VolunTrek

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Module 1: Organisational Needs Assessment

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What will you achieve in this module?

This module will help your organisation understand what it needs, what it can offer and whether it is ready to involve volunteers responsibly.

At this stage, it is essential to pause and reflect on:

- why your organisation wants to involve volunteers;
- your current strengths, resources, limitations and risks;
- meaningful areas in which volunteers could contribute
- recognise barriers related to inclusion, accessibility and intercultural competence;
- decide which gaps must be addressed before recruitment;
- prepare an Organisational Needs Profile to guide recruitment and matching.

This is not about judging an organisation's current capacity, but about building a clear, honest, and forward-looking picture that will inform every subsequent step of volunteer management.

At a glance!	
Estimated reading time	35–45 minutes
Main outputs	Completed Readiness Assessment and Organisational Needs Profile

At a glance!	
Essential actions	Involve the team, assess readiness honestly and address high-priority gaps before recruitment

Why begin with a needs assessment?

An organisational needs assessment is a structured review of your mission, activities, priorities, people, systems and resources. It helps you understand whether and how volunteers can contribute meaningfully and what your organisation must provide in return.

This assessment creates the foundation for recruitment, matching, onboarding and follow-up. Without it, organisations may:

- create unclear or unnecessary roles;
- recruit volunteers without enough capacity to support them;
- place volunteers in unprepared or overstretched teams;
- set requirements that exclude people unnecessarily;
- overlook legal, insurance, safeguarding or data-protection responsibilities;
- depend too heavily on one enthusiastic staff member;
- encounter misunderstandings caused by unspoken cultural assumptions.

A strong assessment helps staff develop a shared understanding of volunteering, establish a baseline for evaluation and design opportunities that are useful to the organisation and meaningful for volunteers.

Without a needs assessment	With a needs assessment
Roles are created reactively when a volunteer appears.	Roles are designed around identified needs.

Without a needs assessment	With a needs assessment
Volunteers are placed wherever someone is willing to receive them.	Volunteers are matched with suitable activities and support.
Inclusion is considered only after someone encounters a barrier.	Inclusion and accessibility are built into role design.
The programme depends on individual enthusiasm.	Volunteering is integrated into organisational structures.
Cultural norms remain implicit and may create friction.	Cultural assumptions are discussed and explained.
There is no clear baseline for evaluation.	Progress can be assessed against agreed intentions and priorities.

Remember: Wanting volunteers is not the same as being ready to support them.

How to complete the assessment

The process has three steps:

1. Clarify your organisational context and assess readiness.
2. Identify meaningful areas for volunteer involvement.
3. Summarise your findings in an Organisational Needs Profile.

Whenever possible, complete the process with people from different teams and levels of responsibility, including frontline staff. Their perspectives may reveal needs, barriers and risks that are not visible to management.

Step 1 – Clarify your context and assess readiness

Begin by discussing why your organisation wants to involve volunteers and whether the necessary conditions are in place. Review the following six dimensions.

1. Strategic purpose

Volunteer involvement should support your organisation's mission, priorities and values. Volunteers may contribute time, skills, lived experience, community connections and new perspectives, but they should not be recruited simply to absorb extra work.

Ask:

- What is our organisation's mission?
- What are our main activities and target groups?
- What are our priorities for the next one to three years?
- Why do we want to involve volunteers, and who should benefit?
- Have we worked with volunteers before? What worked and what did not?
- What does meaningful volunteering mean in our context?
- Do we serve—or want to serve—people from different cultural, linguistic, religious or migration backgrounds?
- What do we already know, and what do we still need to learn, about working respectfully across these differences?

Your action: Prepare a short internal statement explaining why your organisation involves volunteers, who should benefit and which values should guide the process. Ask leadership to approve it and share it with staff before recruitment begins.

2. Organisational culture

Discuss how staff view volunteer involvement. Concerns about workload, role boundaries or volunteers replacing paid staff should be addressed openly rather than dismissed.

Also consider:

- whether volunteers will be recognised as valued contributors;
- whether staff understand the difference between paid and voluntary roles;
- how staff and volunteers will communicate;

- whether communication tools are accessible to people with different levels of digital confidence;
- whether staff feel prepared to engage with people from different backgrounds;
- whether previous cultural misunderstandings have remained undiscussed;
- which unwritten norms may need to be explained, such as expectations about punctuality, dress, greetings, hierarchy or participation.

3. People and coordination

Volunteers require staff time for preparation, communication, supervision and support. Be realistic about the time and willingness available.

Check whether your organisation can:

- appoint a named volunteer coordinator with enough time and knowledge;
- define what the coordinator may decide and what requires management approval;
- estimate the staff time available each week;
- identify teams that both need and can support volunteers;
- avoid placing volunteers in already overstretched teams;
- provide continuity if the main coordinator is unavailable.

4. Structures, policies and legal responsibilities

Identify the systems and procedures needed to support volunteers. Depending on the organisation, role and national context, these may include:

- a written policy on volunteer involvement;
- volunteer agreements and role descriptions;
- rules on conduct, confidentiality and expenses;
- safeguarding and reporting procedures;
- data-protection arrangements;
- appropriate insurance;
- background checks or other legal requirements.

Your action: Identify which requirements apply in your context and obtain appropriate professional or legal advice where necessary. Essential gaps must be addressed before recruitment.

5. Material and financial resources

Check whether you can provide the practical conditions volunteers will need.

Ask:

- Is there suitable space to work, store belongings and take breaks?
- Are entrances, toilets, working areas and emergency exits accessible?
- Is the necessary equipment available?
- Is there a budget for expenses, materials, training, adaptations or additional support?
- For online roles, can volunteers access suitable devices, platforms and technical assistance?

6. Knowledge, skills and attitudes

Consider what staff already know and where further learning is needed.

Ask:

- Do staff have experience managing or supporting volunteers?
- What training or guidance is available?
- Have induction and training materials been prepared?
- Does the team have the social, emotional and intercultural competences required?
- Are key documents written in plain language and available in other languages or formats where needed?
- Can the organisation support volunteers who experience language, literacy or digital barriers?

Complete: Section B, **Organizational Readiness Assessment**, in the *Template Module 1 – Integrated Diagnostic and Organizational Readiness Form. (link)*

Focus on accuracy, not a high score. The purpose is to understand your real situation and identify what must change.

Step 2 – Identify areas for volunteer involvement

Now map where volunteers could make a meaningful contribution. Do more than list unfinished tasks: consider purpose, impact, sustainability and value for both the volunteer and the organisation.

Follow these principles:

Volunteers should complement paid staff, not replace them.

Each role should have a clear purpose and offer a meaningful experience.

Consider direct roles with beneficiaries and indirect roles in areas such as administration, logistics and communication.

Distinguish requirements that are essential from skills that can be developed through training.

Identify the support, supervision and adaptations each area may require.

Use a table like the example below:

Programme or activity	Possible volunteer contribution	Priority	Duration	Requirements and support
Community outreach	Support the facilitation of group sessions	High	Long-term	Training in group dynamics and regular supervision

Programme or activity	Possible volunteer contribution	Priority	Duration	Requirements and support
Communications	Create social media content	Medium	Short-term	Digital skills, content guidance and approval process
Administration	Support data entry, filing or reception	Low	Short-term	Clear instructions, confidentiality guidance and data access controls
Work with beneficiaries	Provide appropriate support within clearly defined boundaries	Medium	Long-term	Relevant skills, safeguarding preparation and understanding of beneficiaries' needs
Outreach with migrant families	Support cultural or language communication with newly arrived families	Medium	Short-term	Intercultural competence and, where relevant, shared language skills

Complete: Section C, **Possible Areas of Involvement**, in the Template Module 1 – Integrated Diagnostic and Organizational Readiness Form (link). Identify all relevant areas before deciding which ones should become volunteer roles.

Step 3 – Create your Organisational Needs Profile

Bring together the findings from Steps 1 and 2 using the *Template Module 1 – Organisational Needs Profile*.(link)

Keep the profile concise and practical. Use bullet points to record:

- the purpose of involving volunteers;
- priority areas for volunteer contribution;
- existing strengths and resources;
- barriers, gaps and risks;
- actions required before recruitment;
- longer-term improvements;
- responsible people and deadlines;
- the date for the next review.

Share the completed profile with everyone involved in volunteer coordination. This is a working document, not a formal report. Use it in **Module 2: Volunteer Recruitment** and **Module 3: Volunteer Matching and Selection**, and update it after each recruitment or volunteering cycle.

Run an effective assessment

Before the assessment

- Explain the purpose of the exercise and how the findings will be used.
- Set aside enough time for meaningful participation.
- Involve people from different roles, teams and levels of responsibility.
- Create a safe environment for concerns, doubts and disagreement.
- Use open questions rather than suggesting preferred answers.

- Ask participants to reflect on personal and organisational assumptions about volunteers.
- Clarify that this is a planning tool, not an audit or performance evaluation.

Staff concerns are useful evidence. They may reveal workload pressures, unclear boundaries, weak supervision, accessibility barriers or other readiness gaps.

During the assessment

- Encourage honest discussion based on evidence.
- Pay attention to vague answers, hesitation, disagreement or limited engagement.
- Record different perspectives instead of forcing agreement.
- Distinguish genuine organisational needs from tasks that staff simply do not want to perform.
- Check that each possible role is meaningful and connected to the organisation's mission.
- Confirm that enough time, knowledge and resources are available to support volunteers.
- Identify legal, insurance, safeguarding and data-protection requirements.
- Consider inclusion and accessibility throughout, not after roles have been designed.

Ask who may be excluded, which requirements are genuinely essential and which tasks, schedules or processes could be adapted. Where possible, consult former volunteers, community members or organisations experienced in inclusive volunteering.

After the assessment

- Summarise the main findings, decisions and unresolved issues.
- Share the results with relevant staff, including those who did not participate.
- Assign a responsible person and deadline to each action.
- Separate actions required before recruitment from gradual improvements.

- Store the assessment and supporting evidence in an accessible organisational record.
- Set a review date and revisit the findings after the first volunteering cycle.

Build inclusion and accessibility into your planning

Inclusion and accessibility should shape the assessment from the beginning. Identify potential barriers and decide which adaptations, resources and support may be required.

Physical accessibility

- Assess every location where volunteers may work, not only the main office.
- Review entrances, corridors, workspaces, toilets, break areas, meeting rooms and emergency exits.
- Check step-free access, available space, signage, lighting and the sensory environment.
- Decide whether physical requirements are essential or can be adapted.
- Communicate honestly about which locations and roles are accessible.

Digital accessibility

- Identify the email, messaging, form, training, database and file-sharing systems volunteers will use.
- Check compatibility with relevant devices and assistive technologies.
- Do not assume that everyone has suitable equipment, reliable internet access or advanced digital skills.
- Provide clear guidance, technical support and an offline or supported alternative where possible.
- Define secure and proportionate access to organisational data.

Language and communication

- Include language requirements only when they are essential.
- Use plain language, explain technical terms and avoid unnecessary acronyms.
- Provide information in relevant languages, formats or visual forms where possible.
- Plan and recognise bilingual support instead of treating it as an informal favour.
- Discuss how communication styles may vary across cultures. Directness, silence or indirect refusal, for example, should not automatically be interpreted as rudeness or disengagement.

Different levels of experience

- Separate competences required before starting from those that can be developed.
- Adapt onboarding and supervision to each volunteer's experience.
- Ensure everyone understands the organisation's mission, procedures and boundaries.
- Recognise professional expertise, community knowledge and lived experience.

Different availability

- Identify roles that require fixed attendance and those that can offer flexible schedules, shared tasks or occasional participation.
- Explain the full expected commitment, including training, meetings and minimum availability.
- Consider short-term, long-term, project-based and micro-volunteering opportunities.

Volunteers with fewer opportunities

- Identify relevant barriers, including disability, financial constraints, geographical isolation, discrimination, health conditions, language, digital access, limited education and caring responsibilities.
- Plan and budget for adapted materials, interpretation, transport, childcare, flexible schedules, technical support or additional coordination time.
- Recognise people's strengths, resilience, lived experience and community knowledge—not only their support needs.

Choose the right duration and format

The assessment should determine how each role can be delivered and whether your organisation can support that format responsibly.

Face-to-face, Online and hybrid volunteering

Format	Readiness requirements	Inclusion considerations	Main risks to address
Face-to-face	Accessible premises, equipment, staff presence,	Transport, mobility, physical access,	Inaccessible spaces, unclear boundaries or

Format	Readiness requirements	Inclusion considerations	Main risks to address
	site induction and safeguarding procedures	sensory environment and scheduling	insufficient on-site support
Online	Accessible platforms, secure data access, equipment, technical guidance and scheduled contact	Devices, internet access, digital confidence, assistive technology and time zones	Isolation, insecure data handling, unclear communication or limited connection with the organisation
Hybrid	Coordination across both formats, consistent information and comparable support	Equal access to meetings, decisions, learning and recognition	Remote volunteers receiving less information, support or visibility

Choose the format according to the role, the volunteer's circumstances and your capacity to provide meaningful support. Online volunteering is not automatically accessible.

Short-term and long-term volunteering

Type	Suitable when…	What the organisation must provide
Short-term or one-off	The task has a clear purpose, limited duration and defined output.	A simple entry process, proportionate induction, clear instructions, appropriate support and safe closure.
Long-term	Continuity, relationships, trust or accumulated knowledge are important.	Structured onboarding, regular supervision, learning opportunities, role reviews, recognition and continuity planning.

Do's and Don'ts

Do	Don´t
Involve staff from different teams and levels.	Assume that one person already knows everything the organisation needs.
Be honest about gaps and weaknesses.	Treat the assessment as a performance review.
Allocate dedicated time for reflection.	Reduce the assessment to a quick administrative task.
Listen to concerns and resistance.	Dismiss concerns that may reveal real risks.
Secure leadership support before recruitment.	Confuse enthusiasm with readiness.
Consider inclusion and accessibility from the start.	Assume that standard roles are automatically inclusive.
Address critical coordination, safeguarding, legal and data-protection gaps.	Recruit while essential procedures are missing.
Use participatory methods such as card sorting, scoring or dot voting.	Let gamification minimise serious legal or safeguarding matters.
Assess the team's intercultural competence and turn gaps into actions.	Assume that goodwill is the same as intercultural competence.
Review the assessment after each volunteering cycle.	Treat it as a one-time exercise.

Good practices

- Involve a diverse group of staff, including frontline workers.
- Record who participated, what was discussed, which decisions were made and why.

- Assess the real situation rather than the ideal one.
- Share findings with the whole team.
- Assign clear responsibility for each identified gap.
- Store the Organisational Needs Profile in a shared, accessible location.
- Set a review date before closing the assessment.
- Check after the first volunteering cycle whether the assessment reflected your actual needs and capacity.

Useful additions

The following elements are helpful but not essential:

- a one-page visual summary of the Organisational Needs Profile;
- a shared digital folder for assessment records;
- a short presentation or video explaining why the organisation involves volunteers;
- a simple dashboard covering strategic, structural, human, cultural and material readiness;
- a brief anonymous staff survey;
- a map linking each organisational need to a possible volunteer role;
- consultation with an organisation experienced in volunteer management;
- a short checklist for the volunteer coordinator;
- a card-sorting activity in which staff classify needs as **in place**, **partly in place** or **not in place.**

Examples in practice

Example 1 – Recruiting before assessing readiness

Situation: A local civil society organisation supporting older residents received an offer from three university students who wanted to volunteer for one semester.

Challenge: The coordinator accepted immediately and created broad tasks such as accompanying residents to appointments, helping with errands and providing “general support”. No one had checked whether the team could supervise three volunteers, and there were no written roles. One volunteer did not know what she was allowed to do, while another felt responsible for a medical decision he was not trained to make. Two stopped attending within a month.

What changed: Before accepting another group, the coordinator completed the readiness assessment with the team. They mapped genuine needs and created short role descriptions with named supervisors and clear limits, including tasks volunteers must never perform, such as administering medication or making care decisions.

Learning point: An offer of volunteer support is not the same as an identified organisational need. Roles created reactively are more likely to be unclear, unrealistic and unsafe.

Example 2 – Identifying an intercultural gap

Situation: A community centre wanted volunteers to support weekly drop-in sessions increasingly attended by newly arrived migrant families.

Challenge: Staff initially rated their attitudes towards volunteers as welcoming. However, discussion of organisational culture revealed different assumptions. Some expected volunteers and visitors to understand the “house rules”, although expectations about punctuality, greetings, gender-mixed activities and who could speak for a family had never been explained.

What changed: The coordinator added a question to the knowledge, skills and attitudes assessment: “Does our team have the intercultural competence to support volunteers and beneficiaries from different backgrounds, and where are the gaps?” The organisation

identified this as a medium priority and arranged an internal session to make unwritten norms explicit and agree how to communicate them before recruitment.

Learning point: Intercultural gaps often remain invisible until they are discussed directly. Good intentions do not replace intercultural competence.

Tools and templates

Tool	Purpose	Who uses it?	When?
Template Module 1 – Integrated Diagnostic and Organizational Readiness Form(link)	Assess readiness and identify activities in which volunteers may contribute	Staff and leadership involved in volunteer management	Before recruiting volunteers
Template Module 1 – Organisational Needs Profile(link)	Summarise the assessment findings, decisions, priorities and actions	Volunteer coordinator with input from the assessment team	At the end of the assessment and after each review

Using AI in this module

AI may help you organise information, simplify language, prepare questions and adapt materials. It must not replace consultation, professional judgement, legal review, safeguarding procedures or final organisational decisions.

Before using AI, follow the responsible-use principles in **Module 0: Using AI responsibly**(link)and your organisation's own data-protection and AI policies.

Appropriate uses

AI can help you:

- simplify complex or technical language;
- adapt documents for different literacy levels or formats;
- prepare meeting questions and reflection prompts;
- organise and summarise properly anonymised information;
- create first drafts of tools and templates;
- translate basic content for human review;
- identify topics requiring discussion or verification;
- review draft materials for possible unstated cultural assumptions.

Information you may use

Use only public, general, fictional or properly anonymised information. Do not enter names, contact details, confidential records, safeguarding information, health information or other identifiable personal data into publicly available AI tools. A pseudonym may not be enough if other details could identify the person.

Important limits

Do not use AI to:

- replace consultation with staff, volunteers, beneficiaries or communities;
- make final readiness, role, safeguarding or legal decisions;
- assess whether a person is suitable for volunteering;
- invent missing evidence, policies or organisational information;
- process identifiable sensitive information in publicly available tools;
- decide what is culturally appropriate for a particular community without consulting people from that community.

A named staff member must review the accuracy, relevance, tone, accessibility, possible bias, data exposure and legal or safeguarding implications of AI-generated material. Final responsibility remains with the organisation.

Example prompts

- **Planning the assessment**

"Prepare a step-by-step plan for a small civil society organisation conducting a volunteer management needs assessment for the first time. For each step, include its purpose, participants, estimated time and expected output."

- **Making text accessible**

"Rewrite the following anonymised organisational text in clear, plain English. Preserve all essential legal, safeguarding and data-protection information."

- **Reviewing barriers**

"Review this anonymised assessment for possible physical, digital, language, financial or organisational barriers. Suggest practical improvements and identify what requires human verification."

- **Organising findings**

"Organise the following anonymised notes into confirmed strengths, gaps, risks, missing information and priority actions. Do not invent information or make a final readiness decision."

Master prompt: Volunteer Management Needs Assessment Guide

Use the following prompt only with public or properly anonymised information:

"Support a civil society organisation in conducting a Volunteer Management Needs Assessment. Ask structured questions about its mission, community needs, possible volunteer roles, staff capacity, resources, recruitment, onboarding, supervision, inclusion, accessibility, legal duties, safeguarding, data protection, risks, recognition and closure. Separate confirmed information, assumptions and missing information. Identify strengths, gaps, risks, actions required before recruitment and longer-term improvements. Classify

actions as high, medium or low priority and produce a practical action plan with responsibilities, timelines, resources and evidence of completion. Do not request personal or confidential information, invent missing evidence, provide definitive legal advice or make the final readiness decision."

Reflection questions

- What is our organisation already doing well?
- What needs to improve?
- Are there areas in which volunteer involvement would currently be inappropriate or premature?
- Which gaps must be addressed before recruitment?
- Which improvements can be introduced while the programme is running?
- Are our current practices inclusive and accessible to different volunteer profiles?
- How might our cultural assumptions influence what we consider "normal" or "professional"?

Key takeaways

After completing this module, your organisation should be able to:

- explain why it wants to involve volunteers and what value they can bring;
- identify activities in which volunteers can contribute meaningfully;
- assess its capacity to recruit, support and supervise volunteers;
- identify barriers, risks and essential improvements;
- distinguish urgent actions from longer-term improvements;
- recognise where its own intercultural competence needs strengthening;
- secure leadership support and shared staff commitment;
- use an Organisational Needs Profile to guide recruitment and matching.

Before moving to Module 2(link): Confirm that all critical gaps related to coordination, safeguarding, legal compliance, insurance and data protection have been addressed. Assign responsibility and deadlines for any remaining actions.

References and further reading

Council of Europe. (2018). Reference framework of competences for democratic culture (Vols. 1–3). Council of Europe Publishing. https://www.coe.int/en/web/reference-framework-of-competences-for-democratic-culture

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