

# VOLUNTEER ENGAGEMENT TOOLKIT

Before you begin recruiting volunteers, take the time to create a clear description of the skills, experience and expected deliverables you require for each role. Position descriptions improve your chances that the right volunteer with the right skills will apply. They also help you get clear on the expectations you have of the volunteer role, and support the volunteer to be successful in their role.

Once you’ve finished the recruitment stage, and found the right volunteer with the right skills you’ll want to sign a letter of agreement with your volunteer. A letter of agreement ensures both you and the volunteer clearly understand and agree on what is expected of the volunteer, both in terms of their project’s end goal and time commitment. It is important any letter of agreement is outlines the commitments and deliverables for both parties.

In this toolkit you’ll find templates and examples of a Volunteer Position Description and a Volunteer Letter of Agreement.

**Table of Contents:**

TEMPLATE: Volunteer Position Description..... 2

SAMPLE: Volunteer Position Description..... 4

TEMPLATE: Volunteer Letter of Agreement ..... 6

SAMPLE: Volunteer Letter of Agreement ..... 9

TEMPLATES: Volunteer Waivers ..... 12

## TEMPLATE: Volunteer Position Description

[YOUR LOGO]

[POSITION TITLE]

*Volunteer Position Description*

[DATE]

### **Link to the Mission:**

State the mission of your organization and how this person will contribute to it. Even if your mission is disconnected from the position (i.e. no direct client interaction), all volunteers are connected to the efficiency and thus effectiveness of your organization. Make it clear *why* this role is important to the greater cause.

### **Qualifications:**

List:

- Experience level
- Specific skill sets, and direct experience
- Personal qualities
- Preferred talents you require for this position
- Include: An interest and commitment to the not-for-profit sector

### **Time Commitment:**

Clearly outline how many hours over what time period you would like the role to last. Be as specific as possible about when and where the hours are to be executed. If you are flexible, highlight your ideal scenario and mention that you have flexibility. Indicate if some of the work can be done from home.

### **Deliverables:**

- Be very specific about the tangible outputs you expect and list them individually.
- Think about this as project planning – outline the steps required for the volunteer to successfully complete the project/role.
- The more specific you are the better chance the right person will apply.
- Specifics give volunteers clarity, just as a clear job description gives your staff clarity to successfully execute their role.

**Accountability:**

Make sure staff and the volunteer know who the responsible staff person is. Clear lines of communication and accountability are as important with external talent as with employees. This also provides a context for handling potential conflicts.

**Benefits and Recognition:**

- List what the volunteer will gain – i.e. knowledge of subject area, contact with new people, learning about the voluntary sector, specific development opportunities they will have in this role.
- You might not be paying volunteers with money, BUT you can pay people in other ways. A letter of recommendation, a reference on LinkedIn, opportunities to learn, credit on final materials, and invitations to networking events are good examples of worthy recognition.
- It's also important to identify and focus on each volunteer's unique motivation. You may want to include: At the outset, we will discuss your learning objectives, and keep those in mind throughout your engagement.
- Another example of personal benefits to include: In this position you will have an opportunity to invest in your community, contribute your skills, learn about the not-for-profit sector and meet new people.

**How to Apply/Contact:**

- Include: If interested, please send your resume (*allows you to assess skills*), and a brief letter outlining your interest (*allows you to assess motivations*) to: name, position, email, phone.
- For certain roles you may also want to ask for examples of previous work i.e. graphic design portfolio, website design examples, writing samples, etc.

## **SAMPLE: Volunteer Position Description**

### **Event and Administrative Assistant Volunteer Position Description**

#### **Link to the Mission:**

Vantage Point's mission is to transform not-for-profit leadership throughout BC. One way in which we achieve this mission is by offering transformational learning opportunities to not-for-profit board members, executives and senior leadership.

We are seeking an Event and Administrative Assistant to support our after-hours learning opportunities and data management initiatives. The assistant will provide high quality logistical, administrative and customer service support during the delivery of our workshops and learning opportunities and detailed data management support when appropriate.

To learn more about Vantage Point and our learning opportunities visit our website at [www.thevantagepoint.ca](http://www.thevantagepoint.ca)

#### **Qualifications:**

- Experience with Customer Relations software and/or willingness to learn
- Attention to detail
- Ability to follow instructions and work independently with a high degree of initiative
- Interest in online research in the NFP field
- Excellent communication and customer service skills
- Excellent interpersonal skills
- Comfort with technology particularly in setting up equipment (laptop and projector)
- Willingness to learn and receive constructive feedback

#### **Time Commitment:**

A commitment of one year is preferred.

Orientation / onboarding to Vantage Point is approximately 2 hours in total.

Evening sessions are delivered typically between 5:00 to 9:00pm. Occasional weekend availability appreciated.

Time commitment is approximately 4 hours per evening session, including set up and breakdown/clean up.

#### **Deliverables:**

- Classify organizations into the appropriate sector and sub-sector(s) in Salesforce CRM based on information provided

- In the process of classifying organizations, update or merge contacts or accounts if duplicates are found
- Provide progress reports to Office Manager on data management initiative
- Complete one or two event shadowing sessions with current staff
- Support evening/weekend sessions as scheduled based on a more detailed logistics document from Vantage Point
- Provide relevant feedback to the Education Events Coordinator on the administration of session as well as other relevant logistical pieces

**Accountability:**

Event and Administrative Assistant will report to Office Manager and Education Events Coordinator.

**Benefits:**

The opportunity to develop broad understanding of the Not-For-Profit community in the Metro Vancouver area while learning skills in data management. The opportunity to develop your skills in event administration and attend relevant professional development opportunities as a guest. We will discuss your specific learning objectives, and keep those in mind throughout your engagement.

**Recognition:**

Vantage Point will recognize you as part of our Talent Team on our website and provide a letter of recommendation at the successful conclusion of your term as one of our knowledge philanthropists.

**Contact:**

If interested, please send your resume and a letter outlining your interest to [Name], Education Events Coordinator at [email].

## TEMPLATE: Volunteer Letter of Agreement

[YOUR LOGO]

### *Letter of Agreement*

Between [Your Organization] and

[Name of Volunteer, Role Title]

#### **[Date:]**

This form constitutes an agreement between [Your Organization] and [Name of Volunteer] for the services described in the included deliverables. The terms and conditions as set out herein are not subject to any other written or verbal condition, qualification or agreement.

#### **Term:**

The term of the agreement shall be from [project start date] to [project end date] for an estimated [number] hours of work, executed in person, via telephonic and electronic consultations and independently. The end date of the agreement is subject to flexibility, with two weeks' notice.

#### **Talent Deliverables:**

[Name of Volunteer] will be responsible to [Your Organization] for deliverables as outlined originally in the Position Description or Terms of Reference. These deliverables include:

- Deliverables from the original role description if you created one. You will also have other, more specific deliverables and timelines that are appropriate to add here.
- Be very specific about the tangible outputs you expect and list them individually.
- Think about this as project planning – outline the steps required for the volunteer to successfully complete the project/role.
- What other specific tasks with deadlines are there that may not be in the project plan? Program or organization documents to review for background? Meetings to attend? Reporting requirements? Specifics give volunteers clarity, just as a clear job description gives your staff clarity to successfully execute their role.

**[Your Organization] Deliverables:**

**[Your Organization]** will be responsible to **[Name of Volunteer]** for deliverables as outlined in the Terms of Reference and as required to enable the project's activities. Additionally, **[Your Organization]** will provide:

- A primary contact: **[Name of Staff and Position]**
- Timely response to questions and requests and access to appropriate information
- Feedback on performance and deliverables
- Awareness of **[Name of Volunteer]** learning objectives and efforts to meet those objectives
- **[Add any other specific deliverables you have agreed to such as a training session]**

**Reporting:**

**[Name of Volunteer]** is accountable to **[Name of Staff and Position]**.

**What will you receive?**

By collaborating with **[Your Organization]** you have the:

- Opportunity to invest in your community
- Capability to contribute to building strong leaders and organizations
- Opportunity to become a Knowledge Philanthropist
- Ability *to* inspire and in return *be* inspired
- Opportunity to move organizations forward

**Compensation:**

Upon completion of the agreed deliverables and at your request, **[Your Organization]** will provide a reference or letter of recommendation based on the work completed. **[Add in any further agreements you have made i.e, graphic credit, free workshop, networking opportunities, etc.]**

**Expenses:**

**[Your Organization]** will pay reasonable expenses, upon submission of receipts and with the prior approval of the **[Name of Staff and Position]**.

**Liability/Insurance:**

[Your Organization] will be responsible for all insurance and liability coverage required for the project.

**Ownership:**

The copyright of any reports/products developed for [Your Organization] relating to the deliverables during this agreement will belong to [Your Organization] exclusively.

**Confidentiality:**

It is expected that [Name of Volunteer] will not divulge any confidential information concerning [Your Organization] or its dealings with individuals or organizations. [Name of Volunteer] will review and abide by the *Privacy Policy Statement* and *Confidentiality* portions of the *Volunteer Handbook*.

**Termination:**

This agreement may be terminated with [days/weeks/months] written notice, by either party. In the case of early termination, [Your Organization] will provide [Name of Volunteer] with appropriate feedback on the quality of performance to that date.

This agreement carries with it no commitment respecting continuation of services beyond the specified term.

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[Name of Signing Authority and Position]  
[Your Organization]

---

Date

---

[Name of Volunteer]  
[Name of Volunteer Role]

---

Date



## **SAMPLE: Volunteer Letter of Agreement**

### ***Letter of Agreement***

Between **Vantage Point** and  
**Jane Doe, Photographer**

**Date: April 30, 2016**

This form constitutes an agreement between **Vantage Point** and **Jane Doe** for the services described in the included deliverables. The terms and conditions as set out herein are not subject to any other written or verbal condition, qualification or agreement.

#### **Term:**

The term of the agreement shall be from March 2, 2016 to April 30, 2016 for an estimated 20 hours of work executed in person (photo shoots) and independently (editing at home), with some telephone and electronic consultations. The end date of the contract is subject to flexibility, with two weeks' notice.

#### **Volunteer Deliverables:**

**Jane Doe** will be responsible to **Vantage Point** for deliverables as referenced in the **Photographer** Description (see position description). These deliverables include:

- Make recommendations on how to structure the photo shoots (formal? informal? Staged scenes?)
- Capture a variety of images to create a photo bank for varied usage
- Conduct any necessary edits to the photographs
- Produce 24 final photos and provide files in formats ready for publication online, in Power Point and print materials
- Provide approx. 75 un-edited files of the raw shots.

#### **Vantage Point Deliverables:**

**Vantage Point** will be responsible to **Jane Doe** for deliverables as outlined in the Terms of Reference and as required to enable the project's activities. Additionally, **Vantage Point** will provide:

- Scheduling of all models and locations for the photo shoots, available props as requested
- Signed release forms from all models giving consent to having their photo used publicly in print and on the web to represent Vantage Point

- Archiving raw and final photographs
- Photo credit to **Jane Doe** wherever the photos are used, when possible
- A primary contact
- Timely response to questions and requests and access to appropriate information.
- Feedback on performance and deliverables.
- Awareness of **Jane Doe's** learning objectives and efforts to meet those objectives.

**Reporting:**

**Jane Doe** is accountable to [name of staff person], [role].

**What will you receive?**

By collaborating with **Vantage Point** you have the:

- Opportunity to expand your networks and connections in the community
- Opportunity to invest in your community

**Compensation:**

Upon completion of the agreed deliverables, **Vantage Point** will provide a letter of recommendation and/or act as a reference as appropriate.

**Expenses:**

**Vantage Point** will pay reasonable expenses, upon submission of receipts and with the prior approval of the Director Communications and People Engagement.

**Liability/Insurance:**

**Vantage Point** will be responsible for all insurance and liability coverage needed for the project.

**Ownership:**

**Jane Doe** will own the artistic credit for all photographs produced and rights to use in her professional portfolio. Photo credit will be given by **Vantage Point** to **Jane Doe** wherever the photos are used, when possible. **Vantage Point** will own the copyright for all photographs produced for **Vantage Point** relating to the deliverables during this agreement.

**Confidentiality:**

It is expected that **Jane Doe** will not divulge any confidential information concerning **Vantage Point** or its dealings with individuals or organizations. **Jane Doe** will review and abide by the *Privacy Policy Statement* and *Confidentiality* portions of the *Volunteer Handbook*.

**Termination:**

This agreement may be terminated with two (2) weeks written notice, by either party. In the case of early termination, **Vantage Point** will provide **Jane Doe** with appropriate feedback on the quality of performance to that date.

This agreement carries with it no commitment respecting continuation of services beyond the specified term.

\_\_\_\_\_  
[NAME]

**Executive Director, Vantage Point**

\_\_\_\_\_  
Date

\_\_\_\_\_  
Jane Doe,  
Photographer

\_\_\_\_\_  
Date

## TEMPLATES: Volunteer Waivers

*Waivers limit the organization's risk in engaging volunteers. You may want to consider adding a waiver into your Letter of Agreement as appropriate to the role. We strongly recommend that all waivers and liability forms be reviewed by a lawyer. For more information about volunteers and the law, please review the People's Law School guide at: [http://www.publiclegaled.bc.ca/wp-content/uploads/2013/07/English\\_Volunteers-and-the-law\\_2000.pdf](http://www.publiclegaled.bc.ca/wp-content/uploads/2013/07/English_Volunteers-and-the-law_2000.pdf)*

### Waiver #1: General Volunteer Waiver

I, \_\_\_\_\_ understand and agree with the following conditions concerning services performed by me as a Volunteer:

#### **It is understood that Volunteers are not covered by the British Columbia Workers' Compensation Act.**

It is understood that if a Volunteer is injured while performing services on [Organization] premises, [Organization] will provide, at the time of injury, reasonable emergency first aid for that injury without charge, regardless of apparent fault; and it is also understood that the provision of emergency medical service does not constitute an admission of liability on the part of [Organization].

This release is intended to discharge [Organization] its Board Members, officers, employees and volunteers from and against any and all liability arising out of or connected in any way with my participation in the activity, and accept that liability which may arise out of the negligence, or carelessness on the part of the [Organization] or persons mentioned above.

I further understand that accidents and injuries can arise out of the activity; knowing the risk, nevertheless, I hereby agree to assume those risks and to release and to hold harmless the [Organization] and persons mentioned above, who (through negligence or carelessness) might otherwise be liable to me (or my heirs or assigns) for damages.

It is further understood and agreed that this waiver, release and assumption of risks is to be binding on my heirs and assigns.

In consideration of my volunteer work as outlined above, I understand that I am not entering into an employment relationship with the [Organization] and that I am not entitled to receive a salary or any employee benefits. I understand that either the [Organization] or I may terminate this volunteer relationship at any time without notice.

I also understand that I have an obligation to respect the confidentiality of any sensitive information or dealings, which may relate to my volunteering at the University and I agree that I will not disclose any information without the prior written authorization from the [Organization]. I understand that my obligation of confidentiality continues into perpetuity.

**Release and Waiver.** Volunteer does hereby release and forever discharge and hold harmless [Organization] and its successors and assigns from any and all liability, claims, and demands of whatever kind or nature, either in law or in equity, which arise or may hereafter arise from any liability or claim that the Volunteer may have against [Organization] with respect to any bodily injury, personal injury, illness, death, property damage or property loss that may result from Volunteer's Activities with [Organization], whether caused by the negligence of [Organization] or its



**Waiver #3: Volunteer Event Participation Waiver**

I acknowledge that I understand the intent thereof, and I hereby agree and absolve and hold harmless [Organization Name], corporate sponsors, co-operating organizations and any other parties connected with this event in any way, singly or collectively, from and against any blame and liability for any injury, misadventure, harm, loss, inconvenience, or damage hereby suffered or sustained as a result of participation in one or more of the events above or any activities associated therewith. I hereby consent to and permit emergency treatment in the event of injury or illness.

\_\_\_\_\_

Signature

Date

\_\_\_\_\_

\_\_\_\_\_

Printed Name

(      ) \_\_\_\_\_

Phone Number