



# Municipal Toolkit

Practical strategies to enhance municipal  
support for your volunteer program





# Acknowledgements

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- ◆ Encouraging Canadians to participate in voluntary organizations
- ◆ Improving the capacity of organizations to benefit from volunteers, and
- ◆ Enhancing the experience of volunteering

Professional Administrators of Volunteer Resources – Ontario (PAVR-O) manages the CVI network in Ontario, including a 15+ person voluntary steering committee and additional sub-committees. The network is responsible for delivering the national programs in Ontario and developing an action plan for volunteerism in Ontario.

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VOLUNTEER  
BÉNÉVOLES  
C A N A D A



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# Section A - Introduction

◆ WELCOME TO THE MUNICIPAL TOOLKIT! You have just taken the first step to enhance the support that your municipal council and senior management give to your volunteers. The primary goal of this toolkit is to assist you and your municipality in developing a plan to sustain and enhance your current level of volunteer engagement in a safe, well-managed approach.

Many staff working in municipalities across Ontario are implementing programs and services with the assistance of volunteers. You may be:

- ◆ A front line recreation staff working with volunteers in a community centre, park, or arena, and are concerned that your responsibility for volunteers is not included as a task in your job description
- ◆ A human resources staff that begins to realize that the volunteers in your municipality should fall under the same policies and guidelines as staff
- ◆ A manager of volunteers who needs additional resources for the volunteer program
- ◆ A senior manager or city councilor who realizes the municipality does very little to support the volunteers in your community
- ◆ A community member who is knowledgeable of and has relationships with both municipal bodies and community volunteer agencies

No matter what your title or department, by opening this toolkit, you are starting a process that will provide you with a plan for enhancing resources for your volunteer program, develop a volunteer policy and guide you through the maze of politics to gain support for a comprehensive volunteer management program. A municipality without an approved volunteer policy and/or volunteer management program is at risk not only for losing its volunteers, but for putting the municipality at legal risk by ignoring a loosely or poorly managed volunteer program.



## Objectives of the Municipal Toolkit

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There is a wealth of information to assist staff in municipalities or volunteers in affiliated organizations to establish a volunteer management program. The concern is that there is a gap between what is expected from volunteers and the staff that manage them and the resources allocated to volunteer programs. This support takes both a tangible and intangible form. A volunteer program requires tangible resources that would include an allocation of dollars for a manager of volunteers, promotion, screening, training, recognition and appreciation. There is an even greater need for the intangible support – this could be acknowledging the work of volunteers, approving a volunteer policy and setting up a Volunteer Advisory Committee.

Each person reading this toolkit is at a different stage of development in regards to managing volunteers. This toolkit will provide not just the “reasons why”, but the “how to’s” to allow you to make change in your community.

This toolkit provides practical strategies, examples and resources for use by municipal champions. The tool kit will focus on volunteers who help direct or deliver municipal programs or services, e.g.

- ◆ Direct volunteers who are recruited and managed by municipal staff
- ◆ Indirect volunteers who serve with groups affiliated with the municipality (e.g. sports, neighbourhood and service clubs) who help direct or deliver programs under the direction of or on behalf of the municipality

The kit may also be useful to independent organizations or individuals seeking to make presentations on volunteerism to municipal council or other organizations.

The Ontario Network of the Canada Volunteerism Initiative (OCVI) actively recruits municipal champions to promote the case for municipalities to invest in volunteers. Municipal champions agree to dedicate between 10 and 15 hours a year to:

- ◆ Promote the value of volunteers to their municipality
- ◆ Make at least one presentation to municipal staff or elected officials using the municipal toolkit
- ◆ Provide feedback to OCVI regarding these presentations
- ◆ Help to promote and distribute the kit
- ◆ Help OCVI recruit other municipal champions

**This Municipal Toolkit** is targeted at identifying those gaps in your municipality and advocating for resources so that you can:

- 1) Raise awareness and understanding of municipal staff and elected officials of the importance of volunteers to municipalities
- 2) Encourage the adoption by municipalities of the Canadian Code for Volunteer Involvement, or the incorporation of similar principles in the municipalities’ volunteer management practices.



## How to use this toolkit

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This toolkit is organized to provide practical help for you to increase awareness in your municipality for the support of the volunteer program. Section C – A Plan of Action, allows you to answer a short checklist to see where your community stands in terms of support for volunteerism. Based on your answers, you can move to the sections where you see a gap in your own municipality. This toolkit presents success stories from several “volunteer friendly” communities that you might identify with in terms of location and/or size. If you are at the stage of implementing volunteer practices, this toolkit also provides resources on current “best practices” in Ontario.

## Background of the Municipal Toolkit

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The Municipal Toolkit is a result of the work done by the Canada Volunteerism Initiative, funded by the federal Department of Heritage, managed by Volunteer Canada and Imagine Canada and delivered by provincial and territorial networks across Canada. It has three goals:

- ◆ Encouraging Canadians to participate in voluntary organizations,
- ◆ Improving the capacity of organizations to benefit from volunteers and
- ◆ Enhancing the experience of volunteering

During the fall of 2003, the Ontario Network of the Canada Volunteer Initiative (OCVI) conducted an **online survey** (<http://www.volunteer.on.ca/English/index.cfm?fuseaction=HelpUS.actionPlan>) and facilitated thirteen events to determine areas to include in an action plan to strengthen volunteerism in Ontario. Individuals were asked to rank six action areas that had been selected from previous recommendations. There was little difference in the ranking of the six areas and the respondents felt that the six were interdependent. The second ranked area was “Interacting with Government” – with the primary focus on municipal government. Participants indicated that the OCVI should focus on municipal governments, as relationships with that level of government have the most potential to make a positive difference on their day-to-day operations. Two important initiatives were undertaken by OCVI – A Municipal Scan (2004) and a Municipal Roundtable (2005).

### **Municipal Scan**

Municipal governments in Ontario have the potential to make a significant impact on the viability of volunteers and not for profit organizations within their local communities. Where there are examples of successful practices supporting volunteers and not for profit organizations, one can identify communities with synergy. An analysis of the municipal scan revealed four factors regarding municipalities and volunteers:



- a. Municipalities across Ontario rely on volunteers to deliver or enhance their services, but few municipalities acknowledge this relationship in a formal statement or policy;
- b. Rural and urban municipalities have different approaches and unique challenges in supporting volunteer engagement in their communities;
- c. In most instances, knowledgeable and enthusiastic front line staff initiate municipal support for volunteer services;
- d. Municipalities cannot take sole responsibility for developing volunteer resources in their communities – they need to work in collaboration with other volunteer support agencies.

On the basis of these findings, the Ontario Network of the Canada Volunteerism Initiative (OCVI) is developing strategies to encourage municipal councils in Ontario to acknowledge the role of volunteers in their communities, increase support services to volunteers, continue to resource staff working with volunteers, and begin to dialogue with other agencies in the community regarding strategies to enhance volunteer engagement.

### **Municipal Roundtable**

Nineteen people from across Ontario participated in the **Municipal Roundtable** (<http://www.volunteer.on.ca/english/pdf/MunicipalRoundtableSynopsis.pdf>) in February 2005. The participants came from all areas of Ontario, representing small and large communities, provincial and municipal governments, and not for profit organizations.

An initial discussion of successful volunteer practices formed the basis of a profile of a highly functioning “volunteer friendly” community. Major barriers could also be identified that prevented municipalities from doing more in the area of volunteer engagement. The Municipal Roundtable participants focused on the final question to provide the OCVI with strategies that they might pursue or that municipalities might consider if they were to increase their efforts with volunteer organizations. The number one priority was the development of a toolkit that could be used by municipal staff or elected officials.

Collectively, the participants of the Municipal Roundtable were able to honour the work being done by dedicated staff working with volunteers in a municipal setting. Concurrently, the group unanimously agreed that there are many gaps, little funding and a general lack of awareness in regards to sufficient municipal resources to support the work of volunteers. This Municipal Toolkit is a direct result of the strong mandate given to OCVI to continue working with municipalities as a key player in engaging volunteers in Ontario.

### **Let's begin...**

Perhaps we should begin with a different perspective.

All municipalities have volunteers. Canada is a country that grew and flourished through the commitment of volunteers. We assume that we will always have a surplus of volunteers to help with our programs and services.

**So, imagine a town without volunteers...**



## Section B – A Town without Volunteers

◆ THERE ARE CERTAIN THINGS IN LIFE WE TAKE FOR GRANTED. There are physical examples such as the sun rising and setting, the seasons changing, and the ongoing supply of fossil fuel. Wait a minute – what was once taken for granted is currently an issue of critical importance. Fossil fuel has been the Western hemisphere’s energy of choice for almost a century and although there has always been an advocacy group that reminded us to use this resource carefully, it is clear that many did not heed their advice and continue to misuse this resource.

Let’s consider another example that we take for granted. Aboriginal people have volunteerism too, plus all cultures that came to Canada brought their own traditions of volunteerism. The reality of life in a new country enhanced the value of helping one another that stemmed from necessity as well as altruism. The face of volunteerism has changed over the years and became a formal discipline in the mid twentieth century. Not unlike fossil fuel, our nation has become dependent on volunteers, yet ignores the trends that could affect the future of volunteerism.

### **Trends in Volunteering**

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Volunteer Canada identified **ten trends** from the 2000 National Survey of Giving, Volunteering and Participation. Each trend will have a greater impact on a municipality that relies on volunteers to fulfill its mandate but does not have a formal volunteer management program.





Trend	Impact on municipal support of volunteerism
<p><b>Much comes from the few</b></p> <p>One in four Canadians volunteer. Over one-third (34%) of all volunteer hours were contributed by the 5% of volunteers (who gave 596 hours or more of their time).</p>	<p>The specific concern in this area is the reliance on fewer volunteers. If the number of volunteers continues to decrease, municipalities will face greater challenges in maintaining the expected level of service that is presently being augmented by our current volunteer base.</p>
<p><b>The new volunteer</b></p> <ul style="list-style-type: none"> <li>• More young people volunteer to gain work related skills.</li> <li>• More seniors who travel or have multiple activities have less time available for volunteering.</li> <li>• More new Canadians volunteer to develop work experience and to practice language skills.</li> <li>• More persons with disabilities view volunteering as a meaningful way to participate in community life.</li> </ul>	<p>Seniors have traditionally been an excellent volunteer resource. Although demographics would suggest that this trend will continue, new retirees, often in excellent health and with financial resources, do not necessarily want to be tied down to traditional volunteer roles.</p>
<p><b>Volunteer job design</b></p> <p>Volunteer job design can be the best defence for changing demographics and fluctuations in funding.</p>	<p>Municipalities without a volunteer management program are recruiting volunteers with little screening, no job descriptions and little follow-up.</p>
<p><b>Mandatory volunteering</b></p> <p>Mandatory volunteer programs through Workfare, Community Service Order and school mandated community work have created a new category of volunteers sometimes called “voluntolds.”</p>	<p>High school students are required to complete 40 hours of volunteering prior to graduating from Grade 12. This opportunity has also provided challenges to municipal staff that are overwhelmed by applications from these students. Without staff resources and a volunteer management program, many students have been asked to look elsewhere for their volunteer obligation.</p>
<p><b>Volunteering by contract</b></p> <p>The changing volunteer environment is redefining volunteer commitment as a negotiated and mutually beneficial arrangement rather than a one-way sacrifice of time by the volunteer.</p>	<p>Potential volunteers now have clear expectations of how they want to spend their time volunteering. With the number one barrier to volunteering being a lack of time, it is clear that a well-organized volunteer management program is the key to successfully recruiting and maintaining volunteers.</p>

*continued*



Trend	Impact on municipal support of volunteerism
<p><b>Risk management</b></p> <p>Considered part of the process of job design for volunteers, risk management ensures the organization can place the right volunteer in the appropriate activity.</p>	<p>Municipalities without a formal volunteer management program are vulnerable to potential litigation. City councils must be proactive by approving a volunteer policy that clearly outlines the steps to screening and supervising volunteers.</p>
<p><b>Borrowing best practices</b></p> <p>The voluntary sector has responded to the changing environment by adopting corporate and public sector management practices including:</p> <ul style="list-style-type: none"> <li>• Standards, codes of conduct</li> <li>• Accountability and transparency measures around program administration</li> <li>• Demand for evaluation, outcome and impact measurements</li> </ul>	<p>Many municipalities in Ontario have begun to adopt best practices as identified in the Canadian Code of Volunteer Involvement. A manager of volunteers who has both the appropriate skills and qualifications to implement a volunteer program can oversee the implementation of these best practices.</p>
<p><b>Professional volunteer management</b></p> <p>Managers of volunteer resources are working toward establishing an equal footing with other professionals in the voluntary sector.</p>	<p>Not only should municipalities designate a manager of volunteers, they should be cognizant of the stature this position is given within the municipality. The responsibility and remuneration should be on par with a similar staff person in the human resources department.</p>
<p><b>Board governance: challenges and contradictions</b></p> <p>Volunteer boards must respond to the challenge of acting as both supervisors and strategic planners.</p>	<p>Municipalities will be looked upon to provide training in these complex areas.</p>
<p><b>Volunteer development</b></p> <p>Volunteer development is a pro-active response to the declining numbers of volunteers. By offering opportunities for training and growth, managers of volunteer resources can recruit and engage potential volunteers while retaining current participants.</p>	<p>The development of volunteers within your municipality should be outlined in your volunteer policy and individual volunteer job descriptions. Your strategic direction in terms of retaining and developing the volunteer program will enhance your volunteer program.</p>



## Other trends

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The past few years have identified other trends that have already started to affect volunteerism:

*International, national and local disasters* – In the past few years we have been deluged with news of disasters. Hurricanes, floods, earthquakes, and war have created greater demand for financial support and offer new opportunities for volunteers.

*Pandemics* – a potential pandemic predicted by many to occur in our lifetime, if not the near future, will put further demands on our volunteer and financial resources.

*Donor fatigue* – how often do you receive requests from worthwhile causes? People have to carefully choose which causes they can support. The same is true with volunteerism – this goes back to the trend “much comes from a few” – are we “burning out” many of our best volunteers?

## Imagine... your town without volunteers

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You might be thinking at this point that there are some relevant points being made to have a more organized approach to managing the volunteers in your municipality. But, surely there is no rush! Things might not be perfect, but they are certainly going along quite satisfactorily. You rely on many volunteers and your city council always praises volunteers when they attend an event planned by volunteers. You might even have an annual appreciation event. Does it really matter that volunteers aren't screened; that there are no volunteer policies; that there are no job descriptions? After all, it is a lot of work and your city council won't allocate additional funds to hire a manager of volunteers.

Would you be more concerned if one of the following headlines not only made your local paper, but the *Globe and Mail*:

- ◆ *Volunteer hockey coach charged with sexually assaulting a ten year old hockey player*
- ◆ *Volunteer friendly visitor, with prior convictions for theft, steals a local senior's life savings*
- ◆ *Special event volunteer fails to perform safety check on neighbourhood carnival ride resulting in participant losing their hand*

Your municipality faces litigation and realizes that their liability insurance does not cover volunteers affiliated with the municipality. You have no volunteer

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“The language of citizenship suggests that self-interests are always embedded in communities of action and that in serving neighbours one also serves oneself.”

**Benjamin R. Barber**

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policy and do not screen potential volunteers. Volunteers are not given training and are left to work on their own once they are accepted as a volunteer.

The press and litigation results in the **entire volunteer complement going on strike** until a formal volunteer management program is developed. City council is convinced that this action will have little affect on the quality of life of their citizens.

**This is what happens:**

1. All volunteers on the city advisory committees and local statutory boards committees resign.
2. All volunteers affiliated with the community services department leave, affecting recreation, arts and culture, sports, special events, children's programming, neighbourhood associations, and seniors programming, resulting in:
  - Cancellation of all minor sports programs
  - Fewer programs at local YMCA and YWCAs
  - Local special events, parades and celebrations end
  - Cancellation of little theatre
  - Cancellation of summer playground programs
  - Neighbourhood associations are dissolved
  - Senior centres are closed
  - Museums and heritage centres close
3. Parent teacher associations are dissolved – no fundraising for special programs
4. One on one and mentoring programs no longer exist
5. Social services programs cancel many programs
6. Community Foundations and United Ways fail to meet fundraising goals
7. Churches and other faith communities cancel children's programs and outreach
8. Service clubs would cease to exist
9. Multi-cultural associations end support to new Canadians
10. Political parties lose committed volunteers
11. Leisure buddies and volunteer attendants are no longer able to assist individuals with special needs who would like to access the services of the municipality

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“Volunteers polish up the rough spots in our communities”

**Jefferson Award  
Winner  
Alice Sandstrom**

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Volunteers are integral to the very fibre of our society and without them we lose the essence that makes each municipality unique. It is so easy to take volunteers for granted. Most volunteers take on their roles out of a true sense of community and they ask for no money nor praise for the work they do. They do their tasks selflessly and their reward is knowing that they have made their community a better place to live.

Nan Hawthorne takes an innovative approach to imagining a world without volunteers in her article *The Impact of Volunteerism: No Small Thing* (<http://charitychannel.com/publish/templates/?a=7090&z=24>).

In order to keep volunteerism alive in your community, your municipality needs to enhance their resources to support volunteerism and acknowledge the work of the volunteers. To be considered a “volunteer friendly” community, you need to create a plan to bring increase support to your volunteers.



## Section C – A plan of action!

◆ ARE YOU READY TO DEVELOP A PLAN OF ACTION to increase the level of support to the volunteers in your community? If you answered yes, this section of the Municipal Toolkit will outline a plan that you can use as a template for your own community. This plan will guide you through the following steps:

1. Rating your municipality – is your municipality “volunteer friendly”?
2. Striking a Volunteer Advisory Committee – this first step is critical to ensure volunteer, staff and public input is the basis for your plan
3. Creating a vision and goals for your volunteer management program – change does not happen overnight – where do you see your municipality in 3 – 5 years?
4. Developing a critical path – Prioritizing your plan of action into a logical series of steps.
5. Developing a budget– it is important to create a realistic budget that can be phased in over several years.
6. Writing a volunteer policy – City councils need a well thought out, well written policy for volunteer management that incorporates the first five steps.

### **Step 1 - Rating your municipality**

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The OCVI Municipal Scan (December 2004) not only identified the need for municipal support for volunteer programs, but also the areas that are critical for municipal support. The responses to the questions on barriers and gaps consistently showed three priority areas where “the municipality could better support volunteer engagement with municipal volunteers and not for profit organizations:”

- ✓ Financial and in-kind resources
- ✓ Acknowledgement and support (non monetary) by your city council
- ✓ Lack of staff resources, e.g. no dedicated manager of volunteer services

Other areas that were noted were lack of the following: marketing tools, training for volunteers, insurance for volunteer organizations, transportation, and recognition or appreciation strategies for volunteers.

It is important for you to have a clear understanding of the strengths and weaknesses of your municipality in order for you to prioritize you plan of action.

Begin by rating your municipality in this Municipal Checklist:



## Engagement of Volunteers Municipal Checklist

Using the following chart, rate the current situation of your municipality. Mark each area using the following:  
 Currently provided – 1 mark; provided to some extent – 2 marks; No work in this area – 3 marks

Criteria	Currently provided - 1	Provided to some extent - 2	No work in this area - 3	Priority – add your results
Acknowledgement of volunteers in municipal strategic plan, vision or mission				
Volunteer audit on current program				
Approved volunteer policy				
Approved Canadian Code of Volunteer Involvement				
Approved budget for municipal volunteer program				
Approved risk management plan, i.e. Safe Steps				
Volunteer Advisory Committee				
Designated staff to manage the volunteer program, e.g. mgr. of volunteer services				
Insurance for volunteers				
Financial or in-kind assistance to local volunteer centre				
Reduced rates on facilities for volunteer groups				
Free or reduced police checks for volunteers				
Appreciation event				
Recognition of the work of volunteers (other than appreciation event)				
Training for volunteers				
Annual marketing strategy				

Areas marked “3” should become your priority areas when developing your plan.



## Step 2: Volunteer Advisory Committee

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A Volunteer Advisory Committee should be your first step in developing a plan of action to increase support for your volunteers. Striking a Volunteer Advisory Committee will bring together other champions of your municipality's volunteers. You may have felt alone regarding your concerns for the volunteer program. If you are working in a small or rural municipality, you may be the only clearly identifiable person working with volunteers. Even in larger municipalities, with more staff working with volunteers, there may be a lack of coordination and dialogue regarding the needs of your volunteers. In either case, it is essential to bring together others to communicate and develop a strategy.

Municipalities that currently have a Volunteer Advisory Committee report that the committee has membership from staff, volunteers, participants, community leaders and often a member of city council. It is important to hand pick the committee members. What skills do you want them to bring to the table? What influence might they have with particular sectors that you may want to bring on board? In what areas have they shown interest or leadership in regards to the volunteers in your community?

A Volunteer Advisory Committee could be structured as an ad-hoc or a standing committee. Be sure to develop a "draft" Terms of Reference for the committee that you can present to people when you approach potential members for the committee. The Terms of Reference can be discussed, revised and adopted when the group first meets. Be sure to identify the following in your Terms of Reference:

- ✓ Name of committee
- ✓ Purpose of the committee
- ✓ Membership
- ✓ Appointment/selection process
- ✓ Decision making process
- ✓ Meeting schedule
- ✓ Reporting structure
- ✓ Support/Budget for the committee

Be very clear on the purpose of the committee. You might need the committee to give you support, advise on the structure of the volunteer program and to advocate on behalf of the municipal volunteers. Depending on your particular situation, you may want the committee to meet fairly regularly at the beginning, e.g. monthly and then less frequently as you work through the planning stages, e.g. quarterly. This should be discussed at the initial meeting of the committee.

*Note: A template for a Terms of Reference for a Volunteer Advisory Committee can be found at the end of this section.*

**Note:** If you know someone on city council that is a supporter of volunteers or has a personal background in volunteering in your community, this would be an excellent opportunity to involve them in the process.





### Step 3 – Creating a vision and goals for your program

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Where do you see your municipality in the next 3 – 5 years in terms of support for the volunteer program? You need to paint a picture of your most preferred future – vision your municipality as a champion of volunteers. What would make your city “volunteer friendly”?

Before getting into the details of what this would look like – take some time to just dream. Think of a catch phrase that your municipality could rally around – think of a phrase, picture or some other technique that would draw people together regarding volunteers. What works for your city? Because visioning is done at the beginning of your planning, it becomes a tool for bringing your community together and building enthusiasm for the process. It also sets the stage for planning and provides a common framework that you can use as your work through the steps in this toolkit.

#### Where are you now?

Before developing a vision, it is important to consider where you are now. Take a good look at the Municipal Checklist in Step 1. How did you prioritize the areas that you wanted to change? What are your shared values in terms of the volunteer program? (Values are the fundamental principles and beliefs that guide a community-driven planning process.) Why do you think it is important for your municipality to support the work of volunteers?

#### Principles of visioning:

If people create the vision, they will own it and the implementation of the vision will happen more quickly

- ◆ The process of developing the vision is as important as its outcome
- ◆ Visions are best stated in the language of the key stakeholders

#### Where are you going?

An internal and external scan is a good technique to set the stage for the visioning process. You will want to have a good understanding of the status of your current program and the capacity to handle additional resources.

Internal scan – some areas that should be considered:

- ✓ Staff dealing with volunteers
- ✓ Management – staffing flow chart
- ✓ Budget – consider where non-designated funds are being used to assist the volunteer program
- ✓ Equipment
- ✓ Customer service
- ✓ Image/culture
- ✓ Physical location of volunteers

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“Nothing happens  
without first  
a dream.”

**Carl Sandburg**

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External scan – some areas that should be considered:

- ✓ Statements about volunteers that are in the municipality's vision or strategic plan
- ✓ Volunteer advisory committees of city council – check with clerk's department
- ✓ Demographics in your municipality – check with your planning department
- ✓ Transportation issues
- ✓ Competition
- ✓ Private companies – do they support volunteerism
- ✓ Political climate
- ✓ Union issues toward volunteerism

One technique that is often used in strategic planning is the S.W.O.T. analysis. This process looks at the Strengths, Weaknesses, Opportunities, and Threats that face your municipality.

Another strategy that you should use is **The Volunteer Management Audit: Canadian Code for Volunteer Involvement** ([www.volunteer.ca/volunteer/pdf/ManagementAuditEng.pdf](http://www.volunteer.ca/volunteer/pdf/ManagementAuditEng.pdf)). It has been developed as a tool for non-profit and charitable organizations to assess their volunteer resources program. This audit tool is composed of seven sections that 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. The tool is published by Volunteer Canada.

### **Where do we want to be?**

Without looking at barriers or problems, this is the time to expand one's sense of possibilities and focus on new initiatives that can lead to success. This is where you bring people together around a common dream.

The visioning session is often facilitated in a workshop format and can include people on your Volunteer Advisory Committee as well as additional staff, volunteers, and participants that would have an interest in the volunteer program in your municipality.

#### **Tools for visioning:**

- Imagery
- Story Telling
- Symbols
- Physical Challenge



### How do we get there?

You now need to formulate your goals and objectives around the work you have done with the municipal audit and the visioning strategy. You now have your vision of where you would like to be in three to five years, but you now need goals to help you achieve this vision. Goals establish the direction for your on-going activities and help to identify expected results. To achieve the best possible results you need to make SMART goals:

- S**pecific
- M**easurable
- A**ction-oriented
- R**ealistic
- T**ime and resource constrained

#### Poor example of a goal:

- ◆ To have more money for our volunteer program

#### SMART Goal:

- ◆ To add an expenditure line in our municipal budget for the volunteer program equal to \$10 per volunteer that is assisting with municipal programs, phased in over the next three years beginning in 2006. This amount will be allocated for recruitment, screening, and appreciation.

To assist you in monitoring your goals, a template for an Action Plan can be found in Step 4.

### Step 4 – Critical Path/Action Plan

Once you have completed the municipal checklist on engagement of volunteers and have finalized your vision statement and goals, it is helpful to develop a critical path/action plan to serve as a roadmap to get to your destination – your vision.

The critical path includes the issues that you have identified as needing a response from the municipality, your goal for each area, the time frame for completion, the person responsible and an area for comments on the goal.

#### Municipal Volunteerism Toolkit Critical Path

Issue	Goal	Date	Person Responsible	Comments



## Step 5 – Developing a budget

The Volunteer Advisory Committee should spend time developing a budget that will support the vision. The budget should take into consideration the current allocation for volunteer expenditures and include a final budget that will allow you to meet your vision in 3 – 5 years.

Often the money spent on the volunteer program is included in other expenditure lines within various program areas. It is important to flush this out and get a baseline budget for the current year.

In terms of developing a budget, you should consider both initial expenses that are often of a capital or one time nature as well as on-going expenses.

The following indicates some areas that you may be considering in developing a budget:

Area	Operating expenditures	Capital (one-time) expenditures
Staffing	Manager of volunteer services Benefits / Travel / Other	
Volunteer management software	Annual fees	One-time purchase
Office	Office supplies Photocopying, including forms, certificates, invitations, other Postage	One-time office expenditure, including desk, phone, computer, etc.
Volunteer program promotion		One-time displays for promoting volunteerism at malls, schools, etc., power point presentations
Volunteer screening	Police Record Checks	
Volunteer training	Speakers, handbooks	
Volunteer recognition/ appreciation	Food, entertainment, gifts, pins, etc.	
Enabling funds	Travel, babysitting, mileage, etc.	
Insurance	Liability insurance (may be included in overall city budget)	
Professional development	Conferences, memberships	Resource material for both staff and volunteers



### **Manager of Volunteer Services**

Perhaps the most critical element for successfully implementing a safe, well-managed volunteer program is the hiring of a manager of volunteer services. This is well documented and there is an array of resource material that can build your case for the hiring of a manager of volunteer services. Create a job description for your position. This is the first step in determining the salary level of the manager of volunteer services. When the position is rated, stress that this position works with “unpaid staff” and should be evaluated on this basis. Meet with staff in your human resources department and determine if this is a union or non-union position. This position could easily be housed within the human resources department, but in many municipalities it falls under the community services, clerks, administration departments.

A template to develop a job description can be found at the end of this section. If you are considering revising current position descriptions to specify duties that relate to volunteers in your municipality, you will be able to use the template to begin these revisions and put a greater emphasis on the management of volunteers.

### **Charity Channel**

(<http://charitychannel.com/publish/templates/?a=2083&z=0>)

Nan Hawthorne, a regular contributor to Charity Channel has written an excellent article that helps to make a case to hire a manager of volunteer services.

*Note: A sample of a manager of volunteer services job position can be found at the end of this section.*

### **Volunteer Management Software**

If your municipality does not already have some type of software to assist with managing your records, this is a worthwhile investment. The software program that you choose should have sufficient reporting capabilities as well as functions to merge data to create correspondence and statistics.

Some volunteer software resources include:

**Volunteer Squared** ([www.volunteer2.com/ca/index.html](http://www.volunteer2.com/ca/index.html))

**Volunteer Works** ([www.redridge.com](http://www.redridge.com))

**The Razors Edge** ([www.razors-edge.biz/volunteer-management.htm](http://www.razors-edge.biz/volunteer-management.htm))

**CIOC – Volunteer Community Information Online Consortium**  
(<http://www.cioc.ca/index.asp>)

This toolkit does not recommend these programs specifically for your community. Each software program should be investigated for its use within your municipality as well as for cost-benefit.



## **Volunteer Office**

A manager of volunteer services often works in many locations within the municipality. Consider the best location for your program. Should the office be located in “city hall”? Should it be located in a community centre? There are pros and cons to each situation and your decision should take into consideration the following factors:

- ◆ What access do you want the manager of volunteer services to have with senior management?
- ◆ Will volunteers (and applicants) feel comfortable in the setting that is chosen?
- ◆ What responsibilities will the manager of volunteer services have and what responsibilities will staff in community centres have in terms of management, i.e. who will take the primary role of interviewing?

## **Volunteer Program Promotion**

Your municipality should be promoting the various volunteer opportunities on a regular basis. Many volunteers are requesting more challenging roles requiring specific skill sets. As you promote your volunteer positions you need to be clear on to whom you are marketing your positions and the various reasons why people want to volunteer.

There will be opportunities to have displays at volunteer fairs and you will be competing with many other non-profit organizations. A display that is professionally done reflects the attitude of your municipality on the importance of volunteers. Look at the displays that your economic development department has developed and see if you can use the same selling points to win volunteers. You have a great opportunity to showcase your volunteer program on your municipality’s website. This is an excellent to promote the values and vision that has been adopted by your municipality.

## **Volunteer Screening**

One issue that materialized during the Municipal Scan was the difference in financial support for police checks. Most municipalities now have routine police checks for volunteers based on their work with vulnerable populations. Most rural communities offer free police checks through the O.P.P. while many urban municipalities have the volunteers pay for their police checks. There are some municipalities that reimburse or pay for police checks. If your municipality pays for police checks, this item should be identified and included in your budget.



### **Volunteer Training**

Volunteer training is often included in general program expenses. More progressive municipalities have included an expenditure line for quarterly or annual training sessions. Expense items that should be considered in this area are facility costs, refreshments and speakers.

### **Volunteer Recognition/Appreciation**

According to the Municipal Scan, most communities in Ontario have some type of volunteer recognition and/or appreciation events. Costs in this expenditure line are associated with gifts or certificates/awards, facility costs, refreshments and entertainment.

### **Enabling funds**

Some municipalities provide support for volunteers to enable them to do their volunteer work. Some volunteers, for example, stay at home moms, seniors, etc., might have the time, but not the financial resources to do a volunteer position. Costs to include in this area may include babysitting costs, mileage, and bus fare.

### **Insurance**

Given the issues in today's society with litigation and liability issues, every municipality should have volunteers identified on their liability insurance. You should ask your insurer about the scope and extent of your current coverage. Most municipalities have community groups that are affiliated with the municipality, e.g. neighbourhood associations, special event committee, youth groups, that should be covered for liability through an affiliation policy. Due to the presumed relationship with the municipality, a legal opinion would determine the extent of liability for your municipality.

Many municipalities have organized information sessions with volunteers to explain the insurance coverage for the volunteer program. This information should also be included in the volunteer orientation package.

### **Professional Development**

This area has ramifications for both one-time and operating budgets. Every municipality should have a resource library that can be used by both staff working with volunteers and the volunteers.

Money should be allocated on an annual basis for conferences for the Manager of volunteer services.

**Two annual conferences that you might consider adding to the budget:**

**CAVR** ([www.cavro.org](http://www.cavro.org))  
Canadian  
Administrators of  
Volunteer Resources

**PAVR-O**  
([www.pavro.on.ca](http://www.pavro.on.ca))  
Professional  
Administrators of  
Volunteer Resources  
– Ontario



### **Phasing-in your budget requests**

In Step 1 you developed a vision for your volunteer program – what you would like your volunteer program to look like in the next three to five years. Your budget should be developed using the same strategy. What budget would you need in three to five years? Once you have determined the budget based on your vision, you need to strategically phase it in over the next few years. One example is the volunteer staff position. If you require a full time manager of volunteer services, you might phase it in over three years. The first year might be 20 hours a week, second year would move to 25 hours a week, and then finally full time. This is a key area to discuss with your Volunteer Advisory Committee, your representative from city council and your finance contact and your supervisor.

The phasing-in can be done in all aspects of your budget and based on the priority areas you outlined in the Municipal Checklist in Step 1.

## **Step 6 – Writing a Volunteer Policy**

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It was reported in the Municipal Scan (2004) that only 12.3% of respondents are in municipalities that have a Volunteer Policy adopted by City Council. The respondents felt that approval of a Volunteer Policy speaks to the support and acknowledgement by City Council and senior management for the work done by volunteers.

Adoption of a Volunteer Policy should be one of the priority items as you and your Volunteer Advisory Committee work through your Critical Path. A Volunteer Policy will become the foundation for your volunteer program.

The Municipal Scan (2004) showed interesting discrepancies:

- ◆ 59.3% of respondents indicated that their municipality has a Volunteer Appreciation Event and 33.3% of municipalities have a recognition program.
- ◆ 83.1% of respondents indicated that their municipality provides free meeting space.
- ◆ 52% of respondents indicated that their municipality provides annual operating grants to not for profit organizations.

**Note:** One caution is not to copy or reproduce policies from other municipalities. Working through the process, although sometimes lengthy, will give you ownership of the policy.

While there are programs and resources dedicated to volunteer programs, there is a definitive lack of a policy to clarify the scope and nature of the Council's support. It appears that most municipalities that lack a Volunteer Policy are operating on past practices and have not pursued the development of a policy.





### **a. Who should write the policy?**

Municipal policies are authored by staff and are often initiated because of issues or concerns that have arisen in a particular area. The Municipal Scan (2004) can certainly serve as a catalyst for your municipality to write and approve a Volunteer Policy. As a Champion for volunteers you would be the logical person to author a Volunteer Policy. The Volunteer Policy should be one of the primary areas of discussion at your Volunteer Advisory Committee meetings. You may want to strike an Ad-hoc sub-committee to work with you in the development of the policy.

### **b. Structure of a Volunteer Policy**

There are many ways to format a Volunteer Policy and you should review other policies in your municipality to determine the proper format and specific expectations of your department or Clerk's Department. Reports to City Council are typically brief, but can include items in appendices that support your recommendations. Either within your report or during the presentation of the report, you will want to praise council on the areas where they have been shown as supporters of the volunteer program.

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**Note:** Check out your own municipal strategic plan and note areas where volunteers are mentioned. These statements can be worked into your own report and policy.

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For example, the City of Ottawa includes the following sections in their Volunteer Policy:

- ◆ Definition of volunteers
- ◆ Principles of volunteer involvement – rights & responsibilities
- ◆ Prevention of harm – covers position description, screening, intake process
- ◆ Reduction of liability – application forms, criminal code, protection of privacy, human rights code
- ◆ Protection of volunteers/clients/staff – orientation & training, supervision, recognition, volunteer departure, discipline
- ◆ Protocols for volunteer involvement – code of conduct, dress code, reimbursement of expenses, reporting factions

**Note:** It is important to work with your supervisor and/or department head throughout this process.

It is your department head that will be the visible advocate for the policy. One of your first tasks may be to convince he or she of the importance of having this policy.

Volunteer Canada is an excellent resource and has written many documents that can be incorporated into your own policies:

**Canadian Code for Volunteer Involvement**

([www.volunteer.ca/volcan/eng/content/can-code/can-code.php?display=3,0,1](http://www.volunteer.ca/volcan/eng/content/can-code/can-code.php?display=3,0,1))

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.

**Safe Steps: A Volunteer Screening Process**

([www.volunteer.ca/volunteer/pdf/SafeSteps.pdf](http://www.volunteer.ca/volunteer/pdf/SafeSteps.pdf))

This workbook has been developed specifically for individuals in recreation and sport organizations who are in charge of setting policy or are directly involved with the screening process. This is a hands-on, practical guide for organizations that want to proceed from the theory of screening to its practical application.

**Rural Supplement - Safe Steps Volunteer Screening Workbook**

([www.volunteer.ca/volunteer/pdf/FinalRuralEng.pdf](http://www.volunteer.ca/volunteer/pdf/FinalRuralEng.pdf))

This resource has been developed to address the need for screening and the challenges inherent in providing screening in rural communities. The Rural Supplement reviews the Safe Steps and offers examples to help organizations with the process of screening.

**The Ontario Screening Initiative (OSI)**

([www.volunteer.ca/volcan/eng/content/screening/ontario-init.php](http://www.volunteer.ca/volcan/eng/content/screening/ontario-init.php))

The Ontario Screening Initiative (OSI) was an innovative and intensive three-year pilot project, designed to change organizational attitudes and behaviours regarding screening. The project, founded on a voluntary sector-government partnership, operated from Spring 1999 to Summer 2002 to help voluntary sector organizations reduce risk of harm to their clients by screening individuals in positions of trust.

The overall goal of the Ontario Screening Initiative (OSI) was to make Ontario's communities safer by helping voluntary organizations adopt screening practices and policies, which will protect the children and other vulnerable people that their programs serve.

A proposed plan for the next phase of the Ontario Screening Initiative has been developed. This next phase is designed to broaden the program's reach by engaging Ontario's diverse communities and to work with current screening partners to expand the program's grassroots impact.



### **Presentation of the Volunteer Policy**

You may work for several months or more to develop your Volunteer Policy. When it is time to bring your report forward, do not miss this opportunity to present it in front of City Council. Involve your Volunteer Advisory Committee in the presentation, develop a professional looking Power Point presentation, and present your City Council with a souvenir of the evening, perhaps a volunteer pin or other memento.

#### **Some sections to include in your report to City Council:**

**Background** – including summaries of the Volunteer Management Audit, demographics, and trends in your municipality or Region.

**Analysis of data** – what critical issues have emerged from the analysis of data and background information, i.e. concerns about screening procedures, lack of control of the program.

**Stakeholders** – members of Volunteer Advisory Board, staff and community input.

**Recommendations** – including policy direction, i.e. approval of Canadian Code for Volunteer Involvement, Safe Steps for Screening, staffing, budget, ongoing status of Volunteer Advisory Committee.



## Volunteer Advisory Committee Terms of Reference

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**Municipality** \_\_\_\_\_

### **Purpose of the committee**

- ◆ Statement on advising on policy
- ◆ Statement on bringing their perspective on volunteer issues
- ◆ Statement on city budget submission/city plan
- ◆ Statement on developing a strategic direction regarding volunteers
- ◆ Statement on relationship with other levels of government and other agencies that deal with volunteer issues, i.e. Volunteer Centre
- ◆ Statement on ability to make recommendations to city council and senior staff

### **Membership**

- ◆ Number of members – either a range or maximum number of members
- ◆ Specify membership from particular interest groups, city staff, city councilors
- ◆ Specify membership from general public

### **Appointment and/or selection process**

- ◆ Specify the process for the selection/appointment of committee members
- ◆ Determine what the application process will be, i.e. application form, reference letters, etc.
- ◆ Specify term of membership

### **Decision making process**

- ◆ Statement on quorum
- ◆ Statement on method for making decisions, i.e. vote, consensus, etc.

### **Meeting schedule**

- ◆ Specify if the committee is a standing committee or ad-hoc
- ◆ Specify if the group meets on a regular basis, i.e. monthly, bi-monthly, etc.

### **Reporting Structure**

- ◆ Specify how the committee reports to city council
- ◆ Specify how minutes are circulated
- ◆ Specify if there is an annual reporting mechanism, i.e. to city council, to the community

### **Support and budget**

- ◆ Specify what administrative support the committee will have
- ◆ Specify if there is a budget for meetings, out of pocket expenses, etc.



**Municipality** \_\_\_\_\_

Job title:         Manager of Volunteer Services  
                       Co-ordinator of Volunteers  
                       Other \_\_\_\_\_

Reports to: \_\_\_\_\_ Department: \_\_\_\_\_

**Job summary:**

A brief overview of scope of responsibility and leadership for volunteer services

- ◆ May want to describe scope of position in terms of impact.
- ◆ What is the extent of your influence with other city departments

**Duties and Responsibilities:**

1. Statement regarding leadership to others
2. Statement regarding policy development, implementation, reporting
3. Statement regarding training, consultation; indicating to whom
4. Statement regarding development of tools for screening, supervision, monitoring
5. Statement regarding promotion
6. Statement regarding Volunteer Advisory Council
7. Statement regarding communication with other departments, etc. – how far reaching is your role
8. Statement regarding budget development, reporting, etc.
9. Statement regarding relationship with other agencies, volunteer centre, provincial groups, etc.
10. Statement regarding communication with media, politicians, etc.
11. Statement regarding volunteers that you directly/indirectly supervise
12. Statement regarding record keeping, data collection, etc.
13. Other

**Qualifications:**

1. Education – basic diploma/degree, plus volunteer management course/diploma
2. Experience - # of years with voluntary sector; # of years as management
3. Certificate – what level of certificate in Management of Volunteer Resources
4. Police check
5. Others

**Knowledge:**

1. Pertinent legislation
2. Current standards, i.e. Occupational Health and Safety, Employment Standard, others?
3. Others



## Section D - Advocating for your volunteer program

◆ THROUGHOUT THIS TOOLKIT there has been mention of the political process and how you need a strategy for moving your new policy and request for additional resources through the political system. It may be that a lack of understanding of the political process has been one of the primary reasons for not pursuing additional support for your volunteer program.

Working in a political environment, you may have noticed that there have been occasions when politicians and senior managers made decisions that are contrary to the technical information provided by staff. There may be occasions when decisions have been made for political rather than for logical, fact based reasons. This has been described as choosing the “politically correct” decision, rather than the “technically correct” decision. Your goal is to make it easy for the politicians to choose both the technical and politically correct decision.

Municipal city councils in Ontario are elected for a three-year term. Municipal councilors do not belong to political parties and bear no party platform. Their platform is developed through the course of the municipal campaign, or for an incumbent through their voting record at city council. Municipal politicians promote their various “pet” issues and look for new issues that they can rally around.

How do you gain political support for your volunteer program?

### **Making the case for volunteer resources to council and senior management**

First, the good news: it’s a case that can easily be made to rational leaders! It makes good sense to initiate the discussion with your senior manager or department head. Essentially, they will want to know “what’s in it for the department?” Given the competition for scarce resources at the municipal level, this is a very legitimate question. So, what’s the answer?

One key strategy will be to demonstrate the economic value to your department. You must be able to demonstrate value for the dollar. For example,

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“The ultimate expression of generosity is not in giving of what you have, but in giving of who you are.”

**Johnnetta B. Cole**

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identifying a community need for a program not currently available, which could be offered through volunteers at a very reasonable cost, versus directly run by municipal staff, at a much more significant cost. Demonstrating the value of volunteers to your department head will be critical for getting more resources for volunteer initiatives.

Now that the “boss” is on board, the next step involves rallying the community to support your goal. One effective strategy is to establish a Volunteer Advisory Committee (see Section C). It is essential that candidates for such a committee offer two things: the skill set required to be effective and, the ability to represent key players/organizations concerned about volunteerism in your community. It would be important for example, to have other recognized groups represented on your committee, such as a neighborhood association representative, a United Way representative, or perhaps representatives from the YMCA/YWCA. A sound cross-section of committee members will bring credibility to your advisory group.

Finally, the political bosses must see the benefits of volunteerism, not only to the community, but also in terms of the political benefits. You should ask your senior management mentor to suggest a member of city council who would be willing to sit on your Volunteer Advisory Committee. Ask your senior management leader to help you recruit the political representative. Again the question becomes, what’s in it for me?

If you are able to identify a community need for a program that the elected official supports, you can again argue that economically volunteers can fill that need. You can further sell the merits of the program by demonstrating to the elected official how they can be seen as the leader to promote the program to city council and to be seen as the community “champion” in meeting this need.

The results of the National Survey of Nonprofit and Voluntary Organizations (NSNVO), and the Satellite Account of Nonprofit Institutions and Volunteering reveal just how large, wide-ranging and important the sector is in Canada, as well as some implications for those who work to promote and enable volunteerism.

Volunteer Canada has developed a 1.5 hour **PowerPoint training session** (<http://www.volunteer.ca/volcan/eng/content/vol-management/resources.php?display=3,0,3#rethink>) as a tool to initiate discussion within your organization and among voluntary sector agents in your community. The training session explores key NSNVO results, as well as some important trends and their impact on volunteerism and volunteer involvement.

This resource would be a good starting point to bring your senior management and councillors up to date on the importance of supporting volunteerism.

**Elected officials** see the benefit in solving community needs and you can reward them by marketing them as the “leader” behind the program.

Once programs are up and running, find occasions to report back to city council on the successes of the program, and take these opportunities to thank city council publicly for their leadership in supporting such activities.



## **Timing is everything**

There are two issues to consider in terms of timing:

### **1. What is the current priority for resources?**

There are usually one of two reasons why you are feeling the need to bring your concerns to the forefront: you have further information that exacerbates your concerns about the lack of resources; and/or you are beginning a new program that puts your municipality at greater risk.

Volunteer Canada has done an excellent job, not just of promoting volunteerism, but also of promoting the need for a structured volunteer program. More research has been published that shows the duty of care that organizations need to take in working with volunteers. Volunteerism has made a huge leap forward in the past decade as volunteers take on more complex roles involving a specific set of skills and qualifications.

The second reason that this has become a critical issue is the municipal role in many social programs that promote volunteers working with vulnerable populations, eg. seniors, special needs and young children. There is no question that this puts staff as well as city council at greater risk, and liable for any wrongdoings of volunteers that have been put in a position of trust.

### **2. When is the best time to bring this forward?**

You may consider the following times to seek support for additional resources:

- a. At the budget meetings preceding an election year
- b. At a time when there is a demonstrated need backed by one or more community groups
- c. When you find a political champion with a volunteer related agenda

The next municipal election years are 2006, 2009, and 2012. These are key windows of opportunity to begin setting up your Volunteer Advisory Committee and writing the Volunteer Policy. You can always find a politician interested in a cause. The one thing about volunteerism is that almost everyone intrinsically thinks it is wonderful. You need to find that key politician and show them the importance of allocating further resources to the volunteer program.

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*"What lies before us  
and what lies behind  
us are small matters  
compared to what  
lies within us. And  
when we bring what  
is within out into the  
world, miracles  
happen"*

**Henry David Thoreau**

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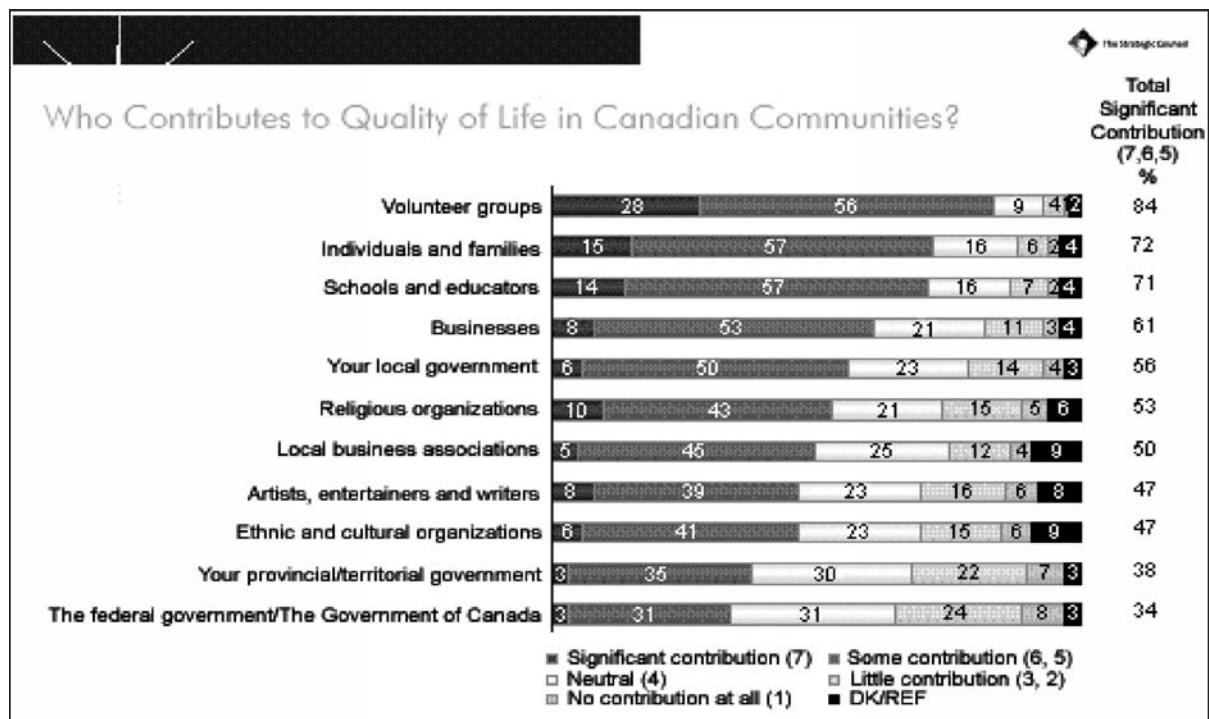


### Link to New Deal

Canada's quality of life depends on strong, vibrant and sustainable cities and communities. With the implementation of the **New Deal for Cities and Communities**, the Government of Canada has taken constructive steps to engage and consult with stakeholders; to continue to promote new partnerships between federal, provincial, and municipal governments; and to start to deliver stable, predictable, long-term funding for cities and communities in urban and rural areas.

The New Deal has been a focal point for research on infrastructure and communities. An excerpt from one survey, "National Overview of Findings from a National Survey on the Quality of Life in Canadian Communities," prepared for Infrastructure Canada by The Strategic Counsel and published in December, 2005, is below:

### Assessments of Quality of Life – Key Contributors to Quality of Community Life



Volunteer groups are viewed as making the most significant contribution to Canadians' quality of life in their communities, far beyond the perceived contribution of the individuals and families residing within a community. This finding suggests that Canadians feel the quality of life in their communities can be enhanced through greater personal empowerment and through partnerships with organizations that understand and connect at the grass roots level.



## Key Contributors to Quality of Life: The Perspective Across Age Groups

The Contribution of Government % Saying "some/significant" contribution (5, 6, 7)						
Age	18 - 24	25 - 34	35 - 44	45 - 54	55 - 64	65+
Local Government	61	50	53	55	51	63
Provincial Government	53	46	33	35	33	39

Municipal governments are aware of the New Deal for Cities and Communities, but may be unaware that the research from their own ministry supports volunteerism in your own community. The New Deal is no longer on an Internet site, but your local municipality should have a copy of it.

### Benefits for your city

There are many benefits for municipalities to support a strong, diverse volunteer base. As mentioned earlier Canada has a strong history of volunteerism and it wasn't until after the Second World War that government took over many of the roles traditionally held by volunteers and families. Families and neighbours helped people who had lost their jobs, stay at home moms planned summer playground programs, YMCA/YWCA volunteers kept youth off the streets, to name a few. It has been in the past decade that volunteers have been critical to local governments as cities try to "do more with less".

### Economic value

It may seem overwhelming to try to quantify the economic value that volunteers give to your organization. We often undervalue the work of volunteers, but when faced with the possibility of trying to replace volunteers with paid staff, their benefit becomes very apparent.

Volunteer Canada and Imagine Canada, as part of the International Year of the Volunteer developed this invaluable resource, **Eight Tools for Efficient Program Management** ([http://www.nonprofitscan.ca/files/iyv/goulbourne\\_man\\_english\\_web.pdf](http://www.nonprofitscan.ca/files/iyv/goulbourne_man_english_web.pdf)). This manual will enable you to assign value to various volunteer positions and summarize the dollar value of volunteers to your municipality.

The **Volunteer Value Calculator** (<http://www.kdc-cdc.ca/vvc/eng/default.asp>) is a new, easy-to-use, online tool designed to help you calculate the economic value of the volunteers at your organization. The Volunteer Value Calculator is designed to produce different types of information on the economic value of volunteers. There are eight separate calculations in the Volunteer Value Calculator, categorized into three strategic areas:



- Human resource productivity measures
- Volunteer program efficiency measures
- Community support measures

In December 2005 Stats Canada released the **Satellite Account of Nonprofit Institutions and Volunteering** (<http://www.statcan.ca/bsolc/english/bsolc?catno=13-015-XIE>) that gives further support for the economic benefits of volunteering.

Volunteer Calgary and the City of Calgary collaborated on an initiative this year to recognize the importance of volunteers in the Calgary community. A street in the city has a new name as a result—it's called Volunteer Way. With a citywide active volunteer rate of 56 per cent, Calgarians have a lot to be proud of and designating a locale to honour and celebrate their work is a fitting tribute to their dedication. Calgary's City Council also proclaimed the month of May as Volunteer Calgary Month to increase awareness of volunteerism.

### Social value

The social value of volunteering is as significant as the economic value. People who volunteer not only show an interest, but also a responsibility for their communities. Volunteering is an avenue to bring people from all income levels and ethnic groups together. It is a vehicle to end isolation and allow individuals to become part of the solution for growing social problems. Volunteerism increases the level of skill and allows individuals to gain experience in new areas.

The **National Survey of Giving, Volunteering and Participating** ([www.givingandvolunteering.ca/pdf/factsheets/benefits\\_of\\_volunteering.pdf](http://www.givingandvolunteering.ca/pdf/factsheets/benefits_of_volunteering.pdf)) presents pertinent fact sheets that underscore the benefits and value of promoting volunteerism in your community.

Ginette Johnstone<sup>1</sup> identifies seven areas where volunteers add to the well being of a community that go beyond their altruism and service:

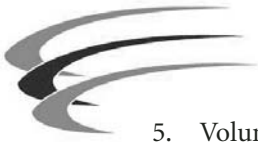
1. Volunteers provide a critical link within the community. Volunteers can be a recipient and participant as well as a volunteer. They offer the unique perspective separate from the operational duties of staff.
2. Volunteers also have a much broader perspective to the decision-making process. They bring experiences and perspectives from other facets of their lives along with new and creative suggestions.
3. Volunteers often have connections to other aspects of the communities. They promote the organization to potential volunteers and may use their community contacts to aid your program
4. Volunteers provide a vast pool of experience, knowledge and expertise to your organization. The skills and experience of volunteers today often complement the current staff resources.

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“Never doubt that a small group of thoughtful citizens can change the world. Indeed, it is the only thing that ever has.”

**Margaret Mead**

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5. Volunteers, both in direct service and at the leadership level, help to keep our organizations accountable. They are separate from the bureaucracy of your organization and can keep the organization true to its mission and goals.
6. Volunteers also keep our organizations current. They are often the change agents in an organization.
7. Volunteers are the essence of the democratic process. At all levels of volunteering, volunteers represent the citizenry of your community.

### **Your legal responsibility**

The day NHL hockey player Sheldon Kennedy testified that his coach, Graham James, sexually abused him hundreds of times when he was a boy, is the day that screening became a reality for many organizations. Kennedy not only settled the score with his coach by agreeing to testify but his admission also signalled the end of the unspoken agreement by many victims to stay silent about abuse.

This story is not limited to sport. The story of Gary Blair Walker haunts many social agencies. Walker admits to having sexually molested over 200 boys over the course of 30 years while he held a variety of positions of trust as a paid worker, and as a volunteer. He was at different times a sport coach, a police officer, a Scout master, a church camp counsellor, a school bus driver and a martial arts instructor.

Organizations that allow people to volunteer are **legally liable** (<http://www.volunteer.ca/volcan/eng/content/screening/background.php?display=3,2,3#>) for the volunteer's actions. This pertains to all municipalities in Ontario. It is important to review the extent of liability as it applies to volunteers that work directly with a municipal program as well as those in programs affiliated with your municipality.

Two important terms that every municipality should be aware of:

#### **Duty of Care**

The concept of duty of care identifies the relationship that exists between two persons (e.g. two individuals, an individual and an organization) and establishes the obligations that one owes the other, in particular the obligation to exercise reasonable care with respect to the interests of the other, including protection from harm. The duty of care arises from the common law, as well as municipal, provincial, federal and international statutes.



## Liability

Liability refers to the duties, obligations or responsibilities imposed on a person by common law or by statute. As it is commonly used, we speak of a person or organization being held legally liable for something, i.e., through a legal action, the individual or organization has been found legally responsible for an action or inaction in a particular set of circumstances and is required to pay damages to someone harmed as a result.

- **Occupiers' Liability:** requires that the person (an individual, an organization) in possession of premises owes a duty of care to those who come on the premises and must take reasonable care to protect them from harm that might come through their programs, on their premises or at the hands of a third party on the premises.
- **Direct Liability:** deals specifically with the issue of fault.
- **Vicarious Liability:** is the liability an organization takes on for the actions of those who function on its behalf.

The **Volunteer Canada** ([www.volunteer.ca](http://www.volunteer.ca)) website provides resources that you can use in developing your policy for screening volunteers. The effort put into safeguarding your volunteer program will pay off ten fold with the knowledge that your volunteers and your municipality are protected from harm and litigation.

1. From: Johnstone, Ginette, *Management of Volunteer Services in Canada: The Text*, Kemptville, Ontario, Johnstone Training and Consultation Inc., 2004.



## Section E - Ontario Success Stories

### ◆ SOME GREAT STORIES:

#### **The County of Elgin**

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The County of Elgin has a number of individual volunteers and volunteer groups that work within its programs and services. These volunteers are a vital part of our community. Back in 2004, they recognized the need to implement a volunteer policy. They have volunteers working in all areas of the county and wanted to put together a standard package for all volunteers to reference no matter what department they were volunteering in.

This process started by selecting certain individuals, within our county structure, to be a part of an Advisory Committee. They selected one member from each area within the county that worked with volunteers. It was very important to have their feedback. There was some concern initially with regards to the criminal checks and the potential difficulty some volunteers may have obtaining them being in a rural community. They understood those concerns but it was imperative to have criminal checks done to limit the liability of the Corporation and to protect the public.

Within 4 months, they County had prepared a Volunteer Policy to take forward to County Council. This policy was supported by Council and approved. Once this policy was approved, our Advisory Committee also put together a standard information package that includes a volunteer application form that could be used for all of our volunteers.

For further information please contact [jobs@elgin-county.on.ca](mailto:jobs@elgin-county.on.ca).

#### **The City of Kitchener**

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Volunteers are an integral and valued part of the City of Kitchener.

In 1998, given the vital role approximately 7,000 volunteers have in planning and delivering both direct and indirect municipal programs and services and the increasingly complex nature of volunteering, the Community Services Department recognized the need for a more coordinated and sophisticated



approach to volunteer management. As a result, 25% of a supervisory position was dedicated to coordinating volunteer management for the whole department. This position was in addition to a full-time Coordinator of Volunteers that was introduced in the 1980s and supported Adults 50+ programs.

In 2000, an operational review of the Community Services Department was conducted. One of the recommendations of this review was to create a section that focused solely on the management of volunteer resources. This recommendation also kept pace with the emerging trend across Canada for municipalities to take a more coordinated and centralized approach to volunteer management.

Since 2001 was International Year of Volunteers (IYV), 50% of this Supervisor's time was devoted to work on initiatives related to International Year of Volunteers and to research and lay the groundwork for the development of the Volunteer Resources section. Administrative Support for this area was also established.

On a local level, a significant outcome of IYV was the City of Kitchener's adoption of 4 values about volunteerism. These values provided guiding principles for the implementation of volunteer programs and future planning. These four values were stated as follows:

**Value #1** – Volunteerism is a fundamental value in a civil society.

**Value #2** – Volunteerism benefits both volunteers and the causes they embrace.

**Value #3** – Dynamic growth in volunteerism is dependent on good volunteer program management.

**Value #4** – Knowledge development is an important element of growing volunteerism.

In mid-2002, a Facilitator for Corporate Volunteer Resources was hired and the role for the Coordinator of Volunteers' roles was broadened to serve the whole corporation. Although Volunteer Resources has a corporate-wide role, it is currently administered through the Community Services Department since the vast majority of volunteers are linked to this department.

The Volunteer Resources Section operates on both a centralized and decentralized basis. In other words, it provides a more centralized and coordinated approach to volunteer management while, at the same time, providing resources and support so that affiliated community groups such as Minor Sports and Neighbourhood Associations as well as city staff can effectively manage volunteers on the front line.



This section is staffed as follows:

One Full-time Facilitator – strategic planning, corporate and community capacity building, staff supervision, budget, policy and procedures development, training, corporate recognition, evaluation, coordinator of informal volunteering, consultation regarding new volunteer program development and other volunteer management related issues

One Full-time Coordinator of Volunteers – primary role is recruitment, screening, and referral of volunteers

0.66 Administrative Secretary – provides administrative support and takes lead role in information dissemination

In 2004, Kitchener City Council approved a Code for Volunteer Involvement. This code was based on the Canadian Code for Volunteer Involvement which was adapted for a municipal setting. This code sets the standards for current and future volunteer involvement across the Corporation of the City of Kitchener.

As well, in 2004, Kitchener City Council acknowledged the value of informal volunteering and municipal programs that encourage it, e.g., litter pick-ups. Several of these programs were consolidated under Volunteer Resources so the name of this section was broadened to “Volunteer Resources & Community Engagement”.

In 2006, a comprehensive audit of the Volunteer Resources & Community Engagement section is planned so that the Corporation can assess and further enhance the effectiveness and efficiency of how it is managing this large, growing, diverse, increasingly complex, valuable, and essential resource.

*“Together, we will build a progressive, vibrant and innovative neighbourhood with safe and thriving neighbourhoods.”*

Kitchener’s Community Vision

For further information about the City of Kitchener volunteer program contact: [joann.hutchison@city.kitchener.on.ca](mailto:joann.hutchison@city.kitchener.on.ca)





## **The City of Ottawa**

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The City of Ottawa has a Volunteer Services Division within the City Clerk's Branch of the municipality's Corporate Services Department. This position is a corporate position and relates to designated staff in all departments of the city whose portfolios include the management of volunteers. Prior to amalgamation of eleven municipalities, this position was most often held within the Parks and Recreation Department, but was elevated to a corporate position to act as the centre of expertise on all matters related to volunteerism. The Volunteer Services division establishes corporate standards of operation and best practices for the internal management of volunteer resources across the department, liaises with affiliated groups and partners, and develops relationships with the volunteer sector in Ottawa.

In 2004, the city recorded involvement of 64,000 volunteers, who contributed 400,000 hours to the City's direct delivery of programs and services that translates to a \$7 million return of cost-effective services.

For further information contact [barb.tiffin@ottawa.ca](mailto:barb.tiffin@ottawa.ca).

## **The City of Cambridge**

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The City of Cambridge approved its first Volunteer Co-ordinator in 1990 as a part-time position responsible for volunteers at three senior centres. Since that time, the position has expanded and currently manages the volunteer program for a division consisting of aquatics, seniors' services, special needs, neighbourhood associations, summer playgrounds and other recreation groups.

When the Seniors Division received funding to implement a Friendly Visiting Program, the new Coordinator of that program expressed concern that the current screening procedures did not include work with vulnerable populations. Following her lead, the Community Services Department staff investigated best practices outlined by Volunteer Canada and completed an Audit of all city programs that worked with volunteers. The audit identified several areas of concern and they began to develop new procedures for rating the risk of volunteer job descriptions and screening volunteers. Following that staff authored a Volunteer Policy during a Master Planning process. In 2001 Cambridge City Council approved the Volunteer Policy that included the Canadian Code for Volunteer Involvement. A three year projected budget was also approved that would enhance additional staff time for the volunteer program, volunteer resources, training, and appreciation.

For further information about the City of Cambridge volunteer program contact: [csd@city.cambridge.on.ca](mailto:csd@city.cambridge.on.ca)

The City of Thunder Bay has staff that coordinate volunteers in the Recreation and Culture Division, Seniors Services and three Homes for the Aged. These positions all carry other responsibilities as well as volunteer management.

Increasingly we are seeing other departments in the City looking to volunteers to provide support for their operations.

In May 2005, the City of Thunder Bay began exploring the adopting of a Volunteer Code modeled on the Canadian Code for Volunteer Involvement. Both Volunteer Thunder Bay and Thunder Bay Association of Volunteer Administrators (TBAVA) were approached by the City staff for their support and guidance in this project. From these initial discussions a partnership evolved whose goal was to develop a Thunder Bay Code for the community that could be adopted by all organizations.

With funding from OCVI, Volunteer Thunder Bay researched other municipalities on Canada that had adopted the Canadian Code. In fall 2005 the City and Volunteer Thunder Bay facilitated 3 community workshops to get input on what volunteers and the organizations they serve would like to see in a Thunder Bay Code. With information from these workshops, a Thunder Bay Code for Volunteer Involvement was drafted. This Code was adopted by City Council in November 2005. The Thunder Bay Code for Volunteer Involvement was officially launched on December 5, 2005 in celebration of the International Day of the Volunteer.

Funding from OCVI also helped with the production and printing of a brochure that can be used to promote the Volunteer Code to both community organizations and the volunteers that support their work.

They also developed a logo for the Volunteer Code:



**The check mark** represents volunteers and has a positive connotation as well as checking off all aspects of the code.

**The C** is representing that the Code is grounded, giving a base for organizations to work with volunteers and a base for volunteers to understand what they can expect from the organization.

In January and February 2006 the Code is being reviewed with all City staff working with volunteers. Coordinator of Volunteers in the City will act as resource for those departments initiating work with volunteers. The



coordinators will meet quarterly to discuss issues, policy and procedures. Volunteer Thunder Bay and TBAVA will take the lead in the community to promote the adoption of the Code by local organizations that are supported by volunteers.

For further information about the City of Thunder Bay volunteer program contact: [shendrick@thunderbay.ca](mailto:shendrick@thunderbay.ca)

## **Region of Waterloo**

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The Region of Waterloo has more than 3,000 volunteers who help make our programs and services a success everyday. These individuals are the essence of our community. The Region's volunteer program has grown dramatically since the Region was created in 1973. Our volunteers assist with various programs including Adopt-a-Road, Doon Heritage Crossroads, Doors Open, Joseph Schneider Haus & McDougall Cottage, Public Health, Sunnyside Home, ten Regional Libraries, Waste Management, Waterloo Regional Police and the Waterloo Wellington Children's Groundwater Festival.

In 2001, the Region began taking a more active role in the development of their volunteer programs by establishing a Regional Volunteer Committee comprised of staff representatives from each program area. The responsibilities of one Volunteer Co-ordinator were expanded to include organizing the Committee and working towards corporate standards. An active partnership with Human Resources staff has resulted in development of a Volunteer Policy and new procedures for volunteer applications, position descriptions, risk management and screening. The Chief Administrator's Office and Regional Chair's Office provide additional support for volunteer programs through formal volunteer recognition events and community support for voluntarism.

The Regional Volunteer Committee is in the process of completing an Audit of all its volunteer programs based on the best practices identified by Volunteer Canada. Their goal is for the Region to adopt the Canadian Code for Volunteer Involvement after the standards are met.

For further information about the Region of Waterloo Volunteer program contact: [ydeborah@region.waterloo.on.ca](mailto:ydeborah@region.waterloo.on.ca)



## Section F - Resources

The following resources may be useful to your municipality as you begin to develop your volunteer management processes:

### **OCVI – Ontario Network of the Canada Volunteerism Initiative**

[www.volunteer.on.ca](http://www.volunteer.on.ca)

CVI began in late 2002 with funding from Heritage Canada and is delivered across the country by provincial networks. The goal of the Canada Volunteerism Initiative (CVI) is to strengthen volunteerism across Canada by:

- Encouraging Canadians to participate in voluntary organizations,
- Improving the capacity of organizations to benefit from volunteers and
- Enhancing the experience of volunteering.

### **The Ontario Screening Initiative (OSI)**

[www.volunteer.ca/volcan/eng/content/screening/ontario-init.php](http://www.volunteer.ca/volcan/eng/content/screening/ontario-init.php)

### **Volunteer Canada**

[www.volunteer.ca](http://www.volunteer.ca)

Volunteer Canada is a one-stop resource for volunteering. Volunteer Canada provides on-line resources for people working with volunteers as well as a marketplace to order information about volunteers. As referenced in this toolkit, Volunteer Canada has information about the Canadian Code of Volunteer Involvement, Safe Steps for Volunteers and the Volunteer Management Audit.

#### **Volunteer Management Audit**

[www.volunteer.ca/volunteer/pdf/ManagementAuditEng.pdf](http://www.volunteer.ca/volunteer/pdf/ManagementAuditEng.pdf)

#### **Canadian Code for Volunteer Involvement**

[www.volunteer.ca/volunteer/pdf/CodeEng.pdf](http://www.volunteer.ca/volunteer/pdf/CodeEng.pdf)

#### **Safe Steps screening program**

[www.volunteer.ca/volcan/eng/content/screening/screening\\_steps.htm](http://www.volunteer.ca/volcan/eng/content/screening/screening_steps.htm)

#### **Rural Supplement**

[www.volunteer.ca/volunteer/pdf/FinalRuralEng.pdf](http://www.volunteer.ca/volunteer/pdf/FinalRuralEng.pdf)

#### **National Survey of Giving, Volunteering and Participating**

[www.givingandvolunteering.ca](http://www.givingandvolunteering.ca)

Imagine Canada developed this website that gives statistical data and analysis on giving and volunteering in Canada.

### **Volunteer Management**

#### **Who are Managers of Volunteers?**

[www.nonprofitscan.ca/files/library/managers\\_of\\_volunteers\\_fact\\_sheet\\_english.pdf](http://www.nonprofitscan.ca/files/library/managers_of_volunteers_fact_sheet_english.pdf)

#### **Charity Channel**

Hawthorne, Nan, *A Case for Hiring a Volunteer Manager*

<http://charitychannel.com/publish/templates/?a=2083&z=0>



## **Benefits to Volunteering**

Assigning Economic Value to Volunteer Activity (2002)

### **Imagine Canada**

[www.nonprofitscan.ca/pdf/MAN/Goulbourne-MAN-English-Web.pdf](http://www.nonprofitscan.ca/pdf/MAN/Goulbourne-MAN-English-Web.pdf)

### **Satellite Account of Nonprofit Institutions and Volunteering (December 2005)**

#### **Stats Canada**

[www.statcan.ca/bsolc/english/bsolc?catno=13-015-XIE](http://www.statcan.ca/bsolc/english/bsolc?catno=13-015-XIE)

### **Volunteer Productivity Calculator**

[www.kdc-cdc.ca/vvc/eng/default.asp](http://www.kdc-cdc.ca/vvc/eng/default.asp)

### **How to Assign Monetary Value to Volunteers**

[www.kdc-cdc.ca/attachments/Quarter\\_final\\_eng.pdf](http://www.kdc-cdc.ca/attachments/Quarter_final_eng.pdf)

## **Volunteer Management Software**

### **Volunteer Works Red Ridge**

[www.redridge.com](http://www.redridge.com)

### **The Razor's Edge**

[www.razors-edge.biz/volunteer-management.htm](http://www.razors-edge.biz/volunteer-management.htm)

### **Volunteer Squared**

[www.volunteer2.com/ca/index/html](http://www.volunteer2.com/ca/index/html)

### **CIOC – Volunteer Community Information Online Consortium**

[www.cioc.ca/index.asp](http://www.cioc.ca/index.asp)

## **Professional Associations - Volunteerism**

### **PAVR-O – Professional Association of Volunteer Resources of Ontario**

[www.pavro.on.ca/conference.html](http://www.pavro.on.ca/conference.html)

### **CAVR – Canadian Administrators of Volunteer Resources**

[www.cavr.org](http://www.cavr.org)



## Municipal Toolkit - Feedback Form

Please complete the following evaluation to help OCVI determine the usefulness and future effectiveness of the Municipal Toolkit:

1. Name of municipality \_\_\_\_\_ Today's date: \_\_\_\_\_

2. Your current role/position with volunteers \_\_\_\_\_  
\_\_\_\_\_

3. Did you participate in any of the following:

Municipal Scan (2004)  Municipal Roundtable (2005)  Second Municipal Roundtable (2006)

3. Specific issues within your municipality that led you to the Municipal Toolkit: (please check all that apply)

- |   |  |
|---|--|
| <input type="checkbox"/> Lack of dedicated staff for volunteer program  | <input type="checkbox"/> Lack of volunteer policy                  |
| <input type="checkbox"/> Lack of municipal vision for volunteer program | <input type="checkbox"/> Lack of budget for volunteer program      |
| <input type="checkbox"/> Lack of insurance for volunteers               | <input type="checkbox"/> Lack of training for volunteers           |
| <input type="checkbox"/> Lack of screening for volunteers               | <input type="checkbox"/> Lack of recognition of work of volunteers |
| <input type="checkbox"/> Other, specify _____                           |  |

4. Which sections of the Municipal Toolkit did you find the most helpful?(please check all that apply)

- |  |   |
|--|---|
| <input type="checkbox"/> Information on Trends           | <input type="checkbox"/> A Town without Volunteers                    |
| <input type="checkbox"/> Rating your municipality        | <input type="checkbox"/> How to strike a volunteer advisory committee |
| <input type="checkbox"/> Creating a vision               | <input type="checkbox"/> Developing a critical path                   |
| <input type="checkbox"/> Developing a budget             | <input type="checkbox"/> Writing a volunteer policy                   |
| <input type="checkbox"/> Power point presentations       | <input type="checkbox"/> Link to New Deal for Cities                  |
| <input type="checkbox"/> Advocating to your city council | <input type="checkbox"/> Success stories                              |
| <input type="checkbox"/> Resources                       | <input type="checkbox"/> Forms and templates                          |

5. What section(s) could be added to augment the usefulness of the Municipal Toolkit?  
\_\_\_\_\_  
\_\_\_\_\_

6. How do you intend to use the Municipal Toolkit over the next six months?  
\_\_\_\_\_  
\_\_\_\_\_

7. How do you see yourself as a Municipal Champion over the next year?  
\_\_\_\_\_  
\_\_\_\_\_

Please indicate if you would like someone from OCVI to contact you in the next few weeks to discuss your plan within your municipality.

Name: \_\_\_\_\_ E-mail: \_\_\_\_\_

**SEND completed form to:** Toolkit Evaluation  
Ontario Network, Canada Volunteerism Initiative  
P.O. Box 24029, Bullfrog Postal Outlet Guelph ON N1E 6V8  
Tel: 519-763-4594 Fax: 519-836-0588

