

THE VOLUNTEER HANDBOOK



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of Canada / Association canadienne des réviseurs

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The Volunteer Handbook

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Being a Volunteer

1

**General Information
About Editors' Association
of Canada/Association
canadienne des réviseurs**

1.1 Who we are

The Editors' Association of Canada (Editors Canada) promotes professional editing for effective communication. Our members work in English and French for individual clients or organizations in various sectors, including government, publishing, business, technical, not-for-profit and academic.

A national executive council governs our federally incorporated not-for-profit association, and we work with other groups on shared concerns.

We support professional development through seminars, online training, conferences and member networking. For more information, including our Statement of Human Rights, visit the About Editors Canada page on our website.

1.2 How we are structured: national, branch and twig

An elected national executive council (NEC) governs Editors Canada, overseeing the national committee chairs who work with staff and volunteers to support professional editors. The NEC also directs association activities and decides how to spend funds. Council meeting summaries and related documents are available on our website in the members' area.

Within our regions, Editors Canada encourages and supports branches (minimum of 30 members) and twigs (minimum of five members).

- Branches and twigs are funded by Editors Canada and accountable to the NEC (as per the Branch and Twig Policy).
- Branches and twigs engage in networking, communication, professional development, outreach and public relations.
- When an editor joins the association, they also choose a branch or twig to belong to.

1.3 A volunteer-run organization

As a volunteer-run organization, Editors Canada relies on the active involvement of its members to achieve its aims and objectives. Volunteers are essential for the healthy functioning of the association.

Volunteering lets members give back to the organization while at the same time developing skills they can use in their careers. It's also an excellent way to make new friends, network with other editors and build relationships.

There are opportunities to volunteer at both the national and local levels. Many tasks can be done from home, so where you live does not need to be a limiting factor. We support our volunteers, and we are committed to helping them perform their roles effectively.

1.4 Editors Canada's responsibility to its volunteers

We actively seek volunteers of diverse backgrounds and experience, and we provide resources for their training and recognition. Student affiliates who volunteer gain the benefits of networking, professional development and mentoring.

Volunteer assignments ideally make meaningful use of volunteers' abilities, needs and backgrounds, or provide an opportunity for growing a volunteer's skills.

Editors Canada informs volunteers about

- our policies and procedures,
- the skills and time the volunteer assignment requires,
- volunteer responsibilities and
- volunteer benefits.

Volunteers receive support, supervision, evaluation and opportunities to give and get feedback. Some important or demanding assignments offer an honorarium.

Volunteer contributions are recognized formally in the annual report or informally in a letter of appreciation. Outstanding volunteer service is also recognized in the annual President's Award for Volunteer Service and the Lee d'Anjou Volunteer of the Year Award.

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Volunteer Conduct

2.1 Policies on general behaviour

We expect volunteers to

- commit to their volunteer assignments in good faith,
- perform their assignments in an effective and timely manner and
- communicate respectfully and responsibly with other volunteers as needed.

As a volunteer, you are expected to seek guidance and feedback on your volunteer assignments. In most cases, you will be assigned to specific committees or subcommittees and report to a volunteer leader. Leaders are available to answer questions, offer feedback and provide clarification or further instructions where needed.

Where disagreement or conflict arises, you should address such situations respectfully, responsibly and promptly. You should go to your volunteer leader if you have concerns about other volunteers or any situations that make you feel uncomfortable. If you are not comfortable speaking to your volunteer leader, feel free to contact someone else, such as a committee chair or branch chair/twig coordinator or any director on the national executive council (NEC).

2.2 Confidentiality

Some volunteer assignments will give you access to confidential information, such as member details or branch/twig finances. This information should not be shared with other members or non-members.

See the following relevant documents on the bylaw, policies and procedures section of our website:

- Confidentiality Policy
- Confidentiality Procedures
- Privacy Policy

2.3 Conflicts of interest

To identify and avoid any actual or perceived conflict of interest between your private interests and association responsibilities, see the conflict of interest policy on the bylaw, policies and procedures section of our website.

2.4 Deadlines, lateness and keeping commitments

If you are unable to meet a deadline, or if you are going to be late for a meeting or event at which you are volunteering, please let your committee chair or project lead know as soon as possible.

Editors Canada is a volunteer-driven organization, so many of our projects depend on volunteers fulfilling their commitments. We understand that you are taking on volunteering as an extra commitment on top of a busy schedule, but we do ask that you are as open and clear as possible about your capacity to take on new tasks.

Poor performance or non-performance of volunteer assignments may have significant operational, financial and/or other outcomes for the association. The volunteer responsible for each assignment is expected to address such situations respectfully and promptly, ensuring both the volunteer leader and the volunteer understand the reasons for and consequences of poor performance or non-performance of volunteer tasks. The volunteer leader may allocate additional support or provide direction.

If poor performance continues, a volunteer may be dismissed or asked to resign. If you believe you have been unfairly dismissed or asked to resign from a volunteer assignment, you may appeal this decision to the national executive council or branch executive as appropriate.

2.5 Volunteers as representatives of Editors Canada

Many volunteer positions take place entirely within a branch or twig and do not involve interacting with non-members. However, certain positions require volunteers to interact with members of the public who may not be familiar with Editors Canada. We encourage you to consider yourself a representative of Editors Canada and take the opportunity to let people know about us and the work that we do.

If you are requesting something from a non-member (for example, calling a local store to ask whether they would consider offering a discount on supplies for a branch event), please introduce yourself as an Editors Canada member.

If you have any difficulties when interacting with non-members, contact your volunteer leader as soon as possible.

If someone asks you a question you don't know how to answer, refer them to the relevant committee chair, NEC director or to the national office. Please do not try to answer the question yourself if you don't have the right information.

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Volunteer Assignments

3.1 Singular assignments

Singular assignments are often tied to events, such as branch holiday parties, local writers' festivals and the annual Editors Canada conference.

3.2 Recurring assignments

Many volunteering assignments repeat, usually on a regular basis. These types of assignments are often tied to monthly branch or twig meetings: buying snacks, greeting members, setting up chairs, etc.

Recurring assignments are usually assigned at the beginning of a season and last for the entire season (September to May).

Committee work runs from July through June but is often lighter over the summer months.

3.3 Information included in an assignment

At the start of an assignment, your volunteer leader should give you the following information:

- what day(s) the assignment is taking place (for singular assignments)
- when the assignment deliverables are due (for recurring assignments)
- what you are expected to do
- how you should complete the assignment (process)
- any special considerations associated with the assignment

If you don't receive this information, ask your volunteer leader to provide it.

3.4 Volunteer support

Volunteers receive an appropriate orientation and on-going support and feedback from the Editors Canada member who oversees the work related to the volunteer's specific assignment. This supervisor may be a volunteer or staff person. Volunteers are also given regular opportunities to provide input.

If you have a question or concern, you should first approach the supervisor for the specific assignment. From there, if needed, you are advised to seek support from whomever the supervisor is accountable to. This may be a committee chair or a national executive council director. If the issue continues to be unresolved, you are encouraged to approach the Editors Canada president.

Being a Volunteer Leader

4

Guidelines and Procedures

4.1 What is a guideline?

A guideline is a document that outlines how to meet an organizational goal when there is more than one way to achieve the goal. Guidelines allow individuals freedom in how they choose to complete tasks.

4.2 What is a procedure?

A procedure is a document used when specific tasks must be carried out in a precise manner to uphold an organizational policy. They include only the steps needed to complete a task successfully.

Procedures are generally stricter than guidelines and Editors Canada uses them only when necessary.

4.3 The purpose of this handbook

The purpose of this handbook is to outline the policies, procedures and guidelines used by Editors Canada to manage our volunteers.

Having these documents in place helps our volunteers. The handbook supports predictability, productivity and accountability of volunteers and volunteer leaders.

The contents of these documents are intended to guide volunteers rather than restrict them, except where legislation, financial requirements or governance documents require a stricter procedure.

4.4 Where to find association procedures

Find our core association policies, procedures and guidelines on the bylaw, policies and procedures section of our website.

4.5 Tasks that do not have or do not require a formal procedure

A procedure is only required when certain actions are necessary to achieve a specific outcome. If volunteers can achieve a goal using multiple methods, a guideline is needed, not a procedure. Tasks such as recruiting and training volunteers will not have procedures, but instead require guidelines meant to aid volunteer organizers.

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Positions in Editors Canada and Their Guidelines

5.1 Position types

There are four types of volunteer positions in Editors Canada: national executive council (NEC) member, branch executive member/twig coordinator, volunteer leader and volunteer.

- Members of the NEC serve as trustees for the general membership. Collectively, they do the following:
 - provide overall direction for Editors Canada activities,
 - advocate for the interests of all members,
 - recruit and supervise volunteer leaders and
 - analyze and approve the organization's budget.
- Branch executives and twig coordinators organize (or delegate the organization of) the activities of the branch or twig and recruit other volunteers as required to support these activities.
- Volunteer leaders include committee chairs and task force leaders. In addition to their other duties, NEC members, branch chairs and twig coordinators also serve as volunteer leaders.
- Volunteers can perform a multitude of tasks. Examples include greeting members at branch or twig meetings, writing a blog for The Editors' Weekly, translating a document, serving on a committee or task force, volunteering for the conference or serving in a national position (such as the Editors Canada mediator).

Each position type has a different set of responsibilities and, in some cases, guidelines.

5.2 Guidelines for specific positions

Guidelines have been developed for NEC members, branch executives and twig coordinators, and committee chairs. These guidelines are provided to volunteers who assume these positions.

5.3 Working with Editors Canada staff

In general, volunteer leaders should go through their NEC directors for support, rather than contacting the office. This will help the office staff better manage their workloads.

Exceptions: Some committees have designated staff (agrément, certification and conference). In those cases, the committee chairs should be the only person contacting the office.

Conference calls (for example, Zoom meetings) are set up through the NEC secretary, not the office.



Volunteer Leaders

6.1 Who are Editors Canada's volunteer leaders?

Volunteers are assigned to a volunteer leader at the beginning of their volunteer assignment.

Volunteer leaders may be

- the national executive council (NEC) or a designated member of the NEC,
- a branch executive or a designated member of the branch executive,
- a twig coordinator or a designated member of the twig,
- chairs of national committees or
- association members responsible for specific volunteer assignments (for example, leading a task force).

6.2 Responsibilities

6.2.1 Members of the NEC

The members of the NEC are voted in as directors every year at the annual general meeting. The directors serve staggered two-year terms.

Members of the executive council serve as trustees for the general membership. Collectively, they direct Editors Canada activities and decide how to spend its money. They are all members of the association.

Find the current directors on the national executive council page of our website.

6.2.2 Branch executives

Branches are self-regulating entities, and they are run entirely by volunteer executive members. Typically, the executive meets once a month to discuss issues and concerns relevant to the branch.

The branch executive includes the following four required members:

- branch chair
- treasurer
- secretary
- marketing/public relations/communications and social media chair

The following are optional positions (including but not restricted to):

- blog editor/newsletter coordinator
- events/meetings chair
- hotline coordinator
- membership relations/volunteer relations chair
- past chair
- professional development/seminar chair
- refreshments coordinator
- speaker nights/programs chair
- website coordinator/webmaster

6.2.3 Twig coordinators

A twig is required to have two coordinators; both must be members of the association. The two twig coordinators organize (or delegate the organization of) the twig's activities and recruit other volunteers as required to support the activities of the twig.

Twig coordinators serve staggered two-year terms, with one new coordinator being elected each year. This system provides for continuity of leadership and sustainability of the twig.

6.2.4 Chairs of national committees

In theory, committees do most of the work of the organization at the national level.

Chairs are responsible for

- running committee meetings (monthly or as otherwise needed),
- identifying tasks that need to be completed,
- assigning roles to committee members,
- checking in with other volunteer leaders,
- reporting to the NEC on committee achievements and challenges and
- reporting to the committee members any guidelines or comments from the NEC.

Refer to the website for a list of national committees.

6.2.5 Association members

Any association members may be designated as volunteer leaders if they take on responsibility for assignments that involve other volunteers.

In these situations, volunteer leaders may be responsible for

- assigning tasks,

- planning a project schedule,
- checking in with team members and
- making sure project deadlines are met.

6.3 Appointing and recruiting volunteer leaders

Certain volunteer positions, such as those on the national and branch executives, are available to Editors Canada members only and involve an election by members.

Other volunteer positions do not require an election and can be filled by any Editors Canada member or student affiliate who is interested in getting involved. The NEC votes on candidates for key leadership roles, such as committee chairs.

For more information, please refer to the nominations policy and procedures on the bylaw, policies and procedures section of our website.

6.4 Support for volunteer leaders

Volunteer leaders receive support from their peers and supervisors.

NEC members receive support from other members of the NEC, including the president.

Branch executives and twig coordinators receive support and guidance from the NEC director of branches and twigs (East or West). They can communicate with each other through the branch and twig email list and the branch and twig Facebook group.

Chairs of national committees receive support and guidance from a designated director on the NEC. They can communicate with each other through the committee email list.

Task force leaders receive support and guidance from a designated director on the NEC.

7

Recruiting and Training

7.1 Engaging potential volunteers

Volunteers may independently offer to help with an assignment that interests them, or committee chairs or branch and twig leaders may invite someone to get involved.

To engage volunteers, it's important to understand individuals' reasons for volunteering. There are many reasons to volunteer, including helping others, making friends, practising a new skill, networking and finding work, and showing commitment to a cause. Once it's understood why people volunteer, it's easier to plan engagement activities and promotion as well as to organize volunteer projects around volunteer goals.

Potential volunteers may be sourced in several ways, including these methods:

- asking existing members of Editors Canada for ideas
- doing a callout via email and social media
- contacting individuals who may be interested
- advertising, including through local media and on the organization's website
- recruiting at events, such as volunteer fairs

Potential volunteers should be given a clear reason for volunteering with the organization. They should be informed why volunteers are important to the organization and how volunteering may be of benefit to them. For example, some people may be motivated to volunteer to gain editing experience and contacts, or to learn or enhance project management skills.

Volunteers should be contacted promptly and given tasks that specifically match their goals, including their reasons for volunteering and the amount of time they have available. The volunteer's task and the time frame for completion should be communicated, and any necessary training should be provided.

Volunteer leaders should reward and recognize volunteers during their work and when they complete their tasks.

7.2 Where to direct new volunteers

New volunteers can be directed to their branch chair or twig coordinator, to committee chairs (particularly the chair of volunteer management) or to NEC directors (particularly the director of volunteer relations). The volunteer leader will assess their goals and capabilities and match them to an ideal volunteer task. It's also good practice to direct new volunteers to this handbook and also to the Volunteer Guidelines, found on the bylaw, policies and procedures section of our website.

7.3 Evaluating a volunteer's capabilities

Volunteer leaders should take care to match potential volunteers with tasks that suit them.

Some volunteers want to develop their skills and may ask for a specific assignment. This is usually a win-win situation for both the organization and the volunteers, especially students and new editors who are eager to learn. However, if there is valid reason to believe a volunteer, whether new or experienced, might not have success with a particular task, it would be wise to suggest an alternative. It's better to redirect a volunteer than to let them take on something that does not match their potential abilities.

Volunteers who have no specific task in mind can be matched in terms of goals, interests, skills and time available.

7.4 Training

Resources are allocated annually for volunteer training and recognition. Information about training can be found in the Volunteer Guidelines, in the bylaw, policies and procedures section of our website.



Volunteer Management

8.1 General management guidelines

When managing volunteers, it's important to understand volunteers' motivations and goals so that they may participate in appropriate projects.

Volunteers must be supported by their leaders, which includes checking in with them regularly, responding to their inquiries promptly and showing that the volunteers' efforts are appreciated.

If a volunteer quits, an exit interview should take place and, if possible, any feedback provided should be acted on.

8.2 Motivating volunteers

In order to motivate volunteers, volunteer leaders should ensure volunteers have manageable tasks that are suited to their interests and that they have the necessary training to complete the task.

To keep volunteers motivated, it's also necessary to communicate regularly with volunteers and provide opportunities for feedback. Regular appreciation, including thank-you cards and events, will also help to make them feel needed and therefore motivated.

8.3 Dealing with lateness, no-shows and poor performance

Poor performance or non-performance of volunteer assignments may have significant operational, financial and/or other outcomes for the association.

In situations where a volunteer is performing poorly, not showing up to complete a task or is often late, the volunteer leader should address the issue respectfully and promptly with a face-to-face conversation with the volunteer, in which the volunteer's strengths are highlighted and the leader's concerns are expressed in a

supportive manner. When having this discussion with volunteers, volunteer leaders should define what the issue is, express it clearly, and put the focus on the volunteer's behaviour and not on the person.

8.4 Evaluation timeline and criteria

Volunteer leaders should formally and informally evaluate volunteers' performance, and this should be done regularly.

The importance, complexity and risk of each assignment should be assessed to determine the degree of supervision and frequency of evaluation needed.

If possible, volunteer leaders should speak with their volunteers every three to six months to provide and receive feedback regarding the volunteer's performance and how the organization can better support them.

8.5 Interpersonal relations

The relationships volunteers have with other volunteers and staff can impact their performance. To ensure volunteers have a positive experience, volunteer leaders should encourage social opportunities and arrange projects in which small groups of volunteers work together.

As leaders get to know their volunteers, they should have volunteers work together who have similar or complementary motivations and personalities and be prepared to separate volunteers who don't appear to be cooperating with each other. Volunteer conflicts can be determined through regular communication with volunteers.

8.6 Dismissing a volunteer

When a volunteer is appointed to a position and/or assigned a volunteer task and continues to perform poorly

or not at all, their volunteer leader must raise and discuss the issue with the national executive council (NEC) or branch executive. If given executive approval, the volunteer leader may dismiss the volunteer.

When a volunteer must be dismissed, the volunteer leader should explain clearly and professionally why the relationship is not working, pointing to a specific rule the volunteer has broken or reason they are being dismissed while making sure to show appreciation for the work completed.

8.7 Requesting a resignation

When a volunteer is elected to a position and continues to perform poorly or not at all, their volunteer leader must raise and discuss the issue with the NEC or branch executive. If given executive approval, the volunteer leader may ask the volunteer to resign.

When asking a volunteer to resign, the volunteer leader should discuss reasons why the volunteer will no longer be working with the organization, announce the departure of the volunteer in a method generally used by the organization, and refrain from calling unnecessary attention to the departure.

8.8 Dealing with a resignation

When a volunteer resigns, a good relationship with the volunteer should be maintained, if possible.

The decision a volunteer makes to resign should be accepted with grace. If they have decided to resign on their own accord, they should be informed that they will be welcomed back to the organization in the future. Do not disclose the reason for the resignation to other volunteers unless the person resigning requests it.

If a position needs to be filled immediately, the volunteer leader should search for volunteers with similar capabilities as soon as possible.

8.9 Volunteer replacement

To find a volunteer replacement, the volunteer leader should first check to see if volunteers with similar interests and capabilities are available. If a volunteer who is already working with the organization is available, this person should be contacted. If a new volunteer needs to be recruited, follow the recruitment section in the Volunteer Guidelines, found on the bylaw, policies and procedures section of our website.



Recognizing Volunteers

9.1 Volunteer recognition

The objective of volunteer recognition is to express sincere, personal and specific appreciation for the volunteer's contribution(s).

When a volunteer assignment is completed, volunteer leaders should send a letter of appreciation to the volunteers, whether individually or collectively as a team.

When writing a letter of appreciation, consider the following guidelines:

- calling the volunteer by name
- referring to the specific task/project the volunteer helped with and, if possible, the amount of time (approximately) spent on the task/project
- including a positive comment about how the volunteer did the task/project
- mentioning any obstacles the volunteer was able to overcome
- sharing the impact of the volunteer's effort in terms of advancing the mission and mandate of Editors Canada

9.2 Public recognition

Public recognition shows our volunteers how much we appreciate their time and hard work.

Consider nominating outstanding volunteers for one of the following:

- Featured Volunteer recognition (contact volunteer_management@editors.ca)
- President's Award for Volunteer Service, awarded each year at the national conference (watch for the call for nominees each February)
 - From among the nominations received for the President's Award, one volunteer is selected to receive the Lee d'Anjou Volunteer of the Year Award.

Volunteers are also credited every year in the annual report. It's good practice for volunteer leaders to keep track of each person who volunteered in the run of the year, no matter how small the task, so they can be included on the list.

9.3 Crediting volunteers

Although volunteers donate their time, they can use their work as a marketing opportunity. With this in mind, provide proper credit whenever feasible and agree to write recommendations if asked and the work warrants it.

General Information

Working as Part of a Committee: Committee System, Roles and Responsibilities

Find detailed descriptions of committee work, and working as part of a committee, in *The Committee Book* (being updated, publication TBD).

Forms and Tools

Find links to various forms and tools in the Volunteer Resources section of our website, found in the members' area under Volunteer.

This includes the Expense Reimbursement Form and the Emergency Response Form.



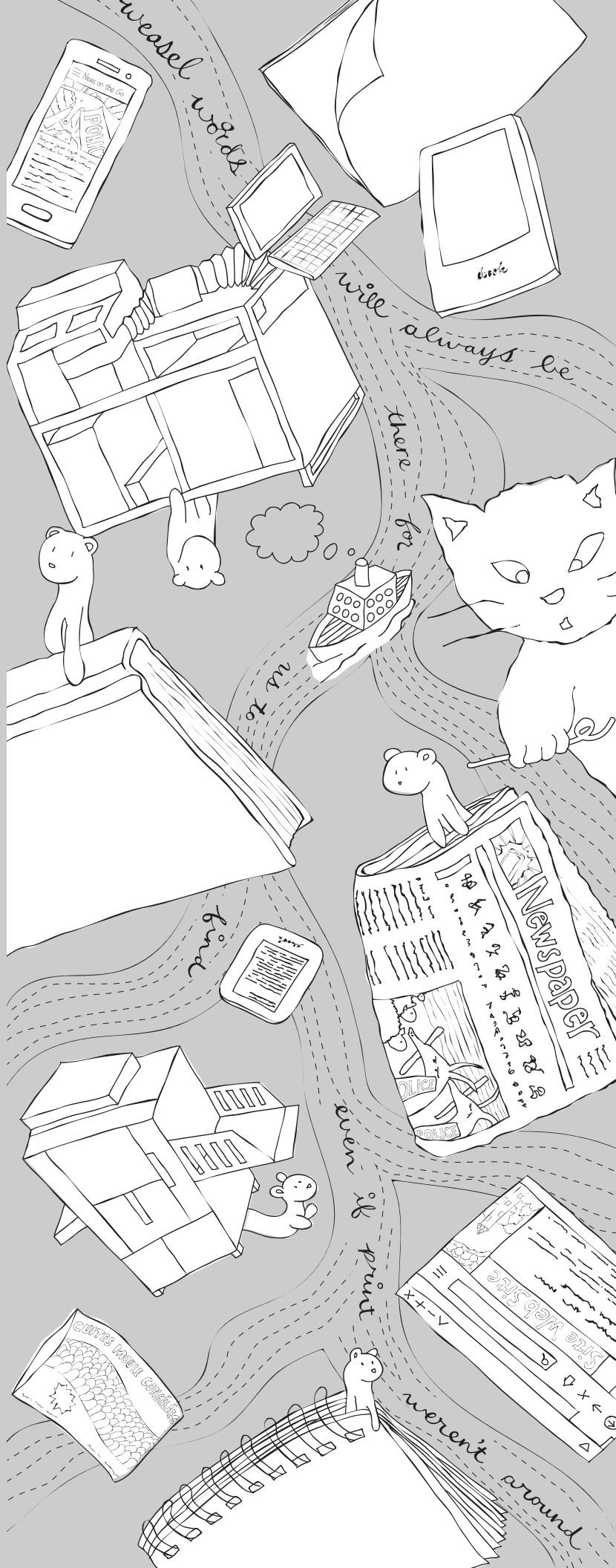
Revisions to This Handbook

This handbook will be reviewed annually to make sure all information is up to date. Revisions will take place as needed.



Acknowledgments

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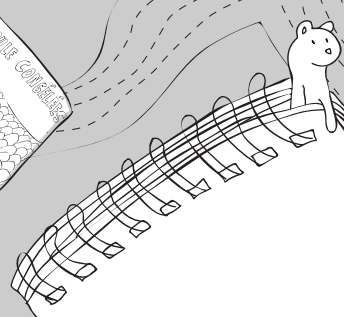
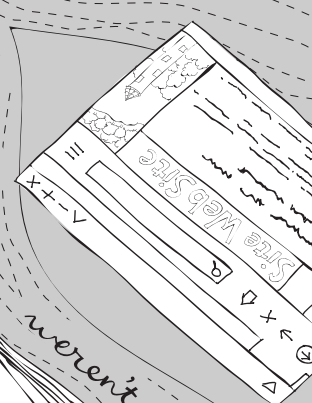
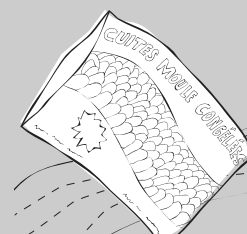
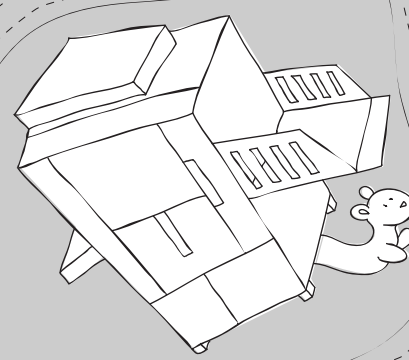
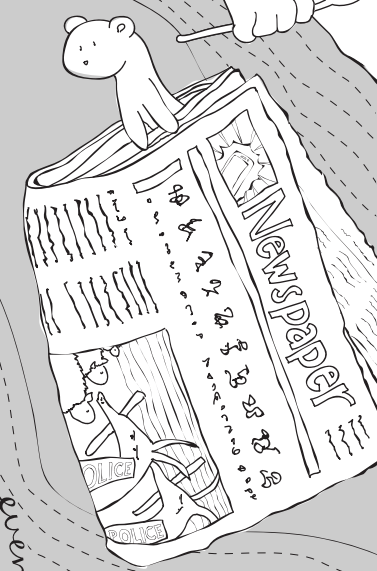
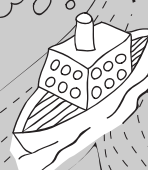
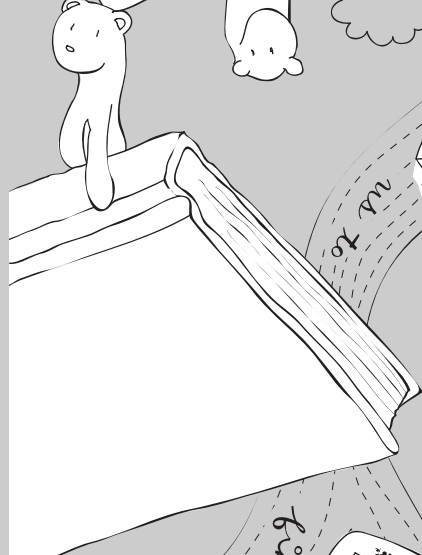
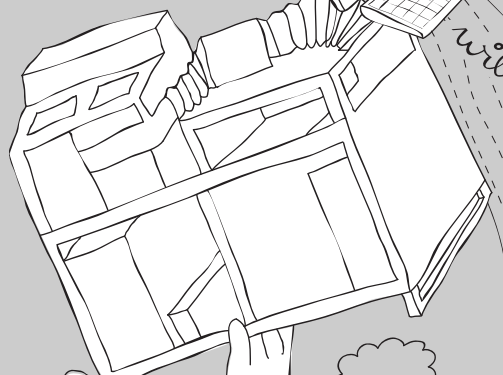
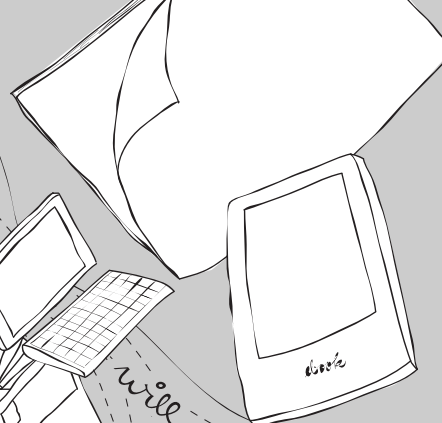
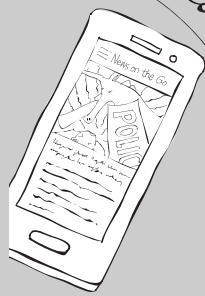
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Volunteer resources