VolunTrek

Co-funded by the European Union

Module 0: Getting Started with the VolunTrek Toolkit

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What will you achieve in this module?

This introductory module will help you understand:

- what the VolunTrek Toolkit is and why it was created;
- who it is designed for;
- how it can support your organisation throughout the volunteer journey;
- how to choose and use the modules, tools and templates most relevant to you.

By the end of the module, you will be ready to use the Toolkit in a way that fits your organisation, whether it is small or medium-sized, new to volunteer management or already experienced, and whether volunteering takes place face-to-face, online or in a hybrid format.

Welcome to the VolunTrek Toolkit!

VolunTrek is a two-year European cooperation project co-funded by the Erasmus+ Programme. This Toolkit was created to help adult educators, volunteer coordinators, staff and organisations plan, manage and improve meaningful volunteering experiences.

It guides you through the full volunteer journey—from assessing whether your organisation is ready to involve volunteers to recruitment, matching, onboarding, follow-up and closure.

How can this Toolkit help you?

Use the Toolkit to:

- assess your organisation's needs, resources and capacity;
- create clear, realistic and inclusive volunteering opportunities;
- match volunteers with suitable roles, tasks and support;
- welcome and prepare volunteers effectively;
- provide regular guidance, feedback and follow-up;
- recognise learning and close the experience responsibly;
- evaluate and improve your volunteer management practices.

Throughout the modules, you will find practical guidance, examples, reflection questions, good practices and adaptable tools and templates.

Keep in mind: This Toolkit is a working resource, not a theoretical manual or a one-size-fits-all solution. Choose what is useful, adapt it to your reality and review your approach as your organisation and volunteers learn.

Who is this Toolkit for?

The Toolkit is mainly designed for small and medium-sized organisations that involve volunteers or would like to start doing so. It is particularly useful if your organisation does not yet have a formal volunteer management system, a dedicated volunteer coordinator or extensive experience with structured volunteering programmes.

You may find it useful if you are a:

- volunteer coordinator;
- adult educator;
- project manager;
- youth worker or social worker;
- trainer or facilitator;
- staff member responsible for involving or supporting volunteers.

It can be used by civil society organisations, NGOs, associations and community-based organisations.

Although the Toolkit is addressed mainly to organisations and their staff, the volunteer's perspective is present throughout. A quality volunteering experience must work for both the organisation and the volunteer.

How should you use the Toolkit?

There is no single correct way to use it. Choose the approach that best reflects your current situation.

If your organisation…	Recommended approach
is preparing to involve volunteers for the first time	Follow Modules 1–6 in order.
already works with volunteers	Go directly to the module connected to the practice you want to improve.
needs to address a specific challenge	Use the relevant guidance, reflection questions, tool or template independently.
is reviewing its overall volunteer programme	Work through the full Toolkit with your team and record the changes you want to make.

Five tips before you begin

1. **Start with your needs**. You do not need to use every module or tool.
2. **Adapt the resources**. Adjust the language, format and level of detail to your organisation and volunteers.
3. **Include different perspectives**. Whenever possible, involve staff, volunteers and relevant stakeholders in reflection and decision-making.

4. **Check for barriers**. Consider accessibility, inclusion and support needs at every stage.
5. **Review what works**. Use feedback and experience to improve your practices over time.

Using AI responsibly

AI can support some volunteer management tasks, such as drafting content, translating information, organising ideas and supporting reflection. However, it must be used carefully and responsibly.

The following principles apply throughout the Toolkit. They are based on European guidance concerning data protection, human oversight, transparency, accountability and the responsible use of AI. They have been adapted into practical safeguards for volunteer management and do not replace legal advice or your organisation's data-protection and AI policies (European Data Protection Supervisor, 2024; European Parliament & Council of the European Union, 2016, 2024; High-Level Expert Group on Artificial Intelligence, 2019).

Principle	What should you do
AI is a support tool	Use AI to support drafting, translation, organisation and reflection. Do not use it to replace human relationships, safeguarding decisions, legal review or final decisions about volunteers (High-Level Expert Group on Artificial Intelligence, 2019).
Use approved tools	Use only AI tools approved under your organisation's policies, contracts and data-protection arrangements. This Toolkit does not endorse any specific AI provider (European Data Protection Supervisor, 2024).

Principle	What should you do
Classify information first	Before using AI, identify whether the information is public, internal, personal, confidential or highly sensitive. Only enter public or properly anonymised information into publicly available AI tools (European Data Protection Supervisor, 2024; European Parliament & Council of the European Union, 2016).
Protect people's identities	Remove names, contact details, identifiers and combinations of information that could identify a person. Replacing a name with a pseudonym may not be enough (European Data Protection Board, n.d.; European Parliament & Council of the European Union, 2016).
Keep human oversight	Ensure that a named person reviews the accuracy, potential bias, tone, accessibility and context of AI-generated content before it is used or shared (European Parliament & Council of the European Union, 2024; High-Level Expert Group on Artificial Intelligence, 2019).
Know what is prohibited	Never use AI to make final decisions about recruitment, matching, safeguarding, disciplinary matters, wellbeing or recognition. Do not use it to infer sensitive characteristics or process safeguarding cases, identifiable feedback or other sensitive personal information in publicly available tools (European Parliament & Council of the European Union, 2024; High-Level Expert Group on Artificial Intelligence, 2019).

Simple rule: If the information could identify, expose or negatively affect a person, do not enter it into a publicly available AI tool. When in doubt, stop and check with the person responsible for data protection in your organisation.

Explore the volunteer journey

The Toolkit includes one introductory module and six operational modules. Together, they cover the full volunteer journey.

Module	What it helps you do
0. Getting Started	Understand the Toolkit, choose where to begin and find the guidance and tools most relevant to your needs.
1. Organisational Needs Assessment	Assess your organisation's needs, capacity, limitations and priorities before involving volunteers.
2. Volunteer Recruitment	Design and communicate clear, inclusive and realistic opportunities that reach a diverse range of suitable volunteers.
3. Volunteer Selection and Matching	Match each volunteer with a suitable role, tasks, working environment and level of support.
4. Volunteer Onboarding	Welcome, prepare and train volunteers, clarify expectations and help them become part of the organisation.
5. Follow-up and Guidance	Provide ongoing support, guidance and feedback while monitoring volunteers' experience and wellbeing.
6. Closure and Next Steps	Bring the experience to a meaningful close, recognise contributions, evaluate results and explore possible next steps.

Each operational module includes:

- practical, step-by-step guidance;
- considerations for inclusion and accessibility;
- adaptations for face-to-face, online and hybrid volunteering;

- guidance for short- and long-term experiences;
- do's and don'ts;
- examples and good practices;
- tools and templates;
- reflection questions and key takeaways;
- suggestions for the responsible use of AI, where relevant.

Explore the volunteer journey

Volunteer management is not only about processes and tasks. It is also about relationships, wellbeing and the ability to work respectfully with different people. For this reason, the Toolkit integrates three competence areas across all modules:

- **Social competences:** communicating clearly, expressing needs, cooperating with others, building appropriate relationships and managing interpersonal situations.
- **Emotional competences:** recognising and regulating emotions, maintaining wellbeing, setting boundaries, asking for support and responding to challenging situations.
- **Intercultural competences:** engaging with people from different backgrounds with openness, equality, mutual respect and self-awareness.

These competences support safe, respectful and meaningful relationships between volunteers, staff, beneficiaries and communities. In each module, consider which competences are most relevant and how your organisation can help people develop them (Council of Europe, 2018; Sala et al., 2020).

Adapt the Toolkit to each volunteering experience

The same approach will not work in every situation. As you use Modules 1–6, consider both the duration and the format of the volunteering experience.

Short-term and long-term volunteering

Short-term experiences may require…	Long-term experiences may require…
concise preparation and immediately clear tasks	progressive onboarding and evolving responsibilities
quick relationship-building	regular relationship and team development
accessible support from the beginning	ongoing guidance, learning and wellbeing support
immediate feedback and closure	role reviews, planned transitions and longer-term recognition

Face-to-face, online and hybrid volunteering

When volunteering includes an online component, pay particular attention to:

- access to devices, platforms and a reliable internet connection;
- digital skills and accessible communication formats;
- data protection, privacy and online safeguarding;
- clear communication and supervision arrangements;
- opportunities to build relationships and a sense of belonging.

If the same guidance applies across different durations or formats, use it as it is. Where needs, risks or responsibilities differ, adapt the relevant process or tool.

Key terms used in the Toolkit

The following working definitions will help you understand how key terms are used throughout the Toolkit. They are adapted from established guidance and are not intended as legal definitions. Always check the legislation and requirements that apply in your country and organisation (International Labour Organization, 2011; National Council for Voluntary

Organisations, 2023a, 2023b; UNESCO, n.d.; United Nations Volunteers, 2022; World Health Organization, 2023).

Term	Working definition
Accessibility	The degree to which environments, information, tools and activities can be used by people with different abilities and circumstances.
Adaptation	A change made to reduce a barrier or improve suitability while preserving the essential purpose of a role.
Beneficiary	A person, group or community that receives, or is intended to receive, support, services or wider benefits from an organisation's activities.
Face-to-face volunteering	Volunteering carried out physically at an organisation, activity site or community location.
Hybrid volunteering	Volunteering that combines online and face-to-face participation.
Inclusion	The active process of ensuring that people can participate, contribute and belong without unfair barriers.
Matching	The process of connecting a volunteer with a suitable role, team, environment and level of support.
Online volunteering	Volunteering carried out mainly through digital tools and remote communication.
Reasonable adaptation	A practical and proportionate change to a role, process, environment, schedule, communication method or tool that supports more equitable participation without removing

Term	Working definition
	essential role requirements or creating disproportionate difficulty.
Safeguarding	The policies, responsibilities and actions used to prevent and respond to harm, abuse, exploitation, neglect or unsafe practices involving volunteers, beneficiaries, staff or other participants.
Selection	The process of assessing whether a candidate is suitable for volunteering or for a specific role.
Volunteer	A person who freely chooses to contribute time, skills or experience for the benefit of others, a community or a cause, without improperly replacing paid work and without an employment relationship, unless national law provides otherwise.
Volunteer coordinator	The person responsible for organising, supporting and reviewing volunteer involvement, including communication, role clarity, inclusion, safeguarding and coordination with staff.
Volunteer role	A defined set of meaningful tasks, responsibilities, boundaries, support arrangements and participation conditions.
Volunteering cycle	A defined period of volunteer involvement that may end in continuation, adaptation, a pause, a new role or departure

Before moving to module 1

Take a moment to discuss these questions with your team:

- Why does your organisation involve, or want to involve, volunteers?
- What would a meaningful and well-supported volunteering experience look like in your context?
- Which part of your current volunteer management practice most needs attention?
- Who should be involved in using this Toolkit?

Your answers will help you decide whether to continue with **Module 1: Organisational Needs Assessment** (link) or go directly to another module that better matches your immediate needs.

Ready to begin? Choose the next module based on your organisation's priorities. You can return to this introduction whenever you need to review the structure, key concepts or transversal principles of the Toolkit.

References and further reading

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