Volunteer Engagement Toolkit

pennsylvania
DEPARTMENT OF AGING

Project Team

August 2013

July 2013

Dear Members of the Aging Network:

I am pleased to share with you a new, valuable resource, *"The Volunteer Engagement Toolkit"*, which was developed by the Pennsylvania Department of Aging, to help strengthen and grow the robust volunteer network within the Aging Network, thereby increasing our capacity to support the growing population and need of older Pennsylvanians.

Prior to the development of this toolkit, the Department of Aging sought input from volunteer coordinators at the Area Agencies on Aging (AAA) to ensure that the content of the toolkit addressed the critical needs expressed by you. What resulted is a toolkit that is designed to assist AAA staff in the recruitment, training and maintenance of a robust volunteer in your local planning and service areas. It will also help in presenting a dynamic message to the public and will complement the other existing resources you currently utilize.

As outlined in the 2012-2016 State Plan on Aging, the four goals are focused on improving access to care, empowering older individuals to remain in a setting of their choice, developing communities as places in which to age and live well, directing persons to opportunities to maximize their health and well-being and toward revitalizing and redesigning the aging services network to enhance the overall quality of life of older Pennsylvanians. A robust volunteer network will be necessary if we hope to achieve these goals.

The Department of Aging is able to make this toolkit available thanks to a grant from the National Volunteer Collaborative and NASUAD.

Thank you for your continued dedication to enhancing the services and supports provided to older Pennsylvanians by creating a welcoming and rewarding environment to our volunteers.

Sincerely,

Brian M. Duke
Secretary of Aging

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Volunteer Engagement Toolkit

Helping Pennsylvania to Meet its Volunteer Program Needs

Chapter Highlights

- Overview of a Needs Assessment Survey of Volunteer Leaders in the Pennsylvania Aging Services Network

- Key Challenges, Barriers, Supports and Tools Needed

- How to Use This Toolkit

Survey of Pennsylvania's Aging Network Program Needs

The purpose of this Toolkit, the templates and the training webinars that accompany it is to boost the capacity of the Pennsylvania Aging Services Network (52 local Area Agencies on Aging within 67 counties) so that it can best support frail and vulnerable adults through effective recruitment, management and deployment of community volunteers.

Before developing this resource, the Pennsylvania Department of Aging (PDA) distributed a survey to gather input from volunteer coordinators at Area Agencies on Aging statewide about their most critical needs. Survey responses were collected March 18-25, 2013. Eighty-five respondents submitted comments.

The result is this Toolkit, which is intended to provide pragmatic support that can be put to use immediately by our network. Rather than a comprehensive overview of volunteer management as a whole, the contents were specifically tailored to address issues that were raised, and requests that were made, via the survey. The Toolkit offers solutions that address the specific needs of Pennsylvania's Aging Services Network (see the survey

results below). It focuses on both addressing barriers as well as enhancing use of the supports that are already working.

Challenges to Coordinating Volunteers

The following are the top challenges identified by volunteer coordinators in the network.

- Volunteer Recruitment/Advertising (56%)

- Time Management (28%)

- Training for Volunteer Role (27%)

- Data Collection (20%)

- Volunteer Supervision (19%)

- External Partnership Development (19%)

Barriers to Getting and Keeping Volunteers

Respondents were asked to share their top volunteer management challenges. The total number of times the barrier was noted is listed in parentheses below.

- Not Enough Time for Staff to Devote to Volunteer Management (33)

- Complexity/Type of Tasks Volunteers are Asked to Do (26)

- Fewer Volunteers Available Due to Changing Life Events (24)

- Rural Geography or Travel for Volunteers (13)

Supports for Getting and Keeping Volunteers

Respondents were also asked to share the most helpful supports from which they benefited. The total number of times the barrier was noted is listed in parentheses below.

- Active Support from Other Staff (22)

- Volunteer Recognition Activities and Incentives (20)

- Matching Volunteers with Meaningful Roles (13)

- Current Active Volunteers (12)

- Training and Webinars for Volunteers (12)

Requested Tools and Templates

Finally, volunteer coordinators were provided the opportunity to request that specific resources be included in the Toolkit. The total number of times a tool was noted is listed in parentheses below.

- Volunteer Recruitment Templates/Ideas/Posting Sites (20)

- Volunteer Position Descriptions/Expectations by Role (13)

- Templates for Application/Screening Process (9)

- Volunteer Orientation Training and Handbook Templates (8)

How to Use This Toolkit

Each chapter of the Toolkit begins with a list of highlights and tools relevant to the content covered in that chapter. At the end of each, there is a round up of key insights from that chapter to help you review what was covered.

A USB thumb drive accompanies this Toolkit, and includes electronic versions of the tools and templates developed for this project. Hard copies of these can be found at the back of the relevant chapter. You are welcome to tailor any of the tools to fit the needs and requirements of your program or organization.

Finally, we hope you find the strategies, tip and tactics described in this Toolkit helpful to your efforts to engage volunteers in your community. If something works particularly well, we hope you will share your successes and advice with others across Pennsylvania's Aging Services Network.

Remember This...

- To develop this Toolkit, leaders of volunteers in the Pennsylvania Aging Services Network were surveyed. This Toolkit directly reflects their expressed needs.

- The most often cited challenge to volunteer involvement was volunteer recruitment.

- The most often cited barrier to getting and keeping volunteers is lack of time to devote to volunteer management.

- Active support from other agency staff was the most often cited support for getting and keeping volunteers.

- The most often requested tools were those related to volunteer recruitment (templates/ideas/suggested posting sites).

- Refer to this Toolkit when you need fresh ideas, inspiration or rationale for a new approach.

Chapter 2:
Volunteer Management Today

Current Trends and Helpful Management Practices

Chapter Highlights

- Volunteer Rates for Pennsylvania and the Nation

- Methods to Calculate the Value of Volunteers

- What Motivates Volunteers

- The Volunteer Engagement Cycle

- **Tools**

  - Return on Investment (ROI) Calculator

  - PA Aging Services Network Fact Sheets (The Value of Volunteers, Overview Of Programs, Budget Abstract, Service Delivery System)

Volunteer Trends in Pennsylvania and Nationally

There are currently more than **2.6 million active volunteers** in the state of Pennsylvania. According to the most recent research conducted by the Corporation for National and Community Service,[1] Pennsylvania ranks 31st amongst the 50 states and Washington, DC in volunteer involvement.

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[1] According to t he most recent Volunteering and Civic Life in America Report, see http://www.volunteeringinamerica.gov/PA.

In 2011 (the most recent data), **26.6% of residents volunteered, compared to the national average rate of 26.8%**. In 2004, the volunteer rate in Pennsylvania was at a high of 32.5%. **This rate has fallen almost 6% in the past seven years, representing a reduction of 490,025 volunteers statewide**.[2]

Volunteer Rate - State vs. National

	2002	2003	2004	2005	2006	2007	2008	2009	2010	2011
Pennsylvania	29.5%	31.1%	32.5%	28.7%	27.4%	28.7%	27.6%	27.6%	26.9%	26.6%
United States	27.4%	28.8%	28.8%	28.8%	26.7%	26.2%	26.4%	26.8%	26.3%	26.8%
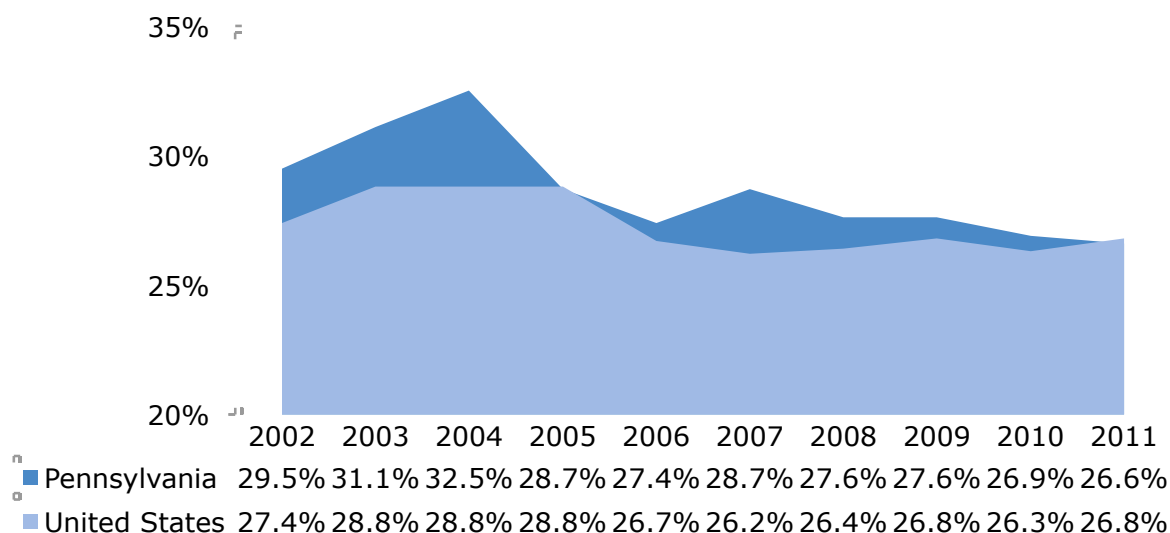
The current overall volunteer rate for Pennsylvania is slightly lower than the national rate; however, the specific rates for urban, suburban and rural volunteers paint a more complex picture. **Both suburban and rural volunteer rates in Pennsylvania are higher than the national average**. Urban volunteering, however, is much lower than national averages.

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[2] In 2004, 3,161,210 people volunteered in Pennsylvania, as compared to 2,671,185 in 2011.

Volunteer Rates by Population Area

	Urban	Suburban	Rural
Pennsylvania	14.7%	28.4%	29.7%
United States	23.4%	27.5%	27.7%

■ Pennsylvania ■ United States
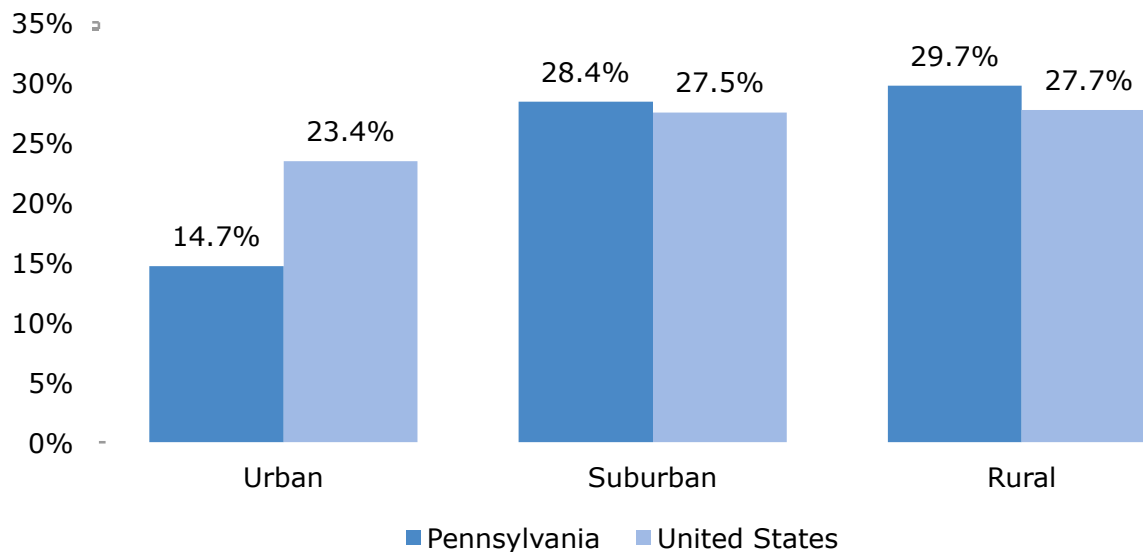
Although the volunteer rate is highest for Pennsylvanians age 35-44, the average number of hours older residents contribute is higher. **People age 65-74 volunteer 100 hours per year on average, which is twice that for their younger counterparts** (48 hours per year for 35-44 year olds).

Pennsylvania Volunteer Rates by Age

16-19	20-24	25-34	35-44	45-54	55-64	65-74	75+
27.2%	21.1%	22.0%	35.8%	29.5%	25.9%	27.8%	22.3%
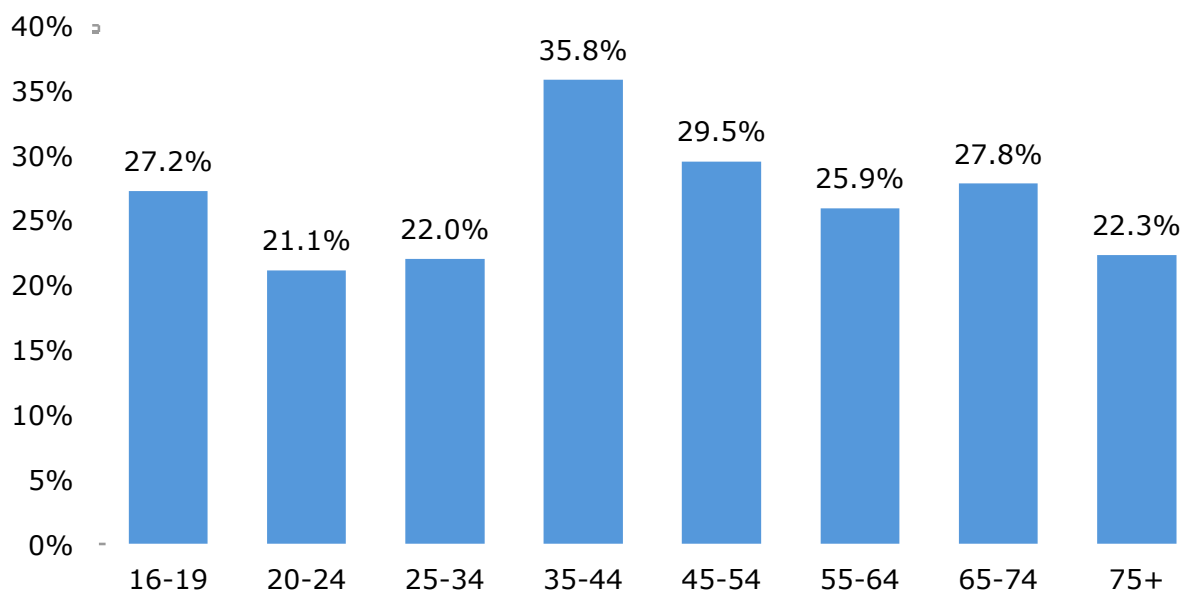
Pennsylvania volunteers, similar to national trends, are **most likely to volunteer for religious organizations (33.9%) and schools (26.3%)**.

Where Pennsylvanians Volunteer

Other 3%
Unknown 5%
Sport/Arts 3%
Civic 6%
Social Services 14%
Educational 27%
Religious 34%
Health 8%
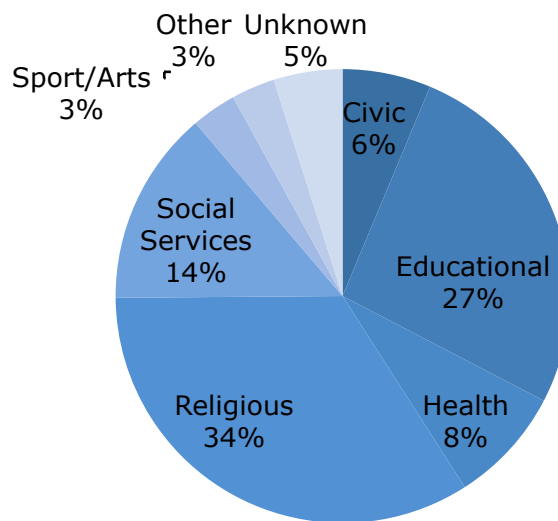
Also similar to national data, Pennsylvanians are most likely to be involved in fundraising (31%) and food distribution (25.9%) activities as a volunteer.

Pennsylvania Volunteer Activities

Activity	Percentage
Other	14.2%
Emergency Response/Counseling	4.3%
Sport Teams	7.5%
Music/Art	10.0%
Religious	12.0%
Office Services	13.4%
Collect/ Disribute Clothing	14.0%
Tutor/Teach	15.3%
Mentor Youth	16.0%
Professional/Management	18.5%
General Labor	20.3%
Collect/Distribute Food	25.9%
Fundraise	31.0%
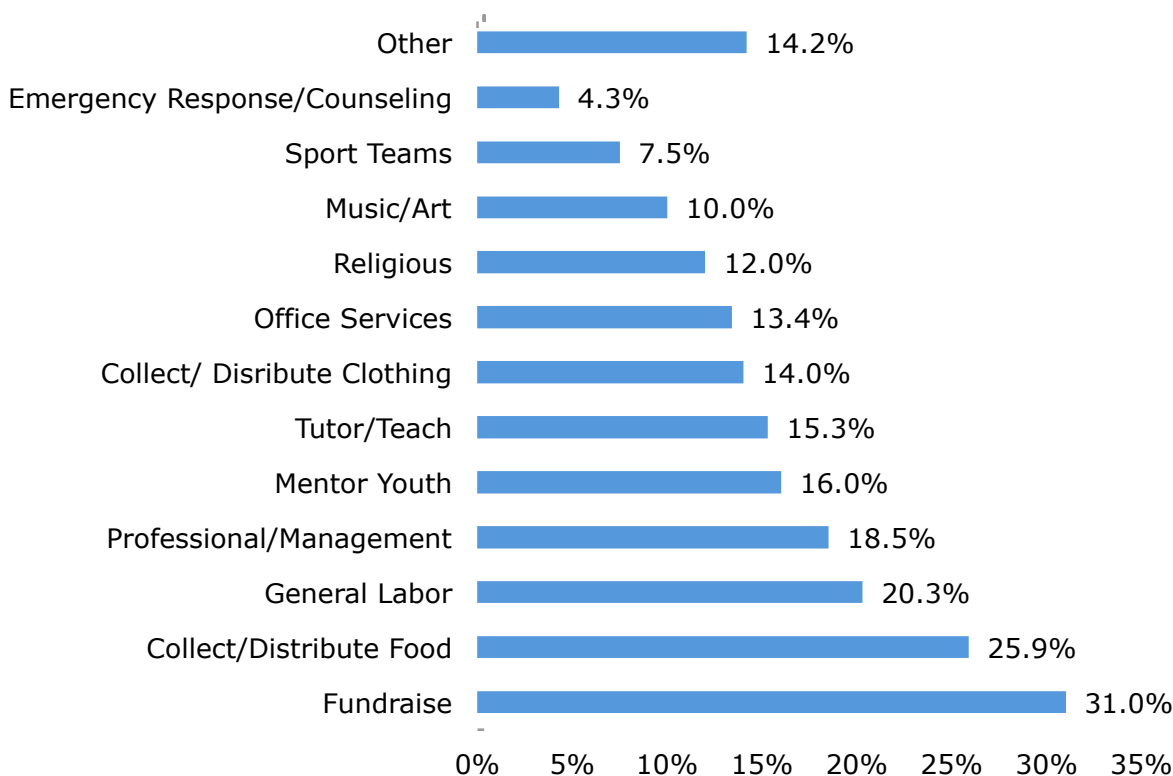
Other helpful statistics:

- **The average annual retention rate for Pennsylvania volunteers (66.8%) is higher than the national average (64.6%)**.

- The average hours per Pennsylvania resident is 33.7 hours per year, compared to 32.7 hours per year nationally.

Volunteer Program Return on Investment

Going to the trouble to calculate return on investment of a volunteer program can generate some impressive results. For example, in 2010, National Council on Aging research concluded that **for every $1 invested, the organizations they studied realized an average of $8 in return resulting from the work of older volunteers in leadership roles**.[3]

There are several different approaches to estimating the value of volunteers, most often used to create a business case for volunteers and justify budget expenditures, but not all can be easily quantified. Volunteers offer organizations increased credibility, enhanced reach into new communities, diverse skills, fresh perspectives and introductions to decision makers within their spheres of influence. For most of these, it is difficult to estimate their direct impact on the organization's bottom line.

Attempts have been made to equate the economic value of a volunteer's work with hourly wages for similar work in paid jobs, which can offer some valuable information to programs that want a quick and easy way to estimate dollar values.

> **Two Ways to Calculate the Simple Value of Volunteer Hours**
>
> ■ According to the Independent Sector, the current estimated value of a volunteer hour in Pennsylvania is $21.25 (see http://www.independentsector.org/volunteer_time).
>
> ■ The Points of Light/Hands on Network created an online calculator with which values can be calculated by specific job titles and total hours logged for each volunteer position. The result is an overall value of all volunteer time, across a variety of roles (see http://www.handsonnetwork.org/tools/volunteercalculator).

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[3] The Boomer Solution: Skilled Talent to Meet Nonprofit Needs (2010), see http://www.ncoa.org/press-room/community-action-volunteering/boomer-solutins-skilled.html

Beyond the value of their work, volunteers also bring other tangible benefits to organizations. Volunteers are often willing financial donors to organizations. In fact, **volunteers donate an average of ten times more than non-volunteers, and two-thirds (67%) report they often donate to the same organization where they volunteer**.[4]

In addition, volunteers also generate a plethora of in-kind resources for organizations — such as meeting space, donations of materials and food, event raffle items and the fuel they use to drive to their volunteer assignments. These can also be included in a calculation to offer a more complete picture of resource sharing and results.

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[4] Fidelity® Charitable Gift Fund and VolunteerMatch study (2009), see http://www.businesswire.com/portal/site/home/permalink/?ndmViewId=news_view&newsId =20091203005609&newsLang=en.

One More Complex Way to Calculate Return on Investment

Use this formula: **ROI = (volunteer value - program cost) / program cost**

Line Item		Notes
Staff Salary	**21,200**	Pro-rate, if part time staff
Staff Benefits	**5,300**	
Volunteer Expenses	**535**	Expenses directly related to volunteers
Office Supplies/Equipment	**2,500**	
Training	**200**	For paid staff and volunteers
Travel	**1,400**	
Other	**200**	Any other expenses not added elsewhere
Overhead	**3,134**	Percentage agency adds to budget
Annual Program Cost	**$34,469**	Sum of all of the above
Volunteer Hours	2,400	Total hours per year
$21.25	**51,000**	Based on Pennsylvania hourly rate
Skilled Volunteer Hours	1,200	Total per year (not included above)
$100.00	**120,000**	Hourly retail cost for a similar service
Cash Donations	**745**	Cash donations made by volunteers
In-kind Donations	**200**	Value of in-kind donations by volunteers
Money Saved Clients	**8,557**	Total saved clients annually
Total Volunteer Value	**$180,502**	
Total ROI	**$4.24**	

In this scenario, for every $1 invested, $4.24 is returned to the community.

Note: An Excel spreadsheet that automatically calculates ROI using your numbers can be found on the Toolkit Flash Drive.

What Today's Volunteers Need and Want

If you ask, most volunteers will tell you that the main reason they contribute their time is to "make a difference" or "give back to their community." Volunteers receive other benefits, as well, but **what keeps them active is a sense of altruism or duty to their community or society**.

Because of these motivations, **volunteers must feel that their work is having an impact**. Their work must have meaning and if they feel they are not making a real difference, they will leave the organization to seek opportunities to serve elsewhere.

What gives volunteers the impression they may not be making a difference in the ways they had hoped? According to recent research,[5] **there are five reasons volunteers leave the organizations they serve. These may also relate to how volunteers perceive the value or potential effectiveness of their work.**

- **Not Matching Volunteers' Skills with Assignments** — Volunteers with specialized skills are often assigned manual labor or low-skill jobs rather than tasks that make use of their unique talents.

- **Failing to Recognize Volunteers' Contributions** — Volunteers are not recognized through an organizational culture that values them and through specific appreciation events. To compound this, organizations don't make an effort to track volunteer time and estimate its equivalent value (or return on investment), so their contributions aren't evident.

- **Not Measuring the Value of Volunteers** — If leaders do not fully understand the return on investment volunteers bring to their organizations, they are less likely to invest in the resources needed to fully develop the potential of a volunteer program.

- **Failing to Train and Invest in Volunteers and Staff** — Staff who have been assigned the role of volunteer coordinator have been provided little, if any, formal training in volunteer administration. Volunteers, likewise,

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[5] See "The New Volunteer Workforce," David Eisner, Robert T Grimm Jr., Shannon Maynard, Susannah Washburn, *Stanford Social Innovation Review*, (Winter 2009).

are not provided orientation and training to better understand the agency and the tasks they will be performing. Finally, other employees need to be trained to effectively work with a volunteer workforce.

■ **Failing to Provide Strong Leadership** — Nonprofit leaders do not place a high value on volunteer talent and thus do not provide substantial resources for the volunteer program to be truly effective. This includes investing in volunteer administration as well as including volunteers in the organization's strategic plan and budgeting accordingly. Volunteers can sense whether they are a valued part of the equation and this affects their motivation.

If these are the reasons volunteers leave, what will help them stay?

■ **Focus on Engagement, Not Management** — Show volunteers how much you value their contributions by replacing a command and control model of supervision with a motivational style that cultivates community interest and commitment for your program. Invite volunteers to participate as partners in furthering your cause versus treating them as temporary staff to fill needed vacancies. Involve them in program decision-making and governance.

■ **Design Meaningful Volunteer Jobs** — Allow for a certain amount of flexibility when designing your volunteer roles and allow volunteers some latitude. This doesn't mean you aren't clear about expectations, it just means there are any number of ways to get the job done.

■ **Match Volunteers with Tasks They Enjoy** — When matching volunteers with tasks, make sure you understand what special skills they bring to the table and what they are willing, and not willing, to take on. Don't force volunteers to do things that make them uncomfortable. Start small and build in the complexity of the work, if need be. They won't last long if they aren't having fun.

■ **Provide Robust Support** — Don't neglect to provide volunteers with adequate materials, training, space, etc. to accomplish their projects or tasks. This includes access to decision-makers when approval is needed.

Volunteers must believe that they have the capacity and the authority to complete a given task.

- **Replace Reward with Acknowledgement** — Instead of focusing your volunteer recognition activities on purchasing giveaways; instead of plaques and trinkets, volunteers are more motivated by being part of the change they hope to bring about in the world. So, thank them and, when doing so, include specific information about how they are making a difference as an individual and as part of a team. Let them know that you understand who they are and the gifts they have brought to the organization and their community.

Volunteer Engagement Cycle

Volunteer programs require many of the same human resource activities and investments that are associated with the supervision of paid staff. Arguably, because volunteers contribute their time and talents without pay, and rely solely on intrinsic personal rewards, **the management skills used to coordinate volunteers must be more effective than those needed to lead paid staff**.

Successful leadership of volunteers does not happen by accident. It requires not only a well-designed management system, but also well-trained and competent people, placed in the right jobs, to effectively train and support volunteers.

Volunteer Engagement Cycle
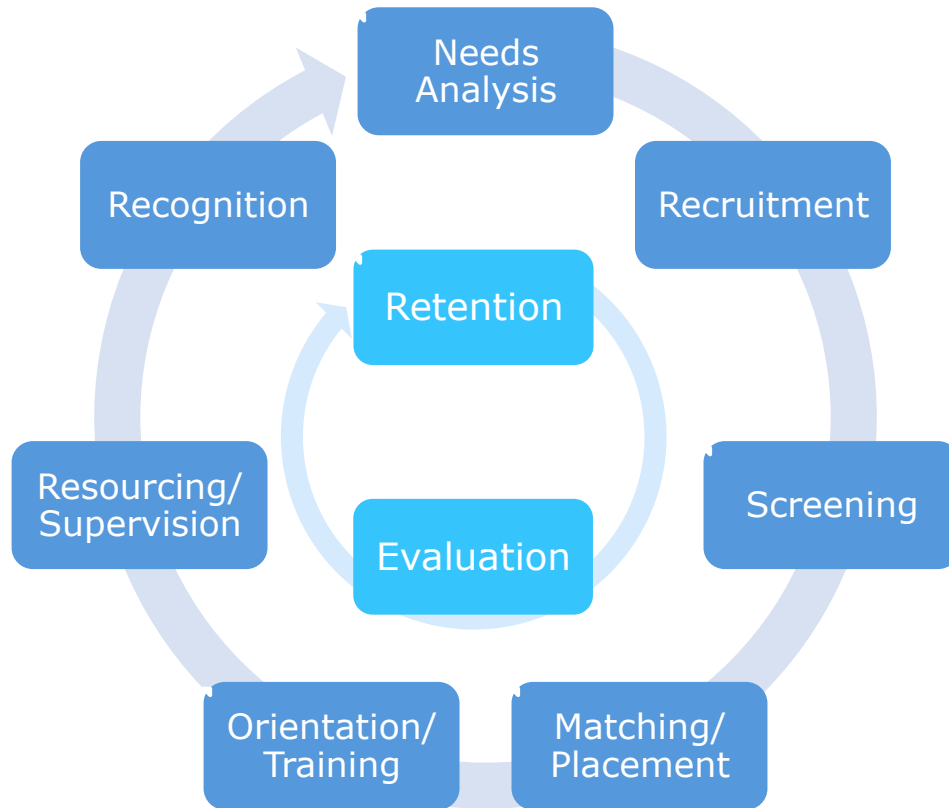
Below are activities that should occur at each step of the process:

- **Needs Analysis**

    - Risk Management Plan
    - Volunteer Workforce Plan
    - Volunteer Position Descriptions
    - Program Policies and Procedures
    - Program Data Collection and Analysis

- **Recruitment**

  - Recruitment Goals for Each Position and Location
  - Volunteer Recruitment Plan and Messages
  - Outreach and Advertising
  - Partnership Development

- **Screening**

  - Assessment of Minimum Qualifications
  - Identification of Volunteer Motivations
  - Evaluation of Volunteer Skills and Abilities
  - Background and Reference Checks

- **Matching and Placement**

  - Matching Volunteer Interests with Available Positions
  - Developing New Positions to Meet Volunteer Needs
  - Introduction to Supervisor and Peers
  - Scheduling

- **Orientation and Training**

  - Training Plan
  - Orientation to Agency Policies and Procedures
  - Initial Training for Volunteer Role
  - Mentoring and Job Shadowing
  - Ongoing In-Service Training

- **Resourcing and Supervision**

  - Assignment of Tasks
  - Feedback About Work
  - Ongoing Support
  - Resources, as needed

- **Recognition**
  - Volunteer Involvement and Empowerment
  - Individual and Team Appreciation
  - Leadership Development
  - Volunteer Feedback Mechanisms

Remember This…

- The volunteering rate for Pennsylvania is 26.6%, compared to the national average rate of 26.8%, but both suburban and rural volunteer rates in Pennsylvania are higher than the national average.

- This rate has fallen almost 6% in the past seven years, representing a reduction of 490,025 volunteers statewide.

- Pennsylvania volunteers are most likely to volunteer for religious organizations and schools.

- The retention rate is higher than the national average for Pennsylvania volunteers.

- There are many ways to calculate the value of the volunteer effort. One study found that for every $1 invested, organizations realized an average of $8 in return.

- Volunteers must feel that their work is having positive affect on their community.

- Arguably, the management skills used to coordinate volunteers must be more effective than those needed to lead professional staff.

Chapter 3:
Volunteer Program Basics

Organizational Readiness to Meet Volunteer Needs

Chapter Highlights

- Core Competencies in Volunteer Administration

- The Differences Between Volunteers vs. Paid Staff

- Volunteer Liability and Protections

- Aligning Tasks with Program Goals

- Designing Volunteer Positions that Motivate

- How to Re-Design Volunteer Jobs that are Overwhelming

- **Tools**
  - Program Self-Assessment Worksheet

  - Volunteer Program Structures: Pros and Cons

  - Volunteer Position Description Template

  - Job Re-Design Template

  - Skills Matrix

What Does it Take to Manage a Successful Volunteer Program

In the past, programs were able to rely on volunteers to commit to consistent, limitless years of service. Unfortunately, this just isn't true anymore. Maintaining sustainability over the long term means that we must rethink how we use volunteer talents, how we reconfigure their work, how

we collaborate within our team and how we share leadership at all levels to ensure the most effective use of volunteers.

By offering compelling volunteer projects, a variety of assignments within which volunteers can apply their own skills and a solid foundation of staff support, agencies can offer current and prospective volunteers opportunities that are relevant, appealing and manageable.

Below is the Council for Certification in Volunteer Administration (CCVA) "Body of Knowledge in Volunteer Administration,"[6] which represents core competencies that support effective volunteer program administration practices, developed by subject matter experts in the field.

According to the CCVA, **five core competencies serve as a foundation for the profession of volunteer administration**, regardless of where or how it is practiced:

1) **Ethics:** The ability to act in accordance with professional principles.

2) **Organizational Management:** The ability to design and implement policies, processes and structures to align volunteer involvement with the mission and vision of the organization.

3) **Human Resource Management:** The ability to successfully engage, train and support volunteers in a systematic and intentional way.

4) **Accountability:** The ability to collect relevant data and to engage in meaningful monitoring, evaluation and reporting to stakeholders.

5) **Leadership and Advocacy:** The ability to advance individual, organizational and community goals by advocating for effective volunteer involvement inside of the organization and in the broader community it serves, through the investment of personal integrity, skills and attitudes.

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[6] See http://cvacert.org/documents/CCVABOK2008-Final_000.pdf. For more information on how to obtain the CVA credential, see http://www.cvacert.org/certification.htm.

Clearly, an investment in staff time and organizational infrastructure is required to build and maintain successful volunteer involvement. The inclusion of volunteers in both leadership and support positions can also help expand what a paid staff person can do alone. Throughout this Toolkit, you will find examples of ways volunteers can help.

Organizational Readiness

Not all organizations should necessarily enlist the help of volunteers. If they are not ready, or do not value the contributions of community volunteers, a new volunteer initiative may fall flat.

Below are some critical components of a successful volunteer program:

- Written philosophy or business case for volunteer involvement

- Development of volunteer workforce model and roles that are aligned with agency's mission, goals and objectives

- Plan for mitigating risks to service clients , volunteers, staff and the agency's reputation

- Plan for recognizing and appreciating volunteers for their support

- Plan and tools for communicating with the volunteer corps on a regular basis

- Written policies and procedures, including a volunteer handbook and agreement

- Volunteer position descriptions and a plan for integrated volunteers into leadership, direct service and support positions, as appropriate

- Sufficient budget for volunteer program expenses

- Communications plan and marketing materials for volunteer recruitment both online and on land

- Standard system for processing applications, screening and matching volunteers with meaningful tasks

- Designated supervisors for volunteers

- Ongoing training and support for staff and volunteers

- Volunteer program goals, plan for ongoing evaluation of volunteer program and database for collecting and analyzing data about volunteer involvement

The Difference between Volunteers and Paid Staff

Volunteers can be used to complement the work of paid staff in many ways:

- To provide special expertise that is missing from paid staff (for example, the use of a pro bono web designer to update the agency web page)

- To expand the hours of paid staff (for example, the use of volunteers to deliver meals on evenings and weekends)

- To assist paid staff in delivering services that do not require professional level expertise (for example, have volunteers provide Medicare benefits counseling, and have paid staff represent clients at administrative appeal hearings)

- To extend the work that would not be done if volunteers were not there to do it (for example, to help out with special projects or extend program services in underserved areas)

Because of the transient and part time nature of volunteer work, volunteer activity should augment the work of paid staff, not replace it. Although volunteers can help build program capacity, they should never be used to substitute for paid personnel and are not a substitute for adequate program staffing levels. Nor should volunteers be treated as temporary workers, with little investment in their welfare and to be called upon only when needed.

To prevent misunderstandings, it is important for volunteers and staff alike to clearly delineate the difference between volunteer and staff duties. Developing distinct position descriptions, volunteer agreements and program policies and procedures for the volunteer program can help decrease the chance of misunderstandings, and thus, risk to the organization.

What is a "Volunteer"?

To be considered a true volunteer, according to the US Department of Labor, all of the following factors must be true:

- The entity that benefits from the service is a nonprofit (or government agency)

- The activity is less than full time

- The services are not offered as a result of coercion

- The services are typically associated with volunteer work

- No regular employees have been displaced by the volunteer

- The volunteer does not expect to be compensated

According to the US Department of Labor, volunteers are individuals who perform hours of service for religious, charitable or similar non-profit organizations without promise, expectation or receipt of compensation. **Volunteers are not considered employees and, therefore, are not covered by the Fair Labor Standards Act**.[7] Public sector employees may volunteer for their agencies, but may not volunteer additional time to do the same work for which they are already employed.

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[7] See http://www.dol.gov/elaws/esa/flsa/docs/volunteers.asp

Whenever paid staff wish to volunteer their time for the agency for which they also work, it is critical that they be subject to the same formal application process as other volunteers and be subject to the same supervision as others in the same role.

Trainees

Trainees, such as school-to-work or internship program participants may volunteer as part of their training, if all of the following criteria apply:

- The training, even though it includes actual operation of the facilities of the employer, is similar to that which would be given in a vocational school;

- The training is for the benefit of the trainees or students;

- The trainees or students do not displace paid employees, but work under close supervision;

- The employer that provides the training receives no immediate advantage from the activities of the trainees or students and, on occasion, his operations may even be impeded;

- The trainees or students are not necessarily entitled to a job at the conclusion of the training period; and

- The employer and the trainees or students understand that the trainees or students are not entitled to wages for the time spent in training.[8]

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[8] See http://www.dol.gov/elaws/esa/flsa/docs/trainees.asp

Volunteer Stipends

Stipends paid to volunteers must be treated the same as payments to paid staff, and income tax and FICA contributions must be withheld. In-kind benefits provided by the organization must be assigned fair market value and are subject to taxation as well. Provision of gifts or items of limited value that recognize a volunteer's contributions are, however, are considered a "de minimus benefit" and are excluded from income. Reimbursements for expenses incurred while volunteering, however, are considered taxable income.[9]

If you decide to offer stipends to volunteers, do so with care:

- Never pay more than a nominal 20% of what an employer would otherwise pay for the same service.

- Do not offer benefits that other employees receive.

- Make it clear that if a volunteer receives more than $500 a year in compensation, they will no longer be protected from liability claims by the Federal Volunteer Protection Act.[10]

Federal Volunteer Protection Act

The Volunteer Protection Act of 1997[11] [42 U.S.C. § 14503(a)] protects volunteers who perform services for charitable organizations. The law provides immunity for volunteers for harm caused by their acts or omissions under the following circumstances, if:

- The volunteer was acting within the scope of his or her responsibilities at the time of the alleged act or omission. The scope of responsibility should be defined by the position description and training received.

- The volunteer is not paid over $500 per year, excluding reimbursement for expenses.

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[9] See https://www.nonprofitrisk.org/library/articles/employee_or_volunteer.shtml
[10] See http://www.dol.gov/whd/opinion/FLSA/2006/2006_08_07_28_FLSA.pdf and http://www.gpo.gov/fdsys/pkg/PLAW-105publ19/pdf/PLAW-105publ19.pdf
[11] See http://www.gpo.gov/fdsys/pkg/PLAW-105publ19/pdf/PLAW-105publ19.pdf

- The volunteer was properly licensed, certified or authorized to act, if appropriate or required. If your program requires certification, then volunteers are not protected for certain activities until they are certified.

- The harm was not caused by willful, criminal, or reckless misconduct, gross negligence or a conscious, flagrant indifference to the rights or safety of the individual harmed.

- The harm was not caused by the volunteer's operation of a motor vehicle, vessel or aircraft to which the State requires an operator's license and insurance.

Pennsylvania Good Samaritan Statutes

Under Pennsylvania immunity law,[12] volunteers who serve a nonprofit organization, a Commonwealth agency or local government are not liable for civil damages resulting from acts or omissions while performing their duties. The only exception is if the conduct falls below generally practiced standards and they should have known that the act or omission created a substantial risk of actual harm to person or property.

Agency Insurance Coverage

As is common business practice, **Area Agencies on Aging and other nonprofit organizations also carry umbrella insurance policies that protect their employees and volunteers** in the event of an accident while on duty.

If volunteers drive an agency vehicle, the agency's commercial auto insurance will generally cover any claims in the event of an accident. If a volunteer is driving their own vehicle, then a claim would be covered under their own personal auto insurance, provided they have sufficient coverage. **In the event of a lawsuit, or when a claim exceeds the volunteer's coverage limits, the agency may be named in a lawsuit.** For this reason, some agencies also purchase non-owned liability insurance, which covers claim amounts that are in excess of the volunteer's own policy when

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[12] See "State Liability laws for Charitable Organizations and Volunteers," Nonprofit Risk Management Center (December, 2009).

a volunteer was driving their own vehicle on behalf of the organization.[13] Check with your agency to see who and what are — and are not — specifically covered by your agency insurance.

Aligning Volunteer Work with Program Goals

Any investment in volunteers is wasted if it does not further the mission and goals of a program or agency. To better understand the priorities of your organization, take some time to review your strategic plan, grant requirements and current projects. Consider the objectives of each priority area and then brainstorm how volunteers can help.

Make sure that every volunteer role on your team relates to a strategic objective of your program or agency. If a current role does not support your goals, look for ways to convert it or retire it.

Designing Meaningful Volunteer Positions

One easy way to develop volunteer positions that are inspirational and meaningful to volunteers is to develop volunteer teams that are either responsible for specific program operations or work on time-limited special projects. These can act as a focal point for new volunteers and may reinvigorate others that are losing interest.

Work through these steps with a team of volunteers and staff. By involving volunteers at this stage in the process, you will be more likely to develop roles that appeal to them and generate interest in your new assignments.

1. **Brainstorm** all of the tasks that need to be completed by your program or organization. Do not separate out paid and volunteer duties yet.

2. **Write one task per post-it**, and try to be as exhaustive as possible. Don't decide who will be responsible for each task yet. Put them all up on a wall.

3. **Identify which tasks only paid staff can do**. Be open-minded — you may find there are few tasks that must be done solely by paid staff. At

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[13] See http://www.nonprofitrisk.org/library/articles/auto050608.shtml

the same time, volunteers have a wealth of skills and past experiences that can be put to use.

4. **Remove paid staff responsibilities** from the larger group, and cluster them together.

5. **Then, cluster the remaining volunteer tasks into groups** of similar duties that make sense together. These are your teams.

6. **Name them, and type up a team description** with a bullet list of tasks, transcribed from the post-its. Include on the team description how the work of the team specifically contributes to program goals and the agency's mission.

7. **Identify which paid staff will support which team**. Consider how you will use paid staff to fill in when there are volunteer vacancies or absences, or when there is a higher-than-normal service volume.

8. **Create one-page volunteer position descriptions** for the jobs that would be needed to perform each team's tasks. In them, describe the "must have" and "need-to-have" skill needed for each job as well as the minimum time commitment needed to adequately perform the task. Be sure to mix in formal and flexible opportunities for commitment.

9. **Prioritize which positions need to be filled first, and Begin Recruiting**. You can't recruit all at once, so pick the ones that will have the most impact with the least training investment at the outset. Be clear about what skills are necessary for each job and match volunteers with areas of interest.

Re-Designing Jobs that are "Too Big"

If volunteers complain that a job is too overwhelming, it is likely either because it is not the right fit with the volunteer's skills, capabilities and preferences or because the job really is too big. The scope of tasks may have expanded over time due to the expanded information needed to perform the job or because additional duties have been added.

When volunteers struggle with the challenges of a big job, one option may be to find or wait around for the right volunteer to come along. Another is to re-design the position so that it feels like a reasonable request for most volunteers.

If you decide to re-design volunteer roles, consider inviting a group of volunteers to participate in the process. You may want to involve volunteers for two reasons:

- Volunteers, especially those who have dedicated many hours, and even years, of service may resist changes to the comfortable work roles and processes they have developed over the years. They will be more amenable to change if they are directly involved in the process of making it happen and have a say in what will ultimately affect them in a very direct way.

- The volunteers who perform the current jobs are subject matter experts in the tasks and their challenges. They have likely already thought of ways to improve things and will be able to provide the practical pros and cons of new proposals.

When re-designing a position, use the following steps:

1. **Identify** all of the main areas of work (administrative, direct service, communications, management, etc.).

2. **Brainstorm** all of the tasks that need to be completed within each work area. Be sure to complete a thorough inventory and break down larger tasks into smaller, discreet chunks. You may begin to see complementary tasks that could be integrated into a single work process.

3. **Assess the frequency and timing** of each task (e.g., twice-a-day, every Monday from 3-6pm, by the first of the month, etc.). This step is important in determining which tasks can be done by volunteers and which by paid staff. This may also help unearth ways to create a more efficient workflow by consistently assigning tasks to the same position that are to be completed at or around the same time.

4. **Rate the complexity** of each task (low, medium, high). This is important in determining the minimum qualifications, training and support needed for each role. In addition, tasks with similar complexities might be combined under one role, so that the most effective use can be made of volunteer talent at each level.

5. **Design new roles** and check to be sure each contains the three elements of job satisfaction[14]:

   - **Task Variety** — uses the different skills and talents of the volunteer
   - **Task Identity** — allows the volunteer to complete some tasks from beginning to end
   - **Task Significance** — the volunteer believes the job has a substantial impact on others and the organization's mission

6. **Create volunteer position descriptions** for each role that reflect the desired qualifications, minimum time commitment, training and support provided and how the position relates to the overall mission of the organization and the goals of the program.

Instead of redesigning your volunteer positions, **there are also other ways to help keep tasks from overwhelming volunteers and, at the same time, prevent burn out**. Here are a few ideas to try:

- **Reduce Effort through Technology and Automation** — For example, instead of answering a statewide toll-free number at the central reception desk and then forwarding it to the appropriate local program, have the toll-free number automatically forward calls based on call origination. Or,

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[14] See http://www.orbee.org/images/5cc-resource-files/1319789168_Hackman%20%26%20Oldham%20%281976%29.pdf

instead of hand-mailing volunteer application packets, make digital copies available on your website.

- **Reduce Mental Demands by Providing Job Aids and Ready Resources** — Develop simple graphic tip sheets that outline key contacts, common work processes, etc. for easy reference. Post everything online, so critical information can be found at any time from any locale.

- **Try Triage or a Team Approach to Share the Load** — For example, assign one team member to the intake portion of client service, while another completes the client counseling, and a third does the follow up. Alternatively, share clients amongst a team that is assigned different days of the week. When using either of these tactics, it's important to increase the team communication and keep everyone in the loop regarding client progress. That way volunteers still feel they were an integral part of the larger solution.

- **Make it Clear When, Where and How to Ask for Help** — Provide guidelines about how and when to make referrals, and to whom (both inside and outside the agency). Be very clear about the scope of the volunteer's work and the importance of relying on the appropriate community resources to help a client. Also, be sure to always offer backup to volunteers who are struggling with a task or are feeling overwhelmed. Let volunteers know that genuine support will be provided when they need it from time to time.

- **Reduce the Bureaucratic Burden** — Figure out how to simplify the administrative hoops volunteers must jump through to get something done. For example, provide them templates, and give them the freedom to create outreach materials without approval each time (but with training and guidelines provided up front). If you can't simplify the steps, at least shield volunteers from tedious, uninspiring work.

Remember This...

■ Agencies that offer volunteers compelling projects, a variety of assignments to apply their skills and a solid foundation of staff support will be more successful engaging high quality volunteers than those who do not.

■ Volunteer activity should augment the work of paid staff, not replace it.

■ In order to be covered by the Federal Volunteer Protection Act, volunteers should never be paid more than 20% of what an employer would otherwise pay for the same service, should never receive benefits that other employees receive and should not receive more than $500 a year in compensation.

■ IN addition, the Federal Volunteer Protection Act only protects volunteers who are acting within the scope of their duties and certification, if applicable.

■ Make sure that every volunteer role relates to a strategic objective of your program or agency. If it does not, look for ways to convert it or retire it.

■ When volunteers are overwhelmed, either re-assign them to another job or re-design the position so that it feels like a reasonable request.

■ Check to be sure each volunteer job contains the three elements of job satisfaction: task variety, task identity and task significance.

Chapter 4:
Volunteer Recruitment

Connecting with the Right Volunteers at the Right Time

Chapter Highlights

- ■ Diagnosing Barriers to Recruitment Success

- ■ Using Effective Messages and Messengers

- ■ Using Recruitment Teams

- ■ New Places to Find Volunteers

- ■ Tips for Compelling Recruitment Postings

- ■ Making the Ask and Overcoming Initial Objections

- ■ **Tools**

  - ■ Recruitment Self-Assessment

  - ■ Recruitment Plan Template

  - ■ Strategic Messaging Platform

  - ■ Volunteer Recruitment Ads/Postings Template

  - ■ Volunteer Recruitment, Screening and Placement Team Charter

Diagnosing Recruitment Problems

Attracting and retaining the right volunteer talent requires a strategic, versus tactical, approach. Tactics are akin to your "To Do" list — they have

to be done, but they aren't necessarily going to help you understand why your recruitment is or is not working.

Strategy involves higher-level analytical thinking — it requires you to make an objective assessment of what's going on and develop a response that makes sense in your specific environment. Tactics are commonly used. Strategy is rare, but more effective in the long term.

If your recruitment efforts haven't yielded the results you had hoped, or you're just looking for ways to optimize your approach, **first try to identify where you're biggest challenges lie. That way you can develop a strategic, versus solely tactical, plan that addresses your key obstacles to success.**

Self-Diagnosis: Why Don't You Have the Volunteers You Need?

Take an honest and objective look at your current volunteer recruitment activities by asking yourself the following questions. Can you find any weak areas that you can address?

■ Have you spread the word beyond the people you generally try to reach?

■ Does your message describe the community need you are trying to address in a compelling and human way?

■ Does your appeal specifically describe how volunteers make an impact on the lives of others?

■ Does your call-to-action describe the specific steps an interested volunteer needs to take to apply?

■ Are your materials free from jargon, acronyms and "insider speak"?

■ Is enough background information about your opportunities made available up front for those who want it?

■ Is your application process consumer friendly and made clear to the applicant? Can it be completed in a reasonable timeframe?

- Do you respond to requests for information and volunteer applications within one business day (to at least confirm they have been received and describe next steps)?

- Do you tailor your opportunities to accommodate volunteer needs, when possible, including types of jobs and time commitment?

- Is your organizational culture welcoming to outsiders?

- Does the community trust your organization to follow through with its commitments?

- Do you include visuals — like photos, videos and slideshows — to make your case?

Effective Messages and Messengers

While no automatic "buy button" has yet been found in the brain, psychologist and behavioral economists have discovered mounting evidence that **certain kinds of information, provided in specific ways, can "light up our brains" and compel us to buy, act, follow through or make a commitment**.[15] Below are a few ways to pump up the effectiveness of your recruitment by making simple adjustments to your appeals.

- **Pitch a Do-able Task or Project** — Humans are actually demotivated by immense problems. Rather, we are inspired by tasks that we perceive to be achievable. For example, "help end world hunger" seems too overwhelming to tackle. So, communicate what can be done into doable chunks. For example, "you can help reduce hunger in our community by delivering hot meals to six seniors a week" is something that many can do.

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[15] For two nonprofit focused eBooks on the science of human behavior, see "Homer Simpson for Nonprofits: The Truth about How People Really Think and What It Means for Promoting Your Cause" (http://web.networkforgood.org/201002ebook/) and "Lisa Simpson for Nonprofits: What Science Can Teach You About Fundraising, Marketing and Making Social Change" (http://web.networkforgood.org/2011-03-ebook-lisa-simpson-ntc/)

- **Rather Than Using Data, Tap Emotions** — The heart decides and the intellect justifies. So, rather than listing statistics about the community need for your services or how many people you helped last year, first make an appeal to the emotions of your audience. How will it feel to volunteer? What are powerful stories of transformation you can share?

- **Focus on One Life, Versus Many** — Similar to above, we are more motivated by emotionally-charged stories of a single person than a group of people, no matter how large or small. So, share the story of a single person who has been able to improve their life through the help of volunteers (make sure you have their permission to share). If you don't have a client success story available, feature one volunteer's story about how s/he joined your organization and the difference she or he has seen because of volunteer efforts.

- **Demonstrate Social Proof for Your Solution** — Peer pressure actually works. We are motivated to support causes and activities that others like us believe in. So, rather than desperate appeals for volunteer help, show how others in the community are already pitching in. If you are starting out with no current volunteers, get community leaders to share why they believe in what you do and how volunteers can make a difference.

- **Choose Credible Authority Figures as Spokespeople** — What we believe will often depend on who delivers the message, and whom we consider a credible source of information has shifted in recent years.[16] In the past, politicians, corporate CEOs and large institutions, such as banks, were considered trustworthy. The landscape of trust has shifted considerably. There has been a significant rise in the reliance on "people like me" and "regular employees" as sources of trustworthy information over authority figures. As in the past, academics or technical experts (outside of government) remain the most credible messengers. So, when pitching volunteerism at your agency, consider who might be a highly trusted and convincing person, or people, to carry your message.

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[16] For more in depth information about who is trusted as institutions, industries and leaders in today's world, see the 2013 Edelman Trust Barometer, http://www.edelman.com/insights/intellectual-property/trust-2013/.

Team Recruiting

Volunteers are the best recruiters of fellow volunteers. What's more, **when volunteers are recruited by fellow volunteers, they tend to stay longer and be more satisfied with their volunteer experience**.[17] Therefore, there is no reason not to support and train a team of enthusiastic volunteers to develop and implement a recruitment plan.

If you set up recruitment activities as a time-limited project, more volunteers will be willing to help. Many tasks don't require a significant time commitment, so everyone can pitch in. **Below are a few roles that might be created or shared within a volunteer team:**

- **Reception** — Responding to email and phone inquiries about volunteering, scheduling volunteer screening interviews and orientations, setting up and maintaining volunteer files, etc.

- **Outreach and Marketing** — Developing a recruitment campaign and marketing materials, posting and updating volunteer postings, making quick pitches for volunteering in classrooms, at community events, etc., tracking the success of specific tactics, etc.

- **Media Relations** — Writing and pitching Op Ed pieces, news releases, newsletters, articles and blog posts about success stories, the value of services and the need for volunteers in the local community, participating in media interviews and seeking out others who are willing to share their story.

- **Volunteer Applications** — Processing volunteer applications and background checks, conducting volunteer interviews, making recommendations about placement and roles of potential volunteers.

- **Volunteer Orientation** — Making welcome calls to new volunteers, scheduling and presenting orientation training, reviewing training evaluations and updating training materials and volunteer handbooks.

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[17] For more on practices that work to retain volunteers, see Mark Hager and Jeffrey Brudney, "Volunteer Management Practices and Retention of volunteers," Urban Institute, (June 2004), http://www.urban.org/UploadedPDF/411005_VolunteerManagement.pdf.

Recruiting Online and On Land

While there is certainly nothing more effective than a personal ask when generating support for your program, recruitment teams cannot physically make it everywhere to spread the word. In addition, those you are trying to reach do not all use the same sources of information. Therefore, **it is always better to use a multi-channel marketing approach to distribute your appeals.**

A "marketing channel" can be any place where your messages are shared — such as your agency website, social media or the lobby of the local senior center. By reaching your audience where they are at, and allowing them to communicate back to you using their preferred method, you will expand your reach and encourage others to spread the word. Don't neglect online channels — 77% of people age 50-64 use the Internet, and 54% of people over age 65 are online.[18]

Multi-Channel Marketing

Some channels you might use:

- Your agency's lobby
- Partner agency's lobby
- Community or school lobby, program and/or reception area
- Broadcast media (radio, TV, etc.)
- Print Media (community and large newspapers)
- Podcasts
- YouTube and video
- Your agency's website (including RSS feeds and sharing widgets)
- Your agency's blog or newsletter
- Email and text messages
- Partner agency's website
- Volunteer recruitment websites
- LinkedIn, Facebook, MySpace, Twitter and other social-sharing tools
- Flickr and other photo-sharing sites
- Public transportation
- Direct mail
- Webinars and workshops
- Online forums

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[18] See Pew Internet & American Life data at http://www.pewinternet.org/Static-Pages/Trend-Data-%28Adults%29/Whos-Online.aspx.

Where to Find Qualified Volunteers

Below are a few tactics you can use and places you can go to find potential volunteers. Make sure you have plenty of marketing materials to give anyone you meet with so that they can share with their networks. If you do not have a budget to print marketing materials, send electronic materials that can be emailed to networks of people.

- **Phone Calls/Emails to Potential Partners and Volunteer Sources**
  Many businesses have a community involvement, employee volunteering or corporate social responsibility staff position. Banks are legally required to be involved in the community so they are a great place to start, as well as larger corporations. While business professionals tend to be more reliable, they are also harder to match with a program since most work until five or six in the evening. Develop a standard pitch and keep it short — tell them the basics and then offer to email, fax or mail more information if they are interested. In all cases, offer clear ways for people to get involved and get in touch.

- **Hang Posters**
  Posting flyers is a good way to get the word out to larger numbers of people. Ask for permission when hanging flyers, especially on college campuses. If volunteers are not available locally to post, mail out hard copies with a cover letter and business card — indicate the timeframe when the poster should be hung up and taken down. If recruiting volunteers on a continual basis, refresh the posters and create new designs every quarter.

- **Class and Club Visits**
  Identify colleges, universities and technical schools that offer courses that are aligned with your mission (service learning, sociology, social work, medicine/nursing, pharmacy, geriatrics, marketing, etc.). Ask professors or department heads if you can make a class visit. A visit should last no more than 15 to 20 minutes. Give a brief overview of the program, hand out flyers and information sheets and pass around a sign-up sheet. Also, do not forget university Greek systems and other campus groups involved in service activities.

- **Internships/Work Study**

  Work with university, college and technical school internship programs to offer credit for Medicare training and certification combined with service learning/work study.

- **Agency/Community Visits**

  An important part of volunteer recruitment is targeting and informing the immediate community. Contact agencies and businesses in target counties, especially those near program sites. Schedule a meeting with local government officials. With every visit, stress different ways to collaborate with your agency, the volunteer opportunities available and how to contact you for services.

- **Volunteer Centers**

  Volunteer intermediary organizations — such as the United Way, some Hands on Network affiliates and other local volunteer centers — exist to help organizations connect with volunteers. They can be great places to find qualified volunteers and identify applicants who aren't a good fit. In addition, some government agencies post volunteer opportunities.[19]

- **Online Recruitment**

  Online recruitment is a relatively easy way to promote a program to a large number of people at very little to no cost. If you are seeking volunteers with computer experience, by definition, online recruitment attracts those that are already computer literate. Below are several places to post opportunities, but the list is always growing.

  - Pennsylvania Associations for Volunteerism (see http://www.pavolunteer.org/)
  - Pennsylvania Volunteer Centers (see http://www.handsonnetwork.org/actioncenters/map/PA)
  - Volunteermatch.org
  - Idealist.org
  - Createthegood.org
  - Likeminded.org

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[19] See http://www.hud.gov/local/la/homeless/volunteer.cfm for postings of volunteer activities.

- Dosomething.org
- Volunteer Solutions *(*volunteer.truist.com)
- Unitedway.org
- 1-800-VOLUNTEER.org
- Allforgood.org
- Craigslist.org
- Internships4you.com
- Servenet.org

■ Online Nonprofit Job Sites

Although these are generally paid jobs, those who are interested in entering the nonprofit workforce — both as a first career and as an encore career — are always seeking ways to get more experience. Volunteering is a great way to achieve this. Here are a few websites that post job openings in the nonprofit sector:

- **Encore.org**
- **The Bridgespan Group** (best for volunteer advisory or leadership positions; see www.bridgespan.org)
- **The Foundation Center** (on its site is the Foundation Center's Philanthropy News Digest Jobs Board; see http://foundationcenter.org/)
- **The NonProfit Times** (hosts The Nonprofit Job Career Center, where you can search by levels that include internships; see http://www.thenonprofittimes.com/jobs/)
- **The Chronicle of Philanthropy** (Jobs Page; see http://philanthropy.com/section/Jobs/224/

■ Online Social and Professional Networking Sites

Sites like LinkedIn can be used to find volunteers who are inspired by the same issues that drive your mission and have the experience you are seeking. LinkedIn profiles have a section for volunteer work, so it is easier to find people who have an interest in similar work as well as the expertise you need. LinkedIn is a connection-based database, so you will know if you have friends in common or friends of friends that can make an introduction. Existing volunteers can also be encouraged to search their online networks to identify potential prospects.

In addition, by setting up an organization LinkedIn page, current volunteers can list your organization in their profile, and your agency staff and volunteers can post updates to their status and profile volunteer opportunities and all can join groups, such as the Volunteer Coordinators group to stay in touch with like-minded people.

- **Volunteer, Job, Health and Other Community Fairs**
  Community fairs may or may not yield results — it all depends on who is staffing the table and whether they can quickly connect with attendees. So, pick the right people (volunteers and/or staff) to run the table. Be sure to represent a polished appearance and provide plenty of handouts and brochures.

  Do not forget to bring a signup sheet on a clipboard for those interested in learning more about current volunteer opportunities. It is best to have a banner, tablecloth and photos of team members (with signed releases). Also, if the next training cycle will occur soon, have an information sheet clearly stating when the next trainings and orientations will be and what will be covered (don't give the address until they have completed the application and screening process).

Where to Find Retirees

Retirees are a great group to tap for volunteering in the aging services network. **Below are several ideas for places to connect with people who are no longer working.** Think of creative, but appropriate, ways to get share information about your volunteer opportunities in these environments (using posters, info tables, presentations, newsletter articles, co-sponsored events, etc.):

- Senior centers and community centers
- Retired Senior Volunteer Program (RSVP)
- Senior Corp of Retired Executives (SCORE) (retirees who are willing to volunteer to help other businesses and nonprofits)
- American Association of Retired Persons (AARP) state and local chapters (they are always seeking volunteer activities for their members, also see www.createthegood.org)
- Churches/religious organizations

- Alumni associations
- Professional associations that may have local chapters
  - National Black Nurses Association (http://www.nbna.org)
  - National Gerontological Nursing Association (www.ngna.org)
  - Retired Military Officers Association (www.rmoa.org/heroes-in-life)
  - National Education Association – NEA Retired (http://www.nea.org/home/1598.htm)
  - American Institute of CPAs (http://www.aicpa.org)
  - National Association of State Farm Agents (http://www.nasfa.com)
  - National Association of Social Workers (www.socialworkers.org)
- Libraries and bookstores
- Pharmacies, doctor's offices, dentist's offices, renal dialysis centers
- Senior citizen associations when they conduct regular meetings
- Cafes and restaurants (especially in the morning or on Senior Discount Days)
- Retirement community activity rooms
- Banks and post offices (especially on first few days of the month to collect pension)
- On boulevards, parks, gardens, walking or jogging paths
- Clubs and pubs (Eagles, Elks, etc.)
- Lectures planned for seniors
- Continuing Care Retirement Facilities (CCRC)
- Elementary schools (waiting to collect grandchildren)
- Fitness clubs, golf courses, tennis centers, etc.
- Activity clubs (for hiking, boating, skiing, quilting, bridge/cards, etc.)
- Casinos
- Disability advocacy and employment groups

Anatomy of an Effective Recruitment Posting

When writing volunteer appeals, imagine the ideal volunteer you are trying to reach. What motivates them to volunteer? What are their values? What are their volunteering needs? Where can they be found? Then, begin to develop an advertisement that will appeal to that person (for both online and bulletin board posting).

Remember that your audience will be looking for the answers to many unspoken questions about the organization, most importantly, "**Does this organization share my world view, and is it filled with people I can trust?**"

Several things make some postings more trustworthy and inspirational than others. Here are a few tips:

- **Carefully Draft Your Posting Title** — It must be volunteer-centric, meaning that it is inviting and avoids jargon. If you are seeking a specific target audience, don't be afraid to use a title that focuses on that segment of the population. Try keeping it specific at first. You can always change to more general language later.

- **Keep it Simple** — Do not overwhelm your reader with details or lists of what you (or they will) do. Offer just enough information to pique interest and inspire the volunteer to take the next step. A good rule of thumb is a length of about 100 words with five sentences, three per paragraph.

- **But, Give Access to Deeper Info** — If you want to give them more access to deeper information, include a web link to a document that has more detail (if the advertisement is on a poster, include a QR bar code to direct the reader to your posted document). When posting on recruitment websites, do NOT include a link to your online volunteer application. Use the website's "apply now" button or link, so that you are able to take advantage of a website's analytical and reporting capability.

- **Tap the Power of Social Proof** — Show evidence that others support your program or organization by featuring a testimonial quote from a client about how a volunteer has helped them, or profile volunteer about what they have gained from volunteering. Also, if the website has the

functionality to rate your organization, encourage your volunteers to do so. Finally, share your postings on your agency social media — better yet, ask your volunteers to do so from their accounts.

- **Post a Photo** — Photos build trust far beyond what plain text or text with a graphic can do alone. So, never lose this opportunity. Make sure you have permission, and then feature a different photo for each posting of people having FUN, along with a caption if it's possible (people read captions more than they read body text). Feature either satisfied clients or volunteers in action. Make sure you can see their smiling faces (versus large group photos from far away). Never use stock photos. If you don't have a bunch of photos on hand, host a contest within your agency with the theme of "How do volunteers make a difference here?"

- **Keep It Focused on Them, Not You, as an Agent of Change** — Invite volunteers to be a partner in community change. Include text that is mission-focused and shares the community problem and organization's solution in a few, brief sentences. Also, describe the impact the volunteer will have, and share what volunteers have already done.

- **Show Support** — Provide brief details on supervision and support. If you have already scheduled an upcoming training or orientation, be sure to note when it will take place.

- **Use Power Words** — Try to use the following highly persuasive words throughout — **You**, **Free**, **Because** (showing the reason why the request is made), **Instantly or Immediately** (when you'll get back to them or when they can get started) and **New** (not a new mission, but a new program, initiative, project or campaign).

- **Create Urgency** — Although you may be recruiting all year, rotate your openings, and set deadlines for each posting. Be sure to take postings down or offline right after the deadline so you don't end up with frustrated readers, and keep your content fresh.

- **Test, Test, Test** — Try different approaches and see what works, and then duplicate it. This means you must track how people heard about your opportunity by asking how applicants hear about you. Or, use

Google Analytics to track traffic patterns to your web site. Finally, you can ask applicants, "What appealed to you about our opportunity?" to learn more about what inspires people to join.

Making the Ask

Although inviting volunteers to join may seem daunting to some, it is a critical step in the recruitment process. In fact, **research has shown that the primary reason people do not volunteer is simply because they weren't asked**.[20] In addition to materials, providing volunteer recruitment teams direction and support on how to extend an invitation can be helpful.

Below is an easy process to identify and invite volunteers by finding interested people at public events:

■ **Step One: Identify Prospects** — At public events and presentations, look around the room for the people who appear interested in the topic area, those who show enthusiasm and a high level of engagement. They may have asked questions or their body language lets you know they are listening intently.

■ **Step Two: Make the Connection** — Approach them after the presentation and speak with them one-on-one, not in front of the whole group. If you know certain attendees are already active in the community, focus on them. They will make the best volunteers because they are already inclined to lend a hand (and often do so across many organizations), and they may have recommendations for others to approach.

■ **Step Three: Make the Ask** — Break the ice by saying "I saw that you were very interested in this topic." Then, listen and let them talk about their passion for the cause. If it seems to be in alignment with your program's mission, state, "Given your interest, perhaps you might consider joining our team as a volunteer. It may be a good fit for you — you could help further the cause [insert description of your program's main goal] and learn more about it at the same time."

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[20] See "Giving and Volunteering in the United States," Independent Sector (2001) http://www.independentsector.org/giving_volunteering

- **Step Four: Follow Up Right Away** — If they are interested, get their contact information and have someone call them the next day and follow up with an email. Explain to them, "We need your input and participation to expand our program." If possible, let them know how many volunteers you need and how many people could be served if those volunteers contributed. Through the information you share, make it clear that if they join, they will make a very concrete difference.

Responding to Volunteer Objections

When a volunteer is hesitant to accept an invitation and expresses objections, you have been presented with an excellent opportunity. By asking follow-up questions, the recruiter can address any misconceptions on the part of the prospective volunteer and find ways to tailor opportunities to the volunteer's needs.

Recruiters should not read into a volunteer's hesitation that they are not willing to help. Rather, be grateful that they are taking the invitation seriously enough to give it careful consideration. If you are unsure if the "no" is definitive, ask the applicant, "Is the issue you raised something that would keep you from volunteering now or in the future?" and "If we could accommodate your limitations, would you be willing to give it a try?"

Below are a few common objects and ways to address them:

Objection	Response
Don't have the time	*"You can volunteer for as little as 8 hours a month. Is there a schedule that might work for you?" or "May I contact you in the future to see if your situation has changed?"*
Health problems or physically unable	*"We can look into short-term tasks that you can do from home. Would this work better forthan you?"*
Don't have adequate transportation	*"What are your issues specifically? Perhaps we can try to arrange carpools with other volunteers or arrange to have you volunteer from home orI can meet with you on the phone or via video."*
Don't know how to get started	*"We'll be sending you an application packet that will help you get started. The first step is to complete the application form and send it in."*
The training is too much or the job is "too big"	*"You can learn at your own pace, and we provide mentoring and support. We can match you with another volunteer for 'job sharing,' or you can work with a team that shares the workload based on what each team member can contribute. Is there something you would like to do, specifically? Perhaps we can tailor a job for you?"*

Remember This…

- Make sure your recruitment messages and messengers include evidence-based tactics that inspire trust and credibility.

- Use a multi-channel marketing approach to distribute your recruitment appeals to a wider audience.

- Use recruitment teams to help with all aspects of the recruitment campaign, and make sure they are equipped with the tools and training they need to be successful.

- Try new avenues and partnerships to reach broader audiences and a larger pool of potential volunteers.

- Don't neglect the Internet as a place to connect with seniors as well as younger people.

- When potential volunteers express objections, it is the recruiter's opportunity to educate and learn more about the volunteer's personal needs.

Chapter 5:
Volunteer Onboarding

Matching Volunteers with a Role That Inspires

Chapter Highlights

- Managing Volunteer Program Risk

- Identifying Personal Motivations for Volunteering

- Matching Skills and Interests with Volunteer Roles

- Ways to Speed Up the Orientation Process

- How to Inspire Deeper Volunteer Commitment

- **Tools**

    - Volunteer Risks by Role

    - Volunteer Screening Interview Questions

    - Volunteer File Checklist

    - Volunteer Interest Worksheet

    - Volunteer Placement Checklist

    - Risk Identification and Prioritization Spreadsheet

    - Learning Objectives Worksheet

    - Volunteer Handbook Template

    - Volunteer Orientation Training Slides Template

Risk Mitigation and Management Steps

Volunteer programs, much like employee-driven organizations, cannot conduct business without incurring some kind of risk. These risks, however, can be substantially mitigated when they are identified and deliberately managed. **Effective risk management for volunteer programs is synonymous with good program design and skilled volunteer management practices.** Risk management programs should reflect the resources available to the organization. When volunteer and social service programs embrace and manage risk effectively, they also realize the rewards of increased service to the community.

Volunteer management models and tools should be developed in a way that balances the need to mitigate significant risks with the need to work within available resources limits. From the process of recruiting, screening and placing volunteers to their training, supervision and recognition, programs should consider potential risks and take proactive steps to prevent potential harm to clients, volunteers, staff, community partners and their organizations in the most cost-effective manner possible.

Risk Management is …

"The discipline for dealing with the possibility that some future event will cause harm. It provides strategies, techniques and an approach to recognize and confront any threat of danger that may hinder an organization from fulfilling its mission." — Alliance for Nonprofit Management

The goals for risk management plans are to …

- Reduce possibility of harm to clients, volunteers, staff, agencies and community partners

- Demonstrate and document proof of due diligence and standard of care

- Ensure an organization's mission is fulfilled

Risk Management Planning Steps

The following is a process for identifying, evaluating, prioritizing, preventing and mitigating risks:

1. **Identify Risks** — To get started, brainstorm a thorough list of possible risks to clients, volunteers, staff, community partners and your agency. Risk management planning does not need to be done in isolation. In fact, it will be more thorough if a variety of perspectives are represented, including staff and volunteer.

2. **Evaluate and Prioritize Risks** — Assess each risk for likelihood it will occur and the magnitude of harm if it were to occur (low, medium, high). Prioritize those that are medium or higher likelihood of occurrence <u>and</u> medium or high magnitude of harm.

3. **Select Risk Prevention and Mitigation Strategies** — Decide which strategies will be used to either prevent a potential issue or reduce the harm if it were to occur.

4. **Write Risk Management Plan** — Document the high priority risks and the strategies chosen to manage them. Include timelines, any budget considerations, tasks and responsibilities. Ask your human resources department and senior management to also review your plan. In the end, your risk management plan should reflect sound and thorough volunteer management practices that will enhance your volunteer program design.

5. **Implement Risk Management Plan** — Follow the risk management plan timeline and tasks. If you find that something has been omitted or is not working, take immediate steps to address it.

6. **Monitor and Evaluate Risk Management Activities** — Review your plan and make adjustments on an annual basis to ensure your plan keeps pace with any program changes.

Risk Prevention and Mitigation Strategies

Avoidance	Modification	Retention	Sharing
Prohibit an activity	Change activity to make it safer	Live with it & minimize harm	Transfer liability to partner (whole or part) through contract
Decline to provide a service	Develop policies & procedures	Buy insurance	
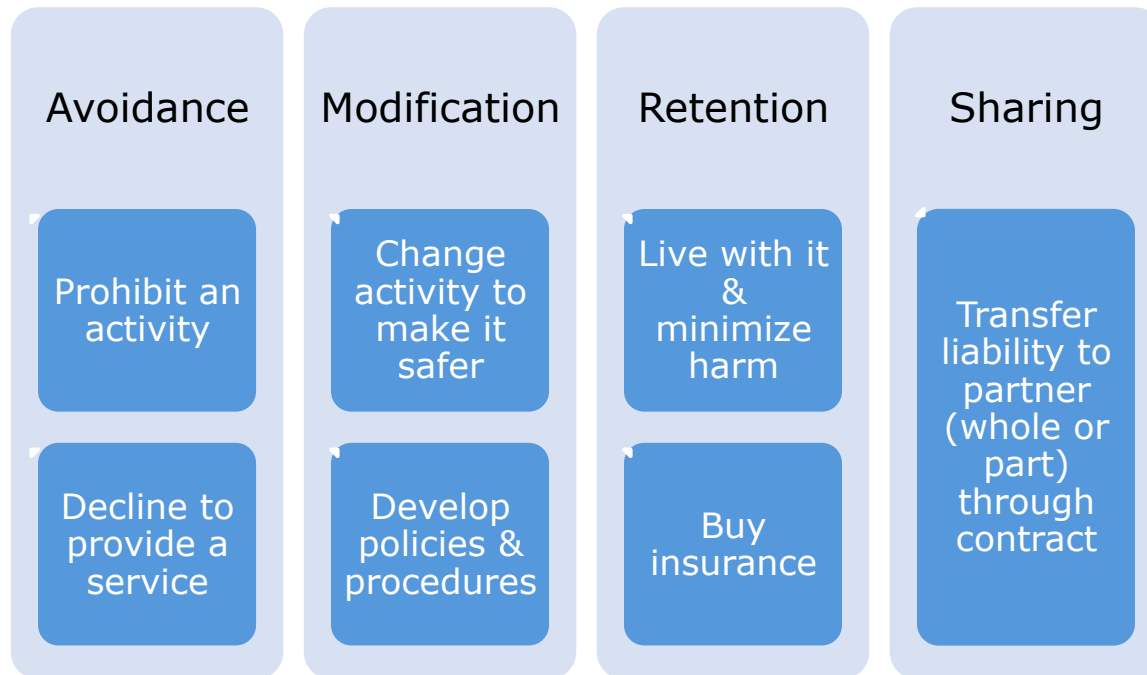
Appropriate Screening for Level of Risk

The screening of volunteers is important to nonprofits as a risk management strategy. Although volunteers donate their time, your agency remains responsible for protecting those it serves, existing volunteers, staff and the agency's reputation. In this case, **the rights of these groups outweigh the wishes of individual volunteer applicants. At the same time, screening standards cannot be so rigid that they are impossible to navigate, unduly discriminate or disrespect the legitimate rights of the applicant**.

Your organization or program may already have established screening requirements for new volunteers, either locally or nationally. If not, this section may help you develop some guidelines.

Programs or agencies can choose to use the same screening requirements for every volunteer; however, because criminal background checks and other screening activities take time and are generally not free, you may want to develop minimum requirements for each volunteer role or within

each program. Whatever you choose, **it will be important to codify these requirements, as well as the administrative process required for all volunteer applications, in a written screening policy to keep on hand if there are questions or claims of discrimination**.

In general, the higher possibility and magnitude of harm, the more intensive the screening process should be. For example, a single day health information fair staffed by volunteers may have substantially less restrictions than volunteers who visit the homes of frail seniors on an ongoing basis.

Criminal background checks are one screening mechanism, but they are not foolproof, nor are they the only way to control risks. Similar to employees, volunteers can be screened to verify their identity, check for past criminal history, review credit history, verify work history and check driving records. Reference checks with past employers, volunteer supervisors and peers can also be conducted to check on the character of the individual and the suitability of the position they are seeking. Finally, screening interviews should be conducted with all volunteers to assess their motivation and fit with your program.

High Risk:
Direct Service
(One-on-One)

Medium Risk:
Direct Service
(Group)

Low Risk:
Short-term
(Special Events)

Varying Risk:
Administration & Leadership
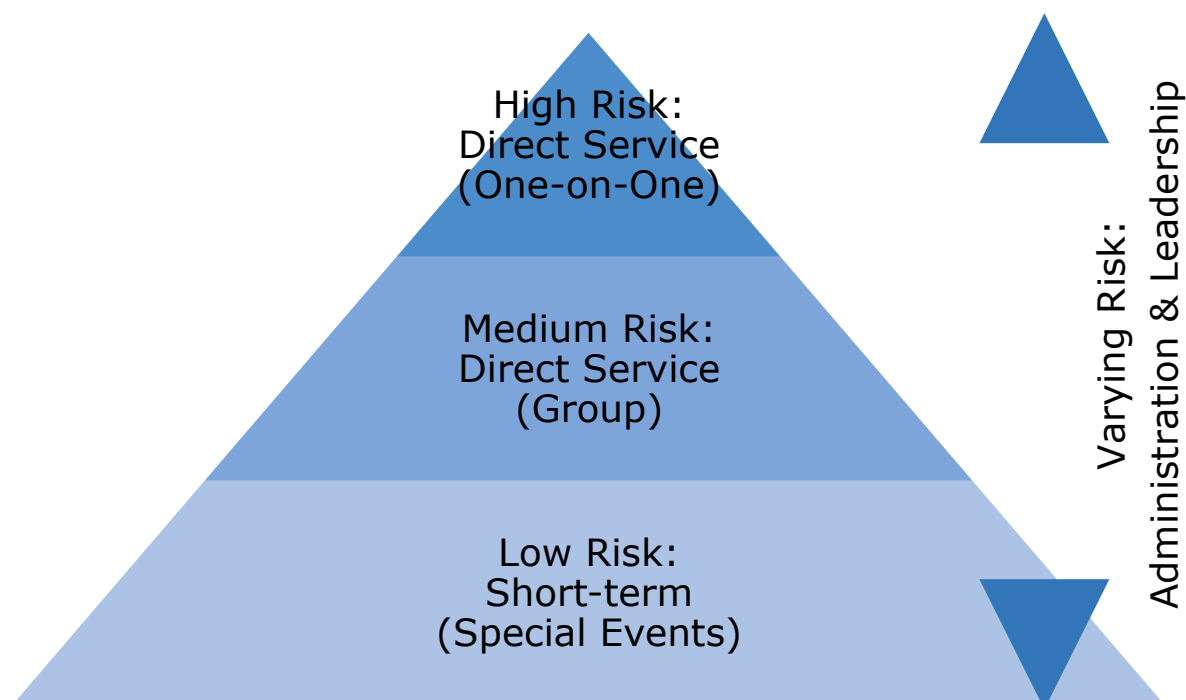
Identifying Volunteer Motivations

Although volunteer interviews are a way to screen and mitigate potential risk, they are also a unique opportunity to better understand the motivations of the volunteer applicant. This not only helps inform whether or not they may be a good fit, but also what might keep them motivated further on down the road.

Volunteer interviews should be a two-way conversation. They are the first step in developing a potentially rich partnership. For this reason, they shouldn't be devoted entirely to your program needs. Plan to spend 50% of the time listening for the volunteer's wishes, hopes and expectations. Finally, interviews are also a great place to gently address any misconceptions or unrealistic expectations on the part of the volunteer.

There are some critical pieces of information to learn about your applicant during an interview:

- **What are the Causes They Feel Passionately About?**
  Volunteers who feel a close emotional connection to the organization's mission are more likely to become deeply engaged and stay. If they don't mention anything that closely resembles your mission, you may want to consider helping them find a better match elsewhere.

- **What are Their "Must Have's" and "Non-Negotiables"?**
  There is nothing more frustrating than being asked to do something you've specifically stated makes you uncomfortable. Volunteers are not being paid and are not a temporary workforce. They are partners in actualizing your mission and, therefore, get to have a say in what they are assigned. Make sure you know your volunteers' taboos up front. It doesn't mean they won't evolve over time, but start with what excites them. Also, be honest about any training requirements.

  Ask them what brings them the most joy. This conversation will likely shed some light on what motivated them to apply in the first place and will give you some ideas about how to thank them for their service. Keep those notes — you'll need them later when you're planning your volunteer recognition activities.

Note: One word about flexibility — It's up to you to be more flexible than your volunteers. So, be creative about ways you can accommodate their talents. Not everyone will be an absolute perfect fit, and you need to plan for ways to accommodate.

■ **Have They Met Your Minimum Qualifications?**
Establish your core requirements for specific volunteer positions, and don't be shy about communicating them. If a volunteer doesn't meet the minimum qualifications and can't learn them easily, they will get frustrated and leave, wasting their time and yours.

■ **What Skills Do They Have to Share?**
Try to design your volunteer program around a broad range of activities, from "menial" to highly skilled. By doing so, you will increase the opportunities for attracting volunteers, of all skill levels, to support your organization. Also, don't assume that just because someone has a skill, they want to put it to use. For example, an executive, who manages stressful corporate mergers all week long, may not be interested in developing partnerships for your organization. They may be more interested in something straightforward and relaxing, like doing data entry. Honor that.

■ **How Does the Volunteer React to Specific Situations?**
By asking volunteers to respond to questions about common situations that occur at your agency, you will have the opportunity to understand how the volunteer operates, plans, problem solves and reacts to stress. This is important information to determine whether they are an appropriate fit and, if so, what support they might need when they join the organization's volunteer corps.

Matching Skills with Jobs

In order to match volunteer skills with available positions, the screening interview can be an important tactic. The interview is a two-way street — you are seeking candidates that meet specific minimum requirements as well as understanding the volunteer's wants and needs. **To prepare for interviews, be sure you have identified the "need to have" and "nice to have" knowledge, skills and abilities for each volunteer role you are trying to fill.** Include them in a volunteer positions description that is specific to each role. Also, give applicants a volunteer interest checklist, which can help hone in on what volunteers are willing and eager to do, and use it as a starting point for discussion.

Below are knowledge, skills and abilities that might be included in a volunteer position description, depending on the specific role:

- **Basic Skills**

  - Learning complex information and translating it into daily practice
  - Understanding the implications of new information to their volunteer role
  - Finding answers to questions using reliable resources
  - Managing one's own time and prioritizing tasks to achieve goals
  - Working with others, both as a leader and a follower
  - Maintaining a positive attitude
  - Completing required reporting and paperwork on time
  - Demonstrating commitment to the program

- **People Skills**

  - Maintaining appropriate professional boundaries
  - Exhibiting compassion and caring for others
  - Listening attentively to others
  - Using self care strategies to handle stress
  - Effectively teaching others to do something, one-on-one
  - Perceiving others' reactions and responding appropriately
  - Resolving conflict and addressing challenging behaviors
  - De-escalating angry people

- Bringing others together to negotiate differences
- Persuading others to change behavior
- Accepting and learning from coaching and feedback
- Exhibiting a responsive customer service orientation

- **Technical Skills**

  - Using a computer (internet, software packages, social media, etc.)
  - Communicating information in a coherent way to groups
  - Developing relationships with community partners on behalf of the agency
  - Writing and designing communication materials using plain language
  - Analyzing and interpreting data and information
  - Solving complex problems
  - Using logic and reasoning to identify the strengths and weaknesses of various alternatives
  - Speaking, reading and writing more than one language
  - Operating a vehicle safely (auto, van, truck, etc.)
  - Following the established protocols for a specific, assigned role

Not all volunteers are prepared and ready right from the start. **If you feel that a volunteer will be able to learn the minimum required skills within a reasonable period of time, find ways to support them in doing so.** If not, look for other roles within your agency or others that may be a better fit.

Volunteer Personnel Files

Below is a list of some of the items you should keep in volunteer files. These will demonstrate that the screening process has been fairly applied across the board. To maintain privacy, keep these in a locked file cabinet or a password-protected folder on a secure computer.

- Volunteer Application Checklist

- Volunteer Application

- Signed Background Check Consent

- Background Check Results

- Screening Interview Notes

- Reference Check Notes

- Copy of Appointment Letter

- Training Records

- Key Milestones

- Recognition Documentation

Welcoming New Volunteers

"Organizational socialization" is the work we all do to master the attitudes, values, knowledge and expected behaviors needed to participate as a true member of any group. It is how we learn to fit in. In the human resources world, socialization is synonymous with the terms assimilation, transition, alignment, induction, integration, onboarding and orientation — all related to helping new hires, paid or unpaid, get comfortable.

Volunteer orientation activities should be designed to help volunteers move smoothly through the process of socialization. The more connected they feel to the organization and the people in it, the greater likelihood they will become long-term contributing members of the team.

Volunteer programs often mistakenly institutionalize socialization by creating a single orientation event that is meant to shorten the time it takes to get volunteers acclimated. **The reality is that socialization is inherently slow.** In fact, it can take over a year for full time employees. Similarly, new volunteer orientation cannot occur during a single event either. Rather, it is a process of adaptation where volunteers experience a wide range of emotions internally — surprise, fear, ambiguity, etc. — while they wrestle with past and current expectations and make sense of their new environment.

To help volunteers get up to speed more quickly, try to integrate orientation information — and opportunities for interaction with other volunteers and staff — before, during and after the formal orientation event. Integrate orientation into the recruitment, screening, training and placement stages of the relationship with your volunteers. This will help solidify their connection with your organization and increase your chances of developing a mutually satisfactory partnership.

Rapid Volunteer Onboarding

So, what helps keep this process moving as quickly as possible? Orientation training can certainly help, especially if it is helpful, supportive, makes social cues easy to read and fosters connections between newcomers, the organization and the people in it. There are also specific, evidence-based tactics you can put to use.

Below are a few research-based practices to promote rapid onboarding:[21]

- **Focus on the Collective Versus the Individual** — Expose newcomers to common entry experiences with a group versus unique experiences in isolation from other new hires. Because volunteers need to be able to bond with others, it may be more helpful to schedule orientations at regular intervals when a critical mass is ready versus conducting them one-by-one or by directing volunteers to an online course that is completed in isolation.

- **Design Formal Versus Informal Orientation Activities** — Use specifically designed activities and materials while segregating newcomers from incumbents, versus using no prepared materials and immediately mixing with incumbents (e.g., learning on the job). Throwing folks in to "sink or swim" isn't helpful, nor are orientations that are conducted verbally without backup materials.

- **Provide Sequential Versus Random Opportunities to Learn** — Communicate the sequence of discrete and progressive learning activities instead of an ambiguous or unknown sequence. During the screening process, provided volunteers with an explicit training plan that describes what will happen and by when.

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[21] See "Organizational Entry: Onboarding, Orientation And Socialization," Society for Human Resources Management, SHRM Briefly Stated (November 1, 2006) http://www.shrm.org/Research/Articles/Articles/Pages/OrganizationalEntryOnboarding,OrientationAndSocialization.aspx.

- **Established a Fixed Versus a Variable Completion Time Frame** — Communicate specific deadlines for completing each socialization step. Although "work-at-your-own-pace" orientations may seem tempting and responsive to volunteer needs, it may be more helpful to set up achievable deadlines for each step.

- **Use Mentors** — Provide newcomers with access to experienced organizational members as role models or mentors. Buddy systems really work, and research shows that they are actually more helpful when a buddy is there to answer mundane everyday questions (like "where do I find the copy paper?") as compared with conducting technical training on how to do assigned tasks.

- **Provide Positive Reinforcement** — Provide newcomers with positive social support and affirm their personal characteristics as opposed to providing negative social feedback until newcomers adapt. That said, volunteer recognition shouldn't be reserved for volunteers who've been around awhile or relegated to your annual recognition event. Plan to build it into your orientation activities right from the start.

Is Orientation Training Better Online or On Land?

Does technology hurt or help volunteer orientations? In one study, a group of new employees participated in either a group, social-based orientation session or an individual, computer-based session. They were then asked to complete a survey measuring the six content areas of organizational socialization (organizational goals and values, history, politics, language, people and performance proficiency).

Compared with employees who attended the social-based orientation session, those who were in the computer-based session reported lower levels of socialization in the content areas of people, politics and organizational goals and values, and no significant difference on the more information-based dimensions of history, language and performance proficiency. **Although it may not always be feasible, it appears that face-to-face training is more effective in helping volunteers identify with the organization and its people. In terms of specific job tasks, online training may work just as well (provided it is designed well).**

Encouraging Deeper Volunteer Participation

To help newcomers negotiate the unfamiliar waters of your organization, and to encourage deeper levels of participation, here are a few specific support tactics that can be integrated into your volunteer orientation process.

- **Establish Rituals** — Rituals increase feelings of safety and reinforce connections between the values of volunteer and organization. They can be a great way of reinforcing the interconnectedness of the team. Rituals don't have to be complicated. They can be simple things you do at the beginning of a meeting or a shift that are expected and fun.

- **Encourage Peer Relationships** — Relationships increase feelings of responsibility and commitment. In addition, both formal and informal peer mentoring and knowledge sharing helps ease the burden of socialization. So, think about ways you can "sow the seeds" of better connections between volunteers.

- **Offer Formal Training** — Although most of what we learn is on-the-job, formal training can help increase self-confidence, connect the dots and provide a roadmap for organizational socialization. Even if the volunteer position isn't highly technical, they still need to be oriented to how your organization does business and how to be a better ambassador for you in public. So, help them do so by investing in training.

- **Point out Program Impact** — Volunteers need to know that the hassle of learning the ropes at your organization is truly worth it. Make sure you continue to talk about how your organization is making a difference and how they fit into the larger picture. In general, programs tend to share this information during the recruitment process, but arguably, volunteers need to hear more about your program's effectiveness when they are on the fence about how much time and energy they will ultimately commit.

Volunteer Handbook Development

Without clear information about their roles and responsibilities, new volunteers may form unrealistic expectations about what your agency can offer. **Managing expectations is an extremely important piece of volunteer management, but even more critical during the initial phases of volunteering when new recruits are still deciding what their level of commitment will be.**

In general, volunteers want to meet the high standards set by their agencies. To help them do so, provide them explicit direction about what to expect and what is required — such as time commitments, required trainings and required submission of reports— in a Volunteer Handbook. The Volunteer Handbook should also include the policy and procedures for volunteer complaints and grievances, thus helping volunteers understand both their rights and responsibilities.

Volunteer Handbooks not only help volunteers, they also help your organization manage risk. If you have trouble with a volunteer, your Handbook (and associated Volunteer Agreement) documents that you shared the rules, roles, expectations, grievance procedures, etc. with your volunteers early in their placement with you. Make sure you cover the most important items included in the Volunteer Handbook during your Volunteer Orientation training.

Finally, Volunteer Handbooks are a nice way to say, "Welcome; we're glad you're here! So much so that we're going to take the guesswork out of volunteering, so you can focus on why you came here in the first place — to make a difference!"

Training Development Process and Tips

The best training is both 1) learner-centered and 2) performance-based. Without focusing on learners and their preferences, needs, concerns and cognitive capabilities, trainers are not likely to grab and retain their attention, which is a basic requirement for learning to occur. Similarly, without a focus on the desired performance results, training runs the risk of becoming unfocused or top heavy and full of content that is rarely, if ever, used on the job. Effective training requires creating a deliberate environment

and set of activities that actually brings about a change in the learner's brain chemistry.

In order to be sure that training resources aren't wasted, do the following:

- **Train the Right Content** — Make a front-end analysis of what will be trained by developing specific learning objectives.

- **Align Content and Business Goals** — Ask, "How will this training content enhance our program's goals or performance outcomes?"

- **Make Training Courses Truly Interactive** — Go beyond pre-recorded voiceover slide shows to include activities, such as scenarios and roles plays that encourage learners to answer and receive specific feedback for every activity.

- **Include Content That is Useful on the Job** — If the course has job aids, make sure that learners can easily access them after they have completed the module.

- **Link Test Content Closely to Learning Objectives** — If you will be testing training participants, make sure that test questions assess what's really important to know and that this content was covered in training. If learning objectives are set at the beginning of the design process, and checked to be sure they are covered, the testing process is easier.

- **Make Sure Support is Available** — Learners should be able to ask for help before, during and after their learning experience from staff and other volunteers. Hands-on support can help them check that their technology meets the minimum requirements and to make any needed adjustments, troubleshoot any glitches that happen during training, answer any questions about the content and confidently transition their learning to the job.

For novice learners, the stair step structure is the most effective architecture for learning. With this approach, the instructor explains a concept, then illustrates how to perform the associated skill, then assigns learners a practice exercise and finally, gives supportive feedback. Then, the next cycle of content is started. The goal of this design is to generate knowledge through practice. Rather than asking participants to observe a lecture-style presentation and requiring them to make the real world connection, they are able to practice and get feedback beforehand.

Stair Step Learning Architecture

Feedback

Practice

Show

Tell
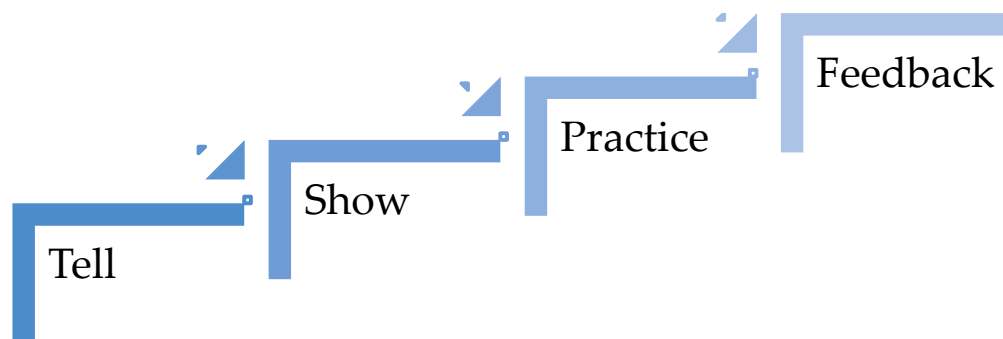
Tips for Effective Feedback

Feedback is an important element of the stair step structure. In fact, it may be the most powerful mechanism for learning. Researchers have found that the following characteristics make feedback work:

- Feedback that is directed toward the task, not the learner, and is not perceived as criticism, is more effective.

- Immediate feedback works for simple tasks; delayed feedback is better for complex tasks.

- Frequent and specific feedback helps improve performance, unless it is too detailed. Both corrective and confirming feedback should be provided with details why.

Improve Presentation-Style Training With Engagement Methods

Presentations, by themselves, do not teach behavior skills or promote critical thinking, but they can be used to provide content overviews and teach facts. **Research has shown that by integrating overt interactivity (e.g., the use of remote hand-held clickers and group discussion) and promoting psychological activity (e.g., the use of rhetorical questions and polling), learning during presentations is greatly improved**, whether the presentation occurs online or in-person. Below are some evidence-based ways to make them even more effective:

- Use presentations to convey information or build understanding, not to teach skills.

- Vary activities as much as possible to increase overt response and psychological engagement.

- Replace text with visuals to explain concepts, processes, structures and relationships, etc.

- Ensure that presenters use a conversational and relaxed tone and are "available" to learners.

- Show a mix of worked and unworked examples (with and without answer keys).

- Include activities that encourage learners to reflect on how they arrived at an answer.

- Implement a "less-is-more" approach when creating slides and keep the presentation tightly focused.

- Provide reference sheets that include simple, bulleted chunks of text that is easily scanned; use charts and graphs to describe processes, timelines or concepts and to organize information into a logical format.

- Extend learning by using new technologies, such as social media and online portals, to encourage on-demand info sharing after training.

Remember This...

- Make sure your recruitment messages and messengers include evidence-based tactics that inspire trust.

- Use a multi-channel marketing approach to distribute your recruitment appeals to a wider audience.

- Use recruitment teams to help with all aspects of the recruitment campaign, and make sure they are equipped with the tools and training they need to be successful.

- Try new avenues and partnerships to reach new audiences and volunteers.

- Don't neglect the Internet as a place to connect with seniors as well as younger people.

- When potential volunteer express objections, it is the recruiter's opportunity to educate and learn more about the volunteer's personal needs.

Chapter 6:
Resourcing and Supervision

Working in Partnership with Volunteers to Serve

Chapter Highlights

- ■ Preparing Agency Staff to Support Volunteers

- ■ Core Competencies in Volunteer Administration

- ■ The Differences Between Volunteers vs. Paid Staff

- ■ Volunteer Liability

- ■ **Tools**

  - ■ Scripts for Crucial Conversations with Volunteers

  - ■ Teambuilding Ideas for Volunteers

  - ■ Support Structure for Remote Volunteers

Preparing Staff to Work with Volunteers

As you probably already recognize, your volunteer corps is a significant asset to your organization. They increase your organization's community profile and reach; they enhance your credibility; and they help you build and sustain the capacity to deliver needed services. So, develop a strategy that will provide this valuable group the kind of attention and caring they deserve.

To develop five-star support for volunteers, it will take a team approach. Volunteer program staff cannot do it alone; they must work with peers in other departments to ensure that volunteers enjoy a safe and supportive

working environment. Make sure that anyone who will be working with volunteers has the training they need to be successful.

Staff will appreciate and benefit from the time you invest offering guidance on how to work effectively with volunteer team members. In addition, **people in your own organization can be great resources — they can provide advice, support, technical assistance and free word-of-mouth advertising.** So, take the time to build the bridges and educate everyone about your program's good work.

In terms of training staff to work with volunteers, several items are helpful to cover:

- **Appreciation** — Agency staff are often "invisible" helpers to volunteer programs in the ways they greet volunteers, help them locate supplies, and navigate around the building. Take this rare opportunity to thank your colleagues for being part of the team.

- **Volunteer Impact** — Because the rewards of volunteer involvement are not always obvious to all, it helps to share the recent accomplishments of volunteers as they relate to the agency's goals and objectives. Also, to reduce staff anxiety, delineate the differences between paid and volunteer work.

- **Program Standards** — Paid staff should be briefed about the volunteer program's policies and procedures so they are offering consistent direction and guidance and have a working knowledge of how volunteers are recruited and inducted into the organization. They will be surprised at how much work goes into the program and are then more likely to actively support your volunteer retention efforts.

- **Volunteer Supervision and Motivation Tips** — Volunteer supervision must be more a partnership than a top-down relationship, so it helps to make staff aware of the difference as well as share information about what motivates volunteers and provide tips on how to successfully work together.

- **Volunteer Roles** — If the staff will be working with volunteers directly, they also need to understand the volunteer positions inside and out and any associated risk management strategies specific to the positions they supervise.

- **Volunteer Recognition** — Staff need to be made aware of, up front, any formal recognition or reward activities they will be expected to participate in and be encouraged to make informal recognition a frequent part of their activities with volunteers.

- **Program Evaluation** — Finally, if volunteers will have an opportunity to assess and comment on their experiences, staff should be made aware that this will occur, as well as any other program evaluation activities.

Participatory and Shared Leadership

While a traditional, hierarchical style of management (sometimes called "command-and-control") works for some situations (e.g., emergency response efforts) and is required in some contexts (e.g., historically bureaucratic institutions), it is rarely helpful in inspiring and motivating volunteers. **In general, volunteers want to participate and have a say in what they accomplish and how they go about it.**

Alternate approaches, therefore, are helpful to consider when planning how to lead volunteers. One helpful model is that of participatory leadership and decision-making. While the traditional industry leadership model is a triangle with a charismatic leader at the apex, a more innovative, and perhaps more effective, leadership model for the knowledge economy involves a network of people around a circle who filter information from the perimeter and feed it into the middle of the organization for action.

A participatory leadership model assumes that the group has greater wisdom than individuals and accepts that, while this approach make take longer up front, it will save time in the long run by increasing morale and productivity and decreasing resistance to change.

Traditional vs. Participatory Leadership Models
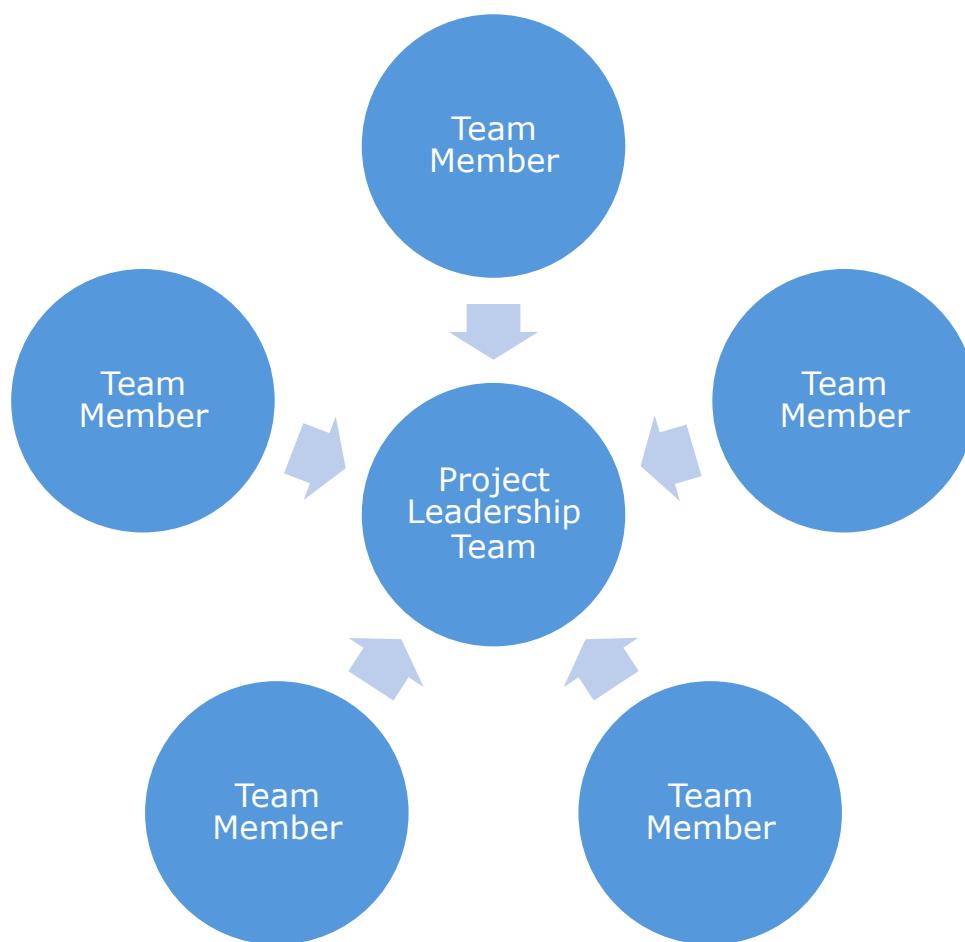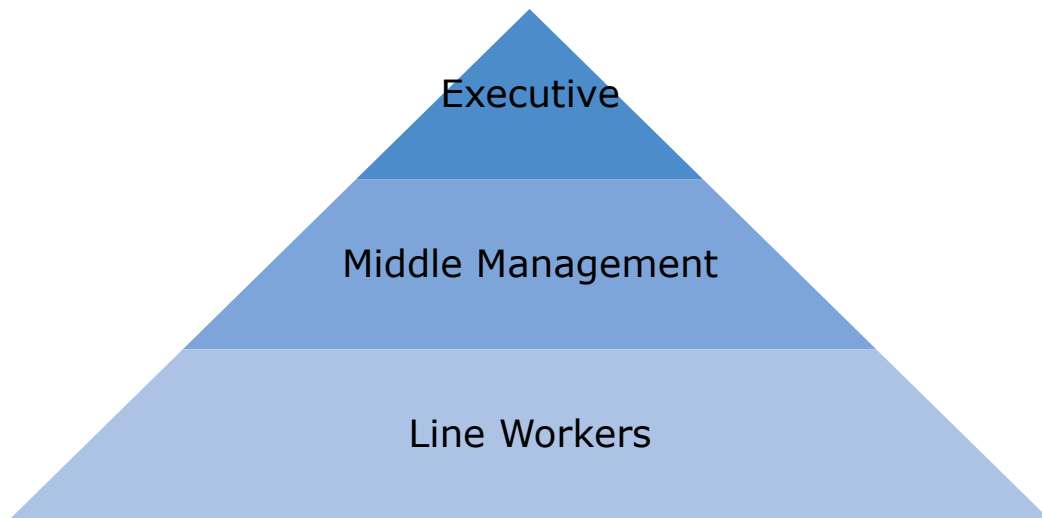
By building a shared framework of understanding, creating a safe environment for diverse views to be shared, seeking new and untested alternatives and a focus on finding win-win solutions to all problems, teams experience an environment that is both challenging and inspiring. **Making the shift to shared leadership is a paradox, however, because it takes the right kind of leader to make it happen**.

Traditional	Participatory
Top Down	Bottom Up
Either/Or	Both/And
Win-Lose	Win-Win
Org Chart Determines Work	Purpose-Oriented Work Teams
Chain of Command	Community of Practice
Individuals Responsible for Decisions	Collective Decisions
Top-down Agenda Setting	Group Agenda Setting
Motivation by Reward/Consequences	Motivation by Ownership
One Meeting Leader/Speaker	Multiple Voices/Leaders
Work Assigned to Position	Team Members Follow Passions
Partial Participation in Discussions	Full Participation in Discussions
Efficiency is Valued	Full Participation is Valued

Shared leadership also works better if the workspace reflects a collaborative model. Although staff may not have complete control over their work environment, they can lead the way in making small changes that support team cohesion. Here are a few:

- **Find Ways to Encourage Play** — If teams are relaxed, they are more likely to work together. Celebrate small victories, play music, post funny photos, make common areas comfortable, give goofy prizes or tailor something that works at your organization.

- **Create Designated "We" Space** — Get rid of the corner office and create a shared space where work can be accomplished communally. Be sure to also have "quiet space" for sensitive conversations and where team members can go to concentrate without distraction. (At the same, time, make sure that confidential documents are kept in locked cabinets and that volunteers have secure, personal storage space while they are on site.)

- **Visualize Your Projects** — Use white boards, walls and flip charts to create shared graphical depictions of your group's process and decisions. Keep them up during the life of the project to remind the team where you're headed and how far you've come.

- **Be Flexible** — Not all work has to happen in an office. Encourage volunteers and staff to work remotely and use technology to stay in touch and communicate as the need arises.

Support for Self-Directed Volunteer Teams

In the traditional model of volunteering, community members are recruited to complete specific tasks on behalf of organizations and causes they care about. **Self-directed volunteer teams work in partnership with organizations to address an issue they care about by working on projects identified by the organization or by initiating their own.** Teams can provide direct assistance to program beneficiaries or indirect organizational support and leadership.

Self-directed volunteer teams offer the chance to tap the talents of volunteers with professional-level expertise in service of organizations and communities in need. The team approach offers the flexibility of commitment many volunteers need, and the independent nature of the work appeals to volunteers who are invested in having a tangible impact on the world and enjoy working together.

Although self-directed teams choose what they want to accomplish and will ultimately lead their own group, **they need support from staff and the organization, particularly at the onset.** That said, for many who have tried this approach, the payoff is worth the investment.[22]

What is a Self-Directed Volunteer Team?

According to the Self-Directed Volunteer Network, a Self-Directed Team is "a group of people who volunteer in organizations to address an issue or need in the community that they care about. Projects are usually time-limited, involve a continuum of volunteer roles and rely on the creativity and initiative of the team members to complete the work independently. The host organizations often provide the focus for the project and the infrastructure to support the volunteers while the volunteers contribute their time and their skills."

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[22] For more on this approach, see http://sdvnetwork.com/volunteer/.

In order to find and support project teams, be prepared to invest the following kinds of activities and reinforcements:

- **Volunteer Recruitment and Screening** — To find the right volunteers and manage risk.

- **Volunteer Orientation Training** — To provide information about the mission, vision and activities of the organization as well as guidance on volunteer policies and procedures.

- **Project Kick Off** — To help determine mission and goal of a project and understand levels of authority in decision-making, the project constraints and the available budget.

- **Ready Access to Resources** — To help volunteer teams use available technology, office supplies, meeting rooms, etc. without having to continually request approval.

- **Community Partnerships** — Developed by staff in advance or during a project to help support the needs of the project in terms of in-kind resources, access to service beneficiaries, marketing, etc.

- **Ongoing Communication** — Participation in team meetings and being available by email or phone to help answer questions, find necessary resources, remove barriers and recognize work to date.

- **Leadership Training and Teambuilding, if Needed** — To help the team facilitator lead and support the collaborative effort and to help the team develop as a whole.

Managing Virtual and Offsite Volunteers

One of the most essential aspects of supporting a flexible work environment is that of trust — team leaders must trust that team members are getting the tasks completed, and team members must trust that the leader has faith in them and won't second guess their work. Many assume that because volunteers or paid staff are out-of-sight, they are likely not being productive; however, this rests on the false assumption that because a team member is present in the office, they are working productively.

The fact is that **both environments can be efficient or ineffective, depending on the person, the resources they have to work with and the guidance and support they are provided**. Below are a few suggestions for leading in a virtual environment, but could be equally applicable back at the office.

- **Clarify Team and Individual Goals** — Make sure that everyone understands the goals and objectives for the project (including deadlines) and how their work contributes to the overall success. Using participatory decision-making, have the team develop and agree upon targets that are achievable and make sense for each individual.

- **Highlight the Skills of Each Team Member** — Take time to share the talents each person brings to the table with the others in order to build confidence and reliance on each other as prime resources.

- **Allow for Interpersonal Sharing** — Encourage team members to share something about their personal lives beyond volunteering or work. This helps members find commonalities and knits together trusting relationships with people who find common ground.

- **Share & Rotate Leadership** — Appoint an overall leader, but share leadership for project stages or meetings with individuals who have the most knowledge or information at the current moment.

- **Establish Communication Norms** — As a group, set up basic guidelines for frequency and types of communications as well when and how to alert others about availability. This is particularly important for volunteers who, because of varying schedules, will most often communicate

asynchronously. Set up a regular schedule to meet as a team, but also allow the flexibility of informal "just-in-time" interactions between individuals or small groups, both online and on land.

- **Meet In-Person, Too** — Some team activities are difficult to accomplish without being able to facilitate rapid discussion and read body language. For tasks like strategic project planning, problem solving and celebrating, bring the team together for an office day.

- **Promote Healthy Boundaries** — Encourage volunteers to maintain a productive work-life balance and let them know they are NOT expected to check email when they are off duty. Refrain from sending texts to volunteers unless they agree or in the case of an emergency.

- **Establish a Code of Conduct** — Although volunteers may not be working in your office, when they are on duty, they are representing your organization. Communicate clear standards for confidentiality, volunteer and staff privacy, email, social media communications and ethics. Because some volunteers may be working from home, this needs to be reinforced regularly.

A second element of effective management of offsite volunteers is, of course, the technology that is used to facilitate communication, resource sharing and collaboration. **The software you use doesn't have to be expensive or complicated**, but it does need to meet the team's needs and be easy to navigate with a little training. Here are a few things to consider:

- **Maintain a Shared Calendar** — Use Google Calendar or other software to communicate when volunteers will, and will not, be working. Also, send team meeting notices via email that volunteers can download to their personal calendars, if they so wish.

- **Use Group Video Chatting** — Software like Skype and Google Meet Ups allow individuals and teams to view each other during meetings. This adds more interest that telephonic calls and allows participants to physically point to sections of documents.

- **Use Screen Sharing** — There are a number of free and fee-based screen sharing tools[23] that can be used to share documents in live time.

- **Set Up Public Emails** — Instead of using their private email, ask volunteers to set up a free email address, such as Gmail or Hotmail so that their identity is protected. This is especially important if they work directly with the public.

- **Store Documents Online** — Google Drive and Wikispaces are two platforms that allow approved users to post and view shared documents. Be sure to establish a file naming protocol the team will use to keep track of multiple versions and edits over time, as well as final documents. Make sure you store both documents that are in development and your basic assets, like your logo, mission statement, templates, etc. — as well as current team contact info — in one, well-organized place.

- **Set Up A Project Management System** — Once you have your project plan decided and tasks assigned, have team members add their key milestones and deliverables to the team calendar. If the calendar is integrated into a project management system,[24] all the better. There are several free options you can choose from, and all have integrated file sharing and management, project chat/email communications and a tasks tracker and calendar function.

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[23] See http://www.makeuseof.com/tag/12-excellent-free-screen-sharing-and-remote-access-tools-you-havent-heard-of-yet/.
[24] See http://www.pcmag.com/article2/0,2817,2380448,00.asp.

Volunteer Training and Talent Development

The Society for Human Resources Management (SHRM) defines talent management as "the implementation of integrated strategies or systems designed to increase workplace productivity by developing improved processes for attracting, developing, retaining and utilizing people with the required skills and aptitude to meet current and future business needs." Volunteer programs that strategically integrate their recruitment, screening, placement and training activities can also use a talent management approach to activating volunteer talent. However, what happens once a volunteer joins?

Research has shown that training and professional development for volunteers has a positive influence on volunteer retention.[25] Unfortunately, many volunteer coordinators don't have the time, budget or expertise to develop in-depth curricula and deliver regular training for their volunteer teams. So, what can be done?

Start by matching volunteers with roles where they can learn something of particular interest to them personally. When you interview prospective volunteers, ask them to share their career hopes and dreams or their personal knowledge quests. Then, match them with positions that will help them develop their skills in formal and informal ways.

Also, coordinate continuous learning and professional development opportunities for volunteers throughout the year. Below are a few talent development activities that are inexpensive to coordinate:

- ■ **Offer a Variety of In-service Trainings** — Ask internal staff, external partners and volunteers themselves to share their expertise with your volunteer team, whether it is to teach people skills, technical skills or raise awareness about the needs of older adults and people with disabilities in your community. When they hear that the training is to support community volunteers, many will be happy to lead them for free.

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[25] See Mark Hager and Jeffrey Brudney, "Volunteer Management Practices and Retention of Volunteers," The Urban Institute (June, 2004) http://www.urban.org/UploadedPDF/411005_VolunteerManagement.pdf.

- **Support Informal Learning** — Most learning doesn't happen in the classroom. Help volunteers teach and learn from each other by sharing new information and resources, providing access to an online repository for relevant information, and by setting up a listserv, social media or an online chat room to connect.

- **Promote Free Webinars** — Several national nonprofit support organizations offer free online courses that are often recorded and archived for on-demand viewing. Encourage volunteers to participate in those that are of interest or that support their work for the organization.

    - **The Aging Network's Volunteer Collaborative** (http://agingnetworkvolunteercollaborative.org/)

    - **Network for Good** (http://www.fundraising123.org/training)

    - **idealware** (http://www.idealware.org/online-training)

    - **VolunteerMatch** (http://learn.volunteermatch.org/)

    - **The Foundation Center** (http://www.grantspace.org/)

    - **Tech Soup** (http://www.techsoup.org/community/events-webinars)

    - **Nonprofit Webinars** (http://nonprofitwebinars.com/)

- **Help Volunteers Earn College Credit for Their Service** — Help students, old and young, get college credits, either through traditional internship (or work-study) programs with local educational institutions or with experiential learning programs, like CAEL,[26] that arrange college credit for life experience.

- **Offer Continuing Education Credits (CEUs)** — If you offer intensive technical training to your volunteers, there is no reason they should not get professional credit for it. It takes some work to be able to offer CEUs, and you may need to form alliances with staff or community partners with

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[26] For more info about how to get started, see http://www.cael.org/home.

specific credentials (e.g., MSW) to make it work, but if these are important to your volunteers, then it may make sense to check it out.

Remember This...

- A traditional, hierarchical style of management is rarely helpful in inspiring and motivating volunteers.

- Self-directed volunteer teams work in partnership with organizations to address an issue they care about by working on projects identified by the organization or by initiating their own. Although independent in nature, they require active support.

- Both office and virtual work environments can be efficient or ineffective, depending on the person, the resources they have to work with and the guidance and support they are provided.

- Research has shown that training and professional development for volunteers has a positive influence on volunteer retention.

- Effective risk management for volunteer programs is synonymous with good volunteer program design.

- It is important to codify volunteer screening requirements and application process in a written policy.

- Volunteer interviews are a unique opportunity to understand the motivations of the applicant and should be a two-way conversation.

- Volunteer position descriptions are a great starting point for discussing volunteer interests and skills.

- If a volunteer will be able to learn the minimum required skills, within a reasonable period of time, find ways to support them or refer them to another program that is a better fit

Chapter 7:
Recognition and Retention

Keeping Volunteers Inspired and Engaged

Chapter Highlights

- What the Research Says About Volunteer Satisfaction and Retention

- Using Intrinsic and Extrinsic Motivation

- Budget-Friendly Ways to Recognize Volunteers

- Developing Volunteer Leaders

- Inspiring Deeper Volunteer Involvement Over Time

- Succession Planning for Volunteer Programs

- **Tools**

  - Anatomy of a Thank You

  - Levels of Engagement Worksheet

  - Leadership Skills Self-Assessment

  - 90-day Check-In Survey

  - Annual Volunteer Survey

  - Exit Interview

Volunteer Satisfaction and Retention Research

The successful retention of qualified volunteers is critical to the long-term success of the Pennsylvania aging and disability services network. Due to the

complex nature of many services, volunteers must undergo in-depth training programs to effectively serve.

Clearly, the volunteer onboarding process requires a significant investment that cannot be overlooked. Volunteer recruitment, screening and placement activities require focused staff coordination in order to be successful, and both orientation training and technical skills development represent a significant investment of agency resources.

If volunteers complete training only to leave before transitioning to active service, or begin service only to leave within a few months, the extensive program resources devoted to finding and preparing volunteers are wasted. In order to ensure the successful retention of new volunteers, **as much attention must be paid to managing volunteer engagement processes after placement as it is to onboarding of new recruits**.

As we noted in earlier in this Toolkit, research has shown us that specific volunteer program elements and organizational characteristics have an effect on volunteer retention. To review, the following activities have an impact on volunteer satisfaction and retention:

- Matching Volunteers' Skills with Assignments
- Recognizing Volunteers' Contributions
- Measuring the Value of Volunteers
- Training and Investing in Volunteers and Staff
- Providing Strong Leadership

In another research study,[27] several interesting findings regarding volunteer retention were uncovered, namely:

- **Regular supervision and communication with volunteers is associated with lower levels of retention**, perhaps indicating that volunteers are not motivated when managed too closely.

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[27] See Jeffrey Brudney and Mark Hagar, "Volunteer Management Practices and Retention of Volunteers," The Urban Institute (June 2004) -- http://www.urban.org/UploadedPDF/411005_VolunteerManagement.pdf

- **The** lack of sufficient budget to support volunteers affects the ability to retain volunteers but, **retention rates do not vary according to the percentage of time a paid staff member devotes to managing** the volunteer program. The ratio of staff to volunteers has no effect on retention rates either.

- Providing strong leadership for volunteer programs is important. **Organizations that experience resistance or indifference toward volunteer involvement are less able to retain volunteers**. In fact, the greater the number of perceived benefits an organization realizes from volunteer involvement, the higher the retention rate.[28]

- **Organizations that use volunteers to recruit other volunteers are better able to retain volunteers**, smaller charities have higher rates of volunteer retention and, not surprising, younger volunteers are less likely to stay because their life circumstances are transient.

Intrinsic and Extrinsic Motivation

Research shows that people are not really motivated by punitive measures or incentives. Instead, consider tapping into what really inspires. Researchers have found that both extrinsic and intrinsic motivators inspire us, but one is much more effective.[29]

Extrinsic motivation works well for simple, mechanical tasks, but not for complex work. It has three serious drawbacks:

- **It is not Sustainable** — As soon as you withdraw the punishment or rewards, the motivation disappears.

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[28] Perceived benefits included increased service quality, cost savings, public support and specialized skills.

[29] For a review of the literature on motivation, see Edwards Deci, Richard Koestner and Richard Ryan, "A Meta-Analytic Review of Experiments Examining the Effects of Extrinsic Rewards on Intrinsic Motivation," Psychological Bulletin, (Vol. 125, No. 6, 1999) http://files.meetup.com/1789648/Review%20on%20Effects%20of%20Extrinsic%20Rewards%20on%20Intrinsic%20Motivation.pdf.

- **There are Diminishing Returns** — If the punishment or rewards stay at the same levels, motivation slowly drops off. To get the same motivation next time requires a bigger reward.

- **It Hurts Intrinsic Motivation** — Punishing or rewarding people for doing something removes their own innate desire to do it on their own and, going forward, you must punish/reward every time to motivate.

On the other hand, intrinsic motivators are much stronger than extrinsic ones. Factors that promote intrinsic motivation are:

- **Challenge** — Being able to challenge yourself and accomplish new tasks, or reflect on why something did or did not work
- **Control** — Having choice over what you do
- **Cooperation** — Being able to work with and help others
- **Recognition** — Receiving meaningful, positive acknowledgment for your work

Extrinsic Motivators

- Earning a stipend or bonus
- Avoiding admonishment or punishment
- Receiving praise or instant gratification
- Winning a contest
- Getting a reward, such as a plaque, certificate or gift

Intrinsic Motivators

- Enjoyment of learning new things
- Self-satisfaction from personal achievement
- Curiosity about new developments in the world
- Joy derived from helping others
- Pride from being given increased responsibility

It is also recognized that "hygiene factors" or other requirements may be required before motivation can occur in the work environment:

- **A place to perform work**
- **Acceptable work environment**
- **Positive team culture**

Similarly, business author Daniel Pink[30] identifies three basic human drives that motivate us:

- **Mastery** — The need to create and learn new things
- **Autonomy** — The need to direct our own lives
- **Purpose** — The need to be part of something that improves our world and ourselves

In fact, Pink's arguments point to the very premise of volunteering itself — volunteers are driven to help organizations and communities, without pay, because they can bring about improvements in society and because they matter.

Low-Cost Recognition Ideas

Despite evidence to the contrary, extrinsic motivators are still what most of the world relies on to reward employees (through pay-for-performance, for example) as well as volunteers (through gifts and awards). Rather than using outdated ideas about what motivates people, leaders of volunteers can use what science has discovered to improve their recognition practices without spending a lot. Below are some ideas:

- **Encourage Mastery**

  - Give volunteers leeway to create new work processes and tools for your program and agency; develop style guides so that they know the minimum expectations and can work within agency guidelines.

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[30] See Daniel Pink's TED talk -- http://www.ted.com/talks/dan_pink_on_motivation.html and book "Drive: The Surprising Truth about What Motivates Us."

- Help volunteers learn new things; invite guest speakers in for monthly "Teach-Ins" (or webinars) that relate to your cause or their work for your organization.

- Hold annual "Idea Mash Ups" where volunteers and staff come together for a day of problem-solving around the organization or program's biggest challenges; then, have them pitch their ideas and vote on which should be considered for implementation.

- **Provide Autonomy**

  - If extensive training is required, allow volunteers to direct at least some of their own learning; offer them a Learning Checklist and goals with which they can track their own progress.

  - Provide robust online resources and tools for learning, personal exploration and growth. Set up a volunteer team to develop a wiki where volunteers can connect and share resources.

  - Set up a process and technology (e.g., an online calendar) for team-based scheduling; appoint one or two volunteer schedule coordinators, but allow the team to work together to plan shift coverage (and offer back up in case issues arise).

- **Reinforce Purpose**

  - Take every opportunity to demonstrate how the world has improved because of volunteer efforts — from both the individual level, by sharing thank you notes from service beneficiaries, and the program level, by reporting program outcomes and achievements.

  - Present an annual "State of the Community" report to volunteers that details the impacts the organization has had in furthering its mission or cause (both measurable and anecdotal), what challenges it has encountered and what still needs to be done.

  - Form a Volunteer Advisory Team to guide your program decision-making and evaluate or audit your program operations to find ways to make improvements.

By changing the way you approach volunteer recognition activities, you may be able to better tap into what really drives human motivations and, along the way, help volunteers feel truly acknowledged and appreciated.

Volunteer Leadership Development Ideas

If mastery, autonomy and purpose are keys to motivation, **there is no better way to motivate volunteers than through leadership programs** that allow volunteers to experience all three. So, what makes an effective leadership program, and how can you inspire volunteers to participate?

Leadership is defined as the ability to organize things within a group to move past the status quo. Leadership is not the same as management— even great management— and organizations need different kinds of leaders at different stages of their development.

The Society for Human Resource Management identifies the following essential leadership competencies,[31] which are relevant to any organization. In the volunteer context at your program, some may be more critical than others. This list can be used to 1) identify priority volunteer leadership competencies to train and support; 2) to assess whether an individual has the necessary base skills to lead a project; or 3) to use as a baseline to craft an individualized development plan.

- **Leading the Organization**

    - Managing change
    - Solving problems and making decisions
    - Managing politics and influencing others
    - Taking risks and innovating
    - Setting vision and strategy
    - Managing the work
    - Enhancing business skills and knowledge
    - Understanding and navigating the organization

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[31] See "Leadership Competencies" SHRM Briefly Stated, March 1, 2008, http://www.shrm.org/Research/Articles/Articles/Pages/LeadershipCompetencies.aspx.

- **Leading the Self**

  - Demonstrating ethics and integrity
  - Displaying drive and purpose
  - Exhibiting leadership stature
  - Increasing your capacity to learn
  - Managing yourself
  - Increasing self-awareness
  - Developing adaptability

- **Leading Others**

  - Communicating effectively
  - Developing others
  - Valuing diversity and difference
  - Building and maintaining relationships
  - Managing effective teams and work groups

While the thought of developing in-house training for volunteer leaders for each of these competencies may feel overwhelming, there are plenty of other alternatives. **Here are a few ways to develop leaders that don't require a large budget and expert training and do allow volunteers to develop their leadership skills incrementally**, making them more likely to accept a needed leadership role when it comes about.

- **Give Volunteers the Opportunity to Form Their Own Teams** — Ask them to tackle special projects they identify and run on behalf of the organization, in addition to their regular volunteer assignment.

- **Provide the Infrastructure** — If volunteer leaders have opted to take on a challenging project (e.g., recruitment of other volunteers), make sure you provide some of the tools they need to get started such as a project road map or project plan template. These guidelines will provide them just enough guidance to develop a plan but not so much that it stifles creativity.

- **Offer "Developmental Assignments"** — Identify specific areas of interest for individual volunteers that have a leadership component. Assign volunteers a special assignment that allows them to research and learn while doing. Accept that the project may take a little longer than anticipated and plan for it.

- **Partner with Employee Volunteer Programs** — Develop a leadership development program, in partnership with a local company, to train volunteer teams (of employee and non-employee volunteers) to spearhead challenging special projects at your organization while, at the same time, growing their skills to lead.

- **Partner with State Agencies and Local Corporations** — Organizations such as the Pennsylvania Department of Human Resources offer courses on leadership. Look for ways to collaborate and offer these free, or at reduced cost, for volunteer leaders.

- **Invite Volunteer Leaders to Staff Development Activities** — In-service trainings and local conferences related to leadership development or nonprofit program management are interesting environments for volunteers to learn your business from the inside out.

- **Create a Leadership Learning Circle** — Set up an online group or community where volunteer leaders can ask questions and share ideas. Regularly "seed" the chat with inspiring resources, such as TED talks (www.ted.com/talks) and Harvard Business Review blog posts (http://blogs.hbr.org/), and topics related to leadership.

- **Share What Works** — Ask volunteer leaders to collect best practices that are innovative, sustainable, able to be replicated and have truly made a difference. If you start by looking for volunteers who have a certain "knack" for something, you will discover that they are likely using a procedure or tactic that works that they may, or may not, recognize as a best practice.

- **Match Volunteer Leaders With a Coach** — Although volunteer teams may like to work independently, they also need easy access to a coach with whom they can have a mutually respectful, trusting and honest relationship. The job of the coach is not to provide easy answers; rather it is to offer suggestions and access to resources, as well as to pose strategic questions that promote critical thinking and reflection.

Common Myths About Volunteer Leadership

- All volunteers make good leaders.

- Volunteers aren't permanent enough to make good leaders.

- Great leaders must rise through the ranks.

- Volunteer leaders with past leadership experience don't need support.

- If you build leadership positions, volunteer leaders will always be willing to fill what you have created.

- If you allow volunteer leaders to create their own position, they won't be effective.

- Volunteer leaders don't like to have expectations placed on them.

- Having volunteer leaders doesn't usually result in a more effective organization.

Maintaining Volunteer Involvement Over Time

A recent study provides a in-depth information about what sustains active community participation over time.[32] In addition to analyzing what stimulates civic engagement, the study also points to organizational issues that can affect supporter retention, which can be addressed directly by organizations.

The project's goal was to improve the understanding of people's experience of participation over the course of their lives, either through volunteering or involvement in a cause. Although participation is widespread, those interviewed for the study also pointed to reasons why they quit specific activities and moved on to the next thing. Not surprising, unforeseen life events affected the ability to participate. More interesting, though, was the fact that **the perceived ability to make a difference within the current situation is a key factor in whether one chooses to participate**.

Changes in personal circumstances aside, the following were the two most frequently cited reasons for discontinuing involvement in a cause:

- **Poor Team Culture** — Participants are adversely affected by negative relationships within groups, including those that are unwelcoming, insular or cliquey and/or feeling unappreciated, disempowered, disillusioned, frustrated or cynical about their involvement.

- **Poor Program Operations** — Participants were turned off by poor group structures and processes, including poorly run meetings that are tedious and do not result in any action and the absence of support (including training, access to opportunities, emotional or psychological support).

The good news is that both of these areas can be addressed directly by you and your organization. If you survey your volunteers and get their candid feedback, you can discover what, exactly, is at the heart of any discontent. You can then take direct steps to address it, such as staff training, program re-design, implementing process improvements, etc.

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[32] See the Pathways to Participation website for a wealth of information -- http://pathwaysthroughparticipation.org.uk/.

In addition, the study found that **volunteer involvement does not necessarily follow a linear progression, volunteers who stay don't necessarily naturally take on increasing responsibilities; and it found that motivation is highly personal**.

Below is one model of volunteer engagement that depicts the life cycle of volunteers throughout their journey. Not all volunteers will travel all the way, and some may even skip stages or travel backward depending on their situation. However, this graphic may help you map out various levels of volunteer engagement to determine just how many volunteers your program needs at each level, what roles they might take on and what communication you need to plan for.

Volunteer Levels of Engagement

Promoter

Patron

Leader

Worker

Learner

Joiner ← Volunteer Appointment

Inquirer

Observer
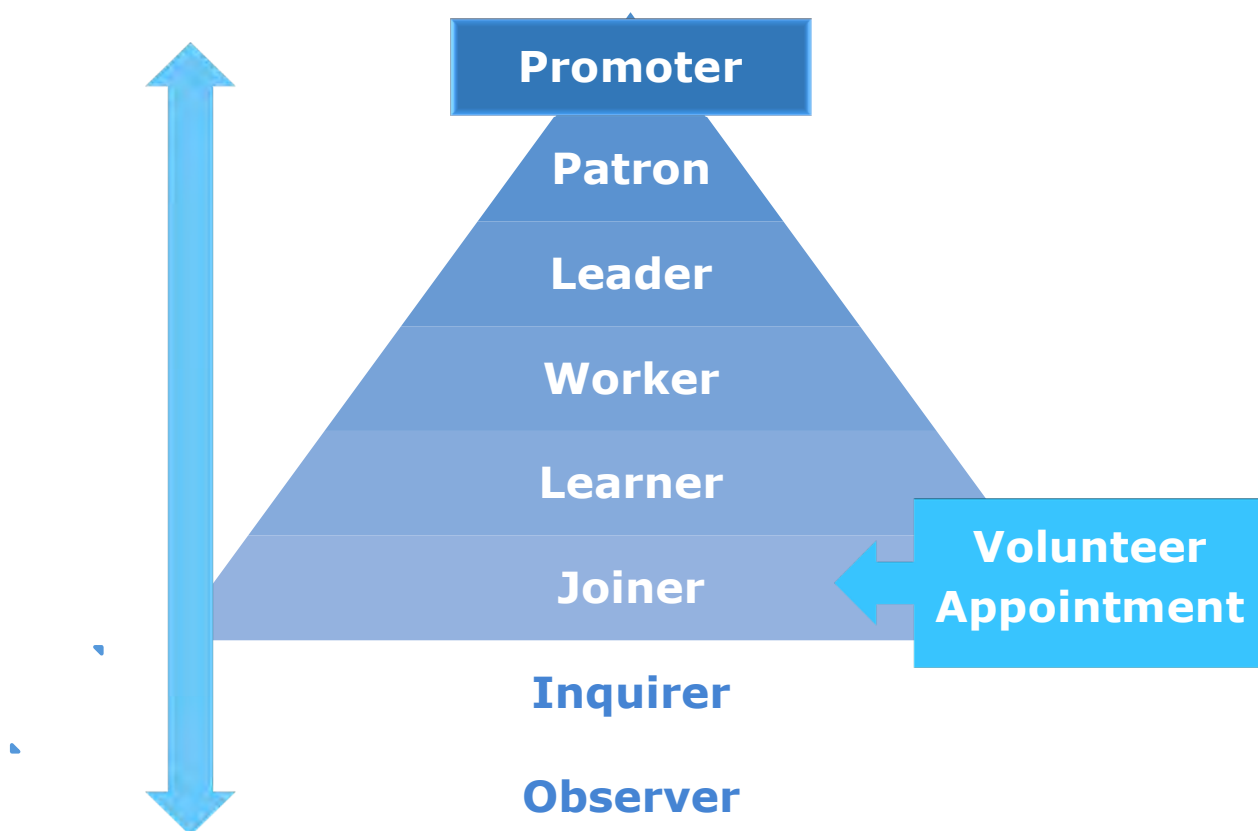
Instead of a one-size fit all approach, this model suggests that, in order to make the most of the volunteer's current state of mind, different volunteer positions may be required for each level. This also implies that volunteer coordinators should maintain regular contact with volunteers to monitor changing individual circumstances that may require a shift in volunteer assignment or to identify opportunities to inspire movement up the spectrum.

Volunteer Succession Planning

Long-term volunteers amass a tremendous wealth of institutional knowledge during their work with your organization. To prevent the loss of this valuable information, actively engage in succession planning so that another volunteer is ready and able to step up to the plate when the time comes. Here are a few ways to ensure that the wisdom of your volunteers, and any relationships they have built on behalf of the organization, is not lost.

- **Use Volunteer Agreements to Plan** — Have volunteers sign an agreement each year or every six months for shorter-term volunteers. Enter their start and end date in your volunteer management database (or a spreadsheet) to track when you may be losing volunteers and plan ahead for the transition.

- **Rotate Volunteer Assignments** — Although it's tempting to keep a well-performing volunteer in one place, set up your program with the understanding that volunteers will rotate responsibilities on regular intervals. That way, everyone learns how to do each job and can cover for each other.

- **Have Volunteers Cross-Train Each Other** — if you don't like the idea of rotating roles, have volunteer job shadow others to learn how they go about their work. Make sure those that are in the teaching role are doing things per the program guidelines so you don't reinforce bad habits.

- **Establish a Recommended Job Progression** — This works particularly well in volunteer governance position and on boards (the vice president takes over for the president, at the end of their term, etc.), but could be put in place for a wide spectrum of volunteer jobs.

- **Get Relationships in Writing** — If volunteers are responsible for developing partnerships or setting up remote sites at community organizations, make sure that the details of the agreement are memorialized in a document that is kept in a central file. Make sure the agreement has the current contact information for the parties who were responsible for establishing the relationship and for those who maintain it on a day-to-day basis.

- **Assemble Desk Manuals** — Ask volunteers to assemble a desk manual for their specific position or team. Desk manuals include information and processes that volunteers use to get their specific job done. A properly written desk manual can serve as a virtual back-up employee and is your best insurance against the loss of valuable institutional knowledge. Desk manuals are also great training tools when you are orienting a new team member. They give the new staff person an easy tool to reference as they learn the ropes and can cut your training time significantly. Here are some things you should include:

  - **Primary Contacts** — The names, phone and email of anyone who is critical to the task or who is contacted frequently (e.g., the database vendor who provides technical assistance, the designer who is working on your brochures, etc.).

  - **Current Passwords** — Passwords for email, your phone system, the database, etc. It's important that these be kept current as they are changed. To safeguard these, the desk manual should be kept in a secure place, so passwords, etc. can only be accessed if needed. Another option is to keep passwords in a separate location; however, someone needs to know where they are.

  - **Task Grid** — A task grid lists the major activities of the position and how frequently each task is performed (e.g., complete monthly activity report). Have your team start with their job descriptions to help identify all of their key tasks.

- **Key Processes** — Major tasks should be broken down into smaller steps. If they are time sensitive (e.g.., turn off voicemail service promptly at 8:30am, front doors should be locked at 6:00pm), be sure to include those times. To get started, have your team keep a log of all the things they do for a week. This will help remind them to include items they might have forgotten otherwise.

- **Flow Charts and Screen Shots** — If the process is complicated, a visual flow chart of the steps needed to complete the task can be helpful. If a specific computer process is being described, screen shots of each step can be included. For visual learners, graphics can be a big help.

- **Helpful Links** — Include online links to other manuals that help get the job done (e.g., instructions on how to use the fax machine). Alternatively, include copies of those instructions at the back of the desk manual.

- **Revision Date** — The desk manual should always include the date it was revised so that you can easily determine whether it has been updated recently.

- **Table of Contents** — Make it easy for others to quickly search and find items in your desk manual by including a table of contents. Also, assemble you desk manual in a binder or other file device that makes it easy to revise individual pages.

Remember This…

- To ensure successful retention of volunteer talent, as much attention must be paid to managing volunteer engagement processes after placement as it is to the onboarding of new recruits.

- Researchers have found that both extrinsic and intrinsic motivators inspire us, but extrinsic motivation is much more compelling.

- The three basic human drives that motivate us — 1) mastery; 2) autonomy; and 3) purpose — can all be tapped to recognize and reward volunteers.

- Leadership competencies can be used to train and support volunteers, assess whether they have the necessary skills to lead or to develop individualized development plans.

- Volunteer leadership can be developed over time, without a large budget, by making smart use of resources already on hand.

- The perceived ability to make a difference within the current situation is a key factor in whether one chooses to participate.

- In order to make the most of the volunteer's talent and current needs, a variety of volunteer positions are required at each level of volunteer engagement.

- To prevent the loss of this valuable knowledge, actively engage in succession planning so that another volunteer is ready and able to step up to the plate when the time comes.

Chapter 8:
Program Evaluation

Pinpointing Successes and Areas for Improvement

Chapter Highlights

- Outcome Measures for Volunteer Programs

- Time-saving Strategies for Data Tracking

- The Differences Between Volunteers vs. Paid Staff

- Volunteer Liability

- **Tools**

  - Volunteer Program Audit Team Charter

  - Volunteer Tracking Spreadsheet

  - Volunteer Database Selection Worksheet

  - Volunteer Management Software Matrix

Sample Volunteer Program Metrics

Without data, it will be difficult to track trends and make meaningful adjustments to your volunteer management practices. The following are recommended metrics[33] that will be helpful in assessing the positive or negative effects that future program enhancements may have on both volunteer satisfaction and the level of engagement, as well as help you predict how many volunteers you will need in the coming months.

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[33] Specific recommended goals are based on the current Pennsylvania averages for some metrics — see http://www.volunteeringinamerica.gov/PA and average survey results from two Pennsylvania volunteer programs.

- **Volunteer Retention Rate:** The percentage of volunteers who stay at least one year (Suggested Goal: 67%).

- **Volunteer Appointment Rate:** The percentage of volunteers who complete the application process and are contacted to begin training (Suggested Goal: To be determined by program, based on historical experience).

- **Post-training Placement Rate:** The percentage of volunteer who complete training and begin to provide counseling services (Suggested Goal: To be determined by program, based on historical experience).

- **Total Active Volunteers:** The total number of volunteers who have received an appointment letter and have logged hours in the database anytime during the previous work quarter (Suggested Goal: To be determined by program, based on expected grant performance measures and current program need).

- **Volunteer Hours:** The average hours contributed per month/quarter (Suggested Goal: To be determined by program, based on expected grant performance measures and program need).

- **Volunteer Satisfaction/Promoter Rate:** The percentage of volunteers who say they would recommend volunteering to others (Suggested Goal: 87%).

- **Grant Performance Goals:** Three to four key performance outcomes required by your grant, broken down for each geographic area or volunteer team (Suggested Goal: To be determined by program, based on identified gaps in grant performance and program need).

Volunteer Tracking Options That Save Time

In order to track and report your program trends efficiently, an Excel spreadsheet isn't sufficient. As your program grows, it will become increasingly difficult to keep track of all of the information. A volunteer management database is an essential part of your toolkit.

Most volunteer management databases on the market today are reasonably priced and generally include a free trial period. If your organization is involved in fundraising, you might want to consider purchasing software that integrates volunteer and donor information; however, these are more expensive. If not, a stand-alone package will do just fine.

When shopping for a database, make sure it has the following functionality at a minimum:

- **Volunteer Profile Information**

  - Contact information (email, direct mail, phone numbers)
  - Interests and special skills
  - Completion of training and other requirements
  - Evaluation or comments by staff

- **Scheduling**

  - Individual and group
  - Re-occurring and ad hoc schedules
  - Online sign-in sheets
  - Group calendar

- **Time and Participation Tracking**

  - Volunteer dates and times by project or event
  - Volunteer roles assigned
  - Mileage and expenses, if reimbursed

- **Communication**

  - Ability to brand with program logo and colors
  - Customized e-blasts
  - Email list segmentation
  - Volunteer community chat (optional)
  - Volunteer online resource repository (optional)

- **Access**

  - Web-based/Cloud-based
  - Volunteer access (password protected)
  - Multiple administrators
  - Enterprise system for networks, if needed

- **Reporting**

  - Total number of volunteer hours completed by month/year
  - Volunteer retention rates
  - Customized fields and reporting
  - Exporting to Excel

- **Ease of Use and Support**

  - Easy for novices to figure out
  - Timely and robust help/customer service when you need it

Volunteer Satisfaction Surveys

Gathering candid opinions from your volunteers will help you gain valuable insights into what you need to improve. **Below are some suggestions that will help generate the rich, actionable feedback you need:**

- **Keep it Simple** — The longer the survey questionnaire, the less likely your respondents are to finish it. Show respect for your volunteers' time and keep your survey short. Even though it is tempting to add a long list of questions, keep it to less than ten.

- **Keep it Easy** — In order to make it manageable for both you and your volunteers, use free or low-cost online survey software (e.g. SurveyMonkey). Send out invitations via email to easily capture and automatically report your responses. Make paper surveys available to those who don't have Internet access.

- **Keep it Real** — Just like other communications, stay away from jargon or acronyms that will confuse respondents, regardless of how long volunteers have been onboard.

- **Keep it Friendly** — Always "bookend" your survey with a short introduction at the beginning and an authentic thank you at the end. Satisfaction surveys are another way to build relationships with your volunteers. Let them know why they've been invited, what you hope to gain and when they will hear back from you with your next steps. Finally, give them a specific contact person in the event they have questions or experience problems.

- **Keep it Organized** — Focus on using structured questions rather than relying primarily on open-ended questions. When designing your questionnaire, ask a few volunteers to help you brainstorm all the possible answers to a question. Then, categorize your answers into neat, multiple-choice options. Add the category of "other" and allow respondents to add their own responses, but try to make your list as exhaustive as possible. This makes it much easier to analyze results.

- **Keep it Focused** — Always ask volunteers to rate how likely it would be for them to recommend their volunteer experience to friends and family. This question gets at perceived value, which is the core of what drives volunteer satisfaction. If you track this metric over time, you'll see whether your value goes up or down in the volunteers' eyes. Also, ask why they chose this rating in a subsequent open-ended question so you can find the root cause of their delight or displeasure.

- **Keep it Open** — Always invite volunteers to share additional comments in an open-ended question at the end. That sends a clear message to volunteers that your ears are open and you are willing to hear candid comments, even if they don't fit into neat boxes.

- **Keep it Functional** — Have a few volunteers test your online (and paper) survey instruments. Make sure they understand what your questions are really asking. Also, confirm with your testers that your list of multiple-choice options include a broad enough selection.

- **Keep it Accurate** — You want to be able to defend your survey results and have confidence in your analysis. As such, make sure you have collected enough responses to generalize your results (collect a "statistically relevant" sample size) — the smaller the population, the larger percentage of responses you must collect.[34] Try to attain a confidence level of 95% with a +/- 5% margin of error. Also, when using ranges, give respondents at least five data points to choose from (called a "likert scale)."

In addition, be prepared for the "halo effect." Volunteers and service beneficiaries alike are reluctant to give negative feedback to nonprofit staff. If they are bothered by something, volunteers will often leave the organization before they will tell staff about their frustrations.

To encourage wide and honest participation, collect responses anonymously and let volunteers know their privacy will be protected. When reporting the results, choose representative statements

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[34] For more information on how to estimate how many responses you need, see "Survey Sample Size," SurveyMonkey. http://www.surveymonkey.com/mp/sample-size/.

from the open-ended comments and do not associate them with an individual's name. Pay attention to complaints; they are likely the tip of the iceberg.

When you have a survey that works, stick with it through several survey seasons. Consider your survey successful when it gets you the information you need to take action, not necessarily because it generates a glowing report. Once you have a design that is feeding you valuable insights, resist the temptation to tweak your core questions each time. That way, you can build a baseline of trustworthy trending data from which to work.

Finally, recognize that no satisfaction survey will get you all the information you need. If your survey results raise additional questions, think about facilitating a volunteer focus group to get at some of the deeper drivers of satisfaction/dissatisfaction. If you are worried they won't be completely candid with your or your staff, hire an outside facilitator to manage the focus group for you. In addition, you can use social media to facilitate conversations within your volunteer team about their needs or you can review your volunteer retention metrics, analyze where and when people are leaving and ask why.

Volunteer Exit Interviews

Surveys are not the only way to evaluate volunteer satisfaction. You can also **conduct exit interviews with volunteers to get their final suggestions on their way out the door**. Interviews, unlike surveys, allow for the possibility for follow-up questions for greater clarity.

Volunteer participation in exit interviews should be voluntary, and departing volunteers should not be compelled to participate but it should be highly encouraged. When conducting exit interviews, make sure volunteers are as comfortable as possible in providing candid feedback; therefore, their former supervisor should not conduct the interview.

Exit interviews should remain confidential, and only general information should be shared. Those who conduct exit interviews must conduct themselves in a highly professional manner, maintaining privacy and refraining from gossip. The best way is to aggregate the data collected over

a specific period of time (e.g., quarterly) and report representative comments. Information gathered could also be reviewed for ideas about how to recognize and motivate volunteers. If discrimination, harassment or abuse was what caused the volunteer to resign, then this information should be reported to the program coordinator or executive management immediately.

Below are a few areas to cover in the exit interview, which can be conducted in-person or over the phone.

- Length of tenure and role(s) of volunteer
- What they enjoyed about volunteering
- Why they decided to resign
- Whether they felt adequately trained
- Whether they felt the role was a good fit
- Whether they believe they were presented with an honest depiction of the volunteer opportunities when recruited
- What responsibilities they were not allowed or offered that they would have enjoyed
- What they would suggest to improve the volunteer program

Volunteer-Led Program Audit

Volunteer program audits are a rare opportunity for self-reflection. They help programs to take a closer look at their volunteer management practices to assess both what is working and what needs to be upgraded. **As opposed to program outcome evaluations, they focus on the volunteer program itself versus an assessment of whether the program's service goals**, or other outcomes, have been accomplished. Volunteer program audits can bring to light a wealth of information about ways to improve your volunteer coordination. They do take time and effort but are generally worth it.

To gather information for an in-depth analysis, it is helpful to **include a range of stakeholders in the process at different steps along the way** — board members, volunteers, program staff, clients and others at your agency who interface with the program's volunteers can all be helpful. This is important for several reasons — it assures that you are getting input from

diverse perspectives, it helps the audit team track re-occurring themes and it validates the findings of the audit.

In addition, everyone who participates in the audit will feel some ownership of the outcome, vital to making necessary changes identified through the audit process. By involving a diverse group, you have the added opportunity to continue to educate those in your agency about effective volunteer management practices and your program's successes and needs.

This following is one process for coordinating an audit:

1. **Get Approval from Management** — You need buy-in from executive management to undertake an audit for a few reasons — first, time and resources must be invested to perform an adequate audit, and second, program challenges may come to light and management must be willing to make these public, as well as how they will be addressed.

2. **Form an Audit Team** — Invite volunteers and paid staff to coordinate all aspects if the audit. By appointing a small group of volunteers as leaders of the project team, you will clearly communicate that volunteers are an important part of your organization, which sets a productive tone.

3. **Develop an Action Plan** — The audit team will need to meet regularly, and the first order of business is to decide what information will be gathered for the audit, from which stakeholder audiences, by whom, through what means and by when. Also, decide how many participants you would like to include in each activity. Finally, make sure that everyone agrees to some basic audit standards up front (such as ensuring confidentiality for all who submit comments, responses or input).

4. **Communicate the Basics** — When the audit plan has been developed, alert all stakeholders that the audit will take place, what the program hopes to gain from the process, the basic audit standards and expectations, some of the basic activities that will occur and the timeline of events. Be sure to provide them a main contact person if they have questions or concerns and enthusiastically encourage participation.

5. **Develop the Tools** — Once you have chosen the tactics for gathering information, develop the questionnaires, guides, scripts, etc. you will need for each tactic. These are important tools to maintain a consistent approach and keep the audit team focused.

6. **Conduct the Audit** — Assign each member of the audit team some portion of the audit activities. Make sure that everyone understands the importance of conducting the audit in a professional and discreet manner with respect for all participants in the process. There is no place for gossip in the audit process; it will undermine trust and do more harm than good. Also, develop a secure system for filing documentation to ensure privacy.

7. **Compile the Report** — Assign a small team to compile the entire report or have each team member write a section. Then, have the entire team review and edit it. Since confidentiality is a priority, remove any information that identifies participants from the documentation.

8. **Report out to Stakeholders** — Put together an executive summary and presentation slide deck to present key findings and thank participants. Share next steps and help them understand how the audit will improve your mission and service delivery.

9. **Celebrate**! — Audits are hard work. Don't miss the opportunity to de-brief, celebrate and appreciate the work of the audit team and those who supported them. Take time to reflect on what went well and what you would do differently next time, and document what you learned from the process.

When it's over, don't forget to archive everything in a project file, in both hard copy and electronic format. That way, you don't have to reinvent the wheel the next time you want to do a full or partial audit.

Ways to Gather Information for Your Audit

- **Review of Mission and Priorities** — Important to do right at the beginning of the audit because it establishes the "lens" through which to view all other activities. This review asks core strategic questions like: Why are volunteers here? Does our volunteer program currently reflect our organization's stated values? What are our priorities for the next three years? Does the work of volunteers directly relate to our program's mission, goals and priorities? If volunteers weren't here, what would happen? Have volunteers been successfully integrated into all aspects of our program operations?

- **Files and Materials Review** — A thorough review of program documentation, volunteer files, policies and procedures, handbooks, training, communications and recruitment materials can help determine whether the materials work together as a whole, are communicating your key messages, are in line with effective volunteer management practices, are visually pleasing and effectively represent your program's personality and promise. This review also helps identify gaps in your processes and gather suggestions on how to improve them.

- **Surveys** — Surveys are good tools for understanding the attitudes of a large group of people; however, they don't often answer the question "why?" They need to be tailored for different groups (e.g., staff vs. volunteers). You can send out a new survey or review data from previous surveys.

- **Interviews** — Individual interviews are helpful in digging deeper and getting at personal motivations, and if interviewees are assured of confidentiality, they are usually very up front about their feelings. They are limited in that they only represent the small number of perspectives and cannot be generalized to a larger group. It's important to have a set of prepared interview questions.

- **Focus Groups** — Focus groups are helpful in gathering more in-depth information, but they require good facilitation skills to bias the process and to flush out minority viewpoints. In addition, it's important to have a focus group guide and script prepared ahead of time.

Remember This...

- Establish outcome metrics so that you can track the effect any changes have on the overall health of your program and to predict future needs.

- Most volunteer management databases on the market today are reasonably priced and include a free trial period.

- Invest the time to develop a survey questionnaire that you can use each year to track volunteer satisfaction rates over time.

- Conduct exit interviews with volunteers to get their final suggestions on their way out the door.

- As opposed to program outcome evaluations, volunteer program audits focus on the volunteer program itself versus an assessment of whether the program's service goals have been met.

- To ensure robust and candid data and responses, actively involve volunteers as leaders of the volunteer program audit team and invite a wide range of stakeholders to participate.

Chapter 9:
Partnership Development

Leveraging the Power of Collaboration

Chapter Highlights

- Possibilities for Internal and External Partnerships

- Core Competencies in Volunteer Administration

- The Differences Between Volunteers vs. Paid Staff

- Volunteer Liability

- **Tools**

  - Sample Pitch Letter

  - Partnership Agreement Template

  - Sample Fact Sheet for Partners

  - Sample Partnership Meeting Agenda

  - Partner Satisfaction Survey

Ideas for Internal and External Partnerships

The work of administering volunteer programs is a big job, and one you cannot do alone. Investing the time to cultivate relationships can pay big dividends in the long run in the form of reduced barriers, increased support and enhanced in-kind resources. Successful collaborations can help your volunteer team be more productive.

By cultivating supportive partnerships, both inside and outside your organization, you can help your team connect with a number of other "go to" people and partners. **Instead of solving all your team's problems, you can help your team (both staff and volunteer) develop the capacity to solve them on their own or through a network of resources.** Working from a network mentality also builds relationships that can bring value to your team in ways you may never imagined.

The following are six good reasons to collaborate:

1. Build Program Capacity to Meet Goals

2. Address an Emerging Program or Project Need

3. Help Staff and Volunteers Expand Their Knowledge and Skills

4. Develop Resources to Support and Recognize Volunteers

5. Manage Risk

6. Comply with Grant Requirements

To get started, work from the inside out. Begin your partnership development process by asking your staff and volunteers, regardless of their job title, to act as resources for one another. Ask volunteers and staff to identify the skills and talents they would be happy to contribute and create an internal resource map that the team can use to quickly access internal program expertise.

Next, look inside your organization for other people who have knowledge, skills or resources that could help you. People in your own organization can be of great help to you. They can provide advice, support, technical assistance and free word-of-mouth advertising. If you don't have a positive working relationship with other departments or programs, they can also put up unnecessary barriers or put your reputation to question by incorrectly framing your program. Most people don't understand what effective volunteer program management entails. Take the time to build the bridges and educate everyone about your program's good work.

Finally, look outside your organization for prospective local community partners. **Partnerships can generate excitement and motivation among staff and volunteers because their existence means that the community respects your program.** Start by including people with whom your network already has a connection. Ask those with connections to make an introduction and attend the initial meeting with you. This will lend you credibility, which will give you a platform from which to build.

Partnerships can be developed with a wide array of entities such as internal staff, other non-profits, government agencies, educational institutions and private industry, to name a few. If your current group of partners isn't helping your program move ahead, try to think beyond the usual cast of characters. **Consider building non-traditional relationships that are both mutually beneficial and bring more resources to the table.**

Ideas for Collaboration

- Revenue generation
- Mailing lists
- Co-location
- Service continuum
- Advocacy support
- Staff sharing
- Collaborative authoring
- Consulting services
- Program evaluation
- Co-branding
- Admin infrastructure
- Cross posting
- Data sharing
- Teach-ins & teambuilding
- Training materials
- Community needs assessment
- Tech development
- Special events
- Volunteer recruitment

Below are some ideas for prospective partnerships and how they can help:

Internal Partners

- **Fund Development Office** — processing in-kind donations, tracking volunteer hours for grant applications and annual reports, coordination of fundraising and volunteer asks, volunteer recruitment information at fundraising events, training on how to cultivate in-kind support, assistance with grant applications, etc.

- **Communications/Public Relations Department** — communications style guide, electronic copies of logos, boilerplate text, media relations policy and process, opportunities for co-marketing and outreach, marketing training for volunteers, etc.

- **Human Resources** — employee policies and procedures, review of volunteer handbooks, volunteer orientations, risk management advice, supervision tips, legal advice, volunteer recognition ideas, etc.

- **Technology Staff** — help posting success stories, help setting up an online repository, analytics of online recruitment postings, basic technology training for volunteers, web page search engine optimization, social media strategy, suggestions for free or low-cost software solutions, volunteer relationship management, database development, etc.

- **Key Executive Leadership: Board, Executive Director, Program Directors** — information on critical strategic goals of the organization, volunteer appreciation, additional budget, pro-bono professional services, access to staff and volunteer in-service training, etc.

- **Facilities/Janitorial Staff** — help with event set up, after hours building access, equipment check out and repair, etc.

- **Co-Located Programs** — shared reception coverage and office supplies, coordinated outreach, coordinated service delivery, client cross-referrals, etc.

- **Other Volunteer Programs Inside Your Organization** — cross referral of volunteer applicants, resource sharing, co-branded recruitment, shared orientations, shared recognition events, in-service training swaps, etc.

External Partners

- **Local Banks** — cash grants for program development and volunteer recognition, employee volunteers for special events, etc.

- **Local Universities** — computer labs for volunteer training, internship or work study programs, etc.

- **Local Corporations** — leadership training for volunteers, employee volunteers for special projects, etc.

- **Local Grocery Stores** — donations of food and cakes for volunteer celebrations and recognition, etc.

- **Local Media** — help spreading the word about volunteer recruitment efforts, featuring stories of successful volunteer projects, etc.

- **Local Retailers** — donations of items for fundraising auctions or volunteer recognition, etc.

Requirements for Successful Collaboration

Research has identified 20 factors that are related to the success of partnerships.[35] When you are deciding whether to enter into a new partnership, are designing an agreement or diagnosing a problem with an existing collaborator, **this list can serve as a handy checklist to pinpoint or prevent problems.**

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[35] See "Mattessich, P., Murray-Close, M., & Monsey, B. "Wilder Collaboration Factors Inventory," St. Paul, MN: Wilder Research (2001). To take the free online assessment for your collaboration(s), go to http://wilderresearch.org/tools/cfi/index.php.

- **Factors Related to the Environment**

  - History of collaboration or cooperation in the community
  - Collaborative group seen as a legitimate leader in the community
  - Favorable political and social climate

- **Factors Related to Membership Characteristics**

  - Mutual respect, understanding and trust
  - Appropriate cross-section of members
  - Members see collaboration as in their self-interest
  - Ability to compromise

- **Factors Related to Process and Structure**

  - Members share a stake in both process and outcome
  - Multiple layers of participation
  - Flexibility
  - Development of clear roles and policy guidelines
  - Adaptability
  - Appropriate pace of development

- **Factors Related to Communication**

  - Open and frequent communication
  - Established informal relationships and communication links

- **Factors Related to Purpose**

  - Concrete, attainable goals and objectives
  - Shared vision
  - Unique purpose

- **Factors Related to Resources**

  - Sufficient funds, staff, materials and time
  - Skilled leadership

Tips for Building Successful Partnerships

Partnership development takes work, commitment, organization and good communication skills. Below are a few tips to help you be successful.

- **Invest in Planning Time** —If adequate time is spent on strategy, you will identify the right partners making the development process less stressful and generally more productive. Do your homework and choose organizations that are likely to make a difference versus developing partnerships for partnership's sake.

- **Know your Goals** — Be clear on why you need a specific partner before you meet with them. You may discover new ways to share resources through the conversations, but it helps to come prepared with clear suggestions that are beneficial to both organizations.

- **Set Up a Tracking System** — Be sure that you have a system for assessing whether the partnership has a positive impact on your program goals and outcomes. It may be as simple as continuing your regular data collection and generating reports or you may need to gather new data. See what data your partner is already gathering. Can you share aggregate data instead of duplicating effort? By thinking ahead, you will be ready and able to report out to grantors and other stakeholders when needed.

- **Establish Clear Criteria** — Are there organizations or entities that pose a conflict of interest? Do they need to have an established record of performance in partnership with others? Do they need to share the same goals? Make sure you have decided your basic requirements for any partnership before you initiate meetings so you don't waste anyone's time.

- **Set a Plan** — Establish clear goals for the partnership. Who will do what by when and why? The person establishing the partnership may not be the person who maintains it day-to-day. Be clear about who will be responsible for specific roles during the partnership development process, the transition period during implementation and when the project is up and running.

- **Do Your Homework** — Make sure you know the history between your organization and the potential partner, if there is one. If there were issues, acknowledge them, and state your commitment to forging a new kind of relationship.

- **Give It Time** — The first meeting is to get to know the other organization, not necessarily to set the plan in motion. Tour their facility, ask questions, bring general information about your organization, how it is run and its successes. True collaboration takes multiple meetings and discussions, so set your expectations accordingly.

- **Document Agreements in Writing** — All collaborations should be memorialized in writing. This will keep you focused, help you assess the viability of the partnership along the way and establish a foundation should any of the key players leave the organization or program. Don't assume any grey areas will work themselves out later. If your partner doesn't have time to discuss and formalize the details of your agreement, consider how committed are they to its overall success. Similarly, don't open your discussions with the need for a contract. A partner job description is a helpful tool to get started and then work from there.

- **Check for Mutual Value and Understanding** — Listen to determine what is in it for your potential partner. State what you hear and check to see if they find that of value. If there is no value beyond listing a new partner on grant reports, the partnership won't last. In addition, vocabulary is critical. Don't assume you understand what they mean by "partnership," "collaboration" or other often misunderstood words like "outreach."

- **Evaluate During and After** — Check how it's going while the project is in progress. Use informal conversations and meetings to identify mid-course corrections. In addition, each year (or at the end of the project) ask, "How did we do?" at a wrap-up meeting or via surveys. Finally, don't forget to analyze the results. Did you meet your goals? Why or why not? What would you do differently next time? This sets the stage for another future project together and helps everyone reflect on important lessons learned.

Employee Volunteer Programs

Now, more than ever, private companies are interested in corporate social responsibility. Research has shown that **companies that are perceived to support the community are more appealing to consumers. In addition, employees that work for companies with more robust community engagement strategies, including employee volunteering, are more satisfied** and engaged with their work.

Despite (or maybe because of) the economic downturn, new corporate volunteer programs are popping up across the country. In the past, corporate support was offered mostly in the form of donations and grants to charities. Now, private industry is looking to donate time either in addition to, or instead of, cash.

Corporate (or employee) volunteer programs are looking for organizations with which to partner, and they have specific goals in mind. **Below are three things you need to keep in mind when considering a potential partnership:**

1. **Impact Focus** — Employee volunteer program managers are interested in generating concrete outcomes. They hope that the experience of volunteering will encourage greater teamwork amongst employees, will lead to enhanced skill development and will result in deeper job satisfaction and retention. They also hope the program will have an impact and advance the cause they are investing in. So, be prepared to discuss goals.

2. **Strategic Alignment** — Corporations are also keenly aware of how they use their valuable resources. They seek to form strategic partnerships that align with their own corporate culture, values and organizational objectives. They seek to build a portfolio of volunteer opportunities that match their brand. If their brand is about kids, they will look to help programs that benefit children. Sometimes, the focus is in helping the community refresh its economic vitality in general, which will make it a better place to do business. So, make sure you understand something about the company's brand and the initiatives they have supported.

3. **Efficiency** — Coordinators of corporate volunteer programs are also under pressure to make the most of their employee's time. Many are experimenting with different models of episodic, or short-term, volunteering that give the best "bang for the buck." Their employees are working under time constraints, and they want to be sure their investment is well spent. So be ready with a variety of ways volunteers can contribute and be willing to be flexible. At the same time, don't create opportunities that aren't going to help you reach your program goals.

If you are interested in working with employee volunteers, simply contact the local corporate offices in your area. Ask if they have a corporate social responsibility or employee volunteer program coordinator, and get in touch.

Remember This...

- Develop partnerships to help your team (both staff and volunteers) develop the capacity to solve their own challenges through a network of resources.

- Most people don't understand what effective volunteer program management entails. Take the time to build the bridges within your organization and educate everyone about your volunteers' successes.

- If your current group of partners isn't helping your program move ahead, forge non-traditional relationships that are mutually beneficial and bring more resources to the table.

- Companies that support the community are more appealing to consumers, and employees that work for them are more satisfied.

Chapter 10:
Webinar Slides and Notes

Continuous Learning and New Ideas

Note: Use this section to store webinar slides, notes and new ideas.

PDA Volunteer Engagement Toolkit Tools & Templates List
Electronic versions of the following tools and templates can be found on the USB thumb drive that accompanies this Toolkit.

1)   Return on Investment (ROI) Calculator (Excel)
2)   PA Aging Services Network Fact Sheet: The Value of Volunteers (Word)
3)   PA Aging Services Network Fact Sheet: Overview of Programs (Word)
4)   PA Aging Services Network Fact Sheet: Budget Abstract (Word)
5)   PA Aging Services Network Fact Sheet: Service Delivery System (Word)
6)   Program Self-Assessment Worksheet (Word)
7)   Volunteer Program Structures: Pros and Cons (Word)
8)   Volunteer Position Description Templates (Word)
9)   Job Re-Design Template (Word)
10) Skills Matrix (Word)
11) Recruitment Self-Assessment (Word)
12) Recruitment Plan Template and Strategic Messaging Platform (Word)
13) Volunteer Recruitment Ads/Postings Templates (Word)
14) Volunteer Recruitment, Screening and Placement Team Charter (Word)
15) Volunteer Risks by Role (Word)
16) Volunteer Screening Interview Questions (Word)
17) Volunteer File Checklist (Word)
18) Volunteer Interest Worksheet (Word)
19) Volunteer Placement Checklist (Word)
20) Risk Identification and Prioritization Spreadsheet (Word)
21) Learning Objectives Worksheet (Word)
22) Volunteer Handbook Table of Contents and Template (Word)
23) Volunteer Orientation Training Slides Template (PPT)

24) Scripts for Crucial Conversations with Volunteers (Word)
25) Teambuilding Ideas for Volunteers (Word)
26) Support Structure for Remote Volunteers (Word)
27) Anatomy of a Thank You (Word)
28) Levels of Engagement Worksheet (Word)
29) Leadership Skills Self-Assessment (Word)
30) 90-day Check-In Survey (Word)
31) Annual Volunteer Survey (Word)
32) Exit Interview (Word)
33) Volunteer Audit Team Charter (Word)
34) Volunteer Tracking Spreadsheet (Excel)
35) Volunteer Database Selection Worksheet (Word)
36) Volunteer Management Software Matrix (Excel)
37) Sample Partnership Pitch Letter (Word)
38) Partnership Agreement Template (Word)
39) Sample Fact Sheet for Partners (Word)
40) Sample Partnership Meeting Agenda (Word)
41) Partner Satisfaction Survey (Word)