

Module 1 – Organisational Needs Assessment [CAR-SERV]

Main purpose of the module

This module aims to support organisations in understanding their internal needs, capacities and priorities before beginning or strengthening volunteer recruitment processes. At this stage, it is essential to pause and reflect on:

- what is truly needed,
- what already exists, and
- what conditions must be in place for volunteering to be a successful and sustainable experience
- **what cultural assumptions or gaps in intercultural competence might affect volunteers, staff or the people the organisation serves**

for both the organisation and the volunteers themselves.

This module guides organisations through a structured self-assessment process. It 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	A readiness assessment, needs map and Organisational Needs Profile.
Essential actions	Involve the team, assess readiness honestly and address high-priority gaps before recruitment.

1. Introduction

An organisational needs assessment is a structured process through which an organisation reviews its mission, activities, resources and priorities to understand whether and how volunteers can contribute meaningfully. It provides the foundation for the following stages of volunteer management, particularly recruitment and matching. Without a clear understanding of organisational needs, it becomes difficult to define relevant volunteer roles, communicate realistic expectations and attract suitable volunteers.

Effective volunteer management requires planning, clear communication, appropriate support and regular reflection. For this reason, the needs assessment should be the starting point of the process, helping organisations involve volunteers in a purposeful, realistic and well-organised way. It also contributes to more inclusive and accessible volunteering by helping organisations distinguish essential requirements from unnecessary assumptions. **Also, it includes recognising where staff and existing structures may lack the intercultural competence needed to work confidently with volunteers, beneficiaries and communities from different cultural, linguistic or religious backgrounds.** This makes it possible to create more flexible opportunities and improve the experience of volunteers, staff and beneficiaries.

Within the VolunTrek Toolkit, volunteer management is presented as a continuous cycle: Needs Assessment, Recruitment, Selection, Matching, Onboarding, Monitoring, Ending and Evaluation, followed by a new Needs Assessment. The effectiveness of the entire cycle depends on the quality of its starting point. When the needs assessment is weak or skipped, misunderstandings and mismatches may affect all subsequent stages. Each module of the Toolkit therefore builds on the clarity created during this initial assessment.

Organisations should also revisit their needs after each volunteering cycle, as their activities, resources and priorities may change over time. What was relevant twelve months ago may no longer reflect the organisation's current reality.

2. Why this topic matters

Before recruiting volunteers, organisations need to understand what they actually need, what they can offer and what support they are able to provide. Without a clear organisational framework, volunteering can lead to

confusion, frustration and early dropout. A needs assessment helps prevent mismatches between volunteer profiles and organisational realities, while creating a shared understanding among staff about the role of volunteers.

Without this assessment, organisations may recruit volunteers for poorly defined roles, place them in teams that are not prepared to support them or provide training without knowing which competences are required. They may also overlook legal, insurance or safeguarding responsibilities, particularly when working with vulnerable groups. A thorough needs assessment therefore creates the foundation for meaningful, effective and ethical volunteer management.

This process also supports inclusion and accessibility. Organisations often create generic volunteer profiles that unnecessarily require high language proficiency, formal qualifications or extensive availability. A needs assessment encourages them to consider not only what support is needed, but also who could contribute and in what way. This can lead to more flexible and accessible opportunities for people with limited formal education, disabilities, developing language skills, caring responsibilities or specific availability and support needs. It creates space to design roles that are accessible to:

- Adults with lower levels of formal education or limited literacy
- People with physical, sensory or intellectual disabilities
- Migrants and refugees, including those still developing language skills in the host country
- Older adults who may prefer shorter, more flexible or less physically demanding engagements
- People with caring responsibilities who need irregular or remote volunteering options

Accessibility also depends on how the organisation operates. A needs assessment helps organisations to identify structural barriers that may make the experience unnecessarily difficult for volunteers once they are in place:

- Physical access: Are your premises accessible to people with mobility impairments? Are digital tools and platforms used by volunteers compatible with assistive technologies?
- Information access: Are volunteer guidelines, policies and communications written in plain, clear language? Are they available in multiple formats or languages?
- Support structures: Is there a named contact person for volunteers? Are supervision arrangements clear and predictable?
- Cultural access: Does the organisational environment feel welcoming to people from different cultural backgrounds? Are assumptions about shared norms made explicit? [Do staff and volunteer coordinators have experience working across cultural, religious or linguistic differences? Are unwritten norms \(dress, greetings, gender-mixed activities, punctuality, hierarchy\) ever made explicit, or are volunteers and beneficiaries expected to guess them? Is there a way to raise a cultural misunderstanding without it being treated as a complaint?](#)

Identifying these barriers before volunteers arrive allows the organisation to address them instead of expecting volunteers to manage them alone.

Finally, the needs assessment contributes to the sustainability of the volunteering programme. Programmes based on informal arrangements or on the efforts of one or two staff members are vulnerable to disruption. By assessing its needs collectively, the organisation can integrate volunteering into its structures, responsibilities and long-term planning. Volunteers are then recognised not as an occasional extra, but as valued contributors who require clear roles, appropriate support and responsible management.

Without Needs Assessment	With Needs Assessment
Roles created reactively, when a volunteer appears	Roles designed proactively, based on identified organisational gaps
Volunteers placed wherever there is a willing staff member	Volunteers matched systematically to areas of genuine need
Inclusion left to chance - whoever applies is accepted	Inclusive role design built in from the start

Without Needs Assessment	With Needs Assessment
Accessibility barriers discovered only when problems arise	Barriers identified and addressed before recruitment begins
Programme dependent on individual enthusiasts	Programme embedded in organisational systems and culture
Evaluation impossible - no baseline was established	Evaluation grounded in clearly stated initial intentions
Cultural assumptions treated as neutral or universal	Cultural assumptions identified and made explicit before they cause friction

3. Practical guidance

Before initiating or strengthening a volunteering programme, the organisation must create internal conditions for it to succeed. This is not only about having the right paperwork in place - it is about building shared understanding, clear governance, and a culture in which volunteer involvement is recognised as a legitimate and valued part of how the organisation operates.

Readiness to involve volunteers effectively can be assessed across five key dimensions:

Dimension	What It Means	Key Questions to Ask
Strategic	Alignment between volunteer involvement and the organisation's mission and priorities	Why do we want volunteers? How does this serve our mission?
Structural	Systems, policies and processes to support volunteers	Do we have volunteer policies, agreements, insurance?
Human	Staff capacity and willingness to coordinate and support volunteers	Who will supervise volunteers? Do they have time, knowledge?
Cultural	Organisational attitudes and values around volunteering	Do staff welcome volunteers? Are boundaries clear? Do staff have the confidence and skills to work with people from different cultural, linguistic or religious backgrounds? Are cultural assumptions ever discussed openly?
Material	Physical and financial resources to host volunteers	Do we have a workspace, tools, a budget for volunteer support?

Step 1 - Clarify Your Organisational Context

Before involving volunteers, the organisation should understand why it wants to do so and whether it has the capacity to support them. Volunteering should be connected to the organisation's mission, priorities and values, rather than seen only to complete additional tasks.

Strategic dimension

Leadership should clarify what volunteers can bring to the organisation, such as time, skills, lived experience, community connections and new perspectives.

Reflection Questions:

- What is the core mission of your organisation?
- What are your main activities and target groups?
- What are your current priorities for the next 1–3 years?

- Has the organisation worked with volunteers before? What worked well and what did not?
- What does meaningful volunteering mean in your organisation?
- Does the organisation currently serve, or aim to serve, communities from a range of cultural, linguistic or migration backgrounds? What does the team already know, and not know, about working respectfully across these differences?

Based on this reflection, prepare a short internal statement explaining the purpose of volunteering, who it should benefit and which values should guide it. Leadership should approve this statement and communicate it to staff before recruitment begins.

The organisation should also decide whether it wants to offer short-term volunteering, long-term volunteering or both. Short-term opportunities require simple structures and very clear tasks. Long-term volunteering requires more induction, supervision and relationship-building, but allows volunteers to take on more complex roles.

Structural dimension

Staff should clearly understand who is responsible for each part of volunteer management. The organisation should:

- Appoint a person responsible for coordinating volunteers.
- Define what the coordinator can decide and what requires management approval.
- Create basic rules covering conduct, confidentiality, expenses and safeguarding.
- Identify relevant legal, data-protection, insurance and background-check requirements.

Human dimension

Volunteers require staff time for induction, communication, supervision and support. Before recruitment, the organisation should be realistic about the time it can provide.

- Estimate how much staff time is available each week.
- Identify the teams that need volunteers and can support them.
- Avoid placing volunteers in teams where staff are already overstretched.

Cultural dimension

New volunteers may create concerns among staff, particularly about workload or confusion between paid and voluntary roles. These concerns should be discussed openly, with clear responsibilities and role boundaries.

The organisation should also decide how it will communicate with volunteers and ensure that the tools used are accessible to people with different levels of digital skills.

This is also the moment to ask whether staff feel confident engaging with volunteers and beneficiaries whose cultural background differs from their own, and whether any past misunderstandings have gone undiscussed.

Material dimension

The organisation should check whether it has the practical and financial resources needed to host volunteers.

Consider whether:

- Is there suitable space for volunteers to work, store belongings and take breaks?
- Are toilets, entrances and working areas accessible?
- Is there a budget available for volunteer support?
- There is suitable space for volunteers to work, store belongings and take breaks.
- A budget is available for expenses, materials, training or other forms of support.

Prepare for the Full Volunteering Journey

Preparation should not end with recruitment. The organisation should consider the full experience, from the first contact to the end of the volunteer's involvement.

- Outline the main stages of the volunteer journey.
- Identify moments when volunteers may be more likely to leave or feel dissatisfied, particularly during the first weeks or periods of change.
- Plan how volunteers will be supported, recognised and thanked throughout their involvement.

Step 2 - Identify Areas for Volunteer Involvement

In this step, you will map the specific areas within your organisation where volunteers could meaningfully contribute. This goes beyond listing tasks — it requires thinking about impact, sustainability, and the value added for both sides of the volunteering relationship.

Guiding Principles

- Volunteers are not a substitute for paid staff. Their involvement should complement existing work, not replace it.
- Meaningful volunteering creates genuine value for the volunteer as well as the organisation.
- Consider both direct roles (working with beneficiaries) and indirect roles (administrative, logistics, communications).

Programme / Activity Area	Potential Volunteer Contribution	Priority	Duration short/long term	Notes on volunteer requirements
e.g. Community outreach	Support facilitation of group sessions	High	long	Needs training on group dynamics
e.g. Communications	Social media content creation	Medium	short	Requires digital skills
e.g. Administration	Data entry, filing, reception	Low	short	Low complexity but high time input
e.g. Work with beneficiaries	Providing professional or lower level services (depending on their expertise)	Medium	long	Requires skills and/or understanding of beneficiaries' needs
e.g. Community outreach with migrant families	Cultural and language bridging between the organization and newly arrived families	medium	short	Requires intercultural competence and, ideally, shared language(s) with the community served

Copy and complete this table for your organisation.

Aim to identify as many relevant areas as possible before moving to the next step.

Step 3 - Assess Your Organisational Readiness

This is the most substantial step of the module. Using the five dimensions outlined above, your team will systematically assess the current state of your organisation across each readiness area.

Readiness Self-Assessment Tool

For each statement below, score your organisation from 1 (not in place) to 4 (fully in place). Be honest - the value of this tool lies in identifying gaps, not in achieving a high score.

Statement	1 – Not in place	2 – Partially	3 – Mostly	4 – Fully
Leadership has endorsed internal statement of purpose of volunteering	☐	☐	☐	☐
Staff is familiar with internal statement of volunteering	☐	☐	☐	☐
Volunteer coordinator is appointed	☐	☐	☐	☐
A clear written policy for volunteer involvement exists	☐	☐	☐	☐
Legal requirements are checked and are in place	☐	☐	☐	☐
Staff have time allocated to coordinate volunteers	☐	☐	☐	☐
Staff attitudes towards volunteers are welcoming and clear	☐	☐	☐	☐
We can offer volunteers a safe and equipped working environment	☐	☐	☐	☐
We have or can develop volunteer training materials	☐	☐	☐	☐
We have a budget to cover basic volunteer expenses	☐	☐	☐	☐
We have proper communication systems in place	☐	☐	☐	☐
Basic volunteer journey is in place	☐	☐	☐	☐
We have a process for recognising volunteer contributions	☐	☐	☐	☐
Staff and volunteer coordinators have the intercultural competence and confidence to work with people from different cultural, linguistic or religious backgrounds	☐	☐	☐	☐
Unwritten cultural norms and expectations (communication style, gender-mixed activities, religious practice, dietary needs) have been made explicit rather than assumed	☐	☐	☐	☐

Statement

Interpreting Your Score

Consortium decision: retain the agreed score ranges as written. Scores at the boundary points should be interpreted through team discussion and the organisation's evidence, rather than automatically determining readiness.

46 - 60 points: Strong readiness. Focus on refining your approach and building on existing strengths.

31 - 45 points: Moderate readiness. Identify 2–3 priority gaps to address before full-scale recruitment.

15 - 30 points: Early stages. Consider a phased approach - begin with a pilot involving 1–2 volunteers.

A gamification option: The scoring tool can be run as a team game rather than an individual exercise. Ask each participant to score independently without discussion, then reveal scores for each statement and discuss the differences. Variation of scores within the team is itself valuable data since it surfaces different perceptions of organisational readiness that a consensus process might hide. Recognise the team's willingness to discuss differences openly rather than rewarding individual scores.

Step 4 - Identify Gaps and Plan Next Steps

Based on your reflections in Steps 1–3, this final step asks you to turn your findings into actionable priorities. The goal is to move from assessment to planning - completing the Organisational Needs Profile.

Needs and Resources Mapping template

Complete this template as a team, one row for each need you identify within your organisation.

Be honest about what is and is not currently in place - the value of this tool is in identifying gaps, not in presenting an optimistic picture.

Organisation: _____

Completed by: _____

Date of assessment: _____

Scheduled review date: _____

AREA 1 — HUMAN RESOURCES

Staff time, coordinator capacity, supervision availability

Need identified	What is currently in place	Gap or action required	Responsible person	Timeline	Priority (H/M/L)	Status

Guiding questions for this area:

- Who will coordinate volunteers, and how much time do they have available?
- Which teams or staff members will work directly alongside volunteers?
- Is there capacity to provide regular supervision and support?
- Has this been discussed and agreed with the relevant staff members?

AREA 2 — FINANCIAL RESOURCES

Budget for volunteer support, expenses, training and materials

Need identified	What is currently in place	Gap or action required	Responsible person	Timeline	Priority (H/M/L)	Status

Guiding questions for this area:

- Is there a budget line for volunteer-related costs (travel, meals, materials)?
- Are volunteer expenses reimbursed, and is the process clear?
- Is there funding available for volunteer training or induction activities?
- Have insurance costs related to volunteers been accounted for?

AREA 3 — STRUCTURAL AND LEGAL

Policies, insurance, volunteer agreements, data protection, safeguarding

Need identified	What is currently in place	Gap or action required	Responsible person	Timeline	Priority (H/M/L)	Status

Guiding questions for this area:

- Does the organisation have a volunteer policy? Does it cover conduct, confidentiality, safeguarding and expenses?
- Are volunteers covered by the organisation's liability insurance?
- Are there legal requirements specific to your sector or country that apply to volunteers (background checks, data protection obligations)?
- Is a volunteer agreement template available?

AREA 4 — MATERIAL AND PHYSICAL RESOURCES

Workspace, equipment, digital tools, accessibility of premises

Need identified	What is currently in place	Gap or action required	Responsible person	Timeline	Priority (H/M/L)	Status

Guiding questions for this area:

- Is there a physical space where volunteers can work, store belongings and take breaks?
- Are premises accessible to people with mobility or sensory impairments?
- What digital tools will volunteers need to use? Are these accessible and easy to use for people with varying levels of digital literacy?
- Is equipment (computers, phones, materials) available for volunteer use?
- Are offline alternatives available for volunteers who cannot use digital tools?

AREA 5 — KNOWLEDGE, SKILLS AND INTERCULTURAL COMPETENCES

Staff competences, training materials, intercultural awareness, language support

Need identified	What is currently in place	Gap or action required	Responsible person	Timeline	Priority (H/M/L)	Status

Guiding questions for this area:

- Do staff have experience of managing or supporting volunteers? If not, what training is available?
- Are induction and training materials for volunteers already developed, or do they need to be created?
- Does the team have the intercultural competences needed to support volunteers from different backgrounds?
- Are key documents available in plain language and, where needed, in additional languages?
- Is there capacity to support volunteers who face language barriers or have lower digital literacy?

SUMMARY OF FINDINGS

Once all five areas have been completed, use this summary table to capture the overall picture.

Area	Total needs identified	Needs met	Partially in place	Gaps to address
Human resources				
Financial resources				
Structural and legal				
Material and physical				
Knowledge and skills				
Total				

Priority gap analysis

List the gaps that must be addressed before volunteer recruitment begins. For each gap, note what action is required, who is responsible and by when.

Gap identified	Area	Action required	Responsible	Deadline

Key decisions and notes

Use this space to record any decisions made during the assessment, disagreements or minority views noted, and any contextual information that is important for understanding the findings.

Next steps

1. Share the findings with all staff involved in volunteer coordination
2. Obtain leadership endorsement of the priority gap action plan
3. Begin addressing high-priority gaps before proceeding to Module 2
4. File this document in the organisation's volunteer management records
5. Set a calendar reminder for the scheduled review date

Step 5 - Organisational Needs Profile

The Organisational Needs Profile is the key output of this module.

It is a working document - not a formal report - that captures the essential information gathered during the assessment.

It will be used directly in Module 2 (Recruitment and Selection) and Module 3 (Matching).

How to Use This Template

Complete each section based on your team's discussions in Steps 1–4.

Keep it concise — bullet points are preferred over extended prose.

Revisit and update this document after each recruitment cycle.

Share it with all staff involved in volunteer coordination.

Section	Content
Organisation name and brief description	
Core mission and target groups	
Why we want to involve volunteers (rationale)	
Key areas for volunteer involvement (from Step 2)	
Number of volunteers needed (initial estimate)	
Readiness assessment score and key strengths	
Priority gaps to be addressed and timeline	
Staff member responsible for volunteer coordination	
Key risks identified and mitigation plans	
Date of assessment and review schedule	

What coordinators and adult educators should pay attention to

The organisational needs assessment should be a collaborative and realistic reflection process. The coordinator or adult educator facilitates discussion, encourages participation and helps the team reach clear conclusions.

Before the assessment

Explain the purpose of the assessment and how the findings will be used.

Set aside enough time for meaningful participation and involve staff from different roles and areas.

Create a safe environment in which people can express concerns, doubts and different opinions.

Use open questions rather than suggesting preferred answers.

Reflect on personal and organisational assumptions about volunteers, their abilities and the roles they may perform.

Clarify that the assessment is a planning and improvement tool, not an audit or performance evaluation.

Concerns raised by staff are useful information. They may reveal issues related to workload, role boundaries, supervision, accessibility or organisational readiness that should be addressed before recruitment.

During the assessment

Encourage honest, evidence-based discussion and pay attention to hesitation, vague answers, disagreement or limited engagement.

Record different perspectives rather than forcing artificial consensus.

Distinguish genuine organisational needs from tasks that staff simply prefer not to perform.

Check whether each proposed role is meaningful, appropriate and connected to the organisation's mission.

Assess whether enough time, staff, resources and knowledge are available to support volunteers properly.

Identify legal, insurance, safeguarding and data-protection requirements that must be addressed before volunteers begin.

The goal is not to obtain the highest possible readiness score. It is to understand the organisation's real situation and identify the actions required for responsible volunteer involvement.

Inclusion during the assessment

Inclusion should be considered throughout the assessment, not added after roles have already been designed.

Ask who may be excluded, whether requirements are genuinely essential, which tasks or schedules can be adapted and whether assumptions are influencing decisions. 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 all relevant staff, including those who did not participate directly.

Assign responsibilities and deadlines for addressing gaps.

Separate actions required before recruitment from improvements that can be introduced gradually.

Store the assessment and supporting evidence in an accessible organisational record.

Set a review date and revisit the assessment after the first volunteering cycle.

4. Inclusion and accessibility

Inclusion and accessibility should be considered from the beginning of volunteer planning. During the needs assessment, organisations should identify barriers that may prevent participation and decide what adaptations, resources and support may be required.

4.1. Physical accessibility

Assess entrances, corridors, working areas, toilets, break areas, meeting rooms and emergency exits for every activity location, not only the organisation's main venue.

Check step-free access, available space, signage, lighting and other relevant access needs.

Review whether physical requirements are essential or can be adapted.

Communicate honestly which spaces and roles are accessible, assessing each activity location separately.

4.2. Digital accessibility

Identify the email, messaging, forms, training platforms, databases and file-sharing systems volunteers will use.

Check compatibility with relevant devices and assistive technologies.

Do not assume that every volunteer has suitable equipment, reliable internet access or advanced digital skills.

Provide clear guidance, technical support and an offline or supported alternative where possible.

Refer to the Shared Digital Access and Data Access Checklist in Module 0.

4.3. Language and communication

Include language requirements only when they are essential to the role.

Use plain language, explain technical terms and avoid unnecessary acronyms.

Provide relevant languages, formats or visual guidance where possible.

Plan and recognise bilingual support rather than treating it as an informal favour.

Language support works best alongside broader intercultural awareness: understanding, for example, that directness, silence or indirect refusal can carry different meanings across cultures helps prevent language gaps from being read as rudeness or disengagement.

4.4. Emotional and relational support

Give every volunteer a named contact person and combine formal supervision with regular informal check-ins. Create safe opportunities for feedback and pay attention to signs of stress, disengagement or overload. Maintain clear professional boundaries and refer people to appropriate services when specialised support is required.

Be aware that norms around discussing emotions, asking for help or accepting supervision can vary culturally; check in through more than one channel or format rather than assuming one approach works for everyone.

4.5. Different levels of experience

Separate competences that are essential before starting from those that can be developed through training. Adapt onboarding and supervision to the volunteer's experience while ensuring that everyone understands the organisation's mission, procedures and boundaries.

Recognise professional knowledge, community knowledge and lived experience as valuable contributions.

4.6. Different availability

Identify which roles require fixed attendance and which can offer flexible schedules, shared tasks or occasional participation.

Explain the expected commitment, including mandatory training, meetings and minimum availability.

Consider short-term, long-term, project-based and micro-volunteering opportunities.

4.7. Volunteers with fewer opportunities

Identify barriers relevant to the organisation's context, including disability, financial barriers, geographical isolation, discrimination, health conditions, language, digital access, limited education or caring responsibilities. Plan and budget for measures such as adapted materials, interpretation, transport, childcare, flexible schedules, technical support or additional coordination time.

Recognise volunteers' strengths, resilience, lived experience and community knowledge, rather than viewing them only through support needs.

5. Online, face-to-face and hybrid volunteering

The needs assessment should determine how each role can be delivered and whether the organisation has the resources to support that format responsibly.

Format	Readiness requirements	Main inclusion considerations	Main risks
Face-to-face	Accessible premises, equipment, staff presence, site induction and direct-contact safeguarding procedures.	Transport, mobility, physical access, sensory environment and scheduling.	Feeling unsupported on site, inaccessible spaces or unclear boundaries.
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 of both formats, consistent information and comparable support across locations.	Equal access to meetings, decisions, learning and recognition.	Remote volunteers receiving less information, support or visibility than on-site volunteers.
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The format should reflect the nature of the role, the volunteer's circumstances and the organisation's ability to provide meaningful, inclusive and well-supported participation. Online participation should not be assumed to be automatically accessible.

5.1. Short-term and long-term volunteering

Type	Suitable when	Organisational requirements
Short-term or one-off	The task has a clear purpose, limited duration and defined output.	Simple entry process, proportionate induction, clear instructions and safe closure.
Long-term	Continuity, relationships, trust or accumulated knowledge are important.	Structured onboarding, regular supervision, role reviews, recognition and continuity planning.

6. Do and Don't

Do	Don't
Involve staff from different teams and levels in the assessment.	Do not skip the assessment because you believe you already know what the organisation needs.
Be honest about weaknesses and gaps. The assessment is a planning tool, not a performance review.	Do not create volunteer roles before identifying organisational needs.
Allocate dedicated time for team reflection.	Do not treat the assessment as a quick administrative task.
Listen to staff concerns and resistance.	Do not dismiss concerns as obstacles; they may reveal important risks.
Secure leadership support before recruitment begins.	Do not confuse enthusiasm with readiness. Wanting volunteers does not mean the organisation can support them properly.
Consider inclusion and accessibility from the beginning.	Do not assume that standard volunteer roles are automatically inclusive.
Review the assessment regularly and after each volunteering cycle.	Do not treat the assessment as a one-time exercise.
Address critical gaps in coordination, safeguarding, legal compliance and data protection before recruitment.	Do not recruit volunteers while essential procedures are still missing.
Use participatory methods such as card sorting, scoring or dot voting to engage the team.	Do not allow gamification to reduce the seriousness of legal, safeguarding or data-protection issues.
Ask explicitly whether the team has the intercultural competence needed for the communities it works with, and treat gaps as an action item, not a personal failing.	Don't assume that staff goodwill or good intentions are the same as intercultural competence.

7. ✓ Good practices and Nice to Have

- Involve a diverse group of staff, including frontline workers who have direct contact with beneficiaries.
- Keep records of who participated, what was discussed, which decisions were made and why.
- Store the final Organisational Needs Profile in a shared and accessible location.
- Assess the organisation's real situation rather than what should ideally be available.
- Communicate the findings to the whole team, including staff who did not participate.
- Assign clear responsibility for addressing the identified gaps.
- Set a review date before completing the assessment and add it to the organisational calendar.
- Review the findings after the first volunteering cycle to determine whether the assessment accurately reflected the organisation's needs and capacity.

The following elements can strengthen the process but are not essential:

- A one-page visual summary of the Organisational Needs Profile.
- A shared digital folder containing all assessment documents and records.
- A short presentation or video explaining why the organisation is involving volunteers.
- A simple dashboard showing readiness across the strategic, structural, human, cultural and material dimensions.
- A brief anonymous staff survey before and after the assessment.
- A mapping tool linking each organisational need to a possible volunteer role.
- A consultation with an organisation experienced in volunteer management.
- A short reference checklist for the volunteer coordinator.
- A card-sorting activity in which staff classify needs as in place, partially in place or not in place.

8. Examples

Example 1 — Skipping the assessment and recruiting reactively

Situation: A local CSO supporting older residents received an offer from a group of three university students who wanted to volunteer for one semester.

Challenge: Keen not to lose the offer, the coordinator accepted immediately and invented tasks on the spot - accompanying residents to appointments, helping with errands and "general support". No one had asked whether the CSO had capacity to supervise three new volunteers at once, and no written roles existed. One volunteer was unsure what she was allowed to do; one felt responsible for a medical decision he was not trained to support. Two of the three stopped attending within a month.

What the organisation did: Before accepting a second group the following semester, the coordinator ran the readiness self-assessment tool with the whole team, mapped which activity areas genuinely needed support, and wrote short role descriptions with named supervisors and clear limits - including what volunteers must never be asked to do (e.g. administer medication or make care decisions).

Learning point: An appealing offer of volunteers is not the same as an identified organizational need. Roles created reactively, without an assessment, tend to be unclear, oversized and risky for everyone involved.

Example 2 — The assessment surfaces an intercultural gap

Situation: A community centre in a mid-sized town wanted to recruit volunteers to help run its weekly drop-in sessions, which are increasingly attended by newly arrived migrant families.

Challenge: During Step 3 of the assessment (Readiness Self-Assessment Tool), staff scored "Staff attitudes towards volunteers are welcoming and clear" highly, but discussion under the Cultural dimension revealed disagreement: some staff assumed volunteers and visitors would naturally "understand the house rules", while others pointed out that norms around punctuality, physical greetings, gender-mixed activities and even who is allowed to speak for a family were not shared or explained to anyone - staff, volunteers or visiting families. No one had ever discussed this openly before.

What the organisation did: The coordinator added a specific question to Area 5 (Knowledge and Skills) of the Needs and Resources Mapping template: "Does our team have the intercultural competence to support volunteers and beneficiaries from different backgrounds, and where is this currently missing?" The gap was marked as medium priority, and the organisation scheduled a short internal session to make its unwritten norms explicit and agree how they would be communicated to volunteers before recruitment began.

Learning point: Intercultural competence gaps are often invisible until someone asks about them directly. Naming "cultural access" as its own line of inquiry during the needs assessment, rather than assuming goodwill is enough, is what turns an assumption into a plan.

9. ♦ Tools and templates

Tool	Purpose	Who should use it?	When?
Readiness Self-Assessment Tool	Assess the organisation's current readiness to involve volunteers.	Organisation	Before involving volunteers
Volunteer Involvement Areas Template	Identify activities and areas where volunteers may contribute.	Organisation	Before designing volunteer roles
Needs and Resources Mapping Template	Identify gaps, priorities, available resources and actions.	Organisation	During the needs assessment
Organisational Needs Profile	Summarise the main findings and decisions from the assessment.	Organisation	At the end of the assessment

10. Artificial Intelligence support

Artificial Intelligence can support organisations during the needs assessment by helping them organise information, simplify language, prepare questions and adapt materials. It must not replace consultation, professional judgement, legal review, safeguarding procedures or final organisational decisions.

10. Artificial Intelligence support

10.1. Appropriate uses

Simplify complex or technical language.

Adapt documents for different literacy levels or formats.

Prepare meeting questions and reflection prompts.

Organise and summarise anonymised information.

Create first drafts of tools and templates.

Translate basic content for human review.

Identify topics that require further discussion or verification.

[Help prepare culturally sensitive reflection questions or check draft materials for unstated cultural assumptions \(for human review, not as a final judgement\).](#)

10.2. Information that may be used

Use only public, general organisational, fictional or properly anonymised information. Do not upload names, contact details, confidential records, safeguarding information, health information or other identifiable personal data to public AI tools. Replacing a name with a pseudonym may not be sufficient when other details can identify the person.

10.3. Important limits

Do not replace direct consultation with staff, volunteers, beneficiaries or communities.

Do not make final readiness, role, safeguarding or legal decisions.

Do not assess whether a person is suitable for volunteering.

Do not invent missing evidence, policies or organisational information.

Do not process identifiable sensitive information in public tools.

[Do not rely on AI to determine what is culturally appropriate for a specific community; this requires direct consultation with people from that community.](#)

10.4. Human responsibility

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

10.5. Example prompts

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

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

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

“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 AI Prompt: Volunteer Management Needs Assessment Guide

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

“Support a civil society organisation to conduct a Volunteer Management Needs Assessment. Ask structured questions about its mission, community needs, 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.”

11. Reflection questions

- What is the organisation already doing well?
- What needs to be improved?
- Are there areas where involving volunteers would currently be inappropriate or premature?
- Which gaps must be addressed before recruitment, and which can be improved while the programme is running?
- Are current practices inclusive and accessible to different volunteer profiles?
- Where might our own cultural assumptions be shaping what we think is 'normal' or 'professional' for volunteers?

12. Key takeaways

By completing the needs assessment, the organisation should be able to:

- Clearly explain why it wants to involve volunteers and what added value they can bring.
- Identify the activities, programmes and roles where volunteers can contribute meaningfully.
- Assess whether the organisation is ready to recruit, support and supervise volunteers.
- Identify barriers, risks and essential improvements.
- Prepare an Organisational Needs Profile to guide recruitment and volunteer-role planning.
- Secure leadership support and a shared commitment from staff
- Identify where the organisation's own intercultural competence needs strengthening, rather than placing the burden of adaptation on volunteers alone.

13. References and further reading

All references must follow APA 7th edition and include, where available: author or organisation; year (or n.d. when no date is available); title in sentence case; edition or report details; publisher when required; DOI or stable URL. Partners must verify that every source exists, supports the cited content and can be accessed through the stated link. Unverified references should remain marked “details to be confirmed” and must not be presented as final evidence.

- Global Volunteering Standard – A framework that helps volunteer-involving organisations understand good practice and strengthen responsible and impactful volunteer management:
<https://forum-ids.org/global-volunteering-standard/>
- European Volunteer Centre (CEV) – European resources, policies and good practices related to volunteering:
<https://www.europeanvolunteercentre.org/>
- Inclusion Europe – Guidance and resources on accessible and easy-to-read communication:
<https://www.inclusion-europe.eu/easy-to-read/>
- Council of Europe's Reference Framework of Competences for Democratic Culture:
<https://www.coe.int/en/web/reference-framework-of-competences-for-democratic-culture>

Attachments to Module 1

The following ready-to-use tools belong to this module. In the final Toolkit, the module should retain the overview and usage instructions, while each complete editable tool should appear once in this attachments section to avoid duplication.

- Readiness Self-Assessment Tool
- Volunteer Involvement Areas Template
- Needs and Resources Mapping Template
- Organisational Needs Profile
- Volunteer Management Needs Assessment AI Guide