previously acute and fatal within a short period of time have evolved into chronic illnesses. Many of these illnesses, such as HIV/AIDS and Alzheimer's disease, carry a social stigma or have symptoms that are disturbing to many. As a result, the general public tends to marginalize people with these illnesses and leave them to the care of specialized agencies and institutions. These agencies and institutions, in turn, struggle to create effective programs to help people maintain their independence and self-esteem.

An estimated 435,000 Canadians over the age of 65 manifest various dementias, including Alzheimer's disease and related dementias, and it is expected that there will be over 100,000 new cases a year in this age group (Alzheimer Society of Canada, 2006b).The number of Canadians living with HIV/AIDS is currently 58,000, which is 20% more than in 2000 (Smith, 2006).

Two research projects funded by the Knowledge Development Centre highlight the value of volunteering for people with chronic illnesses. These studies found that volunteering benefits people with chronic health problems in three major ways: it builds their self-confidence and self-esteem, it rebuilds their connections to their community, and it dispels myths and misconceptions about their illnesses. The results of these studies apply to anyone suffering from a chronic illness who is still capable of contributing to the community.

A.2.1 Alzheimer's disease

Improved ability to medically detect Alzheimer's disease and related dementias (ADRD) and increased public awareness of the symptoms mean that people are seeking information and support very early on in the development of their disease. Consequently, there are many people with early-stage ADRD who have only mild symptoms and are high-functioning for long periods of time. However, as the Alzheimer Society of Canada explains in its research report, *Engaging People with Early-Stage Alzheimer's Disease in the Work of the Alzheimer Society*,

> ...it was, and is, a commonly held view that people with the disease cannot speak for themselves or make their own decisions. In fact, the current public image of someone with ADRD is based on the later stages of the disease (p. iii).

This image is being overcome by individuals with early-stage ADRD who volunteer and raise public awareness about the disease. Volunteering also enables people with ADRD to contribute to and have a voice in the activities of the Alzheimer Society and other organizations dealing with ADRD. Three groups participated in the research conducted by the Alzheimer Society:

- Alzheimer Society volunteers with early-stage ADRD;
- non-volunteers with early-stage ADRD who are in support groups; and
- Alzheimer Society staff from 10 provinces and one territory.

Volunteers and staff saw many benefits of volunteering for people with early-stage ADRD, both for the volunteers and for the Alzheimer Society.

The benefits for volunteers were:
- increased self esteem;
- being in an environment where ADRD is understood;
- the opportunity to improve their quality of life by participating in decision-making on policies and programs dealing with ADRD;
- the opportunity to assist those with later-stage ADRD;
- the opportunity to contribute to research on ADRD; and
- increased respect from the general public, government, and agencies dealing with ADRD.

The benefits for the Alzheimer Society were:
- better understanding of how to meet the needs of its clients;
- improved services, based on better understanding of needs;
- increased client involvement in planning more effective policies and practices to assist people with ADRD;
- improved profile and image for the society; and
- improved awareness and support from government and the general public.

Practical implications

Engaging people with ADRD as volunteers can help nonprofit organizations that deal with this disease better understand the people they serve and thereby provide more effective programs. However, there are practical implications that organizations and potential volunteers need to take into account. These include the following:

- Organizations should provide information for those diagnosed early with ADRD to encourage them to step forward and volunteer.
- Staff of support organizations should focus on the potential of people with early-stage ADRD to be volunteers rather than just viewing them as clients.
- Provision should be made for specific training for staff who will be working with volunteers who have ADRD.
- Organizations engaging people with ADRD as volunteers should be open to allowing them to take part in public awareness raising, fundraising, task groups, planning, board meetings, etc., depending on their interest, confidence, ability, and past experience.
- Extra support should be given to volunteers with ADRD who participate in meetings and public presentations.
- There should be clear policies on the role of people with ADRD in the work of an organization (e.g., what role they will play in activities such advocacy and program planning).
- Organizations need to ensure that they assign enough staff to work with volunteers with ADRD and to care for these volunteers as their health declines.
- There should be guidelines for staff and volunteers about what to do as a volunteer's condition worsens.
- Any organization supporting people with ADRD should allow them to contribute to planning the support systems that will help them as their health declines.

The Alzheimer Society concludes:

> It is our hope that the findings and observations of this report will be useful to other charitable and nonprofit organizations that are concerned with advocacy, inclusion, and empowerment, and would like to see their consumers become active self advocates, not just passive recipients of care and support (Alzheimer Society of Canada, 2006a, p. 26).

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A.2.2 HIV/AIDS

André Samson's (2006) research supports the findings of the Alzheimer Society of Canada. In *Volunteering by People with HIV/AIDS or a Major Chronic Disease: Issues and Challenges*, Samson argues that individuals with HIV/AIDS can improve their quality of life by volunteering. Volunteer activity also reduces the social stigma associated with the disease and increases an individual's sense of inclusion.

Samson's research focused on volunteers with HIV/AIDS who volunteer for organizations dealing with these issues and on senior staff of these organizations. His goals were to assess the impact of volunteering on people with HIV/AIDS and the implications for nonprofit organizations serving these people in francophone communities in Gatineau, Ottawa, and Toronto.

People diagnosed with HIV often feel that they have been given a death sentence even though manifestation of symptoms can be delayed for decades or symptoms may not manifest themselves at all. As one volunteer commented:

> *"At first, I associated the infection with death. I was facing a wall. Volunteering opened a door for me and I discovered life was still possible."* (Volunteer with HIV)

HIV infection, and its possible manifestation as AIDS, isolates individuals because of the general public's stigmatization of those infected or showing symptoms. However, volunteering allows those with infected with HIV to counteract negative attitudes and regain a sense of dignity, purpose, and self-confidence. All of the volunteers in the study were homosexual, so they had to face the stigma not only of their disease but also of their sexual orientation. Study participants explained that negative attitudes declined because of their volunteer activity. As one study participant emphasized:

> *"I feel appreciated by others. This makes me happy. Volunteering has given me a certain inner peace…I give to others and I feel that what I do is appreciated."* (Volunteer with HIV)

Volunteering benefits individuals with HIV/AIDS by:

- giving their life new meaning;
- enhancing their self image;
- providing structure to their lives;
- providing a means for self-expression;
- helping them reintegrate into their local community;
- breaking down the wall of secrecy and misconceptions about HIV/AIDS;
- giving them the opportunity to advocate on behalf of those with HIV/AIDS; and
- providing a venue where they are not confined physically or socially by their disease.

Practical implications

Nonprofit organizations that wish to engage volunteers with HIV/AIDS should consider the following recommendations:

- Adopt an explicit policy to allow people with chronic illnesses to volunteer. This will reduce the social stigma of these diseases.
- Provide sensitivity training to their staff and volunteers.
- Provide guidelines to staff and volunteers as to what they should do as the health of a volunteer with HIV/AIDS declines.
- Encourage current volunteers with HIV/AIDS to share with peers who have not yet volunteered the positive benefits of volunteering for their health, well-being, and social status within their community.
- Be prepared to be flexible in scheduling of volunteer activities to accommodate fluctuations in the health of volunteers with HIV/AIDS.
- Raise awareness among other organizations of the value of these volunteers.

A.3 Ex-offenders as volunteers

There are currently 32,046 adults in complete custodial control of Correctional Services of Canada and 117,506 under community supervision (Beattie, 2006). Once these people have completed their custodial sentences and are out in a community, they often struggle to regain acceptance. One way to facilitate the integration of ex-offenders back into society is to provide transition programs for them. Joanne Murray of the John Howard Society of Greater Moncton, in collaboration with William Morrison and Cynthia Doucet the University of New Brunswick, undertook a research study to explore the value of engaging ex-offenders as peer volunteers in transition programs.

Their research report, *Ex-offenders as Peer Volunteers: Promising Practices for Community-Based Programs* (Morrison, Doucet, & Murray, 2006), reviews the literature on the value of peer volunteering and examines the personal impact on ex-offenders who volunteer on rehabilitation programs. To gain a national perspective, they used the John Howard Society national network to identify 21 key informants for interviews. These were frontline workers (e.g., executive directors, program managers) and community volunteers working on rehabilitation programs for ex-offenders. The researchers also explored the views of 41 ex-offenders who were volunteers by holding four regional focus groups with peer volunteers across Canada.

The benefits of engaging ex-offenders as peer volunteers are as follows:

- Clients of rehabilitation programs are more comfortable receiving advice and help from their peers.
- Peer volunteers speak from experience and so clients find them credible and are more willing to listen to them.
- Peer volunteers show there is hope for success and inclusion back into the community.
- Peer volunteers experience the rewards of giving back to their community.
- Peer volunteers give staff fresh insights into the challenges facing ex-offenders.

Benefits highlighted by staff were confirmed in the focus group sessions with peer volunteers. These ex-offenders emphasized that their 'lived experience' and their successful establishment of a crime-free lifestyle had a profound and positive impact on their clients. Peer volunteers who have achieved such stability are successful mentors in helping new ex-offenders meet their parole and legal obligations and readjust to life outside prison. Peer volunteers are also a valuable resource for educating the general public on the value of helping ex-offenders to re-establish themselves.

Practical implications

If ex-offenders are to successfully reintegrate into the community, they need to be provided with the opportunity to get involved in activities that strengthen their sense of civic responsibility. Nonprofit organizations that provide transition programs for ex-offenders can offer this opportunity by engaging fully rehabilitated ex-offenders as volunteers. Other nonprofit organizations that provide services to the community could also consider engaging ex-offenders as volunteers. However, care is needed in choosing suitable individuals and activities. Organizations should follow these guidelines when recruiting ex-offenders as volunteers:

- Recruitment and screening should be positive, easy to understand, and match volunteers to placements that will be safe and successful for both the volunteer and the organization's clients.
- Volunteers must be able to demonstrate they have had a stable, crime-free period since finishing their custodial sentence.
- There should be evidence that the ex-offender has been consistent, dependable, and true to his or her word since leaving custody and community-based transition programs.
- Motives for volunteering should be carefully examined.
- Ex-offenders should have good interpersonal skills and be willing to work inside the prison system as well as outside if they are assisting on transition programs as peer volunteers.
- Appropriate volunteer tasks need to be identified (e.g., individuals who may be high-risk for working with others can be given low-risk tasks such as gardening, maintenance, administration, etc.).

The report makes the following recommendation for organizations that want to engage ex-offenders as peer volunteers in transition programs:

- Orientation, training, and mentoring are essential to ensure that ex-offenders adjust successfully to their volunteer roles.
- During orientation and training, staff should emphasize that the volunteers are valued and can make meaningful contributions to the transition program.
- Ongoing individual and group support should be offered to peer volunteers to build their confidence, self-esteem, and sense of teamwork.
- Peer volunteers should be allowed to add their 'voice of experience' to program planning.

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- Organizations should create a caring environment for peer volunteers and provide them with opportunities to demonstrate caring attitudes towards themselves and others.
- Ongoing monitoring and evaluation of the peer volunteer program is essential and should be a transparent process.

A.4 Low-income volunteers

Individuals can be marginalized and excluded not only because of individual physical or behavioural attributes or previous history but also for economic reasons. Low income and its accompanying poverty often isolates people because it deprives them of the financial wherewithal to access physical, social, and economic resources within the community. Consequently, many nonprofit organizations run programs aimed at alleviating poverty and helping low-income individuals and households gain access to community resources.

Findings from the Canada Survey of Giving, Volunteering, and Participating (CSGVP) demonstrate that as household income rise so does the likelihood of individuals in the household volunteering (Hall, Lasby, Gumulka, & Tyron, 2006). The volunteer rate rises from a low of 30% for individuals with annual household incomes of less than $20,000 to a high of 60% for those with incomes of $100,000 or more. However, volunteers with incomes below $20,000 contribute more hours (177 on average) than do those with incomes of $100,000 or more (155 on average). This suggests that low-income individuals are very committed volunteers.

The Social Planning and Research Council of British Columbia (SPARC) undertook research to examine the experiences and motivations of low-income volunteers. Their results were published in a report entitled *What Motivates Low-Income Volunteers? A Report on Low-Income Volunteers in Vancouver and Prince George, British Columbia* (SPARC, 2005a) and in two fact sheets: *Understanding Low-Income Volunteers* (SPARC, 2005b) and *Low-Income Volunteers: People to Appreciate and Accommodate* (SPARC, 2005c).

SPARC interviewed 53 low-income individuals to find out why they chose to volunteer; most interviewees were living on welfare, employment insurance, or pensions. Seventy-nine (79%) percent said that volunteering provided a means to reduce their isolation and make social connections. They pointed out that, when you are unemployed, your social circle diminishes rapidly unless you make a concerted effort to undertake activities that bring you out into the community. For some low-income volunteers, volunteering is a way to build employment-

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related skills. For others, it is a way to reduce the psychological stress of poverty by redirecting energy into a rewarding activity. Many low-income volunteers also want to 'give back' to the organizations that have helped them. Indeed, low-income individuals often become volunteers by making the transition from client to volunteer within the organizations that are assisting them.

Low-income volunteers experience barriers and constraints to volunteering that those with higher incomes often do not face. These include:

- **income constraints:** often volunteering has associated expenses that may be hard to cover (e.g., transport, equipment, food, etc.);
- **psychological stress:** individuals on low-incomes are often stressed and this can affect their ability or inclination to volunteer;
- **health constraints:** many individuals on low-incomes have associated health problems that make it difficult for them to volunteer;
- **time constraints:** individuals on welfare and employment insurance are legally obliged to search for jobs, so their time for volunteering is limited.

Practical implications

Based on interviews with volunteer coordinators and low-income volunteers, SPARC developed several recommendations for nonprofit organizations interested in recruiting and retaining low-income volunteers:

- Look to low-income clients as a source of volunteers as they are known to your organization and knowledgeable about its activities and mission.
- Ask clients personally if they want to volunteer. This is important as they are likely to have low self-esteem because of their circumstances. Being asked is recognition of their value as a person.
- Ask volunteers what they can contribute to the organization. Allowing them to decide what they can give increases their confidence and feeling of self-worth.
- Ensure that potential volunteers do not think they have to volunteer in order to receive support services.
- Avoid enquiring about a potential volunteer's financial status as this will often be a sensitive issue.
- Take time to find out what low-income individuals wish to gain from volunteering and then help them realize at least some of their goals. This is important in building self-confidence.

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SPARC makes the following recommendations for retaining and recognizing low-income volunteers:

- Become familiar with the personal circumstances and needs of the volunteer so that you can offer appropriate forms of support.
- Consider providing financial support for transport if necessary.
- Consider how some of the basic needs of the volunteer (e.g., food, clothing, household supplies) can be met.
- Be as flexible as possible with schedules, particularly for volunteers who have low incomes because of disability or poor health.
- Acknowledge and reward the efforts of volunteers; low-income volunteers in the study preferred small, useful forms of recognition rather than large, formal events.
- Be careful with financial rewards such as honoraria as those on welfare must declare such 'income.'

A.5 Concluding points on volunteering and individual diversity

There are several common threads running through the information resources discussed in this section. Specifically, they all report that volunteering is a means for individuals to:

- rebuild confidence and self-esteem;
- demonstrate both to themselves and to their peers that it is possible to regain a sense of well-being and accomplishment;
- recognize that they have much to contribute to their community;
- show that their particular attributes or past history should not be a reason for exclusion from society;
- dispel the myths and stigma associated with their individual attributes;
- show nonprofit organizations that they can be effective in assisting organizations achieve their mission; and
- facilitate re-entry into the life of their local community.

GROUP ATTRIBUTES B

Group attributes that contribute to community diversity include culture, ethnicity, language, and religion. This section is divided into two parts:

B.1 Immigrants volunteers
B.2 Aboriginal volunteers

Practical implications are discussed for each of the research studies under *Immigrants as volunteers*, and are synthesized for those on *Aboriginal volunteers* at the end of the section.

B.1 Immigrant volunteers

New immigrants are rapidly increasing cultural diversity in Canada, which currently has more than 200 cultural and ethnic groups (Scott, Selbee, & Reed, 2006). Immigration also accounts for 53% of Canada's population growth (Canadian Heritage, 2006). This is a result of Canada's strong multiculturalism policy, which has encouraged immigration to the country. To ensure equity of opportunity for new immigrants, Canada's Multiculturalism Act states that the government will:

> promote the full and equitable participation of individuals and communities of all origins in the continuing evolution and shaping of all aspects of Canadian society and assist them in the elimination of any barrier to that participation (Canadian Multiculturalism Act, R.S., 1985, c. 24 (4th Supp.), section 3(c)).

One avenue for promoting immigrants' inclusion in Canadian life is volunteering. There is evidence that immigrants volunteer as a way to contribute their knowledge and experience to their new communities and establish themselves in their new country.

In *Caring Canadians, Involved Canadians: Highlights from the 2004 Canada Survey of Giving, Volunteering, and Participating*, Hall et al. (2006) report that immigrants to Canada are slightly less likely to volunteer than are native-born Canadians (41% vs. 48%). But when immigrants do volunteer, they contribute almost the same amount of hours per year (an average of 165) as native-born Canadians (an average of 168).

In this section, we discuss the results of several projects focusing on volunteering among immigrants to Canada. Some of these projects were funded by the Knowledge Development Centre; some were funded by the Community Support Centre.

B.1.1 Perceptions and experiences of immigrant volunteers

Two KDC-funded projects looked at the perceptions and experiences of immigrant volunteers. Nicole Chiasson and Claudia Morel conducted a study of New Canadians living in Quebec. The results are presented in a report entitled *Perceptions, Attitudes and Motivations of New Canadians Regarding Volunteerism* (Chiasson & Morel, 2007). Fay Fletcher, Blythe Campbell, and Jeneane Fast undertook research to understand the volunteer experiences of immigrant women. Their main results are presented in two facts sheets. *Immigrant Women as Volunteers: Benefits for Charitable and Nonprofit Organizations* (Fletcher, Campbell, & Fast, 2007a) provides guidelines for organizations interested in recruiting immigrant women as volunteers. *Immigrant Women…Why volunteer?* (Fletcher, Campbell, & Fast, 2007b) is written for immigrant women who are interested in volunteering.

Chiasson and Morel (2007) conducted their research in the Estrie region of Quebec. They began by conducting focus groups with representatives of 11 organizations and 13 immigrants from Colombia, El Salvador, and Yugoslavia. Based on the results of this preliminary research, they developed a questionnaire which was answered by 98 New Canadians. Fletcher, Campbell, & Fast (2007a, 2007b) conducted personal interviews and focus groups with 24 immigrant women living in Edmonton, Alberta. The women represented a mix of cultures and backgrounds. They included professionals, students, stay-at-home mothers, and retirees. All of them were volunteers.

The results of these projects suggest that, like most Canadians (see Hall et al., 2006), New Canadians volunteer to help people, give back to the community, help a cause they believe in, use their skills and knowledge, acquire new skills, and have fun. However, immigrants also have some unique reasons for volunteering. These include:

- to help other immigrants and be a role model for them;
- to learn more about Canadian life and culture;
- to meet and get to know native-born Canadians;
- to gain a Canadian reference for their resume; and
- to practice their English or French.

New Canadians also face many of the same barriers to volunteering as do other Canadians, including lack of time and the inability to make a long-term commitment. However, some barriers are unique, or at least more common among immigrants than among non-immigrants. These include:

- difficulty expressing themselves in English or French;
- feeling unwelcome or unappreciated by voluntary organizations;
- lack of knowledge about the volunteer opportunities that are available or the skills that are required for volunteer positions;
- concern about the costs associated with volunteering (e.g., for childcare or transportation);
- discomfort with the formal nature of volunteerism in Canada (e.g., application processes, criminal record checks, regular schedules).

Practical implications

These resources include many recommendations for organizations that are interested in recruiting and retaining immigrants as volunteers. Their major recommendations are as follows:

- Offer a warm, friendly, welcoming environment.
- Spend plenty of time orienting immigrant volunteers to your organization and to the tasks they will be performing.
- Have pamphlets describing your organization and its activities in various languages or at least in easy-to-understand English or French.
- Ensure that staff members and Canadian-born volunteers are aware of cultural differences that they may encounter (e.g., direct eye contact is considered aggressive and rude in some cultures).
- Be aware that some immigrants find criminal background checks offensive and try to be flexible about these if possible.
- Show an interest in learning about the cultures of immigrant volunteers (e.g., encourage them to talk to staff and other volunteers about their cultural traditions).
- Consider working with other organizations in your community to raise awareness about volunteering among immigrants.

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B.1.2 The role of ethnic congregations in volunteering

Many immigrants seek help in adjusting to Canada by joining religious congregations of their own ethnic and cultural background. As Femida Handy, Leona Anderson, and Lisa Diniz explain in their research report, *The Role of Ethnic Congregations in Volunteering*:

> For many immigrants…congregations provide a safe haven where they can make friends, speak their language, and retain their cultural practices (Handy, Anderson, & Diniz, 2005a, p. 1).

There is evidence from the 2004 CSGVP that religious organizations play an important role in immigrants' lives. Although immigrants and native-born Canadians volunteer for religious organizations at similar rates (11% and 10% respectively), immigrants contribute a higher proportion of their volunteer hours to religious organizations than do native-born Canadians (22% vs. 15%).

In their report and fact sheet (Handy et al., 2005a, 2005b), the researchers explore why new immigrants become members of ethnic congregations, how they become involved in volunteering through them, and the impact of their volunteer activities. Across Canada, clergy in 34 congregations representing eight religions and 16 ethnic groups were interviewed about immigrants as volunteers. In addition, 33 focus groups with over 190 immigrants were held in various parts of Canada and over 834 immigrants responded to a survey.

New Canadians gain many benefits from volunteering in their congregations. Two of the most important benefits highlighted in the research are the creation of new social networks with members of the congregation (50% of respondents) and with members of the local community (45% of respondents). Gaining work skills and job training was cited by 25% of respondents. Focus group participants also felt that making social connections was the most important aspect of their volunteering. Other benefits for immigrants of volunteering in ethnic congregations were:

- Congregations provide a welcoming space where immigrants can use their Language and experience their culture while volunteering;
- Immigrant volunteers can make new friends of their own cultural and ethnic background when volunteering;
- Volunteering for a congregation where activities expose immigrants to native-born Canadians and Canadian institutions helps immigrants improve their language skills and learn about Canadian culture; and
- Volunteering in a congregation provides Canadian experience and assists new immigrants in finding paid work.

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Practical implications

The findings of this research highlight the need for congregations and nonprofit organizations to collaborate in encouraging immigrants to volunteer. The report makes the following recommendations for ethnic congregations and nonprofit organizations that seek to engage immigrants as volunteers:

- Nonprofit organizations should approach ethnic congregations to make them aware of the value of volunteering in terms of making social connections and contributing to the community outside the congregation.

- Congregations should emphasize that their volunteer opportunities not only help immigrants build social connections but also provide Canadian experience, which is a first step towards establishing employment.

- Nonprofit organizations should explore the possibility of establishing links and collaborating with ethnic congregations in joint volunteer activities. In this way, immigrants who are already volunteering in their congregation will be exposed to other kinds of institutions and volunteering. These immigrant volunteers may then begin to see volunteering not only as a means to obtain work and social connections but also as essential to providing a safe, healthy, and tolerant community that respects and values diversity.

- Nonprofit organizations should also consider collaborating with ethnic congregations as a means to increase diversity within their volunteer programs. Increased diversity of volunteers and paid staff within nonprofit organizations will better reflect the community's demographics and help organizations to serve their local population better.

B.1.3 Immigrant seniors

The 411 Seniors Centre Society undertook research to explore how volunteerism is understood and practiced by ethnocultural seniors who are new to Canada. The seniors highlighted in the report, *Volunteering among Ethnocultural Seniors Who are New to Canada*, (Juliusson, 2005) came from six different ethnic groups. Interviews were conducted with 63 individuals, and 316 seniors participated in 25 focus groups. The objective was to generate information that could be used to design volunteer programs that are attractive to these seniors, who are often keen to help out in the community and have the time to do so.

Regardless of ethnicity, most of the seniors in the study (80%) provided direct assistance to individuals or groups in their community without going through an organization. This preference for informally helping out rather than formal volunteering, which is common in many cultures, is a challenge for Canadian nonprofit organizations that wish to increase the diversity of their volunteer base to better reflect the communities they serve. Other challenges facing nonprofit organizations that wish to engage ethnocultural seniors as volunteers include:

- creating multicultural values or spirit within the organization that ethnocultural seniors will find welcoming;
- providing a less intimidating application process for volunteers;
- encouraging ethnocultural seniors to move from being passive recipients of an organization's services to becoming active contributors in their design and implementation;
- addressing the fears that ethnocultural seniors have about liability associated with formal volunteering; and
- encouraging seniors from non-multicultural societies to move out of their comfort zone of only assisting within their own ethnic community in Canada.

Practical implications

If nonprofit organizations wish to be more representative of the multicultural communities they serve, they would be well served by engaging ethnocultural seniors. Seniors are highly respected within many ethnic groups. Therefore, having them as volunteers would help nonprofit organizations become more accepted, valued, and effective in providing culturally appropriate services for different ethnic groups.

The report makes the following recommendations for organizations that seek to engage ethnocultural seniors as volunteers:

- Forge links with different ethnic groups within your community to gain an understanding of the culture, language, and informal volunteering that seniors and others do within their ethnic group.
- Through discussion and collaboration with local ethnic groups, create culturally relevant volunteer programs.
- Explore ways to support informal volunteering and see which elements of informal volunteering might be of value for formal volunteer programs.

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- Create a welcoming environment within your organization where native-born staff and volunteers are accepting of diversity.
- If possible, try to approach seniors in person to ask for their help.
- Ensure that language is not a barrier by having people who can communicate with ethnocultural seniors who have limited English or French language skills.
- Keep the screening process for new volunteers as informal and non-intimidating as possible.
- Ensure that your organization's documents (e.g., mission statement, description of volunteer programs, volunteer application forms) are provided in the languages of the ethnic groups with which you wish to work.
- Emphasize the value and fun of volunteering (e.g., it provides a chance to share knowledge about one's culture, apply one's skills, help others, and strengthen one's sense of belonging to the community).

B.1.4 Immigrant youth

The Calgary Immigrant Aid Society (CIAS) undertook a pilot project designed to understand how nonprofit organizations can more effectively recruit and retain young volunteers from diverse ethnocultural backgrounds. They began by holding two focus groups with 17 immigrant and first-generation youth from eight different cultures and countries of origin. The youth were asked to comment on:

- barriers to formal volunteering in nonprofit organizations,
- the volunteer opportunities and activities they would find attractive to do, and
- the training they feel they would need to undertake volunteer activities.

They also held two focus groups with 11 volunteer coordinators and program managers from major nonprofit organizations in Calgary.

The focus group sessions produced findings regarding the benefits and challenges of engaging ethnocultural youth as volunteers. These findings, along with recommendations for organizations, are published in a handbook entitled *Culturally Diverse Youth and Volunteerism: How to Recruit, Train, and Retain Culturally Diverse Youth Volunteers* (CIAS, 2005).

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The benefits for organizations that engage culturally diverse youth as volunteers include:

- improvement of the organization's cultural competence (i.e., staff and volunteers learn about different cultural norms and traditions);
- ability to provide more effective services and support to diverse cultural groups;
- development of stronger ties to diverse cultural groups and greater support from them;
- enrichment of the organization's programs because of the wealth of new knowledge, skills, experience, and energy diverse youth bring to the organization; and
- creation of a pool of culturally diverse candidates for future staff positions.

Practical implications

The report makes the following recommendations for overcoming barriers to recruiting culturally diverse youth as volunteers:

- Form links with neighbourhood schools; give talks there and put up posters about volunteer opportunities.
- Create opportunities for youth from particular cultures to volunteer together; this will increase their comfort level.
- Be sensitive to differing language abilities; have some volunteer activities that only require limited language skills.
- Advertise volunteer assignments in different languages if possible or at least in very simple English or French.
- Provide flexible schedules and, where possible, have many short-term assignments that youth can easily do in the time available to them.
- Be flexible about screening and reduce it as much as possible.
- Try to connect with parents of volunteers so that they understand what their children are doing and will give them support.

The report makes the following recommendations relating to orienting and training culturally diverse youth volunteers:

- Be flexible in scheduling orientation and training.
- Make orientation and training sessions interactive and fun.
- Use clear, simple, easily-understood language, and do not provide too much information at once.
- Use visual tools to reduce the problems of language and increase understanding of the session's topics.
- Because many youth come from cultures where formal volunteerism is not a tradition, ensure your orientation session explains the concept.
- Wherever possible, try to have adults available who are supporters of diversity and/or can speak the language of the youth volunteers.

Finally, organizations that wish to retain culturally diverse youth volunteers are urged to do the following:

- Make volunteering fun by ensuring there are opportunities for social interaction with other youth.
- Provide some tangible rewards or incentives (e.g., facility passes, gift certificates, movie passes, reference letters, etc.).
- Celebrate holidays of different cultures.
- Allow youth to provide feedback in debriefing sessions to ensure volunteer activities are appropriate and relevant to them.
- As their experience grows, allow them to take on more responsibility.
- Recognize their language skills; many speak more than one language.
- Recognize their diverse life experiences and encourage them to share them with staff and other volunteers.
- Celebrate the contribution that culturally diverse youth bring to the organization and community they serve.

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B.2 Aboriginal volunteers

Traditionally, Aboriginal societies operate on a basis of equality in which individuals regardless of age, sex, or status exercise individual choice over a wide range of issues. Decisions about the community are made by all its members through a process of discussion and consensus. Leadership is communally held by Elders who ensure that the process of reaching consensus is respected (Whittles, 2005).

With regard to civic involvement and commitment to community, Aboriginal people have a strong tradition of sharing and caring for neighbours, kin, and their community (Chorney, Silver, Mitchell, Ranville, & Sinclair, 2006). Many refer to such contributions as 'helping out.' This usually takes the form of informal, unstructured activities that occur as needed rather than formal volunteering through an organization (Mowatt & Young, 2006a).

As communities have changed and Aboriginal people have migrated into urban areas for employment and other services, traditional practices have come under pressure. The historical legacy of the interactions between Aboriginal and non-Aboriginal people has also affected traditional practices of communal support and governance. These changes have had a negative impact on social behaviour, health, and general well-being in many Aboriginal communities. However, a process of recovery is now underway, and many rural and urban Aboriginal communities are revitalizing themselves through programs that involve a mixture of traditional 'helping out' and formal volunteering.

B.2.1 Aboriginal volunteering in the north

Five information resources from two studies focus on aboriginal volunteering in the Northwest Territories (NWT). They are:

- *Continuing Strong Traditions: Aboriginal Participation in the Northwest Territories' Voluntary Sector* (Little, Auchterlonie, & Stephen, 2005);
- *Engaging Aboriginal Volunteers in Voluntary Groups with Territorial Mandates In The Northwest Territories* (Little, 2005);
- *Fort McPherson: A Volunteer Model* (Auchterlonie, 2005a);
- *Our Stories: Stories About Aboriginal Participation in The Northwest Territories Voluntary Sector* (Auchterlonie, 2005b); and
- *It's A Noble Choice They've Made: Sport Volunteerism in Small Communities in The Northwest Territories* (Daitch, Short, Bertolini, & MacPherson, 2005).

The information in these resources highlight three aspects of Aboriginal volunteering in the north:

- perceptions and experiences;
- community based versus territorial organizations; and
- volunteering in remote communities

Perceptions and experiences

Commitment to one's community is the basis of Aboriginal traditions. People are expected to help others without being asked and share their time and resources freely with friends and neighbours. This commitment to community is the foundation on which many community-based nonprofit and voluntary organizations in NWT are based. Traditions of informal helping out and sharing also influence the more formal volunteering that many Aboriginal people now undertake with larger municipal and territorial organizations.

Little et al. (2005) argue, however, that volunteerism in NWT is in decline. They cite several reasons for this:

- Communities are larger and less homogeneous, reducing feelings of individual connection and collective responsibility.
- The economy of NWT has moved from subsistence harvesting of natural resources, where collective support was essential, to a wage-based economy. As a result, people are more focused on the economic well-being of themselves and their family than on the well-being of the community as a whole.
- There is confusion and tension around the issue of paid and unpaid work.
- Many people still believe that it is the chief's responsibility to organize people to meet the collective needs of the community, but some chiefs no longer do this.
- In many NWT communities, youth and others are engaged in unhealthy behaviours that interfere with traditional values such as helping out and sharing.

Tension between traditional, informal approaches to helping people and communities and newer, more formal approaches are pervasive in NWT. Hence, it is important to understand how Aboriginal people view formal volunteering. Little et al. (2005) provide the following insights:

- Structured and institutionalized assistance sometimes sends the message that informal helping out is less important.
- Formal volunteer programs run by government and nonprofit organizations displace individual initiatives, responsibility, and commitment to community.

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- Formal volunteering, because it is structured and often sophisticated in terms of organization, appears to require more high-level skills that many Aboriginal people feel, often incorrectly, they do not have.
- Formal volunteer programs give the impression that helping others should be done through organizations and only in certain ways.
- For a variety of reasons, there is a view that individuals engaged in formal volunteer activities should be paid.
- Formal volunteering is often narrowly focused by sector (e.g., on youth, sport, early childhood, etc.), which differs from the traditional commitment of providing assistance wherever it is needed.
- Narrowly focused volunteer programs may create division within a community because of competition for funding and volunteers to sustain the activities of individual programs.

Community-based vs. territorial organizations

Many Aboriginal people start their own voluntary organizations within their communities. In her case study, *Fort McPherson: A Volunteer Model*, Auchterlonie (2005a) highlights how local voluntary organizations often receive full community support and incorporate a mix of formal and informal volunteering. She examines 12 local organizations that deal with different aspects of community life (e.g., local radio, fire service, Elders' council, women's wellness, youth, suicide prevention). Many people provide these organizations with informal help when necessary. Others volunteer more formally in structured activities (e.g., board meetings, assemblies, etc.). These contributions are viewed as different from informal helping out and deserving of honoraria. The honoraria do not fully compensate people for their time and effort, but show that they are valued for their formal volunteer contribution.

The extension of traditional values to large nonprofit and voluntary organizations with territorial mandates is more problematic. Aboriginal people see organizations at this level as competing for scarce financial and human resources, which is counter to the traditional values of providing integrated and holistic support to communities. Many territorial organizations also have few Aboriginal staff or volunteers and so do not reflect the reality of NWT. Their highly formalized structures and programs often deter Aboriginal people from volunteering for them.

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Then there is the issue of payment for formal volunteering. Prior to the expansion of the nonprofit sector in NWT, the public sector dominated service provision and paid people honoraria for attending meetings, sitting on boards, and doing other 'volunteer' work. Nonprofit organizations now provide many of the services formerly provided by the public sector. These organizations expect people to volunteer without pay, which creates confusion. The confusion is exacerbated by the fact that Aboriginal languages have no word for 'volunteer' or 'voluntary group.' Helping out, caring, and sharing are what one does as a matter of course whereas structured volunteering is seen as philanthropic 'work' that deserves to be recognized with some form of payment.

Volunteering in remote communities

Daitch et al. (2005) studied sport volunteering in four remote communities: Deline, Hay River Reserve, Ulukhaktok (Holman Island), and Wha Ti. These communities have populations ranging from 298 (Hay River) to 570 (Deline). More than 95% of the population in these communities is Aboriginal. Young people (under 25 years of age) comprise between 45% (Deline) and 51% (Ulukhaktok) of the population. A total of 29 sports volunteers and 23 non-sport volunteers were personally interviewed and attended focus groups to explore the issue of sport volunteering in their community.

The researchers found that the most important motivation for volunteering in sports was altruism (i.e., to help other people). Ninety percent (90%) of sports volunteers said this was the major reason they volunteered. Many sport volunteers also viewed their activities as a way to help youth avoid negative behaviour and contribute to the well-being of the community.

All four communities have kept their cultural traditions alive and these traditions have a big impact on sport volunteering. Sport is not seen as a separate activity with a narrow focus. Rather, it is viewed as a way to strengthen Aboriginal traditions of helping out in one's community and to contribute to the holistic development of the individual. Non-traditional sports (e.g., golf) are incorporated into traditional celebrations alongside traditional activities such as fishing, cutting wood, and preparing hides. In this way, sport is part of an integrated collection of activities that strengthens people's sense of community and social connection.

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B.2.2 Aboriginal volunteering in urban communities

Two projects funded by the Knowledge Development Centre looked at aboriginal volunteering in urban communities. Josephine Savarese and her colleagues (2006) studied women volunteers in two community schools in Prince Albert, Saskatchewan. Most of the women in the study were Aboriginal. Their findings are reported in *Women and the Volunteer Experience in the Midtown and East Hill Areas of Prince Albert*. Paul Chorney and his associates (2006) examined the role of aboriginal volunteers in revitalizing a downtown area of Winnipeg, Manitoba. Their report is entitled *Aboriginal Participation in Neighborhood Revitalization: A Case Study*.

Savarese et al. (2006) note that the two schools they studied have been very successful in retaining volunteers even though they are located in low-income neighbourhoods. Both schools have strong connections to their local communities and encourage parents and other community members to visit regularly and contribute to school activities. The schools also have a community room where people can freely come and go with their children, meet other people, and build social connections. Finally, each school has a paid community school coordinator who mentors volunteers and assists them wherever needed.

Many of the women who participated in the project came from difficult economic and domestic circumstances, had little formal education, and/or were unemployed. Volunteering allows them to:

- learn new skills;
- gain self-esteem and confidence;
- feel a sense of satisfaction from giving to their community and helping out;
- alleviate depression and boredom;
- create new social connections and networks;
- share in their child(ren)'s school life; and
- deepen their relationships with their child(ren), other volunteers, and educators.

The most important benefit for the community is that schools are able to provide a more secure, effective, and locally appropriate educational environment for children and their parents. Schools and communities also benefit because volunteers:

- provide direct support to the school in many service areas (e.g., giving presentations, creating displays for the school, keeping the school organized, helping with extra-curricular activities);
- create a friendly and welcoming atmosphere at the school;
- help to create an ethic of helping and caring among children;
- provide support and reassurance to those in difficulty;
- help the school gain respect within the community; and
- lead to the community in taking more interest in the school.

In a separate but related study, Chorney et al. (2006) undertook research on the revitalization of the West Broadway community in Winnipeg. This is a low-income neighbourhood of about 5,000 people that has transformed itself from a high crime area to a vibrant, secure community. The turnaround has been achieved through active participation of community members, particularly those of Aboriginal origin. The research study explored why Aboriginal community members volunteered and what unique cultural approaches they contributed to the revitalization process. The study also examined the impact of the volunteer experience on the Aboriginal volunteers.

The researchers interview 32 Aboriginal volunteers about their volunteer experiences in West Broadway. Forty percent (40%) of the interviewees were unemployed and on social assistance. They gave the following reasons for volunteering:

- to help out and contribute to the community;
- to form new social connections within the community and strengthen old ones;
- to improve the well-being of the community;
- to set an example for children and youth and encourage them to be more civically responsible and make healthy life choices;
- to give back after being helped through difficult life experiences such as drug addiction; and
- to gain skills and experience that will be useful in finding employment.

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Participants also reported that volunteering benefited them by:

- making them feel good;
- increasing their confidence in dealing with everyday life;
- providing them with challenging situations that allowed them to build their social and technical skills;
- increasing their understanding of how to cope in an urban environment;
- allowing them to strengthen the local community and make it more secure;
- giving them an opportunity to forget their problems by focusing on helping others;
- helping them maintain traditional practices by sharing them with others; and
- giving them an opportunity to meet and work with non-Aboriginal people and new Canadians and develop understanding and respect for each other.

B.2.3 Aboriginal women as volunteers

The Institute for Advancement of Aboriginal Women (IAAW) undertook a national research study in 2006 focused on Aboriginal women volunteers. IAAW wanted to understand the volunteer experiences of Aboriginal women and collaborate with them to design a volunteer recruitment guide for nonprofit organizations.

IAAW observed Aboriginal women volunteers at two large gatherings in Alberta, one for First Nations and one for Métis. The researchers used their observations to develop a series of questions for Aboriginal women volunteers and to design the format for 'gathering sessions' where Aboriginal women would discuss these questions. Nine gathering sessions were held in four provinces and one territory (British Columbia, Alberta, Manitoba, Nova Scotia, and the Northwest Territories). At each session, women related their experiences and made suggestions for a guide for nonprofit organizations. The ideas for the guide were carried to each subsequent session, which added to and modified what the previous session had suggested. In addition, six Aboriginal women provided detailed input. The framework and content for the guide was finalized at a focus group session of Aboriginal women held in Medicine Hat, Alberta.

IAAW produced both a handbook for organizations, *Guidelines for the Recruitment and Retention of Aboriginal Women Volunteers* (Mowatt & Young, 2006a) and a report explaining their research process and findings, *Volunteerism in Aboriginal Communities: Volunteer – Who Me?* (Mowatt & Young, 2006b).

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Participants at the gathering sessions said that they volunteered to:

- contribute to the community;
- help others in need;
- give by sharing their skills and knowledge;
- maintain traditional values of caring and sharing;
- make new social contacts and strengthen old ones;
- build experience, skills, and knowledge; and
- enhance work experience and suitability for employment.

Participants identified the following methods as being most successful when recruiting women volunteers:

- Ask them directly for help.
- Use word of mouth.
- Use the media (e.g., print, radio, Internet, etc.).
- Provide childcare or on-site facilities so that women can bring their children.

Finally, participants identified the following as essential for maintaining good working relationships with Aboriginal women:

- Respect their culture (i.e., heritage and traditions).
- Treat them with respect and dignity.
- Do not be judgmental.

B.2.4 Recruitment and retention of Aboriginal volunteers at sporting events

Sask Sport Inc. and the University of Regina conducted a collaborative study to identify key lessons for successful recruitment of Aboriginal volunteers. They based their study on their experiences at two major sporting events: the 2005 Canada Summer Games and the 2006 Saskatchewan First Nation Winter Games. The results of this study are reported in two fact sheets: *Recruitment of Aboriginal Volunteers at Sporting Events* (McKague, Hoeber, Riemer, Dorsch, & Kryzanowski, 2007) and *Retention of Aboriginal Volunteers at Sporting Events* (Hoeber, McKague, Riemer, Dorsch, & Kryzanowski, 2007).

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The research team found that the primary motivation of Aboriginal volunteers was to support the athletic pursuits of their children. Through volunteering, parents were able to ensure that their children had access to opportunities they might not otherwise get. There was also a secondary motive, which was to be a role model for youth. As one Aboriginal volunteer explained:

> *"If they see parents doing it [volunteering] then they are going to do it."*
> (Parent volunteer)

Another motivating factor was being invited to participate in a formal capacity and showcase Aboriginal culture at a unique event.

Event organizers appealed for volunteers through a few Aboriginal individuals who had links to the sports that would be at the events and who had skills that would be useful. These individuals in turn appealed directly to friends, family, and community members. McKague et al. (2007) point out that the majority of the volunteers for the 2006 Winter Games were recruited through family networks.

The researchers found that there were no problems with volunteer retention at either the 2005 Summer Games or the 2006 Winter Games. They thought this was probably due to the strong Aboriginal tradition of helping out and caring for others. However, it was also due to the nature of the tasks that Aboriginal volunteers undertook. Many were tasks with considerable flexibility and informality, and were done as a family group. Aboriginals volunteers were also in the minority so the event organizers ensured that Elders were present for moral support and that Aboriginal traditions and symbols were incorporated in the events. All of these elements provided a relaxed and welcoming environment for the volunteers.

The researchers realized that Aboriginal people are very willing to volunteer if tasks are relatively informal, done as a family in a relaxed atmosphere, and they are helping a family member as well as the general community. Volunteers preferred unstructured volunteer opportunities that involved a variety of tasks.

B.2.5 Practical implications

This section synthesizes the main implications of all of the research on Aboriginal volunteering.

To build a positive rapport with local Aboriginal communities, nonprofit organizations should do the following:

- Check the Internet and other sources to find out which Aboriginal groups are located in your area, what reserves they inhabit, their traditional names, languages, etc.
- Contact these Aboriginal groups and ask Elders and other leaders to come and talk about their culture to staff and volunteers in your organization.
- Check to see if there are any Aboriginal ceremonies and festivals in your area.
- Build relationships with Aboriginal communities by asking to join in their celebrations and festivals.
- Involve members of the Aboriginal community in planning and implementing special events or workshops.
- Provide support wherever possible for Aboriginal community organizations.
- Involve Aboriginal people as 'local experts' when you need advice on implementing activities to support their communities.
- Hire Aboriginal people for paid staff positions in your organization.

Nonprofit organizations that wish to recruit Aboriginal volunteers should do the following:

- Promote volunteerism as a way to demonstrate commitment to community.
- Create volunteer programs that are relevant to local Aboriginal communities, and involve Aboriginal staff and local Aboriginal communities in their design.
- Show potential volunteers that your organization can provide a comfortable, welcoming, and fun environment.
- If you have Aboriginal staff, involve them in the recruitment process.
- Involve Elders from the community where you are recruiting in the process.
- Recruit initially by asking people for assistance or help to undertake a volunteer activity rather than asking them to volunteer formally.

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- Show respect when recruiting volunteers, particularly women volunteers.
- Be aware that some Aboriginal women feel uncomfortable working alongside men and try to accommodate them.
- Keep the recruitment process as informal as possible.
- Be aware of cultural differences between Aboriginal groups. Do not be apprehensive about asking people about their cultural background and traditions. This will show you are aware of cultural diversity within the Aboriginal community and wish to respect these differences.

To retain Aboriginal volunteers, nonprofit organizations should consider the following:

- Have an orientation program for new Aboriginal volunteers.
- Ask Aboriginal volunteers about their expectations and work with them to create a suitable environment.
- Ensure that the atmosphere within your organizations is respectful, non-judgmental, open, friendly, and relaxed.
- Encourage the values of sharing and caring within your organization.
- Be mindful of the cultural customs associated with gender and age.
- If possible, allow Aboriginal women to bring their children with them when they are volunteering.
- Be flexible in scheduling volunteer activities.
- Have activities that enable Aboriginal volunteers 'to learn by doing' and take the initiative.
- Give Aboriginal volunteers opportunities to expand their knowledge, skills, and experience and take on leadership roles.
- Recognize and celebrate the contributions of Aboriginal volunteers both formally and informally.

Nonprofit organizations must also recognize the importance of Elders in Aboriginal communities. When recruiting volunteers, nonprofit organizations should involve Elders. They will provide reassurance for volunteers that your organization is welcome and valued in the Aboriginal community.

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Important points to understand about Elders:

- They are recognized as having great wisdom.
- They act as spiritual guides for their community.
- They are the authorities on important family and community matters.
- They are keepers of the culture and teachers of tradition and language.

Important points in working with Elders:

- Seek their permission to ask questions or get their input.
- Follow their advice carefully when dealing with Aboriginal volunteers.
- Provide transport to bring them to your organization.
- Ensure there are refreshments when the Elder is there.
- Recognize and celebrate an Elder's contribution to your organization.

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YOUTH VOLUNTEERISM

PART 3

According to Hall et al. (2006) in their report *Caring Canadians, Involved Canadians: Highlights from the 2004 Canada Survey of Giving, Volunteering, and Participating* (CSGVP), youth between 15 and 24 years of age have the highest volunteer rate (55%) of all age groups. It might, therefore, seem reasonable to suppose that nonprofit organizations do not need to be too worried about the civic commitment of young people. However, despite this high volunteer rate, there are still almost 2 million youth in Canada who do not volunteer.[5] This is cause for concern because there is compelling evidence that lack of engagement in community service when young carries over into adult life. Frank Jones, in his short article *Community Involvement: The Influence of Early Experience*, reports that those who volunteered in their youth had almost five times more involvements in community service as adults than those who had not volunteered when young (Jones, 2000).[6]

In addition, of the 55% of youth who volunteered in 2004, some did so as part of school-based mandatory community service programs. According to the results of the CSGVP, 15% of all volunteers aged 15 to 19 and 9% of those aged 20 to 24 volunteered because they were required to do so. The long-term impact of such mandatory service programs on future volunteering behaviour is not completely clear. Therefore, there is still need to encourage youth to make volunteering a personal choice.

Volunteer rates are only part of the story. The amount of time youth spend volunteering is also important, and the results of the CSGVP indicate that youth volunteers contribute fewer hours than most other volunteers. In 2004, volunteers aged 15 to 24 contributed an average of 139 hours per year while those aged 25 to 34 contributed 137 hours per year, on average. In comparison, volunteers aged 35 to 44 contributed 152 hours and those aged 65 and older contributed 245 hours.

Another point to note is that many voluntary organizations exist to serve, or have programs specifically for, children and youth. In *Cornerstones of Community: Highlights of the National Survey of Nonprofit and Voluntary Organizations*, Hall et al. (2005) report that almost one quarter (23%) of Canada's nonprofit organizations provide services to children and youth. To ensure that these services are appropriate and can adapt to the changing environment in which young people live, nonprofit organizations need youth to contribute their ideas and efforts to both program design and delivery.

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5 This estimate is based on Statistics Canada data which show that on July 1, 2006 there were 4.4 million people in this age group. Statistics Canada, *Table on population by age and sex. Retrieved February 22, 2007 from* http://www40.statcan.ca/l01/cst01/demo10a.htm.

6 Jones defines ten types of community involvement, which are divided into two groups: *civic awareness* and *intensive community commitments*. Civic awareness includes voting and following the news; intensive community commitments encompasses volunteering (formally or informally), participation in service clubs, and political organizations etc.

There is, therefore, ample reason for nonprofit organizations not to be complacent and to be continually exploring how to encourage more youth to make a personal decision to volunteer. However, this is a major challenge for many organizations because they have to compete for youths' attention. They must also have a clear understanding of the needs and aspirations of youth to develop volunteer programs that respond to them. This can be difficult for organizations that do not have enough youth volunteers to provide them with some insight into planning volunteer activities that will be attractive to youth. Nonprofit organizations also need to be open to the idea of youth assuming leadership roles and contributing to governance and strategic planning. This could help to maintain the continuity of organizations and their programs and ensure that organizations have the energy and capacity to innovate that will allow them to cope with a rapidly changing social environment.

The findings and practical implications of KDC-funded research on youth volunteering are presented in this section together with a selection of research findings from other recent studies.

This section is divided into two parts:

    A. Youths' perspective on volunteering
    B. Community service and service learning

YOUTHS' PERSPECTIVE ON VOLUNTEERING A

If organizations are to attract youth volunteers, they need to understand what will motivate them to contribute their time to supporting the community. The only way to do this is to talk to youth. Most of the research projects that are discussed in this section did just that. They conducted surveys, interviews, and focus groups to understand youths' attitudes to volunteering as well as their expectations when undertaking volunteer activities.

The information resources produced from this research are very diverse. Some have a local focus on youth and volunteering in one community, others examine youth volunteering within a province, and some explore youth perspectives on volunteering nationally. Despite this range of focus, the resources report a number of common findings.

Resources in this section are discussed under the following headings:

A.1 Volunteer experiences of youth aged 15 and older

A.2 Volunteer experiences of youth aged 8 to 12

A.3 Youth volunteer leadership and governance

A.4 Guides on youth volunteering

A.5 Family volunteering

A.6 Practical implications

A.1 Volunteer experiences of youth aged 15 and older

A.1.1 Newfoundland

Fran Locke and Penelope Rowe of the Community Services Council of Newfoundland and Labrador undertook a study to explore the factors affecting youth volunteering in Newfoundland. Their findings are presented in the report *Engaging Young Volunteers (age 15 – 34) in Rural Newfoundland* (Locke & Rowe, 2006) and in four fact sheets: *Engaging Young Volunteers in Rural Newfoundland* (Overview) (Locke & Rowe, 2005a); *A Community Profile* (Locke & Rowe, 2005b); *Key Findings about Young Volunteers* (Locke & Rowe, 2005c); and *Be a Volunteer! Tips for Youth* (Locke & Rowe, 2005d).

The value of Locke and Rowe's research is that they not only explored the attitudes of young people but also those of staff of nonprofit organizations that seek to involve youth as volunteers. They held five discussion groups with a total of 44 young people and then conducted interviews

with both youth who volunteered and those who did not. They also surveyed 117 organizations and conducted in-depth interviews with 41 staff members. The result is a very rich picture of the volunteering environment for youth in Newfoundland.

Only 1% of the organizations that participated in Locke and Rowe's survey reported that youth volunteers approached them on their own initiative. This demonstrates very clearly that organizations have to go to youth if they want them to volunteer. When it came to recruiting youth, 68% of organizations said that direct personal requests were the most successful. Advertising with posters and flyers or appealing through schools and churches was only moderately successful. Between 15% and 20% of organizations found these methods effective. The least successful method was making presentations or offering workshops. Only 1% of organizations had success with this approach.

Just over one third (35%) of the organizations reported that they had young volunteers. Only 5% had board members under the age of 19 years and 36% had board members between the ages of 19 and 34. In interviews, senior staff and board members said that the most important challenge was to give young people more responsibility and to trust them to contribute to board planning and decision-making. Locke and Rowe comment that there is obviously a need to educate organizations about the value of encouraging and mentoring young people to take on leadership roles.

In their discussions with youth volunteers, Locke and Rowe asked how they had found out about their current volunteer placement. Forty percent (40%) had found out from family and friends, 24% through direct contact by the organization, and 12% through school. Only 2% said they had acted on their own initiative to approach an organization about engaging in volunteering. Locke and Rowe also asked 82 current and former volunteers if their family and friends volunteered. Just over three quarters (76%) of the young people said their family had a history of volunteering and 92% had friends who volunteered. These findings suggest that young people are more likely to volunteer if other people in their lives volunteer.

When asked why they volunteered, 85% of the young people said it was for personal satisfaction. They defined personal satisfaction as helping a cause they believed in and making a positive difference. They also stressed that volunteering should be fun and should provide opportunities to meet new people. The non-volunteers who were interviewed said that they did not volunteer because they did not have the time, they had not been asked, and/or they lacked confidence.

A.1.2 Quebec

Two studies from Quebec focus on youth volunteering in the small communities of Laval and Montérégie.

Simon Tessier, Nguyen Minh-Nguyet, and Kathleen Gagnon from le Centre de Bénévolat de Laval conducted a survey of 140 young volunteers. They also conducted 15 interviews and five focus groups. They present their results in a research report entitled *Youth Volunteerism* (Tessier, Minh-Nguyet, & Gagnon, 2006).

Cathy Froment-Prévosto and Julie Fortier of Loisir et Sport Montérégie surveyed 80 educational and municipal institutions, nonprofit, and sport organizations, and 220 young volunteers and non-volunteers. They present their findings in *"Walk beside me and be my friend": Framework for Volunteer Involvement for Youth Ages 15 to 19 in Montérégie* (Froment-Prévosto & Fortier, 2006) and two fact sheets: *Why do Youth Get Involved in Community Volunteering?* (Froment-Prévosto & Fortier, 2005a) and *Supporting and Recognizing Youth as Community Volunteers* (Froment-Prévosto & Fortier, 2005b).

Laval

Tessier, Minh-Nguyet, and Gagnon were primarily interested in the conditions that are and are not conducive to youth volunteering and the conditions that contribute to volunteer retention. The researchers felt that if these conditions were known and understood, organizations could create volunteer environments that would encourage long-term participation by youth.

The youth who participated in the discussion groups said that their main reason for volunteering was altruistic; they wanted to help people and to be involved in community or school life. Volunteering provided them with the opportunity not only to help out but also to learn, socialize, and have fun. The survey of 140 youth volunteers produced similar findings: 91% of respondents indicated they volunteered for altruistic reasons, 83% volunteered in order to be useful to their community, and 77% volunteered because they wanted to play an active role in society.

Youth liked being appreciated for their efforts. Ninety-one percent (91%) of the youth in the study said that people's gratitude for what they had done as volunteers was a strong motivation to continue volunteering. It gave the volunteers a strong feeling of personal accomplishment and satisfaction. The researchers found that volunteers felt the most satisfaction when they were able to achieve tangible results as part of a team. Other factors influencing youth to volunteer were interest in the organization and its mission (99%) and the clientele it served (96%).

Nearly three quarters (72%) of survey respondents identified time constraints as the main barrier to volunteering. Other barriers related to the volunteer environment: 56% said it was not inspiring or motivating and 52% said it was too strict. These findings are strengthened by comments from the discussion groups and the interviews. Volunteers and staff of organizations said that there was sometimes a lack of acceptance of young people by adults and poor supervision. There was also a lack of flexibility by organizations in trying to adapt to the rapidly changing needs of adolescents over time.

Tessier, Minh-Nguyet, & Gagnon conclude:

> Findings from our study emphasize that factors that are simultaneously altruistic and personal are at the root of young people's motivations for volunteering (Tessier et al., 2006, p. 13).

Montérégie

Froment-Prévosto and Fortier explain in their report that their objective was to help Montérégie's sports and recreation organizations create environments that will serve as catalysts for youth involvement and that are conducive to volunteer activities. They go on to say:

> We wish to encourage stakeholders [nonprofit organizations] to create an environment that will enable all young people to be at the centre of their own recreational volunteer work and give them the opportunity to participate in the community, to be heard, listened to, and recognized (Froment-Prévosto & Fortier, 2006, p. 1).

The researchers provide a brief overview of the literature on youth volunteerism before presenting detailed findings from the organizations and volunteers they surveyed and interviewed. Results are presented in tables that rank the importance of various factors that affect the recruitment and retention of youth volunteers. There are also tables that show the degree to which youth agree with various statements about youth's place within an organization.

Unlike the study by Tessier et al. (2006), Froment-Prévosto and Fortier found that youth did not identify any particular reason for volunteering as being more important than any others. For example, volunteers ranked 'doing something that makes me proud,' 'serving a cause I believe in,' 'enjoyment,' and 'improving my job chances' as being equally important. When asked to rank factors affecting retention, youth volunteers identified 'enjoyment,' 'acquiring news skills and knowledge,' and 'success in what I undertake' as being equally important.

Froment-Prévosto and Fortier found that representatives of organizations and youth had slightly different perceptions of young people's reasons for volunteering and their expectations. Organizations thought that a sense of belonging to the community, organizations, and/or schools involved in the volunteering would be important to youth, whereas youth said that these were not important. Froment-Prévosto and Fortier say that this suggests that the youth had not thought about the significance of volunteering to this extent. They comment:

> It appeared to us during our research that young people do not have a
> very clear perception of volunteering and that this perception is very often
> quite different from that of adults. Education in this regard appears to be
> absolutely necessary so that youth and organizations speak the same
> language (Froment-Prévosto & Fortier, 2006, p. 13).

When asked about the place of youth in nonprofit organizations, young volunteers said that adults should allow them to voice their opinions and support them in trying to make contributions to planning. In order to do this, organizations should provide a 'discussion space' for youth to formulate their ideas on volunteer issues and present those ideas to adults who will listen with respect.

A.2 Volunteer experiences of youth aged 8 to 12 years

Charlene Shannon and Brenda Robertson conducted a study on the volunteer experiences of children aged 8 to 12. They refer to this age group as 'younger youth' to distinguish them from the 2004 CSGVP definition of youth, which is people aged 15 to 24 (Hall et al., 2006). The results of their study are reported in *Youth Volunteers: Understanding the Experiences of 8- to 12-Year Olds* (Shannon & Robertson, 2006).

Shannon and Robertson point out that most research studies on youth volunteers have focused on those aged 15 and over and, as a result, understanding of volunteering by youth under 15 years is limited. They had the following research objectives:

- to assess the values, attitudes, and experiences of youth aged 8 to 12 in relation to volunteering;
- to identify the social factors that contribute to these attitudes and values; and

- to identify the challenges that youth organizations face in developing younger youth who value volunteerism.

The study's sample was drawn from Boys and Girls Clubs in the four Atlantic provinces. In total, Shannon and Robertson interviewed 73 younger youth (31 boys and 42 girls) and seven executive directors.

When younger youth were asked what the word 'volunteering' meant to them, 70% said it meant 'helping someone to do something,' 25% said it meant 'helping with tasks or activities,' and 14% said it meant 'doing something for someone else.' Only 10% said that volunteering meant 'helping the community.'[7] The researchers conclude from this that younger youth see volunteering as directly assisting someone. This was particularly true for the 8- to 10-year-olds, who cited opening doors for people and helping parents with washing up as examples of volunteering. In contrast, 12-year-olds tended to see volunteering as assisting in an activity. These youth saw volunteering as helping to ensure that an activity takes place.

Younger youth were aware that volunteering is a matter of choice but then confused it with employment. Some thought people were volunteering when they were doing paid work because they had 'chosen' that work:

> *"We wouldn't have any garbage people to take away the trash every*
> *week, 'cause that's their job. They volunteered to do that job."*
> (Younger youth volunteer)

Shannon and Robertson say that younger youth do not define volunteering in the same way that older youth or adults do. Not only do they not distinguish between paid employment and volunteering, but they do not see the difference between contributing to family tasks and the volunteer activities they do in the Clubs.

When asked who should be helped by volunteering, almost all of the younger youth cited vulnerable groups such as seniors, patients in hospitals, and the poor. This may be because executive directors at the Boys and Girls Clubs had explained that volunteering means helping the less fortunate. Only 8% of younger youth could not say who might benefit from volunteer support.

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7 Percentages add to over 100 because many youth provided more than one answer.

The younger youth in the study were asked which older youth and adults they considered to be volunteers. The objective was to see who their role models were. More than half (52%) identified their parents as volunteers and 48% identified friends. Some of the parents did, in fact, volunteer formally for local organizations. However, many younger youth named their parents because of the informal assistance they gave neighbours and friends. For example, one 9-year-old boy cited his father as a volunteer because:

> *"My dad helped a friend from work build a shed."*

Nearly one in five younger youth (19%) identified their siblings as volunteers, and 30% identified members of their Clubs. Very few identified people who volunteered directly on their behalf such as volunteers at the Boys and Girls Club. This led Shannon and Robertson to comment:

Role models can be effective only if they are identifiable. Youth will not learn the value of volunteering if they are unable to recognize volunteers or do not understand that they benefit personally from the efforts of volunteers (Shannon & Robertson, 2006, p. 13).

Most of the younger youth reported that they had been asked to volunteer, usually by the executive director of the Club they were members of. Their motives for volunteering were mostly for fun (36%) and to help people (28%). Many said they got pleasure from helping others. The most common volunteer activities they participated in were fundraising (53%), town and community clean up (41%), helping with tasks at the Club (37%), and leadership or counselor in training tasks (23%).[8] Helping others was almost all done in relation to Club activities. Only between 4% and 7% provided actual direct assistance to people by, for example, serving them meals, helping at a food bank, or visiting nursing homes.

The seven executive directors in the study had all encouraged 8- to 12-year-olds to volunteer, but saw the following challenges to successfully involving them:

- **Lack of adult supervision:** Many Clubs were constrained by limited human resources to accompany younger youth to volunteer activities.
- **Lack of regular volunteer opportunities:** All of the executive directors agreed it would be beneficial to have regular volunteer opportunities for the younger youth, but this was problematic because of resource constraints. Lack of regular volunteer activities made it difficult for younger youth

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[8] Percentages add up to over 100% because many youth provided more than one answer.

to become comfortable with volunteer tasks and the people they were volunteering with.

- **Parents:** Not all parents are supportive of younger youth volunteering, e.g., they do not give their permission or provide transportation.
- **Transportation:** There is a financial and human resource cost involved in transporting younger youth to and from volunteer opportunities. Due to financial constraints, most Clubs could only offer volunteer opportunities that did not require transportation.
- **Perceptions of other organizations:** All of the executive directors believed that younger youth were discriminated against. Other organizations underestimated their value as volunteers and considered them to be unreliable and to require too much supervision.
- **Characteristics of younger youth:** Shyness and lack of confidence are often barriers to the involvement of younger youth. Executive directors also reported that many younger youth expect to receive some sort of tangible benefit in exchange for volunteering. If they did not, they tended to classify the volunteering as unpaid 'work' and were reluctant to participate.

Shannon and Robertson conclude that although younger youth are willing to volunteer, they do not have a clear perception of what volunteering means. Many do not distinguish between paid work and volunteer service and consider professionals, such as doctors and teachers, to be volunteers. They also could not identify the people who were volunteering in order to provide them with activities. Obviously, adults and older youth need to coach younger youth about volunteering so that their perceptions will change. A clear understanding of what it means to volunteer is more likely to ensure younger youth continue to volunteer as they get older.

A.3 Youth volunteer leadership and governance

In his paper *Igniting Young Minds and Spirits: Youth Governance*, Wayne Wiens (2000) comments that, in his experience, most nonprofit organizations that serve young people allow them to provide input and ideas only informally, usually from a position of powerlessness. Wiens feels that these organizations are missing an opportunity by not allowing young people to be active in designing, planning, and leading volunteer activities. Not only would volunteer activities and programs be more appropriate for young people if they had increased input and played a role in leadership, this would also help to create future leaders who are socially aware and committed to their communities.

A.3.1 Youth as governance volunteers

Rising Tide Cooperative Ltd. partnered with the Regional Cooperative Development Centre and the Canadian Worker Cooperative Federation to undertake a research project on governance cultures in nonprofit organizations that encourage youth leadership and volunteerism. Three information resources were produced from this study: a research report, *Attracting and Keeping Youth Volunteers: Creating a Governance Culture that Nurtures and Values Youth* (Rising Tide Co-operative Ltd., 2005), and two fact sheets: *Youth Volunteers: What's in It for Your Organization?* (Canadian Worker Co-operative Federation, 2005a) and *So You Want to Volunteer: A Fact Sheet for Youth* (Canadian Worker Co-operative Federation, 2005b).

Over 350 individuals were involved in the research as members of focus groups, respondents to a survey, and as interviewees. The study area covered New Brunswick, Nova Scotia, Newfoundland and Labrador, and Prince Edward Island. Participants reported that youth bring particular qualities to the volunteering environment of boards such as:

- energy and passion,
- new ways of looking at old problems,
- flexibility,
- non-rigid thinking,
- technological skills (e.g., computing and Internet skills), and
- enthusiasm for community building.

Youth provide continuity because young board members eventually replace older ones. Having youth board members can also help an organization create a following that is committed to the organization's mission but is also open to innovation and change. This ensures that the organization can adjust effectively to rapidly changing social circumstances. The presence of youth also ensures that an organization is more reflective of the community it serves.

Organizations that participated in the research wanted to attract youth to governance positions and to ensure that youth can play an effective role. For this to happen, organizations need to make fundamental changes in how they view governance and how they run meetings. Youth commented that if organizations want them involved on a long-term basis, there has to be equity in how youth are treated within organizations. They should, for example, be included as equals and partners on boards and committees. Organizations also need to be less rigid in their interactions with youth. At the same time, they have to be clear about what roles and responsibilities they expect youth to undertake.

Participants in the interviews and focus groups were asked to identify organizations that did a good job involving youth as volunteers. From their suggestions, two organizations were chosen as case studies: Fredericton Direct Charge Co-op and the Women's Network of Prince Edward Island.

Fredericton Direct Charge Co-op

This co-op was founded in 1973. It has a membership of over 6,000 and a 12-member board of directors. The co-op is very successful at recruiting young people to its board. An information table in its retail store provides information on board volunteering and explains the purpose of the board and why young people, in particular, should consider joining. The co-op also runs information sessions to make co-op members aware of the board's role and why it is important that it be representative of the co-op's membership. The board has enacted by-laws to ensure that it has youth members. In interviews, youth at the co-op who had been on the board commented that it had been a very good learning experience and that they encouraged other youth in the co-op to volunteer for the board. Former youth board members said that the board was very supportive when they started as new members and provided mentoring on their roles.

Women's Network of Prince Edward Island

This network was established in 1996 and has been active in increasing women's involvement in municipal and provincial policy issues. The network has a 20-member caucus and has designated 25% of positions to youth. To engage youth, older members of the caucus went out to meet youth to explain what the network was about and why youth should consider joining the caucus. Changes were made to meetings to make sure that there was some fun involved, the discussions were in plain language, and the meeting space was informal and attractive. During board meetings, responsibilities are rotated so that adults have to learn to play games and youth have to learn to take minutes. Responsibilities are also assigned in a way that allows youth to use their skills and excel. The network has found that adults who work best with youth are open to new ways of doing things, friendly, willing to listen, and able to mentor when asked.

Rising Tide concludes their research report by saying:

> The three most important things that organizations can do to help retain youth volunteers are educate them about the organization, provide training for the tasks they are assigned, and mentor them (Rising Tide Co-operative Ltd., 2005, p. 13).

A.3.2 Youth volunteers in leadership positions

Femida Handy and Kirsten Keil explored issues relating to peer management of youth volunteers in a program instituted by the Toronto branch of the Red Cross. Their findings are reported in a paper entitled *A Study of Peer Management of Youth Volunteers at the Canadian Red Cross* (Handy & Keil, 2001).

The Red Cross provides about 500 youth between the ages of 14 and 25 with volunteer opportunities during the months of July and August. The youth are involved in programs such as Meals on Wheels, Wheelchair Escort Services, and Water Safety Education. In response to the challenges of engaging such large numbers of youth for a short time, the Red Cross instituted a leadership program to train selected youth as peer managers. The youth received training in problem solving, time management, team building, conflict resolution, effective communication, and dealing with stressful situations. Youth leaders were recruited at a ratio of one leader to every 10 volunteers.

In their study Handy and Keil surveyed youth volunteers who had participated in the peer management program between 1996 and 1998. A total of 269 youth were surveyed about their attitudes to peer management and their motivations for volunteering. Youth who had served as peer managers were asked about the benefits and challenges of managing their peers. Handy and Keil also interviewed seven Red Cross staff.

The youth volunteered, on average, just over nine hours per week. Handy and Keil found that 29% of the male respondents and 19% of the females had been leaders. Thirty-six per cent (36%) of respondents had volunteered for more than one summer and of this returned group, 93% said they would volunteer again. The top reasons for volunteering again were:

- enjoyment of the experience (36%),
- wanting to become a leader (19%),
- having been personally asked to return (16%), and
- to meet friends from the previous year (15%).

There was a positive relationship between networking or socializing and the number of summers a volunteer chose to return. This implies that organizations that provide opportunities for youth to socialize during their volunteering are more likely to retain them over the longer term. Friendships grew out of the interaction between youth leaders and the group they were leading. Handy and Keil suggest that having youth leaders makes it easier for youth volunteers to ask for help or discuss their problems. This interaction strengthens relationships, making them more likely to evolve into longer-standing friendships.

A majority of respondents (70%) said they would like to volunteer for the Red Cross as adults; 62% showed an interest in becoming leaders; 58% indicated they would like to work for the Red Cross. This suggests the peer management program was very successful in creating a positive experience for the youth involved. This is supported by the information that, of those youth who had been leaders, 86% said that the youth volunteers they managed liked the peer management program. In turn, 80% of those youth volunteers who had been led by youth peer managers felt that they had been very well supervised; 90% said that they had enjoyed the experience.

In interviews, staff unanimously said the peer management program had been a success. Peer leaders were found to be responsible and had saved staff considerable time. They reported that the youth leaders injected enthusiasm and spirit into the volunteer program. Staff also noticed that once they became leaders, youth felt empowered and quickly took ownership and pride in managing their volunteer group. They were also innovative and presented many valuable ideas to staff about improving services to clients.

In conclusion, Handy and Keil comment that:

> The Red Cross wanted to provide positive volunteer experiences,
> encourage volunteer retention, and promote a sense of community. In
> light of our findings, we believe all of these goals were achieved (Handy &
> Keil, 2001, p. 25).

A.4 Guides on youth volunteering

The Community Support Centre funded several pilot projects to develop resources for nonprofit organizations on how to encourage youth to volunteer. In this section, three of the information resources from these projects will be briefly reviewed.

Manual for schools interested in developing volunteer initiatives
The Colchester Regional Development Agency (2005) produced *Youth as Volunteers: A Resource for Schools*. The manual is intended for schools that want to encourage students in grades 6 to 9 to participate in volunteer activities. The manual contains three lesson plans that explain the "what, why, and how of volunteering" (Colchester Regional Development Agency, 2005, p. 1).

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Rather than telling the students what volunteering is about, the manual shows teachers how to encourage students to discover for themselves what volunteering means. Once they have developed a definition for volunteering, students are then encouraged to identify suitable activities for which they might want to volunteer. Students examine what skills they can bring to volunteering and work in groups to brainstorm possible volunteer activities.

The framework provided in the manual is very simple and can be adapted and elaborated to suit local needs. The value of the resource is that it suggests a means for raising awareness of the value of volunteering at a time in students' lives when they are not being told they must volunteer. Students develop their own volunteer activities and can implement them if they wish. This can help lay the groundwork for schools that have mandatory community service programs in grades 9 to 12.

Manual for youth volunteer programs

The Boys and Girls Clubs of Newfoundland and Labrador (2005) produced a manual entitled *Youth Volunteer Program Implementation Manual*. The manual presents a detailed process for recruiting and orienting youth to volunteering and was produced by a collaborative effort of youth and parents. It shows how to gather support for a youth program and works through all the steps of the volunteer process: recruitment, screening, orienting, training, implementing, and evaluation. It ends by emphasizing the importance of recognizing the contributions of youth volunteers.

Although this resource was developed for Girls and Boys Clubs youth programs, it is applicable to any organization that would like to design a youth volunteer program and can be adapted as needed.

Manual for recruiting and retaining youth volunteers

Recruiting and Sustaining Youth Volunteers (St. George's YouthNet, 2006), presents ideas about how to recruit and support youth volunteers as junior leaders. The manual provides four major steps in developing youth volunteers as junior leaders: designing volunteer leader positions that will be fun and worthwhile, recruiting youth volunteers, orienting and training the volunteers, and sustaining them. Recruitment starts in grades 8 to 12 in an inner city neighbourhood and the youth are chosen based on school recommendations.

The manual was developed to provide suggestions to nonprofit organizations about how to address the challenges of getting youth to commit themselves to volunteering on a regular basis. When youth were presented with the concept of volunteer junior leaders, there was interest but not always commitment. YouthNet consulted youth, parents, and other adults and found that the most important factor in encouraging youth volunteering, particularly if youth are being encouraged to take on leadership roles, is the presence of an adult supporter (e.g., parent, caregiver, friend, etc.).

A.5 Family volunteering

As a source of youth volunteers, family volunteering has been somewhat neglected. Two KDC-funded studies explored the topic of family volunteering. Lois Lindsay of Evergreen undertook a national study of family volunteering that produced two resources: a research report, *Family Volunteering in Environmental Stewardship Initiatives* (Lindsay, 2006a), and a best practices booklet, *Family Volunteering: A Natural for Environmental Stewardship Organizations* (Lindsay, 2006b). Members of Santropol Roulant in Montreal explored why they are so successful at attracting families to volunteer. Tana Paddock, Andrea Taylor, and Emma Davenport (2007) report their findings in *The Temple and the Tavern: A Case Study of Family Volunteering at Santropol Roulant*.

A.5.1 Family volunteering and environmental stewardship initiatives

The objective of Lois Lindsay's study was to improve environmental stewardship programs by encouraging families to volunteer. The study was not focused specifically on youth. However, if families volunteer as a group, children and youth in these families will be exposed to volunteering and may be more likely to volunteer on their own initiative in the future.

Lindsay's objective was to understand the motivations of families who volunteer and the barriers to their participation. Based on this information, she wished to develop recommendations for designing volunteer programs attractive to families. Her research included a national survey of 346 environmental organizations, as well as interviews with 42 family volunteers and staff from 17 organizations.

Almost two thirds (64%) of the organizations that responded to the survey reported engaging at least some family volunteers and 18% had family volunteer programs. When Lindsay interviewed the family volunteers, she found that 57% of families volunteered as a group with a parent (or caregiver) and one or more children, 21% as a group of children and youth from the same family, and 14% as just adults from the same family.

Families reported that volunteering together:

- instilled environmental and community values in children (86%);
- gave families a feeling of accomplishment and connection to community (74%); and
- provided families with a way to spend quality time together (45%).

Organizations said that family volunteering increased:

- their ability to achieve their objectives (27%);
- the organization's profile in the community (26%); and
- the community's sense of cohesiveness and pride.

Family volunteers suggested that if organizations want to recruit families, they should:

- have flexible times for activities (47%);
- offer some activities and/or childcare for children (38%);
- have activities that are fun (24%); and
- have age-appropriate tasks (24%).

Lindsay concludes that families represent a vast volunteer potential that can enhance an organization's programs. Families can act as a means to advertise the value of an organization's programs within their community and to raise children's awareness of the value of volunteering.

A.5.2 Family volunteering at Santropol Roulant

Santropol Roulant is a 12-year-old meals-on-wheels organization located in Montreal that has successfully attracted young volunteers: over 90% of its volunteers are between the ages of 14 and 35. Volunteers prepare and deliver meals, grow vegetables, maintain a bicycle fleet, and organize fundraising. Santropol Roulant has over 100 volunteers dropping in each week to undertake these activities. The organization had noticed that more and more families were volunteering. In their research study, Tana Paddock, Andrea Taylor, and Emma Davenport attempted to understand why families were volunteering at Santropol Roulant and to share that information with other organizations wishing to recruit family volunteers.

The researchers identified several aspects of Santropol Roulant that attracted family volunteers:

- **A welcoming culture:** The main room of the organization is informal and feels more like a living room than an office. People can talk on a couch rather than over a desk, so relationships between the volunteer coordinator and volunteers develop quickly.

- **A safe place:** The caring, community atmosphere, strong connections among staff and volunteers, and informality create a safe environment for children and youth.

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- **A holistic approach:** The organization encourages both caring for others in the form of delivery of services to seniors and caring for oneself as a volunteer.

- **An intergenerational community:** There is no difference in how children, youth, and older volunteers are treated. Everyone is listened to and respected. Youth were particularly attracted to the organization because it does not target any particular volunteer group but welcomes everyone.

- **A flexible approach:** Families, youth, and others were attracted by the wide variety of volunteer activities available. The timing of most activities is quite flexible. In addition, Santropol Roulant allows the volunteers the freedom to decide how they will complete their task.

- **A place for personal growth:** Many of the volunteers, particularly younger ones, felt that they gained powerful life lessons and skills through volunteer relationships that span generations. Everyone commented that it was these social skills and learning that were the most valued part of the volunteer experience, not the technical skills of organizing the meals-on-wheels service. In addition, the diversity of cultures among the volunteers provided a rich learning experience. Lastly, the absence of a mandated political stance and, instead, a quiet, more peaceful activism attracted families.

In conclusion, the researchers from Santropol Roulant explain that their organization is a community in which people live rather than simply an organization for which people volunteer. This has led to its success in attracting families, youth, and adults of all ages.

A.6 Practical implications

The term 'youth' covers a broad range of developmental stages. Statistics Canada defines youth as individuals aged 15 to 24. The information resources reviewed in this section, however, use the term to refer to individuals as young as 8 and as old as 34. Obviously, there are wide developmental differences, both physically and psychologically, across this spectrum of ages. Therefore, nonprofit organizations need to be aware that when recruiting youth, one approach will not suit all ages. Different age groups should be approached and managed in very different ways. Another challenge for nonprofit organizations is how to create volunteer opportunities that allow youth to fulfill their changing needs as they grow and mature.

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The resources discussed in this section offer many recommendations for organizations that wish to involve more youth as volunteers. These recommendations are grouped below into four categories: planning to involve youth, recruitment and retention, boards and governance, and family volunteering.

Planning to involve youth

- Assess what volunteer roles youth could undertake to enhance and sustain your organization's activities.

- If your organization has not had youth volunteers before, provide training to staff and adult volunteers on working with youth.

- Recruit volunteers and staff who are receptive to youth.

- Do not think of youth as an add-on to your organization's activities or as extra labour. Youth should be regarded as valued community members who have a contribution to make to the design, planning, and implementation of volunteer programs.

- Approach schools, youth clubs, etc. to explore the possibility of links and partnerships that can raise awareness of volunteer opportunities among youth.

- Consult with youth, parents, and school staff about recruitment strategies.

Recruitment and retention

- Advertise volunteer opportunities through a variety of means that will reach youth (e.g., newsletters, posters, bulletin boards at schools, youth clubs, libraries. etc.).

- As most youth respond better to personal contact, organize information sessions at schools, youth clubs, or libraries to explore with youth their perceptions of volunteering and their expectations. Also explore any barriers they may see to volunteering.

- If youth seem interested, ask them personally to volunteer.

- Invite school groups to visit your organization so that youth can see your programs and activities first-hand and, if appropriate, meet your clients.

- Develop volunteer positions that challenge youth (e.g., that involve problem solving, responsibility, and/or leadership).

- Contact the parents of youth volunteers to explain the benefits that youth gain from volunteering and encourage them to support their child's decision to volunteer.

- Invite parents of youth volunteers to visit your organization so that they can see first-hand your programs and activities. Give them an opportunity to meet youth who are already volunteers and hear their comments on their volunteering experience.

- Interview and screen youth to assess their interest and skills. Treat the interview as a learning process that will allow youth to find out about the organization and where they can best fit in.

- Provide orientation and training for youth to bolster their confidence to undertake volunteer activities.

- Assign mentors to youth volunteers.

- Show youth volunteers the same respect as adult volunteers.

- Ensure that youth volunteers have the chance to socialize by having activities that bring youth into contact with a wide variety of people both within the organization and outside.

- Many youth are interested in leadership, so try to ensure that there are opportunities for youth to develop leadership skills and become leaders. If youth volunteer in groups, consider training some youth as peer managers.

- Provide the opportunity for youth to voice their opinions on their volunteer roles, your volunteer program, and your organization in general.

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- Involve youth volunteers in the design of monitoring and evaluation procedures that will allow youth and the volunteer coordinator to assess their performance. The objective should be to see where support is needed and/or if the volunteer position needs to be redefined to meet the youth's changing needs.

- Acknowledge the accomplishments of youth volunteers not only within the organization but also in the community.

Involving youth in governance activities

- Develop a board recruitment process that includes raising awareness of youth about the value of volunteering as board members.

- Ensure that the youth who volunteer for your organization are aware that they can join the board and can contribute to governance and strategic planning.

- Designate, with by-laws if necessary, a certain number of board positions for youth, particularly if your organization has youth programs and/or many youth volunteers.

- Invite potential youth board members to come to board meetings to familiarize them with the board's work.

- Have easy-to-understand information packages on the organization, its board, and governance processes.

- Many youth are put off by formal board procedures and settings, so try to choose meeting spaces and procedures that make youth feel welcome and comfortable.

- Have older board members act as mentors to younger board members.

Family volunteering

The information resources on this topic offer two approaches to family volunteering: a formal approach and an informal approach.

Organizations that choose to adopt a formal approach to family volunteering should consider taking the following steps:

- Make a conscious decision to commit to family volunteering and to organizing activities that are suitable for groups of individuals of varying ages, interests, and skills.

- Advertise that you wish to recruit families and consult with them about appropriate volunteer tasks.

- Ensure that your recruitment material makes it clear that children are welcome and their needs will be accommodated.

- Design volunteer tasks that are fun, have realistic goals, and enable families to achieve tangible outcomes.

- Design volunteer activities that are not time-dependent (i.e., that offer some flexibility as to when they must be completed). This will allow families to schedule volunteer time that does not conflict with other family obligations (e.g., a family could be given flyers to distribute anytime over a two-week period).

- When asking families to volunteer for an event, take the needs of children and youth into account. Plan tasks and activities that will enable everyone in the family to make a contribution, whatever their age.

- Check with your insurance provider to ensure that your coverage applies to volunteers of all ages.

- Give families low-risk volunteer activities.

- Recognize families for their contribution and make all family members feel that they are valued.

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B MANDATORY COMMUNITY SERVICE AND SERVICE LEARNING IN CANADA

Organizations that wish to follow a more informal approach to recruiting and retaining family volunteers should consider taking some or all of the following steps:

- Advertise that you welcome people of all ages and people who wish to volunteer in groups.

- Create volunteer opportunities that are flexible with regard to scheduling and that allow volunteers to determine when and how they will complete their tasks.

- Create a friendly, welcoming environment that is informal, secure, and accommodates individuals of all ages.

- Encourage intergenerational volunteering so that youth work with adults of all ages as well as other youth.

- Treat all volunteers with equal respect.

- Work to create a community in which volunteers assist and nurture each other as well as the clients they are serving.

Many schools across Canada now have, or are considering introducing, mandatory community service programs. In Ontario, for example, students must complete 40 hours of community service in order to graduate from high school (Government of Ontario, 1999). The spread of community service programs reflects concern that younger people are less interested in volunteering than they used to be. Such worries may be justified when one considers that the majority of the volunteer hours come from a relatively small proportion of the population. For example, the 2004 CSGVP found that 11% of Canadians contributed 77% of all volunteer hours (Hall et al., 2006). Mandatory community service is seen as one way to bolster the volunteer force and create a larger group of core volunteers. However, until recently little research had been done on the impact of mandatory community service programs.

Several information resources that explore the impact of mandatory community service programs are reviewed in this section. Mark Pancer and his colleagues at Wilfrid Laurier University undertook a KDC-funded project to examine the impact of Ontario's mandatory community service program. The research team produced three information resources: a research report, *The Impact of High School Mandatory Community Service Programs on Subsequent Volunteering and Civic Engagement* (Pancer, Brown, Henderson, & Ellis-Hale, 2007); a manual for schools and nonprofit organizations, *Helping Students Get the Most Out of Volunteering* (Pancer, Brown, Henderson, & Ellis-Hale, 2006); and a manual for high school students, *Getting the Most Out of Your Volunteer Experience* (Pancer, Brown, Henderson, Ellis-Hale, & Buote, 2006).

The Ontario study was the catalyst for a national KDC-funded project in which researchers from Wilfrid Laurier University, Ryerson University, and the University of Toronto collaborated to produce two research reports: *Community Service and Service Learning in Canada: A Profile of Programming Across the Country* (Brown, Ellis-Hale, Meinhard, Foster & Henderson, 2007) and *Best Practices in School Community Service Programs: Evidence from Canada and Abroad* (Meinhard, Foster, Brown, Ellis-Hale & Henderson, 2007).

Two other studies looked at provincial community service programs. One study was done by Sharon Livingston of the Ontario Network of the Canada Volunteer Initiative. Her findings are reported in *Research Findings: A Snapshot of the 40-Hour involvement Program for Ontario High School Students in 2006* (Livingstone, 2006). Dawn Sutherland and her colleagues at the University of Winnipeg examined community service learning programs in Manitoba. Their results are reported in *Youth Volunteerism: Measuring the Benefits of Community Service Learning Programs* (Sutherland, Doerkson, Hansli, Roberts, Stewart et al., 2006).

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Finally, Volunteer Canada has produced four reports on mandatory community service. These are: *Volunteering and Mandatory Community Service: Exploring the Theme* (Volunteer Canada, 2006a), *Volunteering and Mandatory Community Service: A Discussion Paper* (Volunteer Canada, 2006b), *Volunteering and Mandatory Community Service: Implications for Volunteer Program Management* (Volunteer Canada, 2006c), and *Mandatory Community Involvement Activities…40 Hours Well Spent?* (Volunteer Canada, 2006e).

B.1 Studies of provincial community service programs

B.1.1 Ontario

Pancer and his colleagues (2006) focused their study on the first cohort of students to complete Ontario's mandatory community service program in 2003. They surveyed 1,293 second-year students at Wilfrid Laurier University; 602 of the students had been required to complete 40 hours of community service and 691 had not. The researchers' objective was to compare the volunteer experiences of these students to see if there were differences between those who had done mandatory community service and those who had not.

The researchers measured the community service exposure of both groups of students. One measure was a recall of whether the students had volunteered during high school. Another was the breadth of volunteering they undertook during their high school years (i.e., the extent to which they were involved in each of six sectors). The third measure was whether the student had volunteered with an organization regularly for a year or more during high school.

Regarding the first measure, 95% of the mandated group remembered they had volunteered while at high school compared with 77% of the non-mandated students. Measurements of breadth of involvement in volunteering showed no differences between the groups. However, in terms of regularity of volunteering, 51% of the mandated group volunteered regularly for a year or more compared with 43% of the non-mandated students. It would appear from these results that mandatory service programs had a positive impact on students' volunteering behaviour.

The students were then asked about the quality of their volunteer experience on a scale of 1 to 5 where 1 meant very negative and 5 meant very positive. Both groups had identical average scores of 2.8. There was also no significant difference between the groups regarding the percentage of individuals who said that they would definitely volunteer again; 35% of the mandated group said they would volunteer again compared with 37% of the non-mandated group.

The most significant factor affecting subsequent volunteering was the quality of the community service experience, regardless of whether the experience was mandated or not. In addition, students who engaged in community service of any duration while in high school tended to be more interested in politics than those who had not engaged in community service. There was also a positive correlation between having a positive volunteering experience at school and engaging in social activism and university-related political activities.

To complement their survey, Pancer and his colleagues also conducted in-depth interviews with 100 students who had volunteered during high school. These interviews provided practical information for the two manuals: *Helping Students Get the Most Out of Volunteering* and *Getting the Most Out of Your Volunteer Experience*.

In her report, *Research Findings: A Snapshot of the 40-Hour Involvement Program for Ontario High School Students in 2006,* Sharon Livingstone focuses on the quality of the volunteer experience. She poses two questions:

- What factors contribute to a good experience for students, parents, school personnel, and nonprofit organizations?
- What changes would these stakeholders recommend to ensure the experience is positive?

Livingstone conducted focus groups and surveys with 668 youth (aged 14 to 24) and 681 adults (i.e., parents, school personnel, and members of nonprofit organizations). She found that 52% of her student sample had completed the 40-hour community service program. When asked about their experience, 56% said it had been great, 35% said it had been good, 7% said it had been okay, and only 2% reported that they had not liked it. The most positive part of the experience for the students was that it:

- involved them in their community;
- allowed them to test career directions and gain work experience; and
- gave them a feeling of being appreciated and making a difference.

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9 M. Rosenberg. (1965). *Society and the adolescent self-image*. Princeton, NJ: Princeton University Press. Retrieved March 7, 2007 from http://www.atkinson. yorku.ca/~psyctest/rosenbrg.pdf. The Social and personal responsibility scale is described in D. Conrad & D. Hedin (1981). *Instruments and scoring guide of the experimental education evaluation project.* St Paul, Minneapolis: University of Minnesota, Center for Youth Development Research.

In addition to the points raised by the students, the adults who participated in the study said that community service programs increase students' sense of civic responsibility as well as their understanding of the value of giving to the community.

However, students faced some barriers, such as the difficulty of getting started and of finding a suitable position. There was also a lack of consistent information and communication between parents, the schools, and nonprofit organizations. Students often lacked confidence and many needed more support than they were receiving.

B.1.2 Manitoba

Dawn Sutherland and her colleagues (2006) examined community service learning programs in Manitoba. These programs vary from school to school in the province; some are mandatory and some not. Some are part of a leadership training program; others are a requirement of high school graduation. The primary objective of the programs is to raise awareness of the value of contributing to one's community. The programs are also a learning experience in that they require students to write reports about their activities, which contributes to improved writing and analytical skills. In this way, the link between the community service experience and the classroom enhances students' learning while developing in them a sense of caring for others.

Two of the main objectives of this study, as reported in *Youth Volunteerism: Measuring the Benefits of Community Service Learning Programs* (Sutherland et al., 2006), were to:

- measure the impact of service learning programs on students' self-esteem and social responsibility; and
- compare students who volunteered in the programs in order to receive a credit with those who volunteered for other reasons.

Sutherland and her colleagues surveyed 76 students in grades 9 to 12 in 13 different schools. To measure self-esteem and social responsibility, they used two tools, the Rosenberg Self-Esteem Scale and the Social and Personal Responsibility Scale.[9] The researchers also explored motivations for volunteering and examined what kinds of activities students were involved in. The students who completed the survey were mainly volunteering in hospitals or convalescent homes (20%), in community centres (15%), or at church events (15%). Their primary reasons for volunteering were to contribute to community (15%), help people (15%), and do things that would help them with their future careers (15%).

With regard to self-esteem, Sutherland and her colleagues found no significant differences between students who were volunteering either for school credit or for other reasons. The researchers also found few significant differences when measuring social and personal responsibility. The scale had five components: social welfare, duty, competency, efficacy, and

performance. Social welfare and duty relate to responsibility to one's community; the other components relate to personal responsibility. With regard to social responsibility, there were significant differences between students who were volunteering when the study took place and those who were not. The students who were volunteering had a higher sense of social responsibility. Those students whose parents volunteered also had a significantly higher score for social responsibility, duty, and performance.

Sutherland and her colleagues admit that more work needs to be done to verify their findings. They felt that the sample sizes in some cases were too small to allow them to draw conclusions. Nevertheless, this resource is useful in that it presents some tools for measuring impact that might be of value to other researchers who are interested in examining the impact of community service learning programs on students' sense of community commitment and self-worth.

B.2 National study of community service programs

Researchers from Ryerson University, Wilfrid Laurier University, and the University of Toronto examined community service programs across Canada and reviewed the literature about such programs. They report their findings in *Community Service and Service Learning in Canada: A Profile of Programming Across the Country* (Brown et al., 2007) and *Best Practices in School Community Service Programs: Evidence from Canada and Abroad* (Meinhard et al., 2007).

These two resources are valuable because they summarize current knowledge on community service programs and provide an overview of what is happening in Canada. Meinhard et al. (2007) found that there is no consensus in the literature on the relationship between community service programs and valued future outcomes, such as citizenship behaviour, political involvement, future volunteering, and other civic behaviours. There is also no consensus on more immediate outcomes such as improved self-esteem, improved academic performance, or greater tolerance of diversity. Where positive outcomes occurred, they were linked to program structure; that is, student satisfaction was high where programs were well structured.

The researchers identified 20 best practices from the literature and ranked them according to the number of articles in which they were mentioned. The top five best practices in order of most frequently mentioned are as follows:
- providing opportunities for student reflection;
- giving students responsibility;
- providing meaningful work or challenging tasks;

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- establishing regular communication or partnerships between schools and nonprofit organizations; and
- ensuring parent and/or teacher and/or volunteer coordinator/supervisor involvement.

Meinhard and her colleagues then went on to survey 321 schools and school boards across Canada. In general, they found that community service programs are not well developed. In Ontario, for example, loose guidelines and lack of financial support have prevented the development of well-structured programs that incorporate the best practices suggested in the literature. The exceptions to poorly developed programs are found in private secular and religious schools, which tend to incorporate many of the best practices outlined in the literature.

The researchers also interviewed representatives from nonprofit and voluntary agencies. Their thoughts on community service programs are summarized below.

- **Program context:** Guidelines and protocols are insubstantial and schools tend to meet only the minimum requirements set by school boards. Most arrangements between the partners in the program are verbal rather than written, and there is no systematic implementation or evaluation process to assess the efficacy of the programs.

- **Recruitment and orientation:** Schools have no systematic way of advertising volunteer opportunities. Some schools merely post opportunities on school bulletin boards; others have web pages dedicated to community service opportunities and volunteer fairs. Sometimes organizations approach schools about volunteer recruitment, but this is not done in any systematic way.

- **Volunteer experience:** There appears to be little consistency in how organizations treat student volunteers. Some treat them the same as adult volunteers while others treat them as unskilled individuals needing training and supervision. Many organizations only accept senior students.

However, the researchers found that both schools and organizations agreed that:

> the main goals of their community service programs are being met:
> students become more socially aware, they learn about responsibility
> and leadership, they are exposed to social justice issues, and they are
> involved not only in charitable actions but also in community building
> (Meinhard et al., 2007, p. 12).

From the survey, interviews with key informants, and a literature review, a general consensus emerged on what comprises a successful community service program. The most important element is that community service should be a positive experience for the student. To ensure that this is the case, all community service programs need to be well-structured so that they offer suitable activities and supervision and meet the expected learning outcomes for the students involved.

B.3 Volunteering and mandatory community service

Volunteer Canada's report *Volunteering and Mandatory Community Service: Implications for Volunteer Program Management* (Volunteer Canada, 2006c), examines the contentious issues surrounding mandatory community service and its relationship to a typical volunteer involvement cycle, which consists of the following stages:

- program planning,
- position design,
- recruitment,
- screening,
- orientation and training,
- placement,
- supervision, recognition, and corrective action, and
- systems development.

The report works through each element of the cycle as it applies to a mandatory community service programs. Cautionary advice is provided about the pitfalls of involving students who are 'volunteering' because they are required to, without prior planning and forethought about how the program can support an organization's mission. For example, Volunteer Canada emphasizes:

> Resist pleas for involvement that do not support your mission. Students who are desperately seeking to fulfill graduation requirements can make a compelling case, but if their involvement is not in the best interests of the organization, decline the request (Volunteer Canada, 2006c, p. 7).

The report focuses on the adjustments organizations need to make in order to effectively involve mandatory community service participants. In some cases, the adjustments needed are too great and organizations would be better off not accepting these volunteers. However, many organizations may be able to provide short-term assignments that do not stretch their resources. For example, a group of students could be recruited for two weeks to decorate a room in a seniors' home. Organizations should bear in mind that mandatory service participants are likely to have less knowledge and understanding of an organization's missions and programs than most volunteers and so will require more training and support.

Volunteer Canada concludes that mandatory community service is expanding and evolving and has the potential to influence and change traditional volunteering systems. Participants are not true volunteers, and some may even resent being forced to participate. To accommodate these individuals, organizations will likely need to develop approaches that are different from those used with other volunteers. Given this situation, Volunteer Canada emphasizes that much more research needs to be done to assess the implications of community service programs for nonprofit organizations. The value of this report is that it looks at mandatory community service from the organization's perspective whereas most other information resources focus on the students.

Volunteering and Mandatory Community Service: Exploring the Theme (Volunteer Canada, 2006a) discusses the issues of coercive or mandatory community service vis-à-vis service learning and an individual's personal choice to volunteer. Service-learning programs are adapted to fit school curricula so that they enhance a student's learning and skills as well as expose them to community service. A good service-learning program is well-prepared, involves action in the community, and reflection on the impact for the students and community. Unfortunately, according to Volunteer Canada,

> the Canadian varieties [of community service] tend to emphasize service with little to no curriculum support or opportunity to learn through reflection on community experience (Volunteer Canada, 2006a, p. 9).

Volunteer Canada maintains that program structures that are likely to increase the chance of success in instilling civic responsibility in youth have yet to be broadly adopted in Canada. Currently, the model is mandatory community service such as the 40-hour program in Ontario and the 30-hour programs in British Columbia and the Yukon. Although mandatory programs will produce positive experiences for some students, others will probably see the programs as compulsory and punitive. Another problem is that students who are involved in these programs are consistently called volunteers when, in fact, they are not. Therefore, there is a danger that some students will associate volunteering with coercion. However, it should be noted that in the research studies reviewed earlier on mandatory community service in schools almost all students had very positive experiences (Livingstone, 2006; Pancer et al., 2007).

Volunteering and Mandatory Community Service: A Discussion Paper (Volunteer Canada, 2006b) further expands on the debate over mandatory community service. However, this report explores all kinds of mandatory community service, not just school programs. Many of the negative experiences that are discussed in this paper concern mandatory community service with regard to juvenile offenders and individuals doing community service in order to receive welfare benefits etc. It is a valuable document in terms of its broad review of the subject and in its highlighting of the need to be careful when designing mandatory programs so that they are not just punitive but personally constructive for the individuals involved.

Mandatory Community Involvement Activities…40 Hours Well Spent? (Volunteer Canada, 2006e) examines the current state of the Ontario mandatory community service program. This resource reviews the findings of Livingstone (2006) as well as others. It is valuable because it concisely presents all the major issues on community service programs in schools using Ontario as the example.

B.4 Practical implications

Here we provide a synthesis of the major recommendations from all of the information resources on community service programs. What is clear from these resources is that students need a positive experience if mandatory community service is to increase the likelihood that they will continue to volunteer in the future. This means that programs should be well structured and there should be good coordination between schools and nonprofit organizations. However, nonprofit organizations are also providing essential services to their communities. Therefore, school boards and education authorities need to ensure that community service programs

enhance an organization's ability to meet its mission rather than create more work and stretch an organization's resources.

Recommendations for well-structured mandatory community service programs include:

- Schools should designate staff to oversee and organize the community service program and should provide professional training to this staff, if necessary.

- Schools should be proactive in approaching nonprofit organizations to find out what community service opportunities are available and then make these known to students.

- There should be a designated bulletin board and/or school website that posts community service opportunities.

- Staff should make presentations to students about community service and encourage representatives of local nonprofit organizations to attend these sessions.

- Organizations should also be proactive and explore the possible benefits of community service programs. Many organizations are seeking youth volunteers and community service programs are one way to make contact with youth.

- If organizations and schools agree to form a partnership, they need to design a joint strategy for raising awareness among students of the benefits of getting involved in the organization's activities (e.g., they can learn about the community, find out how much fun it is to help others, develop new skills, create new social connections, etc.).

- Community service programs should adopt a service-learning model that combines acquisition of knowledge, action in the community, and reflection of its impact for the community and the student.

- Students should be exposed to community service and issues of civic responsibility as early as possible rather than in grades 9 to 12 when mandatory service programs start. If students have already done a little

EMPLOYER-SUPPORTED VOLUNTEERING   PART 4

Employer-supported volunteering is a growing phenomenon in Canada and is partly a response to demands by the Canadian public that the business sector become more socially responsible. For example, *Corporate Responsibility Monitor: Canadian Public Opinion on the Changing Role of Companies* by Globescan Inc. (2005) reports that 80% of Canadians believe that businesses should assume at least some citizenship responsibilities and 32% believe that companies should be held responsible for solving social problems.

The growing pressure on the business sector to become more socially responsible coincides with major changes in the nonprofit sector. Agnes Meinhard, Mary Foster, and Ida Berger provide a summary of these changes in *Closing the Loop: Corporate Links to the Voluntary Sector* (Meinhard, Foster, & Berger, 2006). They explain how 20 years of fiscal restraint, privatization of government services, and drastic funding cutbacks by provincial governments have affected the nonprofit sector. For example, long-term partnerships with government departments have been replaced by short-term contractual relationships. Often, nonprofit organizations find themselves competing with other nonprofits and even for-profit organizations for government contracts. All of these changes have affected the ability of nonprofit organizations to fulfill their missions. Therefore, many nonprofit organizations are looking to the business sector to replace at least some of the support that they used to get from government.

At the same time, there has been a shift in the way businesses approach philanthropic activities. Originally, companies tended to make charitable donations to achieve corporate goals such as increased brand recognition. Increasingly, companies have been offering a broader spectrum of support that fulfills multiple objectives. This newer model of corporate social responsibility (CSR) is in contrast to the old-style corporate philanthropy. In a speech on *The State of Corporate Social Responsibility in Canada*, Anne Golden of the Conference Board of Canada stated:

> CSR is conceived of as part of the sound governance of an organization, aiming to promote the long-term health, or sustainability, of both the company and society at large (Golden, 2005, p. 5).

With businesses seeking ways to engage in socially responsible activities and nonprofit organizations needing partnerships to assist them with their programs, it would seem natural for both sectors to explore how they might mutually benefit from collaborating to serve their local communities. This is, in fact, beginning to happen. In a summary report of the proceedings of a workshop entitled *Strategic Alliances: Seeking Common Ground*, Ineke Lock states:

> Strategic alliances between not-for-profit and for-profit organizations are emerging as a valuable tool for building stronger, healthy, and vital communities. A consensus is emerging that no organization can survive on its own in today's interconnected world. The magnitude and complexity of the problems crying out for solutions mandates that all sectors (including government at all levels) must join forces to meet the challenges (Lock, 2001, p. 1).

An important way in which companies can exhibit social responsibility is to encourage and support volunteering among their employees. There are many ways to do this. For example, companies can encourage their employees to participate in a company-run volunteer program that provides help to one or more nonprofit organizations in the community. Companies can also encourage employees to volunteer directly with charitable or nonprofit organizations that the company wishes to support, either on company time or on their own time. Finally, companies can accommodate the personal volunteering activities of their employees by allowing them time off or use of company facilities or equipment for their volunteer activity. Several recent research projects have explored employer-supported volunteering in Canada. In this section, we review the information resources produced from these projects.

This section is divided into four parts:

    A. National survey of companies
    B. Case studies and guides
    C. Studies of employee volunteers
    D. Practical implications

NATIONAL SURVEY OF COMPANIES A

Understanding the current state of company support for employee volunteering is the first step in exploring partnerships with businesses that involve volunteer contributions from their employees.

In their analysis of the 2004 CSGVP, Hall et al. (2006) report that only 5% of volunteers nationally were asked by their employer to volunteer. However, 57% of volunteers who had an employer reported that they had received some form of non-monetary support for volunteering from their employer. One third of this group was allowed to change or reduce their work schedule (33%) and/or use their company's facilities or equipment for their volunteer activities (32%). Almost one quarter (23%) received recognition or thanks from the company for their volunteer efforts. Twenty-one percent (21%) received paid time off to volunteer or volunteered on the job.

In *Building Stronger Communities: Business and Voluntary Sector Organizations Working Together*, Larry McKeown and Michelle Brown (2003) note that employer support for volunteering varies according to a number of factors. For example, according to the 2000 NSGVP, 52% of volunteers who were employed full-time reported receiving employer support compared to 43% of part-time employees. Among different business sectors, employer support varied from 41% for employees in retail trade to 52% in financial services, insurance, and real estate.

To understand the current state of support for employee volunteering in Canada, M. Easwaramoorthy and Cathy Barr from Imagine Canada collaborated with Mary Runte and Debra Basil from the University of Lethbridge on a national survey of companies. They report their findings in *Business Support for Employee Volunteers in Canada: Results of a National Survey* (Easwaramoorthy, Barr, Runte, & Basil, 2006) and in two fact sheets: *Employee Volunteerism: What Supports do Companies Provide?* (Basil, Runte, Barr, & Easwaramoorthy, 2006a) and *Employee Volunteerism: Benefits and Challenges for Businesses* (Basil, Runte, Barr, & Easwaramoorthy, 2006b).

Easwaramoorthy and his colleagues surveyed 990 businesses between November and December 2005. All major business sectors were represented in the sample. The largest sector was the retail trade (26% of survey respondents). Fifteen other major sectors were included in the sample and each comprised between 1% and 9% of the survey respondents. The survey covered all major regions of Canada, with the largest representation from Ontario (45%).

Extent of support

The researchers determined the extent of support for volunteering by asking businesses if they encouraged or accommodated employee volunteer activities during working hours and whether they encouraged employees to volunteer on their own time. They also asked if the business had a written policy on employee volunteering.

Almost three quarters of respondents (71%) indicated that their company either accommodated or encouraged employee volunteering during regular working hours or on their own time. Forty-nine percent (49%) of companies encouraged employees to volunteer on their own time; fewer (35%) accommodated volunteering during working hours, and even fewer (18%) actively encouraged it. Only 3% of businesses had a written policy on employee volunteering.

Type of support

Of the 71% of businesses that supported employee volunteering in some way, 78% allowed employees to adjust work schedules, 71% provided time off without pay, and 70% allowed employees to use company facilities and equipment for their volunteer activities. Less than one third (29%) provided time off with pay so that employees could engage in volunteering activities.

About one third (35%) of companies that supported employee volunteering recognized or thanked their employees for their volunteer contributions; 20% provided education on volunteering; and 18% maintained records on the skills and experience of their employee volunteers.

Targeting support and linking it to other contributions

In *Business Contributions to Canadian Communities: Findings from a Qualitative Study of Current Practices* (Hall, Easwaramoorthy, & Sandler, 2007), the authors note that companies often target their contributions to charitable and nonprofit organizations that relate to their core business. As an example, they cite pharmaceutical companies that support health-related causes with cash, in-kind donations, and/or volunteer support.

In their 2005 survey, Easwaramoorthy et al. (2006) asked businesses what kinds of nonprofit organizations or causes they targeted for support through their company volunteer initiatives. They found that 58% of businesses targeted specific causes and organizations. The most common business-supported causes were health (16%), social services (13%), and sports and recreation (12%).

Of the 71% of businesses that supported employee volunteering, 79% also provided cash support (e.g., donations or grants) to charitable and nonprofit organizations and 74% donated services goods, or facilities. Of this group, 58% linked their donations to employee volunteer activities.

Benefits and challenges for companies

Easwaramoorthy and his colleagues found that companies that supported employee volunteering identified three major benefits for the company. A third (33%) said that supporting employee volunteering improved their corporate image; 21% said that it improved employee morale; and 17% said that it improved relations with the surrounding community.

Just over half the companies in the survey reported that they faced no challenges with regard to their employee volunteer initiatives. However, one major challenge was identified by almost a quarter (23%) of businesses: the difficulty of covering the regular workload of employees who leave work to volunteer. Other challenges (e.g., costs, lack of support from employees) were considered minor and were mentioned by 3% or less of companies in the survey.

Size of company and support for employee volunteering

The survey revealed some differences between large (500+ paid staff) and small (fewer than 100 paid staff) companies. More than two thirds (68%) of large companies either accommodated or encouraged employee volunteering during work hours compared to 53% of small companies. Large companies were also more likely to target specific types of nonprofit organizations and causes for support through their company volunteer programs. Three quarters (76%) of large companies targeted causes compared with 57% of small companies. The same proportion of large companies (75%) linked their support for employee volunteers to their in-kind and cash donations to support a specific cause, compared with 62% of small companies. No clear pattern emerged for medium-sized companies (100-499 paid staff).

Formal volunteer programs

Only 14% of the 990 businesses that participated in the survey had formal volunteer programs supported by company resources. The vast majority of these companies accommodated employee volunteering by allowing their employees to adjust work schedules (92%) or use company facilities and equipment (89%). Most encouraged employees to volunteer on their own time (82%) and allowed employees to take time off without pay for volunteer activities (75%). Even among this group, however, only 52% provided time off without pay, only 44% accommodated employee volunteering during working hours, and only 38% encouraged employee volunteering during working hours.

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A

Formal company volunteer programs need to be managed much like any other company program. There should be program objectives, agreed-upon actions to achieve those objectives, and a process for monitoring and evaluating the extent to which activities are meeting objectives. For a program to be successful, a company needs dedicated staff, resources, and leadership. Easwaramoorthy et al. found that a little more than half (54%) of companies with formal volunteer programs had at least one staff member designated to run the program; 9% had six or more staff.

Programs also need leaders who set policy and direction. Of the 14% of companies with formal volunteer programs, 63% were led by a member of the company's senior management team, 12% by a committee or group of employees, and 9% by an employee who was not a senior manager. Easwaramoorthy and his colleagues comment:

> The fact that almost two thirds of corporate volunteer programs are led by senior management suggests that these programs are strategic initiatives for the company (Easwaramoorthy et al., 2006, p. 17).

Among companies with formal volunteer programs, 13% had written policies on volunteering, 30% tracked their employees' volunteer time, and 41% evaluated their volunteer programs.

CASE STUDIES AND GUIDES B

If employers are increasingly interested in supporting employee volunteerism, are there any examples that provide some insight into promising practices? Mark Pancer, Evelina Rog, and Mark Baetz from Wilfrid Laurier University undertook a detailed study of the employee volunteer program at the Ford Motor Company of Canada. They present their findings in one manual, *Developing an Effective Corporate Volunteer Program: Lessons from the Ford Motor Company* (Pancer, Baetz, & Rog, 2002a), and two reports: *Corporate Volunteer Programs: Maximizing Employee Motivation and Minimizing Barriers to Program Participation* (Rog, Pancer, & Baetz, 2004) and *Community and Corporate Perspectives on Corporate Volunteer Programs* (Rog et al., 2005). The researchers also produced two fact sheets: *Corporate Volunteer Programs: Benefits for Employees, Corporations, and the Community* (Pancer, Baetz, & Rog, 2002b) and *Corporate Volunteer Programs: Boosting Employee Participation* (Pancer, Baetz, & Rog, 2004).

The objective of this study was to provide guidance for employers who wish to establish company volunteer programs and motivate their employees to participate in them. However, the information is also useful for nonprofit organizations because it provides insight into the motivations and subsequent actions of a company that wanted to contribute to the local community through volunteering.

This section is divided into three parts:

B.1 Ford Motor Company
B.2 Other case studies
B.3 Guides

B.1 Ford Motor Company

The volunteer program at Ford Motor Company originated from a 1998 team-building exercise that involved salaried employees from around the world, including 2,000 Canadians. During the three-day meeting, participants identified one important strategy for Ford: corporate citizenship. To experience what this meant, Canadian participants at the meeting went to local nonprofit organizations to volunteer. This was so successful that many employees asked how they could become more involved in their communities. Ford saw this as an opportunity to strengthen the company's team-building initiatives and, in 2000, announced a formal corporate volunteer program. The program allows salaried employees to volunteer in their communities up to 16 hours per year on company time.[10]

Ford started by testing its program with head office employees. This gave Ford time to:

- learn about nonprofit organizations in the local community;
- find nonprofit organizations that met Ford's requirements for its volunteer program (i.e., had volunteer opportunities that contributed to team-building, operated during daytime hours, and could provide activities that would enable employees to complete Ford's 16-hour program);
- organize the program so it ran smoothly; and
- evaluate the program's impact on employees and the community.

Once the pilot test had been completed, Ford expanded the program to all interested salaried employees across Canada. Employees were made aware of the program through e-mail, a dedicated company website, and by telephone. Ford emphasized that the program was completely voluntary and that employees would not be evaluated on their participation. Managers or supervisors could not access employees' volunteer records. However, managers were evaluated on their commitment to corporate citizenship and one measure of this was support for employee participation in the volunteer program.

In addition to examining the operation of the Ford program, the Laurier researchers also interviewed representatives of 14 nonprofit organizations that had participated in the program. The results of this research are presented in *Community and Corporate Perspectives on Corporate Volunteer Programs* (Rog et al., 2005). The interviews focused on the benefits and challenges of partnering with Ford. The organizations involved provided a wide range of

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10 At the time the Wilfrid Laurier researchers did their study, this program was the only one of its type at Ford. Since 2005, Ford has formed the Ford Volunteer Corps, which handles all volunteer requests that do not fall under the 16-hour volunteer program. The Ford Volunteer Corps connects Ford employees, retirees, and others in the extended Ford Family to a wide range of projects in their communities. Information is available at http://www.ford.com/en/goodWorks/community/fordVolunteerCorps.htm (Retrieved March 18, 2007).

services (e.g., food banks, clothing exchanges, working with the blind, operating camps for underprivileged children, etc.). Most of the labour that Ford employees provided was manual labour (e.g., landscaping and gardening at community homes, building repair, sorting food at food banks, etc.). It was easier to have Ford employees do this kind of work than to put them through the interviews and screening that are required of volunteers who work directly with an organization's vulnerable clients.

The Laurier researchers found that all of the representatives from nonprofit organizations that worked with Ford employees had very positive experiences. The following are some of the key benefits they cited:

- Nonprofit organizations had greater access to skilled, motivated, reliable volunteers.

- Nonprofit organizations had increased capacity to carry out activities when employee volunteers assisted in their programs.

- Better services for clients (e.g., more animal outings at an animal shelter; more pleasant grounds for the organization's clients to walk in; input of new ideas to improve the organization's programs).

- Strong bonds between organization staff and/or clients and Ford volunteers, leading a more caring and supportive environment for the organization's clients.

- More access to volunteers by referral. Ford volunteers sometimes returned to the organization to volunteer on their own time or encouraged friends and family to volunteer.

- Increased donations. Often the corporate volunteers would also make cash donations.

- Enhanced public awareness. Knowledge about the organization's mission and activities not only increased among Ford employees but also among the general public (e.g., employees often told family and friends, and Ford publicly talked about the community work it was supporting).

- Having a major company support an organization helps to attract volunteers because it suggests that the work the organization does is valuable.

- Nonprofit organizations successfully used the example of Ford's support to attract other businesses interested in providing employee volunteers.

Although nonprofit organizations that participated in Ford's employee volunteer program reported many benefits, they also reported some challenges. These included the following:

- **Finding suitable tasks for short-term volunteers.** Ford volunteers are with an organization for only a short time (e.g., two full days, four half days). This limited the tasks they could do and it was sometimes difficult for organizations to identify team tasks that could be completed in such a short time.

- **Lack of time for training.** All volunteers need some training, particularly if they will be working directly with clients. The short-term placements that are the focus of the Ford program meant that there was only minimal time for such training.

- **Sporadic nature of the volunteer support.** Volunteer teams from Ford might volunteer for half a day or a day and then be replaced by a new team, resulting in little continuity. As well, the organization had to train the new volunteers.

- **Difficulty in providing meaningful volunteer experiences.** Most nonprofit organizations wanted to provide a high-quality experience, but this was not always easy to do given the constraints of the program.

Rog and her colleagues at Wilfrid Laurier also surveyed companies other than Ford Canada to find out the benefits and challenges associated with supporting employee volunteering (Rog et al., 2005). Between June and August 2003, representatives of 34 companies agreed to be interviewed. The companies came from a variety of business sectors (e.g., financial services, insurance, pharmaceutical companies). Representatives from large companies were typically the manager responsible for philanthropy while those from smaller companies were typically the president or CEO.

Half of the companies surveyed had formal employee volunteer programs. The most common type of program offered paid time off to employees who volunteered (up to a certain number of hours per year). Even the companies that had no formal volunteer program supported their employees' volunteering in some way. Examples of this less formal support included: time off work for special volunteer events; recognition of employees' volunteering; and providing information on volunteering to employees. In some cases, companies formed partnerships with local nonprofit organizations and encouraged employees to volunteer for those organizations.

Companies cited many benefits of supporting employee volunteers. These included the following:

- **Improved morale among employees.** Many companies said their employees' satisfaction with their jobs improved as did their physical and emotional well-being.

- **Improvement in employees' skills and personal development.** Volunteering added to employees' personal development and widened their set of skills, particularly their ability to collaborate with others.

- **Improved loyalty to the company and improved employee retention.** Participating in volunteering made employees proud of the company, more committed to it, and therefore more likely to remain with the company.

- **More positive work environment.** Participating in volunteering contributed to a happy workplace because employees felt good about having contributed to the community.

- **Strengthened team spirit among employees.** Working together on volunteer activities built strong teams with strong bonds of trust, which is easily applied to doing group tasks at work.

- **Increased productivity.** The more positive work environment and better social relationships arising from group volunteering translated into greater productivity.

- **Enhanced visibility for the company.** Employee volunteering created a positive image of the company in the community.

- **Improved relations with customers and increased customer loyalty.** Many companies said that their relationships with clients and customers improved and that, in some cases, this led to increased sales.

Even though there are many benefits for companies, there are also many challenges. The Wilfrid Laurier researchers found the following challenges for companies:

- **Limited amount of time for volunteering.** Due to heavy workloads, employees often did not have that much time to devote to volunteering and companies were reluctant to place more work on employees by asking them to volunteer for lengthy periods.

- **Limited staff resources.** Smaller companies often found it difficult to spare employees for volunteering. This was particularly true for companies working in a highly competitive environment.

- **Cost of supporting employee volunteers.** Some companies found it difficult to cover the costs of employees taking time off during the work-day to volunteer. This was more of an issue with smaller companies.

- **Poor economic conditions in some business sectors.** It can be difficult to attempt to contribute to the community through volunteering when a company is in a situation where it has to lay off employees.

- **Issues relating to organizational structure.** In very large, complex companies that have subsidiaries and semi-autonomous branches, it is difficult to have company-wide policies on employee volunteering. It takes time to develop programs that will accommodate a company with diverse sub-divisions scattered across the country.

- **Promoting the idea of volunteering to employees.** Companies whose workforces were mainly between the ages of 25 and 35 said that it is very difficult to get that age group to volunteer. It is can also be difficult to justify a volunteer program to middle management who may view volunteering as a loss to the company's productivity.

- **Communication.** Many large companies find it difficult to communicate effectively with a widely distributed workforce.

- **Employees' ownership of the volunteer program.** Several companies said it was a major challenge to encourage employees to provide input and to take ownership of a volunteer program that was initiated by the company. It worked much better when the idea came from the employees.

- **Finding meaningful volunteer opportunities.** Companies sometimes found it hard to find volunteer opportunities that were interesting and meaningful to employees and that would add to their skills and experience.

- **Adjusting to the culture and work environment of nonprofit organizations.** Companies found that nonprofit organizations work very differently from businesses and that it was sometimes difficult to adjust to a more informal, less organized work environment. Getting nonprofit organizations to deliver what the company needed from a partnership was also a challenge.

- **Lack of models.** Some companies indicated there was a lack of information on employer-supported volunteer programs and good models from which to design new programs.

B.2 Other case studies

B.2.1 Manulife Financial

Manulife Financial has worked with its community partner, Volunteer Canada, to design a volunteer program called REACTS (Retired Employees Assisting Community Through Service). A detailed description of this program is provided in *Upsizing Community Investment: Building a Successful Retiree Volunteer Program* (Hegel, 2001).

REACTS was developed in response to two key findings of Hall et al. (2001) in their analysis of the 2000 NSGVP. They found that volunteers with employer support contributed an average of 20 hours more per year to volunteering than did volunteers without employer support. In addition, older adults logged the greatest number of volunteer hours.[2] These findings spurred Manulife to start a volunteer program for their retired employees. The program provides a means for retirees to apply the skills they have acquired to community issues. The retirees

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2 For more information, see the report *Manulife Retiree Volunteer Program: Phase I Research* (Canadian Centre for Philanthropy, 2001) and the fact sheet *Employer-Supported Volunteering* (Canadian Centre for Philanthropy, 2004).

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are also ambassadors for the company and strengthen Manulife's positive image as a good neighbour to the communities it serves.

In addition to the many benefits volunteering provides to individuals of any age, Manulife thought that it would provide several personal benefits to their retiring employees. Volunteering would:

- ease the transition into retirement;
- help to maintain social ties and social support networks, which might otherwise disappear with retirement; and
- provide health benefits (i.e., help to maintain and improve physical and psychological well-being).

In designing the program, Manulife and Volunteer Canada encouraged etired employees to form a committee, which Volunteer Canada led. The committee decided on a mission for the program, desired outcomes for the community, and the degree of volunteer involvement it hoped to attract. The Canadian Centre for Philanthropy (2001) did a survey of Manulife employees to find out how many were planning to retire or had retired, their availability, and their expectations of volunteering. The volunteer program was initially offered to Manulife retirees in the Greater Toronto Area, who were sent a letter about the program and its intended mission.

According to Hegel (2001), the first year of the program was rewarding for everyone, but there were many challenges. For example, the steering committee of retirees was not well organized, and everyone tried to do everything. This was solved by designating specific roles and responsibilities. Too much attention was paid to recruiting new volunteers and not enough to supporting existing volunteers. There was also too much focus on process (i.e., too much time in meetings about how to organize activities) rather than actively volunteering. The steering committee learned that good organization is critical so that volunteers spend less time on committee work and more time actively volunteering for programs that support the community.

REACTS has now become an established retiree volunteer program that serves many nonprofit organizations. These organizations often cite their partnership with REACTS when trying to encourage other companies to partner with them. Because the program is now well known, it has greatly strengthened Manulife's corporate image.

B.2.2 Home Depot

Home Depot has a decentralized employee volunteer program called the Team Depot Program that encourages each retail outlet to initiate volunteer projects of its own within the community it serves. The details of the program are reported by Natural Resources Canada (2004) in *The Home Depot: Giving Back to Communities.*

Each Home Depot retail outlet has a Team Depot representative who devotes two hours a week to initiating projects. This person receives special training on running successful projects and holding volunteer events. A community affairs manager coordinates the activities of the retail outlets in each region of operation and ensures that they fit into Home Depot's priority areas of community commitment (environmental problems, at-risk youth, and affordable housing). What is remarkable about the program is that it relies on employees volunteering on their own time yet the company has never had problems attracting volunteers. The evolution of Home Depot's program started with the company simply accommodating the volunteer needs of its employees, which over time has been formalized as the Team Depot Program. Home Depot has now become a leader in corporate social responsibility.

B.3 Guides

Volunteer Canada has produced three guides that are valuable resources for nonprofit organizations and companies that want to partner and promote employee volunteering.

Volunteer Connections: The Benefits and Challenges of Employer-supported Volunteerism (Volunteer Canada, 2001b) is a comprehensive guide that provides background information on employee volunteerism and explains the value of partnerships between nonprofit organizations and businesses. Particularly useful is the table and simple diagram on page 7, which give the reader a quick overview of the various kinds of initiatives that exist. The guide argues that employee volunteer initiatives are three-way relationships involving the employer, the nonprofit organization, and the employees, and that all partners in the relationship should contribute equally to the design and management of the initiative.

Volunteer Canada explains that there are many benefits for nonprofit organizations in joining with companies to serve communities. In addition to the ones already mentioned by the nonprofit organizations in the Wilfrid Laurier study, Volunteer Canada lists the following benefits:

- Nonprofits will experience an influx of new ideas and approaches to meeting community needs.
- There will be broad-based employer support for programs and services.
- An alliance with a corporate partner will provide a nonprofit organization with a partner who will lobby the organization's cause.

The guide also lists the steps that nonprofit organizations should take to involve employers and employer-supported volunteers in their activities. For example, it is essential that organizations do preliminary work to prepare themselves to approach companies. This preparation should include establishing clear goals and needs for volunteer activities that will involve companies. Such planning makes it easier to 'pitch' the idea of partnering to companies. Accompanying the strategic steps are several tip sheets that can help in planning and organizing an employee volunteer program.

A second guide, *Developing Employer-supported Volunteerism Policies* (Volunteer Canada, 2003), focuses on the importance of companies seeing employee volunteering as part of their long-term vision and, accordingly, developing policies and procedures to support it. According to the guide, policies should be developed to deal with the following issues:

- the company's stance on community involvement and volunteerism;
- internal recruitment of volunteers by staff;
- release time;
- the relationship between volunteering and company financial contributions;
- the extent of the financial commitment the company is willing to make to employee volunteering;
- the role of retirees; and
- selection of nonprofit partners.

The guide explains why each of these policy issues is important and provides examples of how companies have addressed each issue.

The third guide, *Making a Business Case for Employer-Supported Volunteerism*, by Linda Graff (2004) briefly reviews the value of company volunteer programs and summarizes the benefits in a simple diagram. This information can be used by nonprofit organizations when they approach companies about forming partnerships. Graff demonstrates that all partners in these programs (i.e., companies, nonprofit organizations, and employees) benefit. The spin-off is community enrichment: improvement in community services; augmented programs; and enhanced historical, artistic, and cultural activities for citizens. This improvement in community well-being,

in turn, attracts new businesses and new employees, which leads to subsequent growth in business. Graff comments:

> Employer-supported volunteering is a concrete manifestation of corporate social responsibility which returns to the company enhanced reputation, increased consumer loyalty, and greater attractiveness to prospective employees (Graff, 2004, p. 15).

Graff supports her point about the attractiveness of these programs to employees by quoting research results from a study by Vanderbilt University and Hewlitt Associates. This research found that 100 companies that had been rated 'best to work for' received twice the average number of applications for each posted position. Having an image of corporate responsibility through involvement in community programs is considered a major attraction for employees when they are considering where to work.

B3

PART 4

C STUDIES OF EMPLOYEE VOLUNTEERS

A few studies have focused on the attitudes of employee volunteers to employer-supported volunteer programs. Two resources are part of the study of Ford Canada undertaken by researchers at Wilfrid Laurier University: *Corporate Volunteer Programs: Maximizing Employee Motivation and Minimizing Barriers to Program Participation* (Rog, Pancer, & Baetz, 2004) and *Corporate Volunteer Programs: Boosting Employee Participation* (Pancer, Baetz, & Rog, 2004).

The other study is by John Peloza of the Haskayne School of Business, University of Calgary, who focuses on what he calls 'intra-organizational volunteerism.' This is where companies choose causes to support and develop volunteer opportunities to address them, which they then offer to employees. The results of this study are presented in *Intra-Organizational Volunteerism: A Manual for Creating Internal Marketing Programs to Recruit Employee* Volunteers (Peloza, 2006).

These resources are discussed in seperate sections:

C.1 Employees of Ford Canada
C.2 Intra-organizational volunteering

C.1 Employees of Ford Canada

The Wilfrid Laurier researchers interviewed 105 Ford employees; 59 had participated in the company's volunteer program and 46 had not. They asked these employees about their personal reasons for volunteering or choosing not to volunteer. They also asked about their experiences as volunteers and about any barriers they perceived to volunteering. From analysis of the interviews, six factors emerged that appeared to influence employees' decisions to participate:

- **Employee's personal values, attitudes, and goals.** Employees who valued community commitment were more likely to volunteer.

- **Type of company volunteer program.** Many employees liked that they could take time off work to volunteer and could get to know fellow workers and form bonds of friendship. However, some employees were put off by the requirement to work in a team. These employees saw volunteering as an individual commitment.

- **Types of volunteer opportunities available.** This is a critical factor in attracting volunteers. There was a wide range of volunteer opportunities to choose from at Ford and most employee volunteers could find something that interested them. Volunteers were able to engage in many different volunteer activities. Employees who did not volunteer wanted to be able to choose the cause and organization they wanted to support.

- **Level of company support for participation.** Ford identified volunteer opportunities, made arrangements for employees to become involved, and had enthusiastic managers to provide support to employees. All of these factors attracted employees to volunteering, as did the company's flexibility in scheduling volunteering activities. With less company support, employees might not be so eager to contribute to company volunteer programs.

- **Personal support for volunteering.** Personal support from family, friends, and co-workers had a very powerful influence on encouraging employees to volunteer. This was particularly true when the support took the form of co-workers filling in for employees who were off work volunteering. If there is no such personal support, then employees are unlikely to volunteer. Some workers explained that there was no history of volunteering in their family and so they felt no inclination to volunteer.

- **Degree of satisfaction with the volunteer experience.** Many workers had rewarding experiences in the program and so stayed involved. A few who had less interesting or negative experiences dropped out of the program.

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C.2 Intra-organizational volunteering

Peloza (2006) identifies three kinds of employee volunteerism:

- **Intra-organizational volunteering.** The company selects the cause to be supported and develops employee volunteer opportunities (i.e., the employer is proactive).

- **Extra-organizational volunteering.** Employees choose causes to support and volunteer on their own time (i.e., the employer is not involved).

- **Inter-organizational volunteering.** Employees take advantage of a program whereby the employer makes a financial donation to the organization for which the employee volunteers after the employee has volunteered a certain agreed-upon minimum number of hours (i.e., the employer's support is passive).

Peloza's goal was to explain employee participation in intra-organizational volunteering and to understand its impact on extra-organizational volunteering. He interviewed 29 employees from nine different companies and asked them about their involvement and experience in company volunteer programs. Based on those interviews, he designed an online survey that was completed by 400 employees at 10 companies. Peloza identified five possible motivations for employee participation in company volunteer programs:

- **Organizational citizenship motive.** Employees feel compelled to act as good company citizens because this boosts the reputation of the company and increases employees' pride in it. These employees consider themselves ambassadors for their company. The online survey confirmed that most employees wish to help their employer through company volunteer programs.

- **Altruistic motive.** Most of the employees who were interviewed talked about the benefits to the nonprofit organization they had supported through the company program. Their main focus was to help that organization achieve its mission. The online survey, however, did not confirm altruism as being an important motivation. Peloza suggests that this is because many company programs support causes that are of no personal relevance to employee volunteers.

- **Egoistic motive.** The majority of the employees who were interviewed said they were strongly influenced by egoistic motives. Gaining skills and a higher profile in the company were important factors in their volunteering. The online survey confirmed the importance of the egotistic motive. In particular, the employees wanted to enjoy the novelty of new experiences, improve their career opportunities, spend time with friends, and meet new people.

- **Paid time off.** The employees who were interviewed said that if the scheduling was flexible and they could volunteer during work hours with pay, they were more likely to volunteer. The online survey did not confirm paid time off as a significant encouragement to volunteer. Peloza is unable to explain why online respondents responded differently from employees who were interviewed.

- **Co-worker rates of participation.** Peloza thought that if co-workers were supportive or volunteered themselves, employees would be more likely to volunteer. The online survey did not confirm this motive as being important. Respondents to the online survey were more likely to volunteer for the novelty of gaining new experiences than because of the participation of co-workers.

Peloza also looked at how volunteering for company programs affected employees' other volunteer activities. Ten of the 29 employees who were interviewed said that they reduced other volunteer commitments when they volunteered for their company's program. Peloza believes that this is due to an egoistic motive (i.e., the desire to have a good profile in the company). Respondents to the online survey, however, indicated that volunteering for company programs did not interfere with other forms of volunteering. In fact, it appeared to increase the overall amount of volunteering. Peloza suggests that employees may accommodate both company volunteering and personal volunteering because the two fulfill different goals, but he provides no support for this idea.

Peloza finishes his manual with a statistical analysis of the five motives for volunteering to see which are the most important in encouraging employees to participate in company programs. His analysis shows that the most significant motives are the egoistic and organizational citizenship behaviour motives. According to Peloza, this indicates that employees volunteer to gain new skills and a higher profile for themselves within their company and to enhance the profile of the company in the community. The statistical analysis also shows that participation in company volunteer programs increases employee involvement in inter-organizational volunteering but that has no impact on employees volunteering independently for causes of their own choosing.

C2

PART 4

D PRACTICAL IMPLICATIONS

The information resources discussed in this section contain numerous insights for both nonprofit organizations interested in participating in employee volunteer programs and employers interested in developing such programs. Below we present the key recommendations for each group.

Recommendations for nonprofit organizations

- **Plan for employer-supported volunteering.** Whether an organization is looking to employee volunteer programs to enhance existing activities or design new volunteer initiatives, there are some important planning steps to take. These steps include the following:

  ➢ survey companies in the community to find those that are have similar values in terms of the issues they want to support in their local community.

  ➢ Identify potential business partners from among the companies that have similar values. These partners should be chosen carefully.

  ➢ Identify who within the organization will be responsible for developing the program and how much assistance they will need.

  ➢ Develop a draft proposal on employee volunteerism and present it to the organization's board of directors to get buy-in.

  ➢ Be aware that companies vary widely in their support for employee volunteer initiatives. Some companies have formal volunteer policies and all volunteer initiatives need to conform to the company's requirements. In other companies, the employer has only minimal involvement and volunteer initiatives are driven primarily by employees.

- **Approach selected companies to form a partnership.** The approach will depend on the type of company and its size. It will also depend on whether the company has an established employee volunteer program. For companies with formal programs, the initial approach can be a letter of introduction, followed by a personal visit. For companies with no formal program, a personal visit is best. Other points to consider when approaching companies include:

  ➢ Outline the organization's experience and what it can offer the company.

  ➢ Provide an overview of the volunteer initiative (e.g., its goals and expected outcomes).

  ➢ Explain how many volunteers you need, what skills they should have, and whether you want or can handle groups of volunteers.

  ➢ Explain what other support you would like from the company (e.g., facilities, equipment).

  ➢ Prepare a budget proposal that clearly outlines the costs for the company and the nonprofit organization.

  ➢ Explain the benefits associated with the proposed program (e.g., increased employee job performance, improved employee loyalty, increased customer loyalty, positive image within the community, etc.).

  ➢ Provide a draft partnership agreement that includes not only the volunteer requirements but also the expected time length for the agreement and the level of employer involvement.

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- **Determine how committed the company is to supporting a volunteer initiative.** It is essential to know how much a company is willing to commit to a volunteer initiative in order to decide whether a partnership is worth pursuing. Here are some questions to ask:

  - ➢ Why are you interested in supporting employee volunteers?

  - ➢ Are you willing to give employees time off work to volunteer? With or without pay?

  - ➢ Are you willing to allow your company's facilities and equipment to be used for employee volunteer activities?

  - ➢ Who in the company will be responsible for managing the employee volunteer initiative?

  - ➢ Will the company take on some of the risk and liability associated with volunteer activities, particularly if employee volunteers are working with vulnerable clients?

  - ➢ Are you willing to put your partnership responsibilities in writing?

- **Establish a volunteer management plan in conjunction with the company.** As with any volunteer initiative, there needs to be agreement on how employees will be recruited, screened, oriented, trained, and evaluated. See Part 1 for more information on this topic.

- **Develop a recruitment plan.** The nonprofit organization and the company should jointly design a recruitment campaign. This could include a survey to establish level of interest among employees; a presentation to employees about the program, its volunteer activities, goals, and benefits; and appeals to retired employees.

- **Plan for evaluation.** The nonprofit organization and the company should agree on how to evaluate each others' performance in the partnership to establish what is working, what is not, and what needs to change to improve and strengthen the collaboration.

Recommendations for employers

- **Set goals for the program.** Will the program be geared solely to fulfilling the company's objectives (e.g., team building, improved corporate image) or community objectives (e.g., increasing volunteerism, improving community well-being) or a mixture of both? The goals of the program will determine what activities you support and which nonprofit organizations you partner with. For example, if team building is an important goal of the program, you might want employees to volunteer in groups.

- **Pilot test the program.** It is advisable to test the volunteer program on a small scale first before advertising it throughout the company. This enables the program to be evaluated and refined.

- **Advertise and launch the program in the company.** It is important to create company-wide awareness of the program and explain who is eligible, the purpose of the program, and any other special requirements. Communication can be done through a company's intranet, e-mail, personal presentations, and contact, displays, etc. The essential point is that information on the program is easily accessible to all eligible employees.

- **Designate someone to communicate the program.** Who communicates personally with staff about the program is important. It must be someone whom the staff respect and will listen to and who is approachable. This person should also be knowledgeable about the program and able to answer queries from employees.

- **Develop and communicate key messages.** Employees should be given a clear idea of the program's purpose, the benefits for employees, the benefits for the company, and the benefits for the community. They should also be clear on the company's expectations (e.g., are all employees expected to volunteer or is it up to the individual?). Employees need to know what support they can expect from management, how much time they can volunteer, who will cover their job while they are volunteering, and what organizations they can volunteer for.

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- **Communicate with management.** Managers should be made fully aware of the details of the program and their role in supporting it.

- **Maintain awareness of the program.** Companies should keep employees up-to-date on the progress of the volunteer program in order to maintain interest among employees. Hearing about co-workers' positive experiences will encourage more employees to volunteer.

- **Be flexible.** As much as possible, employer-supported programs should offer a wide choice of volunteer opportunities. Programs should be flexible in the kind of activities they offer and in allowing employees the choice of volunteering individually or as part of a group. Scheduling should also be flexible and provide opportunities to volunteer both during and outside of working hours.

- **Maximize positive volunteer experiences.** Companies should consult with employees to find out their expectations and provide opportunities that will meet those expectations. There should be a way for employees to provide feedback about their volunteer experiences so that if they have not been up to expectations, the company can work with its nonprofit partners to adjust the program accordingly.

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