



**OPERATOR SELF CHECK GUIDE**



Volunteer Tourism Effective Practices is designed for tour operators who are looking to or already incorporating volunteer projects into their trips. Additionally, we hope it will also serve development organizations, volunteer tourism participants and community members in helping to identify and engage in great volunteer projects. We gathered research, input and experience from many people working in the areas of voluntourism, development, and traveler's philanthropy to create this guideline and are grateful for those who have contributed their input. This is a working, living resource, meaning that we are continually seeking feedback in the form of opinions, experiences, lessons learned and anecdotes relating to the outlined effective practices, and responses to the design and content of this guideline.

Many thanks for using this tool to help improve your work in voluntourism, for passing this on to others who might find it helpful, and for contacting us with feedback or ideas for improvement.

Happy Reading,

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# PARTNER ORGANIZATIONS AND HOST COMMUNITIES



## 1. Responsibly identify partner organization

This section is intended to help tour operators identify volunteer project partners (NGO, nonprofit, social venture). For tour operators organizing and offering their own volunteer projects directly to participants, the same indicators and questions apply with regard to the projects and host community relations.

| INDICATORS   | VALUES |    | EVIDENCE | NEXT STEP |
|--|--------|----|----------|-----------|
| <b>Locally Run Community Programs</b>  |        |    |          |           |
| - Are project leaders based locally?   | YES    | NO |          |           |
| - Are project leaders working in close collaboration with the local community?   | YES    | NO |          |           |
| - Are project leaders familiar with the region: local businesses, organizations, government officials; customs, traditions, and laws?  | YES    | NO |          |           |
| <b>Community Buy-In</b>  |        |    |          |           |
| - Was the volunteer project/ community interaction designed in consultation with the community based on community interests and needs?                                       | YES    | NO |          |           |
| - Does the project have the ongoing support and involvement of the community?  | YES    | NO |          |           |
| <b>Long-Term Program Sustainability</b>  |        |    |          |           |
| - Does the partner organization have a stable relationship with the community?   | YES    | NO |          |           |
| - Can the partner organization be relied upon throughout the planning and implementation of the project involved?  | YES    | NO |          |           |
| - Is the project geared toward building capacity within the community to manage its own long-term development?   | YES    | NO |          |           |
| - Was the volunteer project/ community interaction designed to further progress on a larger goal, which existed before volunteers arrive and will continue after they leave? | YES    | NO |          |           |



# PARTNER ORGANIZATIONS AND HOST COMMUNITIES

## 1. Responsibly identify partner organization

| INDICATORS  | VALUES |    | EVIDENCE | NEXT STEP |
|---|--------|----|----------|-----------|
| <b>Corruption Mitigation</b>  |        |    |          |           |
| - Has the partner organization developed relationships with community members?  | YES    | NO |          |           |
| - Has the partner organization set up a monitoring and evaluation system, which involves checks and balances as well as outsider input and assessment?  | YES    | NO |          |           |
| - Does the partner organization have a deep understanding of local customs and laws?  | YES    | NO |          |           |
| - Do project leaders speak the local language?<br>If there are select beneficiaries (certain members or families within a community, or one community rather than another) of the program, is the selection criteria transparent? | YES    | NO |          |           |
| <b>Documentation and Reporting Structures</b>   |        |    |          |           |
| - Can the partner organization demonstrate reliable documentation, measurement and reporting about their organizational operations?   | YES    | NO |          |           |
| Is the partner organization legally registered in the areas in which they work?   | YES    | NO |          |           |
| - Are they actively measuring and reporting the short- and long-term effects of their projects?   | YES    | NO |          |           |
| - Are the financial reports of the organization transparent, both annual and project-specific reports?  | YES    | NO |          |           |
| - Is the partner organization willing to openly discuss the use of the program budget?  | YES    | NO |          |           |
| <b>Ethos and Ethical Alignment</b>  |        |    |          |           |
| - Do you share the social, environmental, and development values of the partnering organization?  | YES    | NO |          |           |
| - Do you have a similar philosophical approach towards community development, and ecological / heritage preservation?   | YES    | NO |          |           |
| - Do you share the same project goals?  | YES    | NO |          |           |
| - Is there clear discussion and understanding of any cultural or organizational differences?  | YES    | NO |          |           |
| - Have you consulted references from your own sources (not only sources provided by the partner), to better understand perceptions and impacts of the partnering organization?  | YES    | NO |          |           |



# PARTNER ORGANIZATIONS AND HOST COMMUNITIES

## 2. Build relationships based on collaborative project management and assessment with the partner organization

The impact volunteer tourism trips have on the volunteers and host communities will depend largely on the partnership between the organization and tour operator. Miscommunication, misunderstandings and any problems that exist could potentially undermine the efforts of everyone involved and so it is important to think of how best to manage the communication and responsibilities of the organizers.

| INDICATORS  | VALUES |    | EVIDENCE | NEXT STEP |
|---|--------|----|----------|-----------|
| <b>Project Monitoring and Assessment</b>  |        |    |          |           |
| - Are there communication channels in place for any project updates or changes?   | YES    | NO |          |           |
| - Are there monitoring structures in place to evaluate volunteer impact and the capacity to make any necessary adjustments?   | YES    | NO |          |           |
| <b>Project Follow Through</b>   |        |    |          |           |
| - Are there clear expectations of how long the tour operator will provide volunteer support and how that aligns with the expected duration of the project needs?  | YES    | NO |          |           |
| - Are there built-in protections in the volunteer projects design against unpredictable fluctuations in the number of volunteer participants? (how might a decline in tourism affect the outcome of the project?)                   | YES    | NO |          |           |
| <b>Volunteer Planning</b>   |        |    |          |           |
| - Is it clear who is responsible for providing to volunteers any necessary pre-trip information regarding the issues the volunteer project addresses, the volunteer project itself the partner organization and the host community? | YES    | NO |          |           |
| - Is the partner organization provided with information about volunteers?   | YES    | NO |          |           |
| - Is it clear who is responsible for any follow up information or activities with volunteers?   | YES    | NO |          |           |
| <b>Memorandum of Understanding</b>  |        |    |          |           |
| - Have you developed a clear understanding of responsibilities and expectations for both organizations?   | YES    | NO |          |           |
| - Do you have in place structures for continual assessment and re-evaluation of partnership relations, project goals, volunteer experiences and community impact?   | YES    | NO |          |           |
| - Do you have documentation of all agreements?  | YES    | NO |          |           |

# PARTNER ORGANIZATIONS AND HOST COMMUNITIES

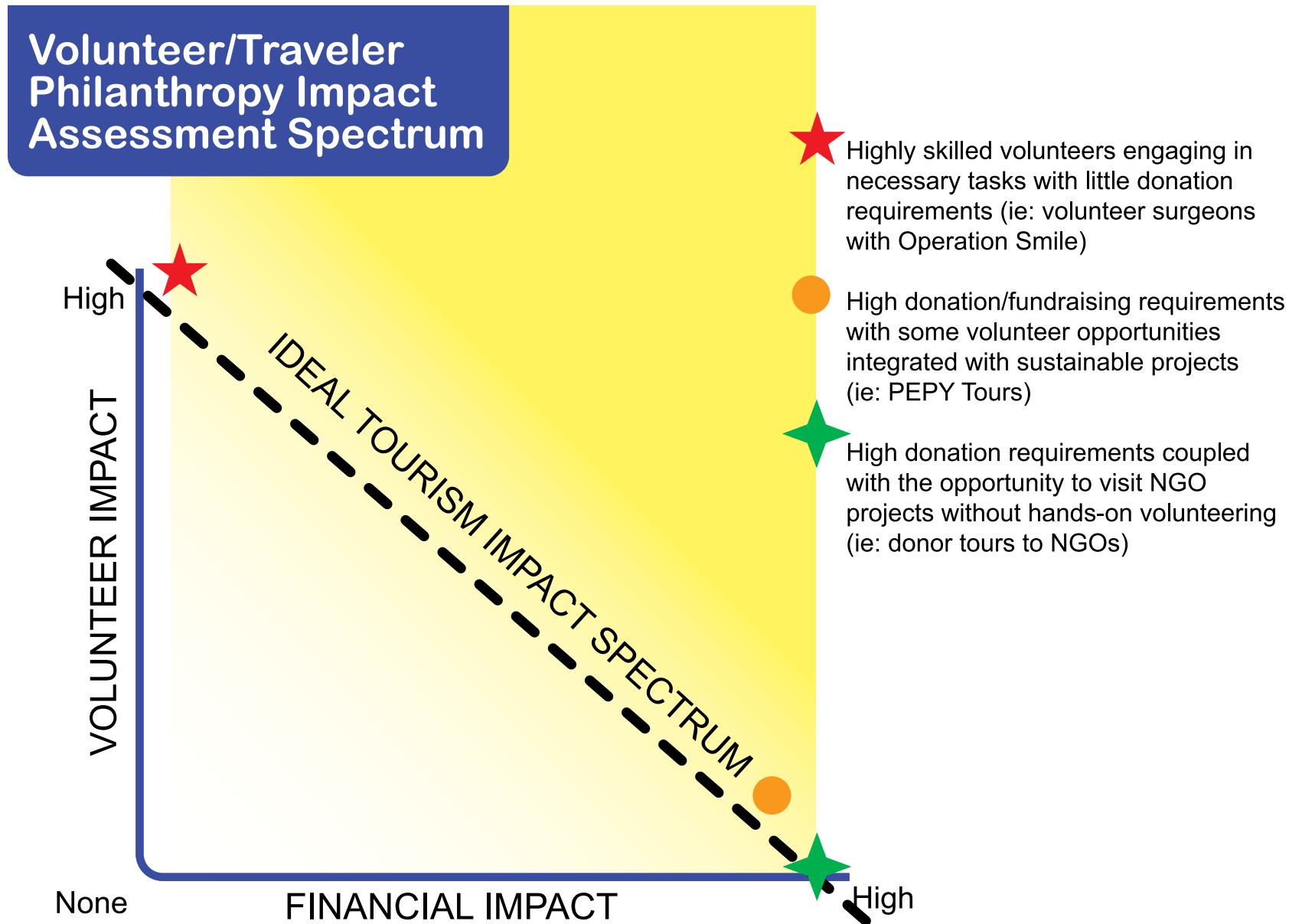


## 3. Ensure beneficial relationship for partner organization and host community

With increasing interest in volunteer tourism, there are increasing demands on tour companies to incorporate volunteer projects in their tours. Tour operators “and volunteers” should keep in mind how their efforts are actually contributing to the needs of the recipient organization and community.

| INDICATORS   | VALUES |    | EVIDENCE | NEXT STEP |
|--|--------|----|----------|-----------|
| <b>Volunteer Contribution</b>  |        |    |          |           |
| - Do volunteers provide valuable services to the organization and community? (Some questions to consider: Do volunteers provide locally unavailable skilled labor? Do volunteers provide services that would otherwise be costly for partner organizations? Are volunteers taking the place of local jobs?)  | YES    | NO |          |           |
| - Does volunteer participation in the project contribute negatively to the local environment?  | YES    | NO |          |           |
| - Is volunteer participation culturally appropriate?   | YES    | NO |          |           |
| - Will the volunteer be employed in a position, which will create dependence or create a void when the volunteer leaves? Alternatively, will their position build the capacity of local people and programs to better sustain themselves once the volunteer is gone? (For example, is the volunteer teaching English directly to children? Or teaching teachers how to improve their English thereby providing capacity building to the teachers?) | YES    | NO |          |           |
| <b>Financial Contribution</b>  |        |    |          |           |
| - Might the financial contribution be more effective than volunteers?  | YES    | NO |          |           |
| - Are the financial costs of hosting volunteers considered?  | YES    | NO |          |           |
| - Would a financial contribution help to sustain ongoing project needs?  | YES    | NO |          |           |
| - Would a financial contribution potentially create any dependencies?  | YES    | NO |          |           |

# A helpful visual analysis to consider:



Please note, the author would like to point out that the impact of those in the first group (Operation Smile) could have even higher impact if their skilled tasks also included training local doctors to perform the operations once they leave.

# VOLUNTEER PROJECTS



## 4. Design projects based on local needs and input as well as volunteer sustainability

Again, the increasing demands on tour companies to incorporate volunteer projects in their tours can potentially lead to poorly designed projects that cater to volunteers' interests rather than – and sometimes at the expense of – the needs of the host organization and community. This section is intended to help ensure that projects are designed on a needs basis.

| INDICATORS   | VALUES |    | EVIDENCE | NEXT STEP |
|--|--------|----|----------|-----------|
| <b>Project Planning and Design</b>   |        |    |          |           |
| - Is a representative from the partner organization and/or community involved in all steps of the volunteer project planning and implementation?                           | YES    | NO |          |           |
| - Is the community directly contributing to the project in any way? Did beneficiaries have to earn these contributions in some way?  | YES    | NO |          |           |
| - Does the short-term project contribute to the long-term goals and needs of the organization and community?   | YES    | NO |          |           |
| - Are volunteer projects adaptable? ie: if project timelines or community needs change, can the volunteer project be altered to meet the new demands?                      | YES    | NO |          |           |
| - Are projects adaptable to changing tourism trends? ie: might the project discontinue if tourism declines in that area?   | YES    | NO |          |           |
| <b>Volunteer Contributions</b>   |        |    |          |           |
| - Are volunteers' skills appropriately matched to the projects' needs and activities?  | YES    | NO |          |           |
| - Are there valuable tasks accessible for non-technical or "unskilled" volunteers, especially if the trip is being solicited to unskilled volunteers?                      | YES    | NO |          |           |
| <b>Timing</b>  |        |    |          |           |
| - Does planning allow for flexibility if/when the project needs change?  | YES    | NO |          |           |
| - Would the timing of the volunteer project potentially keep the progress of the project or other related project on hold?   | YES    | NO |          |           |
| - If the trip is designed to be repeated, is there time allowed for potential changes to the volunteer interaction based on the assessment of previous volunteer projects? | YES    | NO |          |           |



# VOLUNTEER PROJECTS



## 5. Provide on-site project management to ensure a safe, educational, and successful volunteering environment

Execution is everything! The project needs to be well supported and well managed on the ground to ensure that the community and volunteers will benefit from the project. Basic health and safety provisions are absolutely necessary and on-site support will help to facilitate positive experiences.

| INDICATORS   | VALUES |    | EVIDENCE | NEXT STEP |
|--|--------|----|----------|-----------|
| <b>On-Site Safety</b>  |        |    |          |           |
| - Have health and safety concerns been addressed in advance?   | YES    | NO |          |           |
| - Are participants made aware of all health and safety measures?   | YES    | NO |          |           |
| - Is there a project manager on-site at all times?   | YES    | NO |          |           |
| <b>On-Site Support</b>   |        |    |          |           |
| - Is local staff available to answer questions about the project, organization and communicate?                        | YES    | NO |          |           |
| - Are there provisions for volunteers' comfort, such as shade and potable water?                                       | YES    | NO |          |           |
| <b>Measurements of Success</b>   |        |    |          |           |
| - Are volunteers provided with project goals and measurements of success?  | YES    | NO |          |           |
| - Are volunteers educated about how their efforts contribute to the long-term goals and developments of the community? | YES    | NO |          |           |

# VOLUNTEER PROJECTS



## 6. Consider the impact of giving ‘things’

Volunteers – volunteer travelers, short- and long-term volunteers – are often inclined to ‘giving things’. Organizations and tour companies may also be inclined to ask volunteers to support a project through the donation of ‘things’. This section is not specific to volunteer tour operators; it is relevant to all social development projects, tour organizers, and travelers who are considering engaging in philanthropic travel.

| INDICATORS  | VALUES |    | EVIDENCE | NEXT STEP |
|---|--------|----|----------|-----------|
| <b>Consultation with Community</b>  |        |    |          |           |
| - If any items are given, has the community or organization requested those items?  | YES    | NO |          |           |
| - Was a needs assessment conducted before introducing any new items?  | YES    | NO |          |           |
| <b>Sustainability</b>   |        |    |          |           |
| - Are you possibly creating an unnecessary need by introducing new items?   | YES    | NO |          |           |
| - Are repair costs, replacement parts, and usability of items (e.g. wells, electronics), taken into consideration? (Some questions to consider: If repair is costly, who has ownership over repair responsibilities? Do those groups have access to the necessary funding?)                           | YES    | NO |          |           |
| - Has someone been trained to monitor and fix the items given?  | YES    | NO |          |           |
| - If an item becomes broken beyond repair, are there ways for this item to be recycled or returned, or will it become unnecessary waste in the community? (i.e. the environmental impact of giving colored pencils to a school vs. plastic markers which will dry up and become non-recyclable waste) | YES    | NO |          |           |
| <b>Distribution Channels</b>  |        |    |          |           |
| - Are volunteers educated about the potential effects of giving food, candy, money, or other items directly to individual community members, (especially children), such as creating dependencies, reinforcing discouraged behaviors, or undermining organizational or community efforts?             | YES    | NO |          |           |
| - Are volunteers encouraged and advised on how to give things through existing social structures?   | YES    | NO |          |           |
| - If things are given to individuals, are there enough for all to share?  | YES    | NO |          |           |

# VOLUNTEER PROJECTS



## 7. Prioritize child safety

Although many programs are promoted as supporting children, those same programs sometimes undermine the rights of children. These questions are important to ask if your volunteer programs include interactions with children for any period of time.

| INDICATORS   | VALUES |    | EVIDENCE | NEXT STEP |
|--|--------|----|----------|-----------|
| <b>Vetting Partner Organizations and Projects</b>  |        |    |          |           |
| - Are proper child-safety rules a priority when vetting partner organizations?   | YES    | NO |          |           |
| - Have the emotional/psychological effects of rotating short-term care and interaction been assessed?  | YES    | NO |          |           |
| - Does the organization allow any unannounced foreigner to visit their projects and interact with the children?  | YES    | NO |          |           |
| - Based on the amount of support coming to the organization, do the children seem to be well taken care of to the best of the abilities of the staff? (Are there any signs that children are kept "looking poor" to attract more support?) | YES    | NO |          |           |
| - Will a staff member of the organization always be present when volunteers are interacting with children? (What will the volunteer to local staff ratio be?)  | YES    | NO |          |           |
| - Are children required to perform or entertain visiting guests? (If so, how often? What do these performances entail? Can it be viewed as another form of child labor?)   | YES    | NO |          |           |
| - For long term visitors: are background and reference checks required?  | YES    | NO |          |           |
| - For short term visitors: are the guests monitored at all times and never allowed to be alone with a child?   | YES    | NO |          |           |
| <b>Educating Volunteer Participants</b>  |        |    |          |           |
| - Are participants informed about the organization's policies regarding children?  | YES    | NO |          |           |
| - Is there training, or at least information for volunteers on child rights best practices?  | YES    | NO |          |           |
| - Are camera policies discussed regarding photographing children?  | YES    | NO |          |           |

# ||| PARTICIPANTS



## 8. Provide information and clear expectations for participants

The key to success for almost any trip – volunteer or otherwise – is managing participants’ expectations. Educating and informing volunteers is important both for the enjoyment of their trip and how successfully they’ll interact and contribute to the project and the community. Establishing realistic expectations about their experience and what they will accomplish during their volunteer project will also determine the success of the volunteer trip, for everyone involved.

| INDICATORS  | VALUES |    | EVIDENCE | NEXT STEP |
|---|--------|----|----------|-----------|
| <b>Provide information for participants prior to and during their arrival</b>   |        |    |          |           |
| - Are educational materials about the region/local culture, the organization, and the project given to participants before their arrival?       | YES    | NO |          |           |
| - Is information provided regarding the social issues relevant to their volunteer project?  | YES    | NO |          |           |
| - Are participants made aware of any cultural sensitivities, such as appropriate clothing and inappropriate behaviors?                          | YES    | NO |          |           |
| <b>Provide clear and realistic expectations</b>   |        |    |          |           |
| - Are realistic project and personal goals established and communicated to the volunteer?   | YES    | NO |          |           |
| - Is the volunteer aware of how the short-term volunteer project contributes to the long-term goals of the organization and community?          | YES    | NO |          |           |
| - Are volunteers prepared to place their personal needs and expectations secondary to the needs of the project?                                 | YES    | NO |          |           |
| - Are volunteers prepared to be flexible to any changes or delays encountered and willing to adjust their role based on changing project needs? | YES    | NO |          |           |



## 9. Be honest marketers

Honest marketing is essential for participants to understand the nature of the project they are signing up for and to create trust between the tour organizer, volunteer organization, beneficiary communities, and participants. Being honest about the expected impact of the volunteer project is essential. By tour and partnering organizations being honest about the organization's impact, participants can better discern the right fit for them and will not be disappointed by contrasting realities.

| INDICATORS   | VALUES |    | EVIDENCE | NEXT STEP |
|--|--------|----|----------|-----------|
| Provide accurate and honest information on websites and promotional materials.   |        |    |          |           |
| - Do promotional materials reflect realistic expectations about what can be accomplished during a short-term volunteer project?  | YES    | NO |          |           |
| - Do the words used to describe your organization in your marketing materials accurately describe what you are providing such as "voluntourism", "ecotourism", "responsible tourism"? Is your organization's interpretation of such terms clearly defined? | YES    | NO |          |           |
| - Does the material state or imply that the tour operator financially supports the partnering organization when in-fact the onus for donations is left up to the guests themselves?  | YES    | NO |          |           |
| - Are volunteers provided with accurate information on how much of there funding is going to partner projects?   | YES    | NO |          |           |
| <b>Respectful Marketing</b>  |        |    |          |           |
| - Are there images or information provided on your site which might harm or embarrass the people or communities you are meant to be serving?   | YES    | NO |          |           |
| - Are descriptions of places honest or are might they be ethnocentric and/or exaggerated (ie. "squalor", "desperate", etc)?  | YES    | NO |          |           |
| - Are the opinions and contributions of local staff or local volunteers also included with the stories of foreign volunteer efforts?   | YES    | NO |          |           |

# V RESPONSIBLE TOURISM



## 10. Exemplify, educate about, and promote responsible tourism

The success of any voluntourism trip requires promoting and engaging in responsible tourism. There are hundreds of organizations, blogs, articles, etc that address issues of responsible tourism. All travel service providers should become familiar with these best practices and guidelines, perhaps even more essential for those offering volunteer or philanthropic travel options. If volunteer service providers want to offer trips that positively impact local areas, discretion and thought must be put into more than just the volunteer and facilitated community interactions. Responsible operators will consider the most responsible options for travel, accommodation, traveler education, and all other aspects of the travel experience.

As a starting place, it is recommended that tour operators complete the comprehensive checklist developed by Wild Asia Responsible Tourism here: [www.wildasia.net/main.cfm?page=articleID=340](http://www.wildasia.net/main.cfm?page=articleID=340)

# VI RESPONSIBLE DEVELOPMENT

## 11. Exemplify, educate about, and promote development best practices

The increasing role of development organizations around the world has produced extensive research and dialogue about what “works” and which efforts have “positive” “sustainable” impacts. Tour organizers entering the voluntourism sector should be well aware of the complexities and discussions surrounding development issues and make sure to incorporate the lessons learned from those dialogs into their program designs. Some of the concepts, many already detailed above, that relate closely to the impact of voluntourism include the importance of:

| INDICATORS   | VALUES |    | EVIDENCE | NEXT STEP |
|--|--------|----|----------|-----------|
| - Empowering community leadership and using local power structures when implementing programs      | YES    | NO |          |           |
| - Cultural sensitivity   | YES    | NO |          |           |
| - Program design based on research, community needs assessment and ongoing community participation | YES    | NO |          |           |
| - Project monitoring and evaluation systems.   | YES    | NO |          |           |