Recruitment and Retention

Summary

Recruitment and retention of volunteers and learners are important elements for success in any literacy organization. This chapter deals with a number of the key factors that should be considered in developing and maintaining a strong community based organizational strategy.

In developing this chapter it was recognized that connecting with experienced literacy organizations and networks throughout New Brunswick was the single most effective resource available. With this in mind the Literacy Coalition of New Brunswick is committed to "connecting" literacy organization in New Brunswick and in helping to champion the sharing of best practices and successful strategies for recruitment and retention.

The chapter covers the following key strategies:

1. Having a Student Recruitment Strategy
2. Self help and analysis tools
3. Recruiting and retaining volunteers
4. Building strong and effective community partnerships and resources
5. Job Design
6. Access to Resources

As well, three worksheets are included that will help your organization to build better capacity and strategies for recruitment and retention. These are:

A. Identifying Community Needs
B. Identifying resources in your community
C. Mapping the Community

All organizations are different and there is no single strategy that applies to each and every group. However there are key learnings, best practices and resources that can be used to build a successful recruitment strategy that fits your group. This chapter also offers a substantial number of internet based sites and resources that can be accessed through NALD and Volunteer Canada.

The Appendices for this toolkit will also include a few sample documents that will be helpful in planning job descriptions and profiles for volunteers.

1. Having a Student Recruitment Strategy:

A. Learner Recruitment and Retention Strategies for Community Literacy Agencies

Recruitment and retention must be given priority and energy. Retention policies and procedures should be well established in order for a program to expect a high probability that the learner will continue until they meet their goals.

Recruitment efforts intended for groups that a literacy agency can best serve is the first step to an effective learner retention strategy. As soon as the learner enters the program, retention efforts should be built into every part of the literacy program. A learner-centered program is a MUST for those interested in improving retention.

Attention to the following will assist programs in improving retention:

1. Identifying accessible support systems for learners.
2. Using traditional channels such as the media and posters/flyers when informing the public about literacy or programs.
3. Reaching non-participating learners through personal contact especially via current or past learners.
4. Basing instruction on students' goals.
5. Re-evaluating students' goals and making revisions as these goals change.
6. Identifying the retention needs of all students.
7. Placing retention high on the list of priorities.
   (Malitz & Nixon-Ponder, 2000)

***Source*:** Community Literacy of Ontario, *Our Voice Newsletter*, Spring 2002, www.nald.ca/province/ont/clo/newslet/02spring/page3.htm

Program Implementations:

Build students' self-esteem by helping them set reasonable goals that can be reached in a short period of time by:

- Holding regularly scheduled conferences with students to talk about goals, establishing plans for achieving them and updating their progress.
- Helping students in acquiring useful coping techniques.
- Giving concrete proof of success by using a collection of students' work (i.e., a portfolio).
- Assisting students in becoming responsible for reaching their goals.

Building trust between instructor and student is important. Help the student to conquer self-doubt through positive feedback by:

- Assisting students to overcome embarrassment about coming back to school.

- Giving productive and immediate feedback dealing with student learning.
- Teaching problem-solving skills to students through the use of cooperative learning teams.
- Devising a learner-centered classroom.
- Giving positive feedback, especially when the student is struggling.
- Putting into practice what has been learned.

Build on support that includes immediate and extended families by:

- Initiating non-academic activities for students, involving families and neighbors whenever possible.
- Assisting in car pools and childcare.
- Formulating a student communication plan consisting of no-show and extreme absentee follow-up.

Talk with students about their return to school and ask them about their previous experiences by:

- Talking about the positive and negative impressions they have about school, assuring them that the adult learning experience will be different.

Help students to learn about education and career planning. Direct students to agencies/services to assist with non-academic needs (i.e., transportation, child care, employability skills, job placement, and health care).

Create a learner-centered program by:

- Utilizing student feedback to assess teacher approaches.
- Setting up a student retention team (which could involve other students) to help emphasize the importance of coming back.
- Enacting an early-alert counseling program to recognize potential problems before they occur in order to let students know that there are alternatives.
- Acknowledging student mastery, time devoted, and commitment through award ceremonies and newsletters.
- Providing truthful information when recruiting new students, so as not to create false expectations on the part of the students (i.e., "it will be hard work, but we can work together" instead of "come here, get a GED, and get a better job").

Reference: Tracy-Mumford, F. (1994, March). *Student Retention: Creating Student Success (Monograph No. 2)*. Washington, DC: National Adult Education Professional Development Consortium, Inc.

Source:
Research to Practice: Increasing Retention Through Student Success, By Kari Malitz and Sarah Nixon-Ponder
http://literacy.kent.edu/Oasis/Pubs/0200-11.htm

B. Working With The Reluctant Learner

1. A recruitment thrust with a single message is unlikely to reach the bulk of non-participants any more than a single program delivery approach or any one instructional strategy can be applied to all adult participants.

2. People in this target population have often experienced chaotic lives. It is only when everything falls into place and the necessary supports are available that there is a reasonable chance of adults succeeding in their goals. If supports are not in place, the less motivated and curiosity-seekers soon drop out.

3. The main means of hearing about literacy programs is word-of-mouth. In some cases, door-to-door advertising and brochures for children to take home from school have worked.

4. Wide-scale recruitment is successful only if it is accompanied by the provision of a wide range of programs offering flexible schedules in accessible locations.

5. Many adults require bridging opportunities such as one-to-one tutoring or work in a learning centre with individual help before enrolling in a literacy class. These bridging programs build confidence, showing adults that they can learn. In classroom settings, programs with a strong life skills component combined with the academic skills are often necessary before a person can go on to academic literacy classes or vocational training.

6. Adult learners stressed the importance of peer counselling and tutoring and requested more help with the transitions from one program to another. Such strategies are important in both recruitment and retention of learners. Some short training programs may be required and need to be developed for such peer helpers.

7. Sensitivity training and awareness of the issues faced by low-literate adults among front-line institutional and government workers will assist in referrals.

8. There has to be better provision of diagnostic services and counselling for learning disabled adults. This is an important subgroup in the target population. Specialized tutor-training will be necessary if tutorial programs are to help these people. Learning disabled adults also require the use of alternative instructional techniques and aids to help them learn in the way best suited to their learning styles.

9. Many low-literate adults are realistic. They know that it will be a long haul to obtain any kind of credential. They also know that the job opportunities are very limited in many of their communities. They need jobs or trades training which do not demand inflated credentials. It takes an extremely heroic, determined person to continue in literacy upgrading given the current circumstances.

10. There may be surges of enrolment at the beginning of courses with subsequent decline in numbers as the "curiosity-seekers" do not return. Such activity can place added burdens

on literacy programs. Some learners and practitioners suggested a small registration fee, as a demonstration of commitment.

11. Many learners use community-based programs as bridges into college programs. As the former increase and if a provincial recruitment thrust develops, there will likely be increased pressure on college waitlists.

12. Learners enjoy coming to literacy programs. The experience is often very different from what they had imagined. They enjoy learning at their own pace, but some need extra help and others need more stimulation in a self-paced classroom.

Source: Audrey M. Thomas. *The Reluctant Learner - A Research Report on Nonparticipation and Dropout in Literacy Programs in British Columbia.* Project Management by the Centre for Curriculum and Professional Development, Victoria, B.C. 1990.www.nald.ca/fulltext/athomas/rellea/pg2.htm

2. Self-Help and Analysis Tools

A. Reaching-Out Approaches. **–** There is a book available outlining effective methods of recruitment compiled during a workshop in the spring of 1989 in New Brunswick. It includes strategies for rural areas, urban areas, the workplace and for young adults. A companion videotape of the panel presentation is also available. For further information contact:

Charles Ramsey
Director, Program Coordination and Apprenticeship Training
Department of Advanced Education and Training
P.O. Box 6000
Fredericton, N.B.
E3B 5H1

B. Beyond Recruitment - An Online Workshop About Recruitment & Maintaining Volunteers in the New Environment

Downloadable *Course Manual***:** http://www.nald.ca/fulltext/clo/cover.htm

Worksheet A - Identifying Community Needs

Worksheet B - Identifying Needs and Resources in Your Agency

Worksheet C - Mapping the Community

C. Job Descriptions

Appendix A-Sample Job Descriptions for Board Members

Appendix B-Sample Job Description for Volunteer Tutor

3. Recruiting and Retaining Volunteers:

A. Why do people volunteer?

Understanding what inspires or motivates people to contribute their time can provide valuable insights for organizations. The 1997 "National Survey of Giving, Volunteering and Participating" (http://www.nsgvp.org) found that:

- 96% of people volunteered because they believed in the cause of the organization
- 78% volunteered to use their skills and experience
- one out of four people volunteered because their friends do so
- one fifth said it was to improve job skills
- nearly half of youth were volunteering to gain skills to find a job

Other reasons that people volunteer are:

- to give back to their community
- because they are personally affected by the organization's work
- to feel useful and needed
- to fulfill religious obligations
- to use skills they don't use at work
- to be with people who share their values
- to get out of the house
- to have fun

The Economic Value of Volunteers in Community Literacy Agencies in Ontario (produced by Community Literacy of Ontario) found that:

- 89% of literacy volunteers surveyed claimed that learning new skills was "somewhat important" and "very important" and 77% indicated that these skills were transferable.

The single most important value of volunteering was to help others help themselves. Literacy volunteers enjoyed the experience of making a positive contribution to the community.

Four Motivators of Volunteers

Each person has different reasons for volunteering. It is important to identify and recognize these motivators so that the agency can recruit, manage and recognize volunteers effectively. Nan Hawthorne runs a very active and informative website called CyberVPM (www.cybervpm.com). She presents a model of motivation in ***Recognizing Volunteers: Right from the Start***. You can link directly to these motivators at www.cybervpm.com/supervision/motivators.htm

Number One: Praise

Some people like:

- being recognized for their skills and accomplishments
- seeing their achievements identified
- having others see the results of their efforts

Number Two: Accomplishment

Some people like:

- seeing evidence of their work
- practical , tangible projects
- seeing what they have accomplished

Number Three: Affiliation

Some people like:

- being part of a group and not working alone
- the social aspects of the programs

Number Four: Power / Influence

Some people like:

- influencing others
- showing others what they know
- filling positions where they are involved with making decisions, and training

Activity

Thinking about the reasons why people volunteer, take a look at your own agency and consider the following questions. If more than one person per agency is participating in a workshop, discuss the questions as a group.

1. Why would someone volunteer for you?

2. What does he or she need from your program?

3. Do you have a volunteer opportunity that will be a motivator for them?

Remember, a volunteer program is a two-way street: it must meet the needs of the organization and the needs of the volunteer.

B. Types of Volunteers

Episodic Volunteers

Trends show that more people are willing to volunteer for short time periods. Examples of episodic volunteers are snowbirds and university students who are available only at certain times of year. These volunteers often want a time-specific task. Can you accommodate such a person?

Designer Volunteers

More people want volunteer experiences that will benefit them. They have a defined type of experience and defined time they are available. Often, they are trying to gain experience or a new skill set that will help them in their career. Usually this is a short time commitment as opposed to a long term one. How can you use this type of volunteer so that you both benefit?

Youth volunteers

Today, there are more volunteers between the ages of 15-24 years. Sometimes, an adult literacy learner doesn't want a tutor younger than him or herself. If tutoring isn't an option, what could this young and energetic group do for you? Can you tap into the high school students and the new community involvement diploma requirement?

Seniors

The senior population is increasing. Some people have taken early retirement options and have highly developed skill levels. Retired teachers are one obvious source of volunteer tutors, but there are a lot of other retirees out there too. How can you tap into this resource?

C. Getting The Right Volunteers

Selling Your Volunteer Opportunities

Would you eat at a restaurant whose ad read?

> "Please eat here because we have all this food we have to sell!"

Of course you wouldn't! You'd probably choose a restaurant whose ad described how delicious and reasonably priced the food was, not to mention the great service and atmosphere.

Most organizations recruit volunteers much the same way as the restaurant ad mentioned above. They simply say, "We need volunteers." Sometimes they say a bit about their organization, but they don't talk about why they need volunteers, what they need the volunteers to do or what the organization can offer the volunteer.

At best, these blanket requests for help blend in with all the other recruiting that is occurring in your community. They don't make your organization stand out from all the others. Sell your program! If you don't, you run the risk of getting lost in the crowd!

The key to successfully selling your organization to potential volunteers is determining what you have to offer the volunteer and then highlighting it. Like retail businesses, the same customer service standards apply to the volunteers who are interested in your organization. This means that the organization offers a "product" or "service," which will entice the individual to look at your organization as a potential volunteer opportunity. If good "customer service" is not provided to your potential volunteers, then a poor recruitment process and a decline in your volunteer base will result.

From the *National Survey:*

- One third of those who did not volunteer say they would do so if they were asked.
- 44% of volunteer activities began as a result of being approached by someone in an organization.

Tools: Window of Work

Ivan Scheier developed a concept called *Window of Work* that could be included with the application for new volunteers. This tool can help identify individuals with particular skills, knowledge and connections.

Example:

	Window of Work	Name: John Doe
Glad Gifts	Quests	No-No's
Special skills, talents interests you like to use	Areas you would like to learn more about	Please don't ask!
• computer skills • talking to people • reading • writing • crafts and sewing • cooking	• chairing a committee • how organizations run • organizing something	• canvassing for funds • selling tickets • bookkeeping
Things you do well and enjoy doing. Don't hesitate to list something, you'd be surprised how our talents can be utilized.	List areas of interest you may not have the skills to perform but you would enjoy learning about.	Anything you really don't want to do

Remember – you will not always find the perfect volunteer for your job but additional training is possible. Be flexible and try to select the best person for the job.

Don't forget to have your members occasionally update this valuable information. Skills and interests change. Your program also changes. To keep people involved and motivated their experiences may have to be adapted.

Adapted from Ivan Scheier, Yellowfire Press, Colorado, 1986 as described in the Ministry of Agriculture, Food and Rural Affairs Factsheet *Recruiting Volunteers*. This factsheet can be viewed at http://www.gov.on.ca/OMAFRA/english/rural/facts/96-001.htm
For more on Ivan Scheier and the possibilities for creativity and service through volunteering, see *Guerrilla Goodness: An Interview with "Dreamcatcher" Ivan Scheier* by Ed and Gay-Wynn Cooper at http://www.sdearthtimes.com/et0796/et0796s4.html

Recruitment Techniques

There are many ways to recruit volunteers. There is no one right way – your choice of recruitment techniques will depend on the type of volunteers you are looking for and the tasks you need them to do.

Following is a list of recruitment techniques. It is by no means exhaustive!

- media appeals (e.g. newspaper ads, press releases, radio ads, television spots)
- special events (e.g. displays, exhibitions)
- printed material (e.g. newsletters, pamphlets, community noticeboards)
- by personally contacting a potential volunteer
- post your volunteer jobs on a virtual volunteering site such as the Volunteer Opportunities Exchange at http://www.voe-reb.org/welcome.jhtml
- have your existing volunteers recruit others
- testimonials from your learners
- approach a service club
- contact your high school to see if they have a co-op program
- host an Open House
- host a volunteer recognition event and encourage your volunteers to bring a friend
- design a brochure and distribute it widely
- approach a local business to find out if they have a corporate volunteering program
- ask current volunteers for recruitment ideas
- put up a display in the local mall or at a charity fair
- combine fundraising with recruiting

Whatever technique you choose, remember to:

- be sure you have the volunteer jobs for the volunteers you are recruiting
- write your recruitment ad to appeal to the "right" volunteer
- include the benefits of volunteering
- be clear about the jobs you need volunteers to do
- be clear about your expectations of time commitments
- describe the organization and its mission
- outline the support and training which will be offered

Remember, make your recruitment message the most appealing and the most attractive to a potential volunteer. Be creative and remember to identify how your opportunity will benefit the volunteer.

Source: McCurley, Steve and Rick Lynch. *Essential Volunteer Management.* Heritage Arts Publishing, 1989.

Finding the Right Volunteer

Not all people are suited to all volunteer jobs. Just as employees are more suited for one task rather than another, so are volunteers. Here are some hints on getting the right volunteer for the job.

Write a profile of the perfect volunteer. Use the profile as you interview volunteers and talk about the tasks. This is not the same as the position description.

- Talk to current volunteers about taking on a new task. Look at who you have "in house" before going elsewhere.
- Do your best NOT to replace a volunteer. Rather than rushing to fill a vacancy, take the time to assess your situation. Could you combine positions to cover those duties? Does your organization need an overhaul?
- Never lower your standards. Don't just look for a warm body to fill a vacancy. Always ensure the right person gets the right job.
- When you interview, talk about things the volunteer has done. Get examples of previous (related) experience. If the volunteer is new to this particular task, ensure he/she has a mentor or supervisor. Set a trial period and then re-assess the volunteer's suitability for that task.
- If a volunteer will be in a key leadership role, send him/her to lunch with current active volunteers. Then ask your current volunteer to "brief" you about the new recruit.
- When interviewing, ask open-ended questions. Yes and no answers won't tell you very much.
- Write down what you hear. It's easy to forget some key points if you don't take notes.

Be a volunteer. People who manage volunteers should have volunteer experience of their own.

Adapted from *"Picking the Right Volunteer for the Task"* by Nancy Macduff. In **Volunteer Today**. February 2000. Available at http://www.volunteertoday.com/recrui.html

D. A Little Goes a Long Way - Recognizing Volunteers

In 1997, 7.5 million Canadians volunteered their time for almost 200,000 charitable and not-for-profit organizations across the country.

Volunteers bring to each organization a multitude of skills, experiences and knowledge. They give the organization credibility, new energy and ideas, increased capacity to meet service needs and, perhaps most importantly, strength.

Without volunteers, many of the thousands of voluntary-sector organizations could not survive. And because they are not paid, volunteers must be duly recognized in other, equally meaningful ways.

Volunteer recognition can come in a variety of formal and informal ways. A simple thank-you card or a flower often goes as far as a formal banquet, and they are much easier to coordinate!

According to Norah McClintock of the Canadian Centre for Philanthropy, regardless of the form of recognition to be used, "*the best way to offer personal recognition is to link it to the volunteer's reasons for volunteering.*"

Grassroots Recognition

Recognition and appreciation of volunteers is not something you do to volunteers, but is rather a climate in an organization of acknowledging the work of everyone who contributes to the mission and purpose of the institution. Organizations that engage in appreciating the work of everyone build a working environment of trust and positive interaction between staff and volunteers. Here are some hints on how to do that.

Recognize overall abilities. Each volunteer or paid staff member has overall strengths; some have great far-reaching ideas, some are problem solvers, others are good summarizers. Acknowledge those skills, not just projects completed.

Let volunteers set goals. When volunteers set goals, and the means to achieve them, they are more likely to complete the tasks. Then recognition for a job well done is more meaningful.

Think carefully about awards that set people apart. Get volunteers to set goals for their work. If they set goals and reach them, it is time for celebration and a reward of some type. But, day to day, do not create a competitive environment for volunteers.

Urge volunteers and paid staff to say thanks. Create a “brag board.” Make a simple and small paper form on which people can write a “brag” about the work of a colleague that is easy to post and fun for others to read. Put these in the Annual Report.

Be sure volunteers get to speak. Volunteers should be included in paid staff meetings with the chance to tell of accomplishments. And volunteers should include paid staff in meetings with the chance to say how well the paid staff team is progressing on a project that impacts clients or the work of volunteers.

Recognizing Literacy Volunteers

Community Literacy of Ontario's **Economic Value of Volunteers** report reveals some interesting information about volunteer recognition. The good news is that 75% of literacy volunteers were "very satisfied" and 24% were "somewhat satisfied" with their volunteer experience. Less positive is that 28% of literacy volunteers said that they did not believe that volunteers get the recognition they deserve.

In CLO's recent research into practitioner training in Ontario, many tutors reported that they were less concerned with individual recognition and said that they would find it more valuable to highlight the collective importance of literacy volunteers in their community and throughout Ontario!

Ways to Recognize Volunteers

There is no limit to the number of ways that an organization can recognize its volunteers. The following are a few suggestions that may help you come up with your own ideas:

- Make the recognition meaningful to the volunteer based on their interests and motivations
- Make it appropriate for the work completed
- Make it real, not superficial
- Provide recognition often
- Be creative!

In addition to each volunteer's motivations, consider what type of person she or he is. This may help you decide what type of recognition will be most appropriate for that person. The chart below highlights several different volunteer values and accompanying ideas for recognition.

Volunteer Values	Ideas for Recognizing
Recognition	• Public announcements in the media, at public events, in newsletter and/or web site • Letters of reference • Certificates of accomplishment • Picture and write-up on the bulletin board
Personal and organizational achievements	• Certificates upon completion of training • Reward upon completion of project
Relationships	• Social gatherings • Organization pins, mugs, posters, etc. • Recognition of length of service

Looking for more ideas? The following web sites offer different suggestions and products that you can use:

- Cabam: Appreciation Gifts for Volunteers - www.odyssey.on.ca/~cabam/
- Fun, Pun Gift Ideas - www.ianr.unl.edu/ianr/4h/volun/fun.htm
- Volunteer Canada - www.volunteer.ca/
- Energize! Inc. - www.energizeinc.com/
- CyberVPM - www.cybervpm.com/recruit.htm

A successful volunteer recruitment message will always answer the following questions for the interested individual: **"Why should I? What's in it for me?"**

Remember that volunteers come to you because of something they want — not something you want. Does your organization think about this when you are looking for volunteers? By developing an effective recruitment message, you will appeal to the potential volunteer's motivation (remember the four motivators in Module 2) and attract him or her to become part of your organization.

The ***recruitment message*** should include the following:

- a position title
- a motivational appeal to the potential volunteer
- an outline of the basic requirements of the position
- a contact name
- an outline of the training or support that is available for the volunteer

Never use a word like "desperate" in your recruitment message. Even saying "volunteers needed" without being more specific sends the wrong message. The potential volunteer may well think that you are simply looking for a "warm body" to fill a position.

Source: Beyond Recruitment - *An Online Workshop About Recruitment & Maintaining Volunteers in the New Environment.* Community Literacy of Ontario and Ontario Ministry of Agriculture, Food & Rural Affairs. Course Manual - April/May 2000 www.nald.ca/province/ont/volman/beyond/beyond2.htm

downloadable *Course Manual* : http://www.nald.ca/fulltext/clo/cover.htm

E. Screening Volunteers:

Volunteer Canada's Safe Steps Screening Program provides an easy-to-use method for organizations to ensure that the people they serve are safe. The Safe Steps are much like a menu - you need only select those steps that apply specifically to positions within your organization. The key to a successful screening program is to use the steps in a way that best suits a specific position within your organization. The 10 Safe Steps are:

1. **Determine the risk**
   Organizations can control the risk in their programs. Examining the potential for danger in programs and services may lead to preventing or eliminating the risk altogether.
2. **Write a clear position description**
   Careful position descriptions send the message that an organization is serious about screening. Responsibilities and expectations can be clearly set out, right down to the position's dos and don'ts. A clear position description indicates the screening requirements. When a volunteer changes positions, the screening procedures may change as well.

3. **Establish a formal recruitment process**
   Whether an agency posts notices for volunteer positions or sends home flyers, they must indicate that screening is part of the application process.
4. **Use an application form**
   The application form provides needed contact information. If the volunteer position requires other screening measures (medical exam, driver's record, police records check), the application form will ask for permission to do so.
5. **Conduct interviews**
   The interview provides not only an opportunity to talk to the potential volunteer about their background, skills, interests, and availability, but also to explore any doubts about the suitability of the candidate. In other words, the interview will help determine the "right fit".
6. **Follow up on references**
   By identifying the level of trust required in the position and asking specific questions, the applicant's suitability may be easier to determine. People often do not expect that their references will be checked. Do not assume that applicants only supply the names of people who will speak well of them.
7. **Request a Police Records Check**
   A Police Records Check (PRC) is just one step in a 10-step screening process. PRCs signal — in a very public way — that the organization is concerned about the safety of its participants.
8. **Conduct orientation and training sessions**
   Screening does not end once the volunteer is in place. Orientation and training sessions offer an opportunity to observe volunteers in a different setting. These sessions also allow organizations to inform volunteers about policies and procedures. Probation periods give both the organization and the volunteer time to learn more about each other.
9. **Supervise and evaluate**
   The identified level of risk associated with a volunteer position will determine the necessary degree of supervision and evaluation. If the risk is great, it follows that the volunteer will be under close supervision. Frequent feedback in the first year is particularly important. Evaluations must be based on position descriptions.
10. **Follow up with program participants**
    Regular contact with participants and family members can act as an effective deterrent to someone who might otherwise do harm. Volunteers should be made aware of any follow-up activities that may occur. These could include spot checks for volunteers in high-risk positions.

Source: Volunteer Canada’s website: http://www.volunteer.ca/volcan/eng/content/screening/safe-steps.php?display=3,2,3

4. Building Strong and Effective Community Partnerships and Resources

Are You Ready For Partnership?—Assessments

Several things need to be considered and in place before you begin a partnership. For instance, partnerships will not usually happen without such things as a common cause or need, people who are willing to do something together and a supportive environment in which the partnership can survive. There are usually some initial costs and resources needed including the time and expertise of the people who are interested or involved in the partnership.

A partnership should start by inviting organizations to share their skills, time and resources for a clear or definite purpose — one that has the support or approval of those it will benefit. There will be a need for some preliminary discussions about relevant issues prior to a decision that a partnership is desirable. Obviously, before entering into the partnership, some thought should take place about preparedness of:

1. the various organizations that might be involved,
2. the individuals who would be members, and
3. the partnership group as a whole.

Experience tells us that time spent in the beginning, establishing a firm foundation, will be saved in the long run by greatly increasing the probability of success. There is a need to ask if every organization is ready to participate (organizational assessment), if each individual is prepared (self-assessment) and if the partnership group is ready to form the partnership (group assessment). The following might be useful to determine how prepared you are for the partnership.

Organizational Assessment

Many organizations are beginning to think that partnerships may be the route to success and, given some of the changes taking place, they may even be seen as a necessity. Before entering into a partnership, however, it is important to ensure that the organization you represent is ready, willing and able to be a partner. One key issue faced by organizations is who to choose to represent them in the partnership. Usually this will be determined based on what the partnership is addressing and what the organization needs or wants from the person representing it. Selecting someone who is available, who has the skills and who will do a good job for both the partnership and the organization is most desirable, as is knowing in advance how the organization will support its representative in the partnership. As partnerships are sometimes considered secondary to the main work of the organization, it is useful to have ongoing communication about how both the representative and the partnership activities are doing. The following exercise might help sort some of this out.

As an organization, these things should be considered before entering a partnership:

1. Does the organization's mandate fit with the proposed partnership?

2. Are the organization's values compatible with the work that will be undertaken?

3. What resources (e.g. time, money, materials, space, equipment) from the organization might be available for the partnership?

4. Is there someone who can represent the organization in a responsible way, and can that person be spared at this time? How will the organization support their representative in the partnership?

5. How will the partnership benefit the organization? How will the organization benefit the partnership?

6. How much time will it take and how will that time connect to the other activities of the organization?

7. Is there any reason why the organization would not wish to be involved?

Self-Assessment

Everyone has a past, a present and a future. Experiences from our past affect our present and our present has an impact on our future. In partnerships this can be applicable in both positive and negative terms. Most people are accustomed to having responsibility and recognition for their own actions and efforts, so teamwork may be a different experience. In preparing to enter a partnership, we as individuals should spend some time looking at our own attitudes and values about partnerships and teamwork. We have to examine our motivation and evaluate our needs and expectations. The following self-assessment offers some questions to consider about your personal involvement in the partnership. Another example of an individual assessment is included in The Tool Kit.

You may wish to assess your current situation by answering the following questions. Keep in mind that if the answer is no to any of them, there is more work that needs to be done on your part, either before or during the partnership relationship:

1. Why am I interested in this partnership? What is my motivation to be involved?

2. Do I have the time it will take to be a productive member?

3. Do I value teamwork and have a good attitude about shared responsibility?

4. What skills and resources do I bring to the group?

5. What will I require from my organization to be effective and feel supported?

6. Are there any work or personal issues that might affect my partnership involvement (e.g. conflicts of interest, time constraints)?

7. What (if any) unresolved conflict, past history or baggage do I need to sort out related to the partnership?

8. What opportunities and advantages do I see professionally or personally?

9. What fears or insecurities (if any) do I have about working with others in general?

10. What fears or insecurities (if any) do I have about working with this particular group of organizations and individuals?

11. Can I communicate and express my ideas, concerns and feelings in a group?

12. Who or what am I representing? With what authority? Do others agree that I can represent them well?

Group Assessment

Partnerships are sometimes formed with very little attention given to how prepared the group is to proceed or if the community context has been given appropriate thought. The partnership group and the host community need to be considered from the outset. The following exercise may be useful when addressing these two components.

Answer the following questions about the potential partnership:

1. What is the need for the partnership? How do you know it is needed?

2. Who are the individuals, groups or organizations that might be interested and appropriate to have involved?

3. Are there some organizations that don’t seem like obvious partners that should also be considered?

4. How do you know there is support for this partnership from the community, other organizations and the people who will most benefit from it?

5. What form might this support take?

6. Is the political climate favourable for this venture?

7. Where are the resources coming from to operate the partnership and anything that might result from it?

8. How do you know that a partnership, and not any other vehicle, such as a committee or task force, is the right approach to use?

9. What are the implications to others (if there are any) doing similar things in the vicinity of the partnership?

10. What is the best that will happen if all goes well?

11. What is the worst possible outcome if it doesn't?

It's important to consider what types of partnerships you are looking for, and which are available.

A partnership encompasses a broad number of types of relationships. It is "an undertaking to do something together…, a relationship that consists of shared and/or compatible objectives and an acknowledged distribution of specific roles and responsibilities among the participants which can be formal, contractual, or voluntary, between two or more parties" *(Partnership Resource Kit 1995).*

Establishing a context: Reflecting on community needs and resources

Consider the following questions. The focus is on needs at this point, not on specific partners.

- What do you hope to gain by forming partnerships with other agencies that you cannot accomplish or provide on your own?
- Do you hope to gain financial or in-kind support? If so, what would that support consist of?
- Do you hope to access expertise in other disciplines? If so, what kinds of expertise are you looking for?
- Do you want to receive or make referrals to or from other agencies?
- Do you or your agency have expertise that others could benefit from? If so, what is it?
- What other reasons do you have for seeking partners?
- What value would be added to the proposed project by involving partners?

You will also need to consider what benefits or value you could offer to other agencies. THE PARTNERSHIP MUST BE OF MUTUAL BENEFIT, OR IT WILL NOT BE SUCCESSFUL. Think about what potential benefits working with your agency would offer to other organizations.

Reasons that literacy programs seek community partners

Recruitment/access to target group	• looking for agencies who have a 'captive audience' or group already formed (Adult Basic Education, friendship centre, hospital, public health nurses) • looking for a good location, where participants can be contacted • looking for agencies who have access to participants
Financial reasons	• literacy programs don't have the resources or finances to do a full-fledged promotion and recruitment • for general financial assistance • finding partners was a requirement for funding
Because it "makes sense"	• agencies share similar goals • agencies are trying to reach the same kinds of people • collaborating seemed like a natural evolution • a holistic approach • to improve access to other services
To create greater awareness	• let other agencies know they exist • having collaborated has created a very educated group that will not drop literacy because it's now a priority

Building and Maintaining a Partnership

Having an inter-agency meeting will give you and your potential partners the opportunity to ask questions, share information, and clarify what would be involved in forming a partnership to support a family literacy program in your community. Set a date for the first planning meeting for the new partnership at the end of the inter-agency meeting.

Forming an advisory committee

Forming an advisory committee is the next step in building the partnership. Once again, involving a broad representation of community members on the advisory committee will ensure creating a sense of meaningful participation, ownership, and commitment from important stakeholders. Depending on the number of people from your initial inter-agency meeting who are interested in forming a partnership, you may need to create a smaller group to act as the advisory committee for the project. Again it bears mentioning that special effort will be needed to ensure the participation of potential clients. They are in the best position to identify the need for the developing program and advise on how the program can best meet their needs.

What is the function of the advisory committee? Initially, it is to guide, develop, and implement a community needs assessment, if one has not already been done to determine the need for a family literacy project in the community. Based on the needs assessment findings, the advisory committee will develop a set of objectives for the program, and an action plan, which will guide its development and delivery.

Beyond the initial stages of planning and developing the family literacy program, the advisory committee also provides on-going support to the program and plays a lead role in promotion and recruitment. The advisory committee will also be responsible for developing assessment and evaluation strategies for the program. Members may also be involved in fundraising.

Developing a shared vision and goals

After the advisory committee is formed, the first task is to develop a shared vision for the partnership and to identify short-term goals for the group. Not only will a shared vision and goals help to group move forward and set parameters for their efforts, but as Kadel and Routh (1993) point out, it will enable members to justify spending time on the committee.

Goals for the partnership will initially be short-term and should focus on developing the partnership and taking the preliminary steps in developing the family literacy program. Examples of short-term goals could include establishing leadership for the group; developing a common definition of key terms, developing communication mechanisms and meeting schedules and deciding how activities and objectives will be measured. As the project progresses, intermediate and long-term goals can be set based on the information gathered in the needs assessment, and decisions made on how to best address those needs.

In order to develop goals for the partnership, it is necessary to develop a framework for the project that not only sets an overall objective but that also integrates the goals and interests of participating individuals and organizations (Alary 1990).

Conducting a needs assessment

Conducting a needs assessment will ensure that the program you develop is appropriate and realistic for your community. It will systematically identify needs in the community. It will also identify existing programs and services in the community that relate to the identified needs, as well as programs and services that would complement your program. These might include parenting and family resource programs; literacy, adult basic education, and English as a second language programs; or library drop-in programs for children and families.

By comparing the information on community needs and existing programs, you will be able to identify where gaps in service delivery exist.

By involving your advisory committee in the development and implementation of the needs assessment, and by involving other community agencies and individuals, the process builds ownership, awareness, and support among stakeholders. It gauges the level of support for the proposed program, and determines similarities and differences in how literacy needs are perceived.

The needs assessment can also ensure that realistic goals are set for the proposed program, in terms of assessing not only needs but also available resources.

Developing a plan of action

Based on the information gathered in the needs assessment, the partnership should be able to decide if the proposed family literacy model(s) will be effective in addressing community needs, if it should be modified or adapted, and how it can best be delivered. The next step is to develop a list of objectives for developing the program, and a plan of action based on those objectives.

Specific action plans are a vehicle for increasing staff understanding, facilitating program start-up, and solving specific problems related to the early phases of program delivery. "Action plans, complete with lists of tasks, timelines, and persons responsible, can provide blueprints to enable successful resolution of problems or challenges" (Rasinski and Padak 1994: 12).

The details of your plan of action will obviously depend on your particular circumstances. Some of the decisions and issues you will have to address might include:

- identifying similar situations in other communities and drawing from the experiences of others
- choosing an appropriate facility or location
- establishing eligibility for participation (if there is a "target group," if it will affect funding or fundraising, etc.)
- the need for confidentiality and how this will affect referrals and record sharing
- defining roles and responsibilities (individual and agency) among the partners (see below)
- making use of available funds and resources
- recruitment
- promotion and public awareness
- program development
- funding and fundraising
- program and partnership evaluation (see below)

You will need to develop timelines for specific objectives as part of your plan of action. Please see Appendix B for an example of an action plan that includes project objectives, related actions, time lines, partners responsible, cost of activity, and measurable outcomes.

Partnership Agreements

When defining roles and responsibilities, consider whether a partnership agreement is necessary and/or appropriate for your group. There are different opinions regarding the value of partnership agreements; some individuals and agencies see them as essential to obtaining commitment and developing clearly defined responsibility. Others see them as unnecessary and even counter-productive.

The Partnership Resource Kit (1995) describes a partnership agreement as a vehicle you would use to formalize you and your partners' commitment to the relationship. Such an agreement must be "clear, concise, straightforward, and unambiguous" (19). The agreement must ensure that

- the terms of reference, objectives, procedures, roles, authorities and timelines are clear, detailed enough to guide the process, written in clear language, and available to all stakeholders
- any administrative questions are addressed in relation to financial records, reporting, etc.
- mechanisms are in place to detect early signs of problems, and that corrective measures are identified
- expected services are identified
- eligibility criteria are identified
- financial, human resource, communication/information management, and accountability needs and commitments are established
- evaluation requirements, performance measures, and reporting arrangements are established
- flexibility is built into the agreement to allow it to be adapted to changing external/internal circumstances (24)

How you prepare your partnership agreement depends on what types of information you need to have included. For example, do you need to specify the amount of funding that will be allocated to each partner? Are there details regarding ownership of property, such as office equipment or sets of books, or insurance requirements that should be included? How the partnership will be monitored and evaluated should be addressed in the agreement. Provisions for changing or terminating the partnership if necessary should be included as well (adapted from Partnership Resource Kit, 25).

There are different types of partnership agreements that you can use or adapt. For a sample agreement, see Appendix C.

Keeping partners informed

Keeping partners informed is an essential aspect of building and maintaining a partnership. Communication is a factor that is emphasized several times in this manual, both as a barrier and challenge, and as a key factor for success. When there is effective communication, partners all know the progress of the program, what problems have been identified, and what is being done to solve them. When there isn't proper communication, not only are partners uninformed, but also there can be suspicion about the other partners, and the feeling that their participation is not valued.

One of the first things to do for the new partnership is to establish a means of notifying all members of upcoming meetings and events, as well as distributing minutes of meetings, especially to partners who were not in attendance.

The number of meetings, location, and time should be a decision made by the group, not just the facilitator or lead agency. In addition, the length of the meetings should be a group decision;

several community partners and literacy practitioners emphasized the need for short, productive meetings, given their busy schedules and other commitments.

Keeping partners up-to-date does not always need to be done through scheduled meetings. Although face-to-face contact is reported to be the most effective means of staying in touch, telephone contact just to "touch base" is an important part of keeping a partnership dynamic. In addition, one coordinator described the importance of interacting with her partners on other levels, such as going to the friendship centre for lunch on soup and bannock day. The partners may not even discuss the family literacy project during such visits, but the contact is important and the opportunity is there for discussion if either partner feels it's necessary.

Problem solving

How do we solve the inevitable problems that arise when people and agencies work together? It's impossible to predict at the outset all the situations, changes, and challenges that will take place as the partnership and the program evolve. What is important is to have an agreed-upon problem solving strategy in place before things come up. One possibility your committee might consider is to schedule time for discussion and problem solving into your meeting agendas; formally recognizing the need to address problems will encourage people to voice any concerns they have and have them discussed objectively.

When we asked family literacy practitioners and their partners how they solved problems, they gave the following suggestions:

- be flexible and willing to adapt to changes
- don't take things personally
- be diplomatic in how you present the problem. Don't point fingers, but present it as the group's problem, and the group will find a solution
- keep communication lines open
- be prepared to learn from your mistakes, and to admit them to your partners
- never let a problem sit for long. Call a meeting right away to discuss it.
- keep goals and priorities very clear, so they can determine how decisions are made
- keep people informed of any changes
- hold people to what they said they were going to do, and don't be afraid to dissolve the partnership if they don't, and move on

Renegotiating

There may come a time when one or more members feel the need to renegotiate the partnership. Renegotiation is a logical step when people want to continue the partnership, but:

- one or more of the partners can not or can no longer carry out their responsibilities (because of staff changes, unrealistic commitments made in terms of time or resources, restructuring in their agency, etc.)
- a dispute arises that cannot be resolved within the current arrangement
- there is an opportunity to expand the original project

- there is an opportunity to add new members to the partnership (Partnership Resource Kit)

Renegotiating involves bringing the partners back to the table, and repeating the process of determining roles and responsibilities within the context of the need to renegotiate.

Evaluation methods

Evaluation is a key component of building and maintaining a partnership. The purposes for evaluating the partnership and the means by which evaluation will be conducted should be one of the first things addressed, discussed, and developed by your advisory committee. Make sure that adequate records are kept and data is collected so that progress and achievements can be measured.

Evaluation allows members of the partnership to "step back from the ongoing demands of the relationship and look at the bigger picture" (Partnership Resource Kit, 27). It allows us to see what our successes have been, and also where things could be improved. Just as importantly, it identifies why the partnership was or was not effective.

Evaluating the partnership should be done in such a way that it

- improves the quality of decision making
- strengthens the partnership's ability to make a case for continued support from the organizations and their clients (and external support as well)
- stimulates the development of clear policies and practices in the partnership
- justifies in concrete terms the trust of all members of the partnership (Partnership Resource Kit, 27)

Overall, evaluating the partnership will assess whether the objectives, needs, and expectations of the partnership as a whole and of individual members have been met. You will look at the achievement of short-term and long-term goals. As Kadel and Routh (1993) point out, it is important for seeking financial and political support to determine whether the partnership resulted in saving money over traditional methods of providing services. Other types of value added by the partnership should be included as well, such as raising the awareness of literacy issues in community agencies.

Remember that evaluation helps us identify both successes and areas for improvement. These successes must be recognized, celebrated and publicized. Evaluation can mark the milestones and achievements of the partnership, and members need to be congratulated for their accomplishments. Commitment is like an automobile; it can't run forever without refueling. Not only will it help to sustain or renew members' enthusiasm, but publicizing the successes of the partnership will help to sustain community support and gain credibility for the program. Other programs may also find inspiration to try a partnership approach to family literacy.

The specific tool you develop for evaluating the partnership will depend on the objectives your group has set. For an example of an evaluation tool for family literacy partnerships, please see Appendix D.

The committee will also take responsibility for developing and guiding evaluation strategies for the program itself. This information is not included in the scope of this manual. Please see the *Practical Guide to Family Literacy* (Skage 1995) or other resources for this information. (FLAG is currently conducting research on evaluation methods for family literacy programs.)

Planning for improvement The results of the evaluation will provide the necessary information for your partnership to discuss and decide how to make changes and improvements to "how they do things." This may mean making revisions to current practices and activities, or it may mean a fundamental redesign of the partnership. Having evaluation and the follow-up planning sessions built into the structure of the partnership will help people anticipate and accept the process, and may help to reduce the risk of resistance to change.

Source: *The Partnership Handbook*: Human Resources Development Canada: www.hrdc-drhc.gc.ca/common/partners/partner.shtml

5. Job Design:

The role of volunteering has changed and the voluntary sector faces many challenges: changing demographics, changing expectations of volunteers, concerns of risk management, a rethinking of governance theory. Volunteers have changed: they have less time to give and greater skills to offer.

By adapting learnings from a wealth of human resources and corporate theory, *A Matter of Design* provides an exciting new perspective on engaging volunteers. By challenging organizations to fundamentally rethink the involvement of volunteers, starting with an analysis of mission and moving through the elements of volunteer involvement, this thought-provoking discussion paper and manual examines how to create volunteer opportunities that both help the organization fulfill its mandate and are satisfying for volunteers. This resource will give you the theory, and then walk you through the process, step-by-step, using helpful templates and examples of small, medium and large voluntary organizations.

Job design will identify the tasks volunteers can do for the organization to contribute to its mandate. It will let the volunteers know what is expected of them in the way of performance, and it will solidify their commitment.

For the volunteer, job design will clarify the whole volunteer assignment. Clear requirements, reporting structure and guidelines for role limitations—these all protect the volunteer. They mean that the volunteer will not be at a disadvantage through lack of understanding of what he or she is undertaking. He or she will know what is expected in the way of activities, time commitment and behaviour, for example. Volunteers will be able to contribute knowing that their own needs will be met, and they will stay because they find satisfaction and validation in working under these conditions.

Volunteers need to know what is expected of them, just as any paid employee does. Job design facilitates this. It breaks work down into manageable units that can be assigned specifically with regard to the particular talents of the volunteer. It requires the completion of a form that establishes reporting channels, outcomes to be expected, and deadlines or time frames. From an employee's perspective, everything is laid out clearly. The volunteer knows how many hours a task should take and can plan the time efficiently. And, writes Susan J. Ellis, "[w]hen people know what is expected of them, they are happier and more productive" (*From the Top Down*, p. 103).

The organizational backdrop to job design

Three features of volunteer involvement warrant special consideration when it comes to implementing job design: recruitment, competition for volunteers, and the mix of volunteers and paid staff.

Recruitment

- Time constraints: One of the challenges of the voluntary sector is the need to understand the pattern of how volunteers work. Many are available for only short segments of time—perhaps as little as two hours per week—and may not be able to perform in a role that was designed for a 40-hour week. This means that the way we might normally view work assignments needs to be adjusted. Tasks that might typically be grouped into a single volunteer position could perhaps be separated and handled by more than one individual or done by a team. In practice, you may end up recruiting two or more people to handle jobs previously handled by one person. It is also important to realize that if a volunteer works only one day out of five, then the work will take five times as long to complete and the schedule should be designed accordingly.

- Providing a quality experience: Volunteer time should be quality time—both for the volunteer and for the organization. We have already mentioned the determinants of job satisfaction outlined in Herzberg's motivation-maintenance theory: achievement, recognition, the value of the work itself, responsibility and advancement. If the work itself is sometimes routine, then these factors are particularly important. Herzberg contended that the more tangible issues of salary, working conditions, company policy and interpersonal relationships could affect a worker negatively, but could not by themselves provide job satisfaction. Obviously, taking the factor of financial remuneration out of the mix increases the importance of other motivators. No matter what they're doing, volunteers want to enjoy themselves—their volunteering experience should be a positive one. Many volunteers come forward for the opportunity of meeting new people, while others appear with a friend or relative to investigate an opportunity that appeals to them, and yet others come to join a friend or relative already volunteering for the organization. Beyond this, a number of volunteers engaged in similar activities may develop a further identity among themselves or with those served (in the context of natural work units), which may heighten the sense of belonging and thereby enhance the overall quality of the volunteer experience.

- Focus on fit: It is important to find volunteers who fit into the organizational culture, who accept the mandate of the organization as being worthwhile, who are comfortable in the structure themselves and who make others comfortable. 'Chemistry' and 'fit'—defined by Coverdill and Finlay (1998) as "compatibility with the organization's culture, norms and strategies"—are important because belief in the value of the organization's goals strengthens the volunteer's commitment.

- Data from the 2000 NSGVP revealed that over half (59%) of volunteer respondents indicated they had organized or supervised activities or events for an organization, with the next closest task category being 'sitting as a board member,' reported by 41% of responding volunteers. Obviously, these kinds of volunteer tasks or activities can have a profound impact upon the general public perception of an organization, whether positively or negatively. It is therefore important that volunteers in the public eye represent your organization in a positive manner.

The complex nature of volunteer assignments requires comprehensive training and regular supervision and monitoring of volunteers, to ensure they have the necessary knowledge and skills, and that they are performing their tasks in an appropriate and professional fashion as required by each individual assignment.

- One size does not fit all: Some organizations struggle to find people willing to commit to the programs they offer; others have to turn away highly interested people on a regular basis. What are some determining differences between these types of organizations? Among organizations that seem to be successful with recruiting and retaining their volunteers, we notice a number of shared approaches: a passion for their cause, an energy within the organization related to volunteer recruitment and recognition, and the ability to offer distinct kinds of volunteer opportunities.

A number of organizations are involved with the staging of special events or what might be termed 'episodic' needs. In some cases these are truly single events, such as the staging of a world-class athletic meet. In other cases they are of a recurring nature, such as annual cultural events. These organizations often have people lining up to be involved. For some the appeal is the love of the subject matter, but more commonly, it is the perception of a rewarding experience. Such experiences often involve a great deal of time and effort, but over a limited time span. Some volunteers will work around the clock for such events, arranging their vacation to accommodate them and describing the experience as something they would not miss for the world.

In other cases, success clearly depends on the ability of the organization to offer long-term, valuable work in a friendly and supportive atmosphere. Such organizations ensure that volunteers are getting their own needs met, that their involvement is recognized and valued, and that they fit well into the overall milieu.

In each instance, effective volunteer recognition is an integral part of organizational culture and makes allowances for peoples' different needs for recognition. Not everyone wishes to receive a certificate or a plaque. Some people do not wish public recognition, but prefer appreciation to be personal, perhaps only between themselves and their immediate supervisor. The best organizations find ways to personalize their recognition efforts. They understand that a committed volunteer force will achieve far greater returns for the time invested.

Source: *A Matter of Design*: Job design theory and application to the voluntary sector.
Volunteer Canada's website: www.volunteer.ca/volunteer/pdf/JobDesignEng.rtf

Position Descriptions

The success of your organization depends on the quality of your volunteer base. Therefore, you must have a clear understanding of what you can offer potential volunteers. In order to clarify what is expected of a volunteer, a position description is a very useful tool to entice someone to become part of your organization. It will give volunteers an idea of the part they play in the total picture of the organization. An added benefit is that a well-thought out position description can also help the organization clarify what it expects from the volunteer.

The first step in getting the "right" volunteers is to define the type of position that you are recruiting for. This will help ensure that not only does the organization get the right person for the job but that the potential volunteer finds what he/she is looking for.

Position descriptions assist in defining job responsibilities, recruiting volunteers and outlining training needs. Few organizations would consider hiring a staff person without a job description, yet rarely is this recognized as being important for the recruitment of volunteers.

Position descriptions are useful tools that list all the qualifications needed to do a particular job. It will also give volunteers an idea of the part they play in the total picture of the organization. If an organization fails to have position descriptions in place, then the role of the volunteer could be seen as undervalued. This in turn may undermine the overall effectiveness of the organization. Position descriptions should go beyond the qualifications of the job. They should include the benefits, too. Most volunteer opportunities offer, at a minimum, flexible hours and training. You might also be able to provide ongoing training, a chance to learn new skills or even opportunity for travel. These are all selling points to help you attract the volunteers you want, so be sure to include them.

Each position in your organization, whether paid or volunteer, should have a written job description. Here are some useful categories to help develop or revise your job descriptions

- **Job Title** – Try and give the title as much prestige as possible. Clever titles can even attract volunteers.
- **Objective/Purpose of the Position** – This is a general statement that identifies what the job is and why it is necessary within the organization.
- **Job Summary** – Give a brief overview of the position and what is involved.
- **Supervisor Duties and Responsibilities**– Be as specific as possible.
- **Qualifications/Experience/Characteristics Required** – List the skills, knowledge and attitudes you seek. Be careful not to over-qualify the position – you could lose some excellent volunteers.
- **Benefits/Rewards Offered** – What's in it for the volunteer? What is to be gained personally by doing the job?

- **Training Offered** – Outlines what training or orientation is available to the volunteer.
- **References Required**
- **Time Commitment required (hours)** – Expectations regarding time demands of the job. Be specific! i.e. weekly, monthly, long-term basis, flexible, self-determined
- **Length of Service (term)** – If the volunteer position has a specific term attached to it, this would also be outlined in the position description.
- **Probationary Period (if applicable)** – This outlines the length of the probationary period if required.
- **Working Conditions** – Describe the location/office etc. that the volunteer will be working from.
- **Review Procedures** – How an evaluation will be done and by whom. Developing a position description may seem like an enormous task, but in the end it will help you to recruit the best volunteers for your program.

Source: From Community Literacy of Ontario's on-line Volunteer Management Resource Centre at www.nald.ca/volman.htm

6. Access to Resources:

In developing this chapter we conducted a literature review to determine what resources would be most useful to our community-based organizations. The following sites are excellent and contain a wealth of information, best practices and tools that will help with recruitment and retention strategies.

Found on NALD's Website

1. Strategies of our own: learner recruitment and retention for community literacy
www.nald.ca/province/ont/clo/newslet/02spring/page2.htm

2. Taking it to the streets: public awareness and tutor/student recruitment & retention : a manual for literacy practitioners www.nald.ca/province/bc/lbc/ catalogue/details/1672.html

3. Marketing Your Adult Literacy Program - A "How To" Manual - Page 1
www.nald.ca/fulltext/hudson/market/page01.htm

4. Patterns of Participation in Canadian Literacy and Upgrading Programs: Results of a National Follow-up Study (2001) www.nald.ca/resource/rsc3229.htm

5. Strategies of our own: learner recruitment and retention for community literacy agencies. (Newsletter)
www.nald.ca/province/ont/clo/newslet/02spring/page1.htm

6. Guidelines for Working with Adult Learners. ERIC Digest No. 154.
www.ericfacility.net/ericdigests/ed377313.html

7. Research to Practice: Increasing Retention Through Student Success literacy.kent.edu/Oasis/Pubs/0200-11.htm

8. Practitioner Resources – various literacy materials such as manuals, booklets, guides, project reports and other material useful to any of those practicing in the field of adult literacy. www.nald.ca/clr/pracres.htm

9. Developing A Community Needs Assessment for Adult Literacy Programming
www.nald.ca/clr/before/cover.htm

10. Building Strong and Effective Community Partnerships - A Manual for Family Literacy Workers
www.nald.ca/clr/partner/cover.htm

11. Demystifying Adult Literacy for Volunteer Tutors - A Reference Handbook and Resource Guide
www.nald.ca/clr/demyst/cover.htm

12. Handbook for Project L.O.V.E. Programs – Senior Volunteers

www.nald.ca/PROVINCE/PEI/PRJTLOVE/handbook/cover.htm

13. Testing the Balance: 50/50 Management in a Volunteer Tutor Program - Findings of a project dealing with the balance of an organization's resources directed towards recruitment, assessment and training of volunteers and students, and the resources directed towards retention of existing volunteers and students.
www.nald.ca/clr/Balance/page01.htm

14. The Reluctant Learner - A Research Report on Nonparticipation and Dropout in Literacy Programs in British Columbia www.nald.ca/fulltext/athomas/rellea/pg2.htm

15. Encouraging Adults to Acquire Literacy Skills www.nald.ca/fulltext/athomas/encadu/contents.htm

16. Reaching-Out Approaches. - A book on effective methods of recruitment compiled during a workshop in the spring of 1989 in New Brunswick, it includes strategies for rural areas, urban areas, the workplace and for young adults. A companion videotape of the panel presentation is also available. For further information contact:

Charles Ramsey
Director, Program Coordination and Apprenticeship Training
Department of Advanced Education and Training
P.O. Box 6000
Fredericton, N.B.
E3B 5H1

17. Creating A Rural Literacy Centre: A Handbook for Practitioners www.nald.ca/clr/ruralitc/contents.htm

18. The Partnership Handbook. This resourceful book has been developed to help people learn more about what community-based partnerships are and to offer suggestions about how to be effective in them. It provides tools and tips to enhance partnerships, and outlines what is needed to move forward together. www.hrdc-drhc.gc.ca/common/partners/partner.shtml

19. Volunteer Management Web Sites www.nald.ca/fulltext/vomaregu/page42.htm

20. Beyond Recruitment - An Online Workshop About Recruitment & Maintaining Volunteers in the New Environment www.nald.ca/province/ont/volman/beyond/beyond2.htm

downloadable *Course Manual* www.nald.ca/fulltext/clo/cover.htm

21. The ABC's of Volunteer Recruitment www.nald.ca/province/ont/volman/abc/abc.htm

Found on Volunteer Canada's Website

1. Volunteer Management: Resources www.volunteer.ca/volcan/eng/content/vol-management/resources.php?display=3,0,3#rethink

2. Volunteer Opportunities Exchange www.volunteer.ca/volcan/eng/content/vol-exchange/vol-exchange.php?display=3,0,8

3. www.voe-reb.org/welcome.jhtml

4. Facilitated Discussions: A Volunteer Management Work book – Voluntary organizations often identify the need to consult stakeholders in the development, design, delivery or review of service and programs. The **Hosting a Facilitated Discussion** workbook has been developed as a tool to assist organizations in collecting stakeholder information and comments in a practical way. By following the steps in this workbook, voluntary organization staff and/or volunteers can systematically capture stakeholder comments, data and develop strategies for integrating this information into program design and delivery. **Download the workbook.**

www.volunteer.ca/volcan/eng/iwork/info-exchange.php?display=3,0,5

www.volunteer.ca/volcan/eng/content/can-code/can-code.php?display=3,0,1

5. The Canadian Code for Volunteer Involvement - provides voluntary and not-for-profit organizations with a philosophical framework for involving volunteers at the governance, leadership and direct service levels. The Code outlines the values, principles, and standards for effective volunteer practices within organizations. It also includes the Organization Standards Checklist, which will assist organizations to evaluate and improve their volunteer programs. www.volunteer.ca/volunteer/pdf/CodeEng.pdf

6. Volunteer Management Audit: Canadian Code for Volunteer Involvement - has been developed as a tool for nonprofit and charitable organizations to assess their volunteer resources program. This audit tool is composed of seven sections which will provide important information about volunteer involvement and management practices within your organization. Please note that it is not necessary for your organization to have adopted the Canadian Code for Volunteer Involvement in order to complete the audit.
www.volunteer.ca/volunteer/pdf/ManagementAuditEng.pdf

7. Screening Volunteers www.volunteer.ca/volcan/eng/content/screening/screening.php?display=3,2,3

8. Trends in Volunteerism www.volunteer.ca/volcan/eng/iwork/trends-invol.php?display=3,2,4

A. NALD Literacy Collection: Practitioner Resources is a page complete with various literacy materials such as manuals, booklets, guides, project reports and other material useful to any of those practicing in the field of adult literacy. www.nald.ca/clr/pracres.htm

B. Canadian Volunteer Management Sites www.nald.ca/fulltext/clo/page45.html

NALD is an excellent resource for all community literacy organizations. As well, the Volunteer Canada web site offers a number of excellent self-help tools and strategies for recruitment and retention.

What if I still have questions?

Remember the coalition is here to help. Call us if we can be of assistance in any way. We will connect you with other resources and / or other literacy groups who can walk you through successful strategies they have employed in the areas of recruitment and retention.

It is important to stay positive and to learn from others' experiences. For follow up information contact the Literacy Coalition at:

Literacy Coalition of New Brunswick

944 Prospect Street

Fredericton, NB

E3B 9M6

1-800-563-2211

Worksheet A Identifying Community Needs

The purpose of this exercise is to collect your thoughts and general impressions of the needs in your community that relate to literacy. Before you can do that, you need to take a few moments to define your community, so as to set some parameters for your literacy partnership. Your community might be easily defined, such as a specific town or city, or a neighborhood in a city. Or it might be a county or rural municipality. It might even be a region of the province. Where do you deliver services? Write down a working definition of your community.

The next step is to think about what the needs are in your community that could be addressed by a literacy program. What led you to consider a literacy program? Do you have any particular client group in mind? Did information from a survey or needs assessment tell you there was a need?

First think about general needs. What about the importance of reading, or the need to get parents more involved in their children's education? Jot down some general needs you're aware of in your community.

Worksheet B Identifying Needs and Resources in Your Agency

What are your agency's needs and motivations for seeking partners? Take a few moments to reflect on and answer the following questions: (adapted from Isserlis et al, 1994b)

What do you hope to gain from a partnership that you can't accomplish or provide on your own?

- Do you hope to gain financial or in-kind support? What would that consist of?
- Do you hope to access expertise in other disciplines (child care, adult education, health care)? If so, what kind of expertise?
- Do you want to receive or make referrals to other agencies?
- Do you need the support of key decision makers or stakeholders in the community?
- What other reasons do you have for seeking partners?
- What value would be added to the proposed project by involving partners?

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What do you have to offer potential partners?

- Do you have expertise or resources that would be useful to other agencies or organizations?
- Are you trying to reach the same clients or potential clients?
- Would they like to be recognized for supporting families?
- What value or benefit can you offer them?

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Worksheet C - Mapping the Community

You'll need a large piece of paper (flip chart paper works well), blue, red, and black markers, a local telephone book, a local newspaper, and a community services directory (if available) for this exercise.

1. Draw the borders of your community on the piece of paper.
2. Identify the agencies, schools, community groups, contract services, etc. that interact with families on a regular basis. Use your own knowledge of your community and whatever resources are available. For example, many telephone books have a "Community Services" section. Also check newspaper stories for references to agencies and groups, or check the "Upcoming Events" column. Add any existing services that you identified in Worksheet A. Plot these groups on your map in red.
3. Next, identify organizations or services that could possibly meet the agency needs you identified in Worksheet B. Plot these on your map in blue.
4. Consider the type of literacy program that you think might be appropriate for your community. Who are your potential clients? Who do you want to participate in the program? Where in this map of your community are you likely to find them? (Drop-in centres, Adult Basic Education classes, doctors' offices, etc.) Mark these on your map in black.

Using the local phone book, find and list the telephone numbers to match the groups you've identified in the previous steps. If possible, list key names to contact within each group. *This exercise was described in a session delivered by Dr. Ruth Nickse at the Roots of Literacy Symposium in Brooks in 1992, and was later adapted by Kathy Day of Pincher Creek.*

Appendix A - Sample Job Descriptions for Board Members

Function of the Board of Directors

It is the board that is ultimately responsible for making sure that "Association" fulfils its mission.

Responsibilities of Board members

- Understand Association's mission and mandate
- Set policy for Association
- Make sure that effective organizational planning takes place
- Make sure that funds are properly managed
- Know the board's legal obligations and make sure they are followed
- Approve the hiring and releasing of staff, based on the recommendation of the personnel committee
- Represent community-based literacy programs in their region

What is expected of board members?

- Be familiar with Association's by-laws, policies, and business plan
- Be able to attend two face-to-face board meetings each year
- Be able to participate in four board meetings held by conference call.
- Participate in one or more committees / reference groups and possibly chair one
- Prepare for meetings by reading background material

Expected Time Commitment:

- Most board members serve a two-year term
- Your role as a Association board member should take about six hours per month

Association Officers

Association officers have a one-year term. They may only serve two years in any one position. Officers are elected or appointed from among directors at the first meeting of the Board following the Annual General Meeting. Officers are:
Co-chairs
Secretary
Treasurer

Role and Responsibilities of Chair or Co-chair

Association's Co-Chairs will:

- Provide leadership to the Board and Executive Director of Association
- Make sure that Association 's mission statement and by-laws are followed

- Keep the Board focused on Association mandate
- Speak on behalf of Association.
- Make sure that all resolutions of the Board of Directors are accomplished
- Prepare and present a report on Association 's activities at the AGM
- Develop, with input from the Executive Director and board members, the agenda for each Board and Executive Committee meeting
- Chair, on an alternating basis, all meetings of Association and the Board of Directors.
- Give guidance and support to the Executive Director between board meetings
- Provide training for the new Co-Chairs
- Serve on Association 's Executive Committee

Role and responsibilities of the Secretary

The Secretary will:

- Make sure that accurate records are kept for every meeting of Association and the Board.
- Take attendance at every Board meeting
- Sign the official minutes
- Make sure that directors and members receive proper notice of meetings
- Record all motions
- Provide training to the new Secretary
- Serve on Association 's Executive Committee

Role and responsibilities of the treasurer

The treasurer will:

- Make sure that all funds are properly managed
- Make sure that the budget and financial policies are followed
- Review the financial statements monthly (Association 's bookkeeper prepares the financial statements, payroll, invoices, and cheques)
- Present the monthly financial statements to the board
- Present the annual financial statements to the membership
- Help the staff with budget preparation
- Help with developing and monitoring Association 's financial policies
- Chair meetings of the finance committee
- Provide training to the new Treasurer
- Serve on Association 's Executive Committee

Association standing committees

Executive Committee

Association's Executive Committee is made up of:
One Chair or two Co-chairs

Secretary
Treasurer
Executive Director (non-voting member)

The Executive Committee will meet as needed between full Board meetings. The Executive Committee is authorized on behalf of the Board to make decisions that cannot wait until the next Board meeting. The Co-Chairs will chair the Executive Committee. The Head of the Personnel Committee will also be invited to attend Executive Meetings on an "as needed" basis.

Personnel Committee

The role and mandate of Association's personnel committee is to:

- Evaluate the job performance of the Executive Director each year
- Develop and revise Association 's personnel policies
- Develop and revise staff job descriptions
- Interview the Executive Director
- Make recommendations to the board of directors on the selection of the Executive Director
- Help with the hiring of other staff
- Review and approve contracts between Association and core and contract staff
- Advise the Executive Director and the board on personnel policies and practices

Nominations Committee

- The Nominations Committee will plan the elections of the Board of Directors.
- The Nominations Committee will recruit new members to the Board of Directors

Finance Committee

- The Finance Committee will help the Executive Director to develop the budget
- The Finance Committee will help to develop and monitor Association 's financial policies
- The Finance Committee will review the financial statements before each Board meeting
- The Finance Committee will be chaired by the Treasurer

Appendix B - Sample Job Description for Volunteer Tutor

(in one-to-one or small group situations)

Purpose:

To tutor an adult learner or a small group of learners in reading, writing, and in some cases, basic math.

Job Description:

- set goals and plan a learning program with the student
- find and prepare teaching material that suits the student's ability, goals and interests
- tutor the student once a week at the Centre (in subjects that may include reading, writing, math, computer skills and life skill)
- maintain a positive, warm attitude that encourages the student to learn
- tell staff at the Centre about changes in meeting times complete weekly tutor reports
- discuss the student's progress with the tutor coordinator; discuss problems/issues when they arise
- attend various in-service workshops and tutor discussion groups after tutoring begins
- keep a record of volunteer hours with the Centre

Reporting to:

Tutor Coordinator (who matches new tutors and students and provides ongoing supervision)

Requirements:

- patient, open-minded, flexible attitude
- willingness to try new and creative ways of teaching
- understanding student-centred approach to teaching and learning good verbal skills; good listening skills
- ability to work independently and provide support to student
- good basic skills in reading, writing and/or basic math
- ability to be on time for weekly appointments
- respect for confidentiality
- basic computer skills are helpful but not absolutely necessary
- completion of tutor training (some tutors may begin tutoring before tutor training is finished depending on their experience, at the discretion of staff)

Time required:

- two hours of tutoring per week
- planning and preparation: 1/2 hour to one hour per week
- long range: one year commitment preferred (minimum of eight months)
- 12 hours of basic tutor training; 4-6 hours or workshops after tutoring begins