

Module 0 – Introduction [RS]

Main purpose of the module

This module aims to introduce the VolunTrek project and explain the purpose, structure and practical use of the Toolkit. After reading this module, organisations should understand why the Toolkit was created, who it is designed for, how it can support volunteer management practices, and how to navigate the different modules according to their needs.

It also helps organisations see the Toolkit as a flexible and practical resource that can be adapted to different contexts, including small and medium-sized organisations, online and face-to-face volunteering, and short-term and long-term volunteering experiences.

KEY DEFINITIONS	
Volunteer	A person who freely chooses to contribute time, skills or experience for the benefit of others, a community or a cause, without replacing paid work improperly 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.
Beneficiary	A person, group or community that receives or is intended to receive support, services or wider benefits from the organisation's activities.
Safeguarding	The policies, responsibilities and actions used to prevent and respond to harm, abuse, exploitation, neglect or unsafe practice involving volunteers, beneficiaries, staff or other participants.
Reasonable adaptation	A practical and proportionate change to a role, process, environment, schedule, communication method or tool that enables a person to participate more equitably without removing essential role requirements or creating disproportionate difficulty.

Introduction

VolunTrek is a two-year European cooperation project co-funded by the Erasmus+ Programme. It aims to strengthen the competences of adult educators, staff and organisations that host or send adult volunteers, helping them prepare, manage and support meaningful volunteering experiences in face-to-face, online and hybrid settings. Through a shared methodological framework, training activities and practical tools, the project promotes quality, inclusion, accessibility and diversity in adult volunteering.

Purpose of the Toolkit

The VolunTrek Toolkit was created to support organisations in improving the way they plan, manage and evaluate volunteering experiences.

Its main purpose is to provide practical guidance, tools and examples that organisations can use before, during and after involving volunteers. The Toolkit is not designed as a theoretical manual, but as a working resource that can be adapted to different realities, levels of experience and organisational capacities.

- understand their own needs, capacities and limitations before involving volunteers;
- communicate volunteering opportunities in a clear, realistic and inclusive way;
- match volunteers with suitable roles, tasks and support needs;
- welcome and prepare volunteers properly;
- provide regular follow-up, guidance and feedback;
- close the volunteering experience in a meaningful and responsible way;
- use practical tools, templates and reflection questions to improve their volunteer management practices.

The Toolkit also supports organisations in considering inclusion, accessibility, emotional competences and organisational capacity as transversal aspects of volunteer management.

Who the Toolkit is for

This Toolkit is mainly designed for small and medium-sized organisations that involve, or wish to involve, volunteers in their activities. It is especially useful for organisations that may not have a formal volunteer management system, a dedicated volunteer coordinator or extensive experience in structured volunteering programmes.

The Toolkit can be used by:

- volunteer coordinators;
- adult educators;
- project managers;
- youth workers;
- social workers;
- trainers and facilitators;
- staff members responsible for volunteer involvement;
- civil society organisations, NGOs, associations and community-based organisations.

Although the Toolkit focuses mainly on organisations, it also considers the experience of volunteers. A good volunteering process should protect and support both sides: the organisation and the volunteer.

How to use the Toolkit

The Toolkit can be used as a step-by-step guide or as a flexible resource. Organisations do not need to read or apply all modules at once. Each module can be used independently, according to the organisation's needs and stage of work with volunteers.

Organisations that are starting a new volunteering programme may follow the modules in order, from needs assessment to closure. Organisations that already work with volunteers may choose specific modules to improve one part of their practice, such as recruitment, onboarding or follow-up.

Each module includes practical guidance, good practices, examples and tools that can be adapted to different contexts. The resources can be used in internal team meetings, volunteer coordination processes, training sessions, planning moments or evaluation activities.

When using the Toolkit, organisations are encouraged to:

- adapt the tools to their own reality;
- use simple and accessible language;
- consider the needs of volunteers with different backgrounds, experiences and availability;
- reflect on inclusion and accessibility throughout the whole process;
- combine digital and face-to-face methods when appropriate;
- review and improve their practices regularly.

The Toolkit should be understood as a living resource. It can be adapted, expanded and improved according to the experience of each organisation and the feedback received from volunteers.

How the modules are organised

The Toolkit is organised into one introductory module and six operational modules. Each module is followed by its own attachments section containing the corresponding practical tools and templates. All modules follow a common structure so that the Toolkit remains clear, coherent and easy to use. Each module includes practical guidance, inclusion and accessibility aspects, online and face-to-face volunteering, do's and don'ts, good practices, examples, tools, possible AI support, reflection questions and key takeaways.

Module	Focus
Module 0 – Introduction	Presents the VolunTrek project, explains the purpose of the Toolkit, identifies the target users and explains how the Toolkit should be used.
Module 1 – Organisational Needs Assessment	Helps organisations understand their internal needs, capacities, limitations and priorities before involving volunteers.
Module 2 – Recruitment	Supports organisations in attracting the right volunteers through clear, inclusive and realistic communication.
Module 3 – Matching	Helps organisations match volunteers with suitable roles, tasks and support needs, considering motivation, skills, availability, expectations and accessibility.
Module 4 – Onboarding	Supports organisations in welcoming, preparing and integrating volunteers properly before they start their tasks.
Module 5 – Follow-up and Guidance	Helps organisations support, guide and monitor volunteers during their volunteering experience.
Module 6 – Closure and Next Steps	Supports organisations in closing the volunteering experience in a meaningful way, including reflection, recognition, evaluation and future opportunities.
Module Attachments	Each module is followed by its own tools, templates, checklists, forms and additional materials for direct use or adaptation.

Overall, the VolunTrek Toolkit follows the full volunteer journey: from organisational preparation to recruitment, matching, onboarding, follow-up and closure. This structure helps organisations think about volunteering not as an isolated activity, but as a complete process that requires planning, care, communication and continuous improvement.

Shared glossary

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 fit while preserving the essential purpose of a role.
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 people can participate, contribute and belong without unfair barriers.
Matching	The process of connecting a suitable volunteer with a suitable role, team, environment and level of support.
Online volunteering	Volunteering carried out mainly through digital tools and remote communication.
Selection	The process of assessing whether a candidate is suitable for volunteering or for a particular type of role.
Volunteer role	A defined set of meaningful tasks, responsibilities, boundaries, support and participation conditions.
Volunteering cycle	A defined period of volunteer involvement that may end in continuation, adaptation, a pause, a new role or departure.

Transversal notice: responsible use of Artificial Intelligence

ESSENTIAL PRINCIPLE	AI may support drafting, translation, organisation and reflection. It must not replace human relationships, safeguarding decisions, legal review or final decisions about volunteers.
Approved tools	Each organisation should use only AI tools approved under its own policies, contracts and data-protection arrangements. The Toolkit does not endorse a specific provider.
Data classification	Before using AI, classify information as public, internal, personal, confidential or highly sensitive. Public AI tools should receive only public or properly anonymised information.
Anonymisation	Remove names, contact details, identifiers and combinations of details that could reveal a person. Pseudonyms alone may not be sufficient.
Human responsibility	A named person must review accuracy, bias, tone, accessibility and context before AI-generated content is used or shared.
Prohibited uses	Do not use AI to make final recruitment, matching, safeguarding, disciplinary, wellbeing or recognition decisions; infer sensitive traits; or process safeguarding cases and identifiable sensitive feedback in public tools.

Shared Digital Access and Data Access Checklist

Use this checklist whenever volunteers access digital tools, files, accounts, communication channels or personal data. Module-specific sections should refer to this shared checklist instead of repeating the same platform guidance.

Check	Requirement	Evidence / action
☐	The role requires only the minimum digital access necessary.	
☐	The selected tools are accessible on relevant devices and compatible with assistive technologies where possible.	
☐	An alternative or support option exists for volunteers with limited equipment, internet access or digital confidence.	
☐	The volunteer receives clear instructions on accounts, passwords, acceptable use, confidentiality and incident reporting.	
☐	Access to personal or confidential data is role-based and approved by an authorised person.	
☐	Shared links, folders and groups are reviewed before access is granted.	
☐	Multi-factor authentication and secure password practices are used where available.	
☐	Personal data is not downloaded to personal devices unless explicitly authorised and protected.	
☐	The volunteer knows what may and may not be copied, shared, recorded or uploaded to AI tools.	
☐	A named contact person provides technical and data-protection support.	
☐	Access rights are reviewed when the role changes.	
☐	Accounts, permissions, groups and shared links are removed promptly when involvement ends.	
☐	The organisation keeps evidence of access approval, training and closure where appropriate.	

How to read the callouts

★ ESSENTIAL	Minimum action or safeguard required for responsible practice.
✓ GOOD PRACTICE	Recommended approach that strengthens quality and consistency.
+ NICE TO HAVE	Optional enhancement when resources and context allow.
! RISK	Issue that may cause harm, exclusion, confusion or non-compliance.
◆ TOOL	Ready-to-use resource or template.

