

# Fundamentals of Volunteer Management



**PRESENTED BY**

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# Today's Agenda



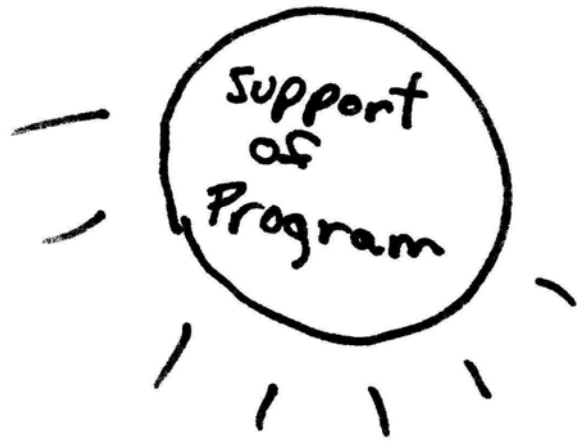
- **Introductions, Agenda and Objectives**
- **Volunteer Management Overview**
- **Risk Management**
- **Policies and Procedures**
- **Break**
- **Essential Forms**
- **Record Keeping**
- **Retention**
- **Break**
- **Volunteer/Staff Relations**
- **Recruitment**
- **Interview and Placement**
- **Break**
- **Orientation, Supervision and Evaluation**
- **Volunteer Recognition**
- **Final Comments**

# Learning Objectives:

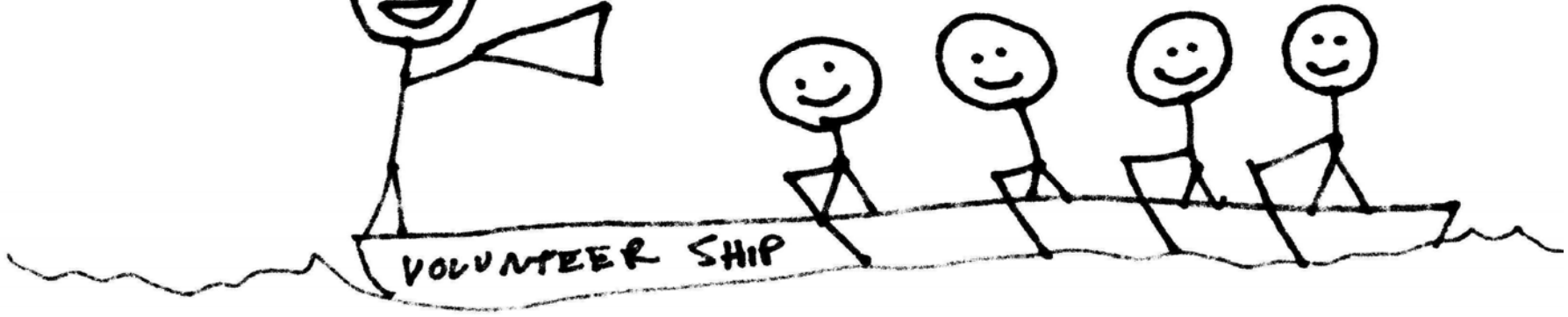


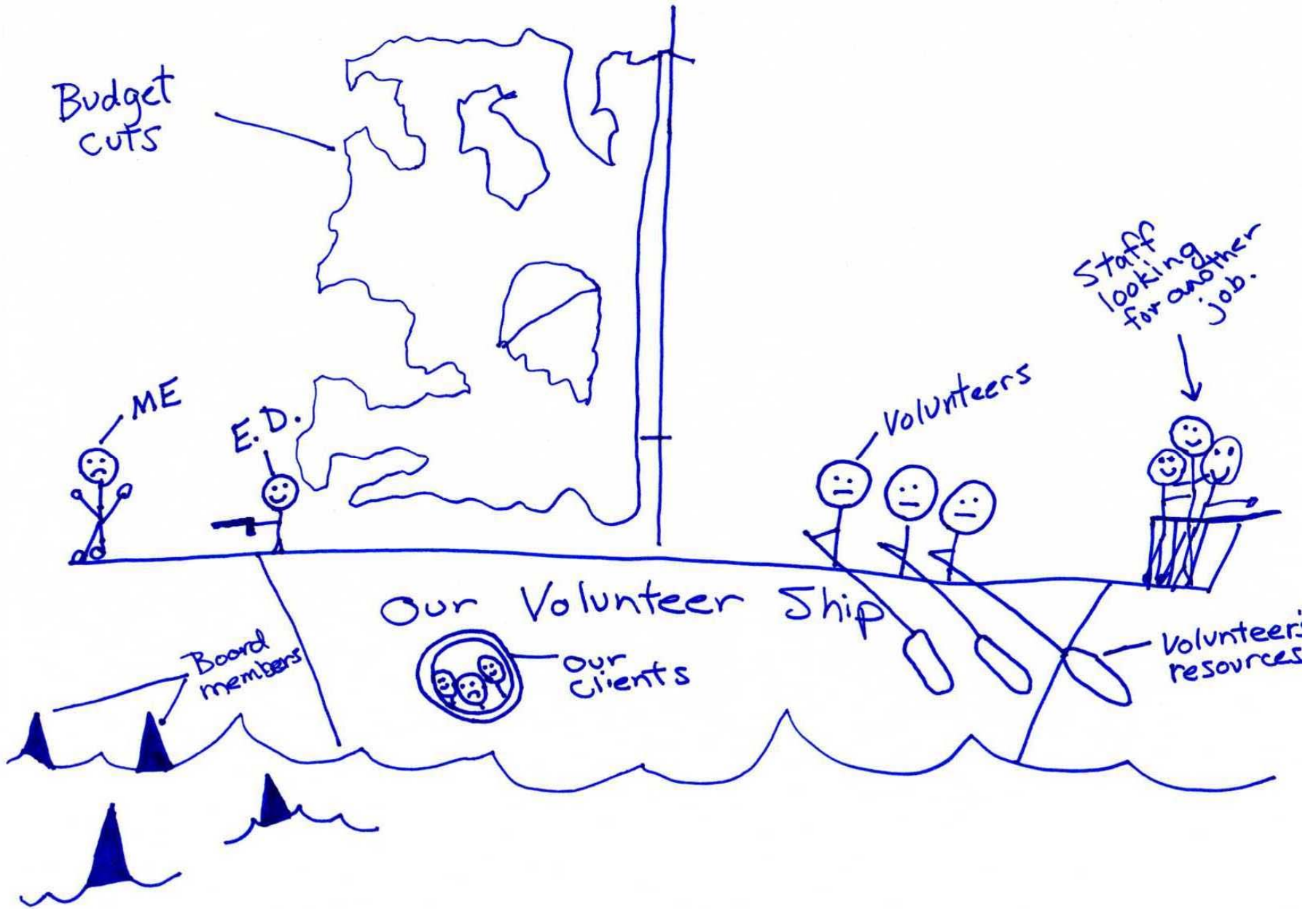
- **Explain a framework for volunteer program management.**
- **Discuss the key components of a successful volunteer engagement program.**
- **Explore ways to employ effective management strategies to ensure a successful volunteer program that achieves program goals.**

ED  
Board



Vol. Mgr  
Stroke, stroke  
your doing it



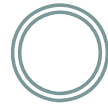


# Reality Check



- A good program takes preparation and hard work.
- Support from the top all the way down is essential.
- Mistakes will be made.
- Volunteers can make or break your ability to respond.
- Flexibility and Creativity will make a difference.

# Risk Management



# What is Risk?



**Any uncertainty about a future event that threatens your organization's ability to accomplish its mission.**

As defined by the Nonprofit Risk Management Center

# What is At Risk?



- **People**
- **Property**
- **Income**
- **Goodwill**

# What is Risk Management



A discipline for dealing with the possibility that some future event will cause harm. It provides strategies, techniques, and an approach to recognizing and confronting any threat faced by your organization.

# Risk Management Process



- ✓ **Establish the context**
- ✓ **Acknowledge & identify risks**
- ✓ **Evaluate & prioritize risks**
- ✓ **Implement risk management techniques**
- ✓ **Monitor & update**

# Ask Three Questions...



- 1) What can go wrong?
- 2) What will we do?
- 3) If something happens, how will we pay for it?



**Having insurance  
DOES NOT EQUAL  
Risk Management**

# Tools to Help Manage Risk



- Policies and Procedures
- Job Description
- Screening
- Applications
- Interviews
- Reference Checks
- Background Checks (CBC & MVR)
- Orientation/Training
- Supervision
- Evaluation

# Success Factors



- ✓ The ideas are practical & realistically take into account existing financial & human resources.
- ✓ Doesn't interfere with organization's community-serving mission.
- ✓ Ideas don't drain huge amounts of time from community-serving work.
- ✓ Ideas can be made effective within the organization's time, people and financial constraints.

# Volunteer Protection Act



The Volunteer Protection Act (1997) provides immunity for volunteers for harm caused by their acts if:

- ✓ The volunteer was acting within the scope of their responsibilities
- ✓ The volunteer was properly licensed, certified or authorized to act
- ✓ The harm wasn't caused by willful, criminal or reckless misconduct, gross negligence or a conscious, flagrant indifference
- ✓ The harm wasn't caused by the volunteer operating a motor vehicle, vessel or aircraft

# Risk Management Resources



- [www.nonprofitrisk.org](http://www.nonprofitrisk.org)
  - Non-profit CARES—web-based tool that assists you in evaluating your risks (\$89)
  - Online tutorial specially designed for volunteer programs (FREE!)
- [www.praesidiuminc.com](http://www.praesidiuminc.com)



**Questions?**

# Policies and Procedures



# What's the Difference?



## POLICIES

Tell people **WHAT** to do

## PROCEDURES

Tell people **HOW** to do it

# Nature of Policies



- ✓ They must apply to everyone in the organization.
  
- ✓ States a boundary
  - Inside the boundary = acceptable
  - Outside the boundary=unacceptable
  
- ✓ Policy is tough—makes one liable for consequences when violations occur.

# Benefits of Policies



- Manage and reduce risk
- Formalize decisions made & ensures compliance
- Determine action & set boundaries
- Clarify responsibilities
- Provide structure for sound management
- Ensure continuity over time
- Establish values, beliefs, & directions
- Contribute to increased volunteer satisfaction, productiveness & enhance

# Questions to Ask



1. Are volunteers engaged in activities that pose risk to themselves, their clients or other staff?
2. Could implementation of policies reduce or eliminate that hazard?
3. Would a policy clarify rules & expectations? Ensure appropriate behavior?
4. Would a policy bring about service enhancement?
5. Are there unwritten beliefs/values that people should know about to set context for agency operations?

# Policy & Procedure Manual Contents



- Job Descriptions
- Paid versus unpaid work
- Recruitment
- Interviewing/Screening
- Background Checks
- Community Service Restitution
- Non-acceptance of Volunteers

# Content Continued...



- Probation
- Orientation
- Training
- Continuing Education
- Volunteer Recognition
- Supervision
- Health and Safety
- Attendance Records
- Absence and Leave of Absence
- Performance Review/Evaluation
- Volunteer Program Evaluation
- Evaluating Board Members
- Volunteer Records
- Dress Code
- Identification
- Insurance
- Volunteer Dismissal
- Grievance/Complaints
- Process for reviewing policies & procedures

# Resources for P & P Manuals



## Books:

*By Definition: Policies for Volunteer Programs;*

by Linda Graff

*Developing Policy & Procedure Manuals;*

by Paula Cryderman



**Questions?**



**Take a 10 minute break!**


# Essential Forms



# Job Descriptions



- Job Title
- Purpose/function/objective
- Specific duties and responsibilities
- Qualification and desired skills, including any specific physical requirements, communication skills, etc.
- Supervising staff person
- Time commitment/length of commitment
- Training/orientation required and/or provided
- Location where job is performed
- Can include other information such as benefits, resources available, special requirements of dress i.e. uniform required, skills to be developed, etc.



In order to complete your Criminal Background & Motor Vehicle Record checks, your application should request the following items:

- ✓ Date of Birth
- ✓ Social Security Number
- ✓ Drivers License Number
- ✓ State of Issue of DL#



# Timesheets



Maintain time records on all volunteers!

Name

Date

Hours worked at site and off site

Supervisor

Should be signed by volunteer & signed off by supervisor.

# Record Keeping

## What Needs to be kept?

- **Volunteer screening paperwork**
  - Application
  - CBC; MVR
  - Interview guide
  - Reference checks
- **Volunteer timesheets**
- **Supervision documentation**
- **Monthly volunteer reports**

## How long do I keep it?

- **Standard is 7 years.**
- **If you terminated them, keep them forever!**
- **Backup electronic files.**
- **Save paper when you can.**

# Volunteer Management Software



- [www.volunteer2.com](http://www.volunteer2.com)
- [www.redridge.com](http://www.redridge.com)
- [www.volsoft.com](http://www.volsoft.com)
- [www.samaritan.com](http://www.samaritan.com)
- **GOOGLE searchfor others**



**Questions?**

# Retention



First, the bad news...



**1 in 3  
volunteers  
dropped out last year!**

# Top 10 Reasons Volunteers Leave



10. Reality of experience is not what they expected.
9. They don't like the work they are being asked to do.
8. Veteran or leadership volunteers won't let them into the "insider" group.
7. They spend more time meeting than doing.
6. No one listens to their suggestions.



5. They feel unrecognized, and see that thanks are unfairly given to all, no matter who did the most work.
4. They are no longer asked to participate.
3. They do not actually understand how to get more involved.
2. They can no longer see how their involvement makes a difference.

And the Number 1 Reason Volunteers Leave...



**It stopped being fun!**

# The Good News...



- ❖ You can be successful in your retention efforts.
- ❖ Retention starts before your first volunteer even walks in the door!
- ❖ It happens when:
  - ✓ Staff warmly welcome volunteers.
  - ✓ Recruit the right volunteers for the right job.
  - ✓ Properly recognize volunteers.



**Questions?**



**Take a 10 minute break!**

# Volunteer/Staff Relations



# Staff sometimes think...



- Volunteers take too much time & become a burden
- Can't get rid of volunteers
- Pose a threat to confidentiality
- Take jobs away from employees
- Other concerns?

# Job Factor



**List Tasks**

**Keep/Share/Give**

- 1.
- 2.
- 3.
- 4.
- 5.
- 6.
- 7.

# Other Things to Do...



- Orient staff on volunteer program.
- Find volunteer champions on staff.
- Teach volunteers the care & feeding of staff.
- Invite volunteer to speak at staff meeting.
- Provide regular updates to staff regarding volunteer efforts.
- Form staff/volunteer advisory council.
- Actively recognize staff for efforts with volunteers.
- At appreciation events, recognize volunteer/staff teams.



**Questions?**

# Recruitment



Our golden opportunity to educate the public about our cause, generate excitement about our organization and discover the human riches of our community.

# Before you start...



## Ask yourself:

- Who will be qualified for and interested in this position?
- Who will be able to meet the time commitments?
- Where will you find these people?
- What motivates them to serve?
- What is the best way to approach them?

# Recruitment Principles



- Don't go where there are "people," go where there are the right people.
- If you feel you're in the right place to find the prospects you want, keep asking until you get a positive response.
- Tell the whole truth from the start!
- Making something sound easy is not necessarily as attractive as making it sound challenging.
- To reach diverse volunteers you have to go beyond word of mouth.
- Get listed everywhere.
- Use your agency's Website.
- Avoid competition for attention—surprise people in unexpected places.

# Targeted Recruitment-Messaging



## Youth Volunteers

- Change the language around age. Move from language such as “kids” and “children” to young people, youth, young adults.
- Create meaningful positions with real responsibility.
- Provide opportunities for leadership and leadership development.
- Design work that can engage more than one youth to allow for peer interaction.

# Targeted Recruitment-Messaging



## Gen X, Gen Y Volunteers

- Provide flexibility in roles & schedules, casual attire, and a comfortable environment
- Offer technology-centered tasks as well as one-on-one interactions to choose from
- Very attuned to terminology related to identity. Consciously engaging the use of language when describing gender, sexual orientation, class, ethnic groups and political orientation is critical. Avoid offending.

# Targeted Recruitment-Messaging



## Baby Boomers

- Repackage the way volunteer opportunities are presented. Focus on the work to be done and the skills needed rather than the volunteer status.
- Design & manage positions like paid positions.
- Emphasize the needs and characteristics of future volunteers.
- Consider the volunteers' skills & interests
- Show the personal & community impact to the volunteer
- Pair opportunities with education

# Targeted Recruitment-Messaging



## Post-Career

- Change the image of aging. Use designations other than “Older,” “Senior,” or “Retired.”
- Provide work that is meaningful & challenging—work that can make a definable difference in the community.
- Focus on skills & experience and legacy
- Create opportunities for mentorship and leadership.

# Targeted Recruitment-Messaging



## Corporations

- Know the corporation and their target causes
- Team building activities
- Work that matters and makes an impact
- Community attention and press
- Low maintenance, “in and out” opportunity

# Recruitment Strategies



**Set a goal of empowering all staff and current volunteers to be champions of your agency!**

- Regularly share recruitment needs at staff meetings.
- Include volunteer needs in newsletters/memos to current volunteers
- Have pre-prepared recruitment packets available at all times with appropriate messages
- Coach staff in developing their own “Elevator speech”

# Be Ready with your Elevator Speech!



- Just the facts
- Less is more – should be less than two minutes
- Personalize it
- Use one or two statistics
- What change does your agency make?
- End with a question



**Questions?**

# Interview and Placement



# Purpose of an Interview



- Determine volunteer interests, skills and motivations.
- Appropriateness of volunteer for the agency environment/alignment with agency mission.
- Effectively place volunteer in right role.
- Protect your clients.
- Enhance the reputation of your agency
- Continue to “sell” the agency
- Evaluate marketing efforts

# Interview Tips



- Behavioral interviewing
- Open-ended questions
- Skill-oriented questions
- Follow-up on concerns and/or questionable comments

# Placement



- Sign contract or letter of agreement
- Give volunteer policy and procedure manual
- Welcome letter
- Orientation information
- Who they will work with and will they continue to relate to you?
- Date of evaluation
- Have the volunteer begin ASAP



**Questions?**



**Take a 10 minute break!**

# Orientation, Supervision & Evaluation



# Orientation Content



- Organizational history, services and funding overview
- Mission, vision, values, philosophy and goals
- Market niche - how the organization sets itself apart in the community
- Organizational structure/culture
- Facility tour
- Interrelationships between departments/functions
- Names of department heads
- Management style
- Dress codes
- Emphasis on teamwork, group interactions, diversity, quality, communication, etc.
- Overview of workplace policies
- Work arrangement policies - flexibility in scheduling, etc.
- Career development opportunities such as training courses & mentoring options
- Explanation of the performance evaluation system
- Organizational events, meetings and activities
- Educate re: working with clients of agency (especially if direct service vol.)

# Volunteer Supervision



- Vital to managing risk.
  - Protects clients
  - Protects volunteers
  - Protects agency
- Lack of supervision can open volunteer & agency up to liability.
- Supervision should fit the job.
- Identify volunteer's direct supervisor.
- Identify other potential supervisors.
- Identify training needs (volunteers and supervisors).

# Volunteer Evaluation



- Annual volunteer performance evaluations
- Survey volunteers annually
- Evaluate staff/volunteer relations
- Dismissing a volunteer
  - Document events
  - Have a witness



**Questions?**

# Volunteer Recognition





Recognition starts when volunteers are offered meaningful work that is clearly in support of the agency's mission and continues in how well they are prepared for and supported in their efforts.

# Everyday & Ongoing Recognition



- Listen and act on their ideas & suggestions
- Let them succeed at helping solve the problem or contribute to the community
- Allow them to grow in their volunteer position
- Prevent or remove barriers to the volunteer's success
- Give volunteers regular feedback
- Make their work environment pleasant
- Match volunteers with appropriate jobs
- Treat them as part of the organization
- Find ways to show them you notice their accomplishments
- Communicate Impact

# Informal Recognition



Informal recognitions are small, immediate things one does to recognize achievements by a single or limited number of volunteers.

Examples include:

- Bookmarks
- Handshake from the director
- Certificates
- Food

(Random Recognition Handout)

# Formal Recognition



- These events, while no substitute for individual recognition, provide opportunities for...
  - Team building and program recognition
  - Public recognition
  - Socializing
  - Recognizing volunteer contributions
- Recognize the limitations of formal recognition events
  - Cost
  - Planning
  - Less personal
  - Logistics

# Public Recognition...



## Acknowledges the work of the volunteer:

- Articles in a newspaper, magazine, corporate newsletter, church bulletin, school paper, agency newsletter
- Feature articles on volunteers in staff break areas
- Nominations for awards

# Recognition Resources

## Ideas

- [www.mindperk.com](http://www.mindperk.com)
- [www.motivateus.com](http://www.motivateus.com)
- [www.quotationspage.com](http://www.quotationspage.com)
- <http://www.greatday.com/motivate/index.html>
- [www.ArlineOberst.com](http://www.ArlineOberst.com)
  - *(Chicken Soup for the Volunteer's Soul)*
- [www.harrisonpromotions.com](http://www.harrisonpromotions.com)
- [www.voluncheer.com](http://www.voluncheer.com)
- [www.volunteergifts.com](http://www.volunteergifts.com)
- [www.successories.com](http://www.successories.com)
- [www.baudville.com](http://www.baudville.com)

## Electronic Thank Yous

- [www.egreetings.com](http://www.egreetings.com)
- [www.bluemountain.com](http://www.bluemountain.com)
- [www.hallmark.com](http://www.hallmark.com)
- [www.beatgreet.com](http://www.beatgreet.com)
- [www.americangreetings.com](http://www.americangreetings.com)

## Awards

**Local Volunteer Centers**

**State Office of Volunteerism**

**Points of Light/Hands On Network**

# Volunteer Management Resources



- [www.energizeinc.org](http://www.energizeinc.org)
- [www.idealists.org](http://www.idealists.org)
- [www.serviceleader.org](http://www.serviceleader.org)
- [www.nationalserviceresources.org](http://www.nationalserviceresources.org)
- [www.volunteermatch.org](http://www.volunteermatch.org)
- **The Volunteer Management Report** (subscribe at [www.stevensoninc.com](http://www.stevensoninc.com))
- **e-volunteerism e-newsletter** (subscribe at [energizeinc.com](http://energizeinc.com) or [evolunteerism.com](http://evolunteerism.com))

# Final Thoughts?



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