

Volunteer Management

AUDIT

REVISED
EDITION

A self-assessment tool
to uncover what's right
and what's wrong with your
volunteer program...and what's next!

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Susan

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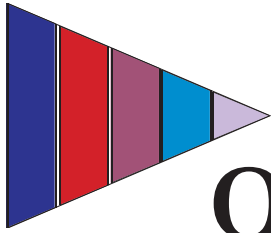
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Overview

Introduction

Volunteers comprise the unpaid personnel department of an organization. How aware is everyone of what it takes to support volunteer involvement successfully? How effectively are volunteers incorporated into the work of the organization? What are the strengths and weaknesses of the volunteer management system now operating? There are many reasons to conduct a volunteer management audit:

- ◆ Work contributed by volunteers affects and is affected by the entire organization, so it is as important to evaluate volunteer involvement as to evaluate any other component of an agency.
- ◆ Success in recruiting and retaining volunteers is dependent on effective support throughout the entire organization, so the Audit provides an opportunity to educate everyone about the elements of a successful volunteer program.
- ◆ Assessment of and planning for volunteer involvement is the responsibility of an organization's administrators and board of directors, as well as of the volunteer program staff—and this Audit can engage them all in the discussion.
- ◆ Identification of the strengths and weaknesses of the support system available to volunteers provides the starting point for volunteer participation to grow and develop.

When the Audit and subsequent activities are completed, everyone should be more informed about:

- ◆ What contributes to a successful volunteer program (EDUCATION);
- ◆ The status of the present volunteer effort (EVALUATION);
- ◆ The possibilities for the future (VISION);
- ◆ The next steps to take to move forward (A PLAN); and
- ◆ What support is needed from which parts of the agency (RESOURCES).

An additional value of implementing the Audit process is that it emphasizes the professional character and complexity of the volunteer program and of the role of the manager of that program. The tool

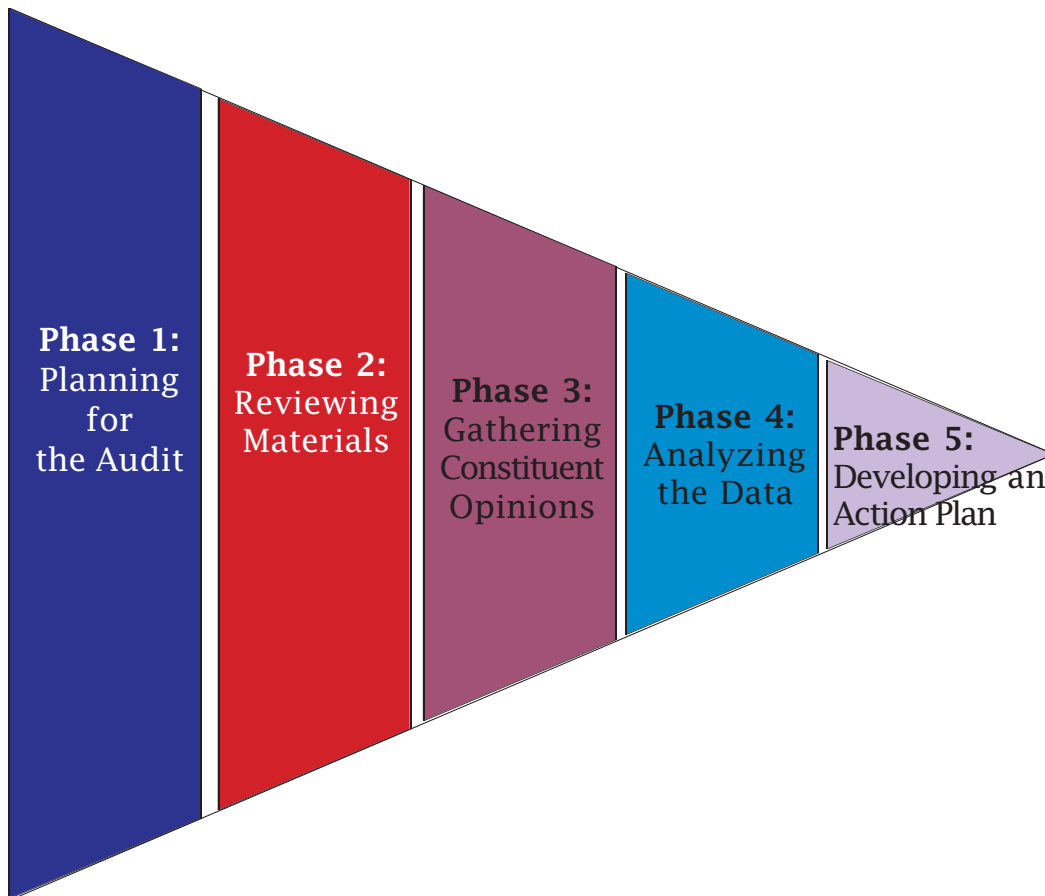
can be the basis of planning meetings, even a retreat, to discuss how to overcome barriers. Ideally, by involving many people in the assessment, there will be buy-in for needed changes.

What Is the *Volunteer Management Audit*?

The *Volunteer Management Audit* is a tool for analyzing the effectiveness of an organization's approach to and procedures for involving volunteers. It is an assessment of the current status of the organization's volunteer management effort. Its value lies in the recommendations made as a result of the Audit process and in any actions taken subsequently. It is above all a discussion starter. Its greatest value is to focus attention on issues affecting volunteers.

It must be stressed that this Audit is not an evaluation of volunteer accomplishments, effectiveness, impact or outcomes. These are very critical to identify and assess. After all, if volunteers do not accomplish anything of value, why have a program at all? But the goals and activities of every volunteer program are unique and so it is not possible to design a generic evaluation tool to do outcomes assessment. This Audit is specifically designed to examine the internal management practices of an organization—the standards necessary to support volunteers regardless of setting.

The *Volunteer Management Audit* has five distinct phases:



Phases 1, 2, 4, and 5 should be done as described here, but naturally with whatever adaptations best suit your specific needs. Phase 3, Gathering Constituent Opinions, offers the most options and variations. There are two different Audit Scoresheets provided, the first requiring more time and energy: Complete and Abbreviated. In addition, several possible approaches are suggested so that you can select the process that is of greatest value to your organization and is most feasible given your resources.

How Is this Book Organized?

In "Section I: Audit Instructions," you'll find a step-by-step guide to planning and conducting all five phases of the Audit, as well as ideas for variations or special uses of the process.

"Section II: Audit Tools" provides everything you will need to distribute to Audit participants. This includes both the Complete and Abbreviated Scoresheets and various handouts and worksheets. All of these items are explained in Section I, but have been grouped together for you in Section II to make them easy to photocopy.

For Whom Is the Audit Designed?

The Audit is primarily designed for nonprofit or government agencies involving volunteers in the delivery of service to clients or the public. While it can be a tool for agencies planning a new volunteer program (more on that later), it is aimed at evaluating the present status of existing programs.

The volunteer world includes many all-volunteer organizations, as well as self-governed associations such as auxiliaries, friends groups, fundraising committees, advisory councils and, of course, boards of directors. The Audit is not meant to be used for these all-volunteer situations. Its focus is agency-related volunteer programs, in which paid staff and volunteers work together to accomplish goals.

Volunteer program managers will immediately understand the value of the Audit and can use it personally to do a

A Special Note to Those Using the Audit as a Starting Point in Developing a Volunteer Program:

An agency just starting to explore the development of a volunteer program obviously cannot complete the Audit as written, since your scores would all be "1." But the standards statements under each element are actually a guide to what must be put in place to create a successful volunteer program. So, the Audit Scoresheet can be an excellent starting point for serious discussions.

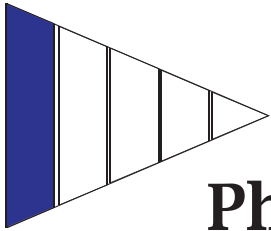
Go over each item and ask: "Do we have a plan for implementing this standard?" Your recommendations then would concentrate on any item receiving a "no" response. Spend the majority of your team's time on the elements of "Planning and Resources," "Staffing," "Volunteer Work Design," and "Volunteer/Employee Relationships."



confidential assessment of how much support their program receives from their organization. However, as with a financial audit, the issues raised in this process are meant to be considered by the top administrators of an agency—the decision-makers and policy-setters who do not always spend the necessary time thinking about volunteer contributions. That is why the Audit’s greatest value is as a discussion starter. If the executive director, the board, department heads and others begin to engage in serious analysis of the support they give to volunteers, results are bound to occur.



Section I: Audit Instructions



Phase 1: Planning for the Audit

Determine Your Resources

The *Volunteer Management Audit* is neither a quick activity nor a quick fix. If you have never done anything like this before, it will be time-consuming to do it well. Of course, the goal is to expend the effort to gain important benefits. Keep in mind that, once you've conducted the Audit, you will have a baseline against which to assess the volunteer program in the future. Not only will you have an action plan against which to measure results, but you will have collected key documents and other program materials in such a way as to be able to re-examine them with less effort the next time.

What resources do you need?

Time. Depending on the size of your organization and on the size of your volunteer program, what is the balance between the time spent and the return on that investment? Can you yourself carve out enough time to lead the process well? What about the various people whom you will need to involve in the process, both volunteers and employees? How much time can they give you?

Timing. When can you conduct the Audit so that it is least disruptive to the work of the organization? Is there a slow season during which people will be better able to give you a few concentrated hours? Might you need to ask people to work on this in the evening or on a weekend, outside the hustle and bustle of a regular service day?

Access. Whom can you involve simply by asking and who may require some special effort? Will you be able to involve top administrators or board members, as they are important to the end result?

The person to whom you report directly. Is this person (or the board, if you're the executive director) supportive of the Audit process? Is it clear to her or him that this important activity will occupy your time for a concentrated period?



It is critical to obtain the endorsement of top management, since the Audit is only worthwhile if there is intent to take action on what is discovered through the process.

How Long Will This Take, Really?

Of course you know that the answer to how long it will take to conduct the Audit is: It depends.

And it does depend on a wide variety of factors unique to your setting. However, as a guideline, here are educated estimates of the time each Phase might take:

Phase 1: Planning for the Audit

If everything is in place without any obstacles, this can take as little as 2-3 hours. If there is a lot of groundwork to be laid to get buy-in, it can take more.

Phase 2: Reviewing Materials

See pages 9 to 12 for instructions on doing a Materials Review. The time it will take to gather the materials is the wild card here. If the necessary documents are already in a central place and well-organized, the first step is easy. But if the documents are scattered or have to be created, this step may take as much as several days. The good news is that, from a volunteer management perspective, all these things need to be close at hand for daily operations and so the Audit may provide great motivation to bring the office up to speed!

One factor is the age of the program and whether or not the current manager is the one who developed all the materials in the first place. If you are re-creating “history,” it will obviously take longer. But, again, consider the positive outcome. Then commit to maintaining the document base/archive to be current from then on.

Once the materials are assembled, the time to do the review should be about 3 hours.

Phase 3: Gathering Constituent Opinions

This is the phase with the most choices, including a complete and an abbreviated version of the Audit Scoresheet. See the discussion of the options to estimate the timeline.

Phase 4: Analyzing the Data

Depending on the amount of data to assess, this ought to take one or more 3-hour sessions, plus time to write a final report.

Phase 5: Developing an Action Plan

One or more three-hour sessions.

Gain Support for Conducting the Audit

It is expected that, most of the time, the Audit will be undertaken through the leadership of the person responsible for coordinating volunteers in an organization. Depending on the circumstances, the Audit can also be suggested through a consultation by a Volunteer Center or other technical assistance provider for an agency seeking to strengthen its volunteer efforts.



The Audit has been produced with a top-level audience in mind, so its look and tone are professional. When someone reads this material, its relevance to decision-makers ought to be evident. But the challenge is to get the attention of executives, since one of the concerns in the volunteer field is the relatively low-level management position many volunteer program leaders hold. One not-so-hidden-agenda of the Audit is to demonstrate why executives need to take a greater interest in volunteer involvement.

Consider requesting the chance to make a formal presentation at a face-to-face meeting with your agency's executive director or other top managers. Present your case for conducting the *Volunteer Management Audit* and—perhaps even more important—for implementing the findings afterwards. Explain the time involved and your need for access to representative staff members. Do not *expect* resistance. Even if there is no precedence for something like this, approach your request with a positive attitude. After all, it is good management practice to want to assess a program. You may find that the request is greeted with some surprise at first, but that your initiative ultimately brings you increased respect for wanting to do the Audit.

Try some of these ideas:

- ◆ Remember to stress that the purpose of the Audit is to strengthen the way the agency involves volunteers so that services can thrive as you move into the future. This is not a "report card"; it's a strategic planning tool.
- ◆ If you have a volunteer program advisory committee, have them present the idea to the executive director on behalf of the program. If there is no formal advisory group, you can still enlist one or two long-time volunteers to accompany you to the meeting with the executive.
- ◆ If your agency conducts regular or periodic evaluations of other aspects of its service delivery, use that momentum to suggest this more intensive look at the volunteer program in particular.
- ◆ If it is your immediate supervisor who must first be convinced, use the same techniques at the middle management level. Try to be the one to make the presentation higher up, or at least to accompany your supervisor. If this is not workable, give the person who will represent you a "talking points" list in preparation for being an advocate for the Audit concept.
- ◆ Use the "Teaser Checklist" on the next page to spur interest and curiosity in respondents, opening the door for you to introduce the value of the Audit.

If You Are the Top Administrator

Some of the comments on this page may be off-base if you are reading this introduction as the Executive Director or other key leader of this organization. If you are already supportive enough to be the one initiating or urging the Audit process, bravo! Please forgive the various allusions to less-supportive bosses. Unfortunately, however, it is a fact of the volunteer world that too many volunteer program managers must continually "educate up." So few administrators have ever received training in volunteer administration that even outstanding agency heads can be completely unaware of what they are not doing right when it comes to engaging the community as volunteers.



Teaser Checklist:

Are We Doing the Best We Can with Volunteer Involvement?

Test your understanding of our volunteer involvement by indicating your opinion next to each item below:

Y = Yes

N = No

? = I don't know

Our organization...

- Has access to highly skilled volunteers as on-call consultants or advisors.
- Lists current volunteer opportunities with free Internet registry sites.
- Participates in local National Volunteer Week celebrations.
- Has a volunteer corps that reflects the diversity of our community.
- Knows what volunteers are saying about us to their friends.
- Provides training for staff who work with volunteers.
- Is tapping into the new trends in volunteerism such as singles and families as volunteers, online service (virtual volunteering), and student service-learning.
- Invites financial donors to participate as volunteers to increase their long-term loyalty.
- Fulfills legal requirements for screening volunteers.
- Benefits from national and local days of service like "Make a Difference Day."
- Is implementing the best practices of volunteer management.
- Sees the connection between direct-service volunteers, fundraising volunteers, board members, student interns, loaned executives, and other people who contribute time and talent to us without going onto our payroll.
- Gets and uses input from volunteers on how we might improve our services.
- Can create useful assignments for volunteers who offer us unexpected skills.
- Has a vision for what we would like the volunteer program to look like in 10 years.

Do these questions make you wonder if you are maximizing volunteer involvement on behalf of your agency? They should! Volunteerism is all about tapping the community to help meet agency needs. The only limits are imagination and not providing effective support once volunteers have been recruited. (If you answered N or ? to more than half the questions, a *Volunteer Management Audit* may need to be in your future!)



Sometimes it is easier to gain support for the Audit if it isn't viewed simply as your idea but instead as good practice accepted by others in the field. This is a great way to make use of a local professional network of volunteer program managers such as a DOVIA (Directors of Volunteers in Agencies). Work collectively with the other DOVIA members to introduce the Audit to all your executives at the same time. Here are some possible techniques:

- ◆ Get endorsement of the Audit from one or more respected agency executives who are willing to give public testimonials (written or verbal) about its value. You can approach the first agency by challenging it to "pioneer" or "experiment" with the Audit, thus helping you strategize how to explain it to others.
- ◆ Get on the agenda of a local meeting or conference specifically for executives and make a brief presentation about the Audit tool. Or, at least ask for the opportunity to distribute written information there.
- ◆ Invite your executives to a short breakfast meeting to explain the Audit—possibly something that might be done as a community-wide project. This has the added benefit of giving directors of volunteers a chance to accompany their administrators to an informative event.

See the last chapter in this Section to get more ideas for how the Audit process might be used by an association or Volunteer Center to stimulate interest in good volunteer management in a city or region.

Be Alert to Real Feelings

It is important to note that the subject of volunteer involvement may elicit a wide range of feelings from the paid staff, and not necessarily positive ones. The issue of tension between employees and volunteers is very real. The Audit is designed to surface and help address any situation in which teamwork is not occurring well, but it can only do this effectively if people are willing to share their opinions honestly. This means an environment of trust.

You will need to decide whether or not your organization welcomes open discussion and dissent, and whether there are unwelcome consequences to expressing concerns. If you sense any hostility or tension, try to deal with it before doing the Audit. Be completely open yourself as to why and how the Audit will be done—and what the subsequent results will mean in practice. Explain the purpose clearly and with advance notice, perhaps through meetings or a special memo. Stress that the point is to grow stronger, not to lay blame. Enlist the most neutral or trusted people in helping you spread the word. Inject some fun; this is not, after all, a *tax* audit! Maybe introduce the Audit with some group event that includes snacks (always a way to win friends).

If you cannot overcome people's unwillingness to give honest feedback publicly, then you may need to develop a more anonymous process for completing the Audit. For example, you can ask individuals to complete the Scoresheet independently and return it without personal identification. Then a different group of people can discuss the results.



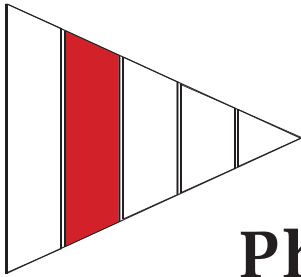
Selecting the Audit Team

A successful Audit will engage participants from all the constituents of a volunteer program in making the assessment and—even more important—in developing an action plan for improving things. Consider the many people with a stake in the volunteer program:

- ◆ Currently-active volunteers: in different assignment areas, representing diverse demographic characteristics, and with varying lengths of service
- ◆ Line staff who work with volunteers: different professions and level of experience
- ◆ Management-level staff
- ◆ Clients or consumers who are affected by the work of volunteers
- ◆ Top executives and the board of directors (themselves volunteers)
- ◆ Possibly colleagues in other volunteer programs in the community or members of the public at large
- ◆ Former volunteers whose reasons for leaving may be relevant
- ◆ The leader of the volunteer program

You can involve quite a number of people in the process at different stages. This is important for several reasons. First, it assures that you are getting input from many perspectives and therefore validates the findings of the Audit. Second, everyone who participates will feel some ownership of the outcome, which is vital to making necessary changes identified through the Audit.

A small group of volunteers and paid staff should be involved with you all the way through the Audit. In a small organization, this will be the “Audit Team” doing all the activities described here. In a larger organization, these people will work with you to plan and implement the whole process, but other representatives of the constituents listed above can be invited to help with various parts of the Audit. Each of the Phases requires either a group meeting, an assessment team, or a planning committee (all described in the next chapters). Think about how asking for input from many people also gives you the chance to educate everyone about volunteer management principles.



Phase 2: Reviewing Materials

Just as in a financial audit, documents and records provide evidence of what has been happening during the period being examined. A volunteer program indeed has a “paper trail” (even if today much of it is on computer). Gather together the first seven categories of documents listed in the left-hand column of the chart on the next page. Then produce whatever materials listed in category eight are relevant to your situation. Add anything else that you feel presents documentation of volunteer program activities and accomplishments.

Depending on your situation, the age and complexity of your program, and the time available, you can choose to do either a simple *compilation* or a more detailed *analysis* of your materials. Regardless of which option you select, you will need to physically go and assemble all the materials, which may require some hunting.

If you are already organized to the point of having everything at your fingertips, you ought to take credit for your efficient administrative procedures. For others (particularly anyone who inherited a program from someone else and may never have actually looked at all the documents listed below), this is a worthwhile exercise in and of itself! The good news, of course, is that the Audit provides the perfect excuse to make time to assemble what really needs to be centralized in one spot anyway. After this, you will have your program archive and can keep it current.

Option 1: Compilation

You can choose simply to produce the materials identified in the left column below and check the appropriate box for each section:

- Fully provided.
- Partially provided. (Explain what's missing and why.)
- Not available. (If this box is checked, it's important to answer: *Why couldn't we assemble this information?*)

Option 2: Analysis

Alternatively, you can choose to do a thorough review in which you complete the left column and then convene a group of constituents (see previous Phase) to discuss the analysis questions listed in the right column. Close examination of these documents can provide almost as much information about volunteer program operations as the Audit questions that follow.



1. A list of all existing volunteer positions/assignments.	Analysis Questions
<p>Highlight any assignment newly created within the past 12 months. Note, also, any assignment eliminated or substantially changed during the past 12 months.</p> <p><input type="checkbox"/> Fully provided.</p> <p><input type="checkbox"/> Partially provided. (Explain.)</p> <p><input type="checkbox"/> Not available. (Why?)</p>	<ul style="list-style-type: none"> • Are we responding appropriately to the changing needs here? • Do volunteer positions reflect a diversity of skill levels? • Are we willing to eliminate roles no longer of primary usefulness?
2. A list of all departments or units in the organization, noting:	Analysis Questions
<p>Where volunteers are currently active. Where there are currently no volunteers and why.</p> <p><input type="checkbox"/> Fully provided.</p> <p><input type="checkbox"/> Partially provided. (Explain.)</p> <p><input type="checkbox"/> Not available. (Why?)</p>	<ul style="list-style-type: none"> • What are the reasons volunteers are not active in some areas and are these reasons valid? If not, is the issue staff resistance or the need for better recruitment? • Are volunteers working in professional roles as well as clerical ones? • Are volunteers assigned to managers as well as to line staff?
3. A set of all existing volunteer position descriptions (or at least a good sampling).	Analysis Questions
<p>Arrange these in chronological order, from oldest to newest. (Note: it is good practice to date each description at the bottom, noting when it was created and when it was last re-assessed.)</p> <p><input type="checkbox"/> Fully provided.</p> <p><input type="checkbox"/> Partially provided. (Explain.)</p> <p><input type="checkbox"/> Not available. (Why?)</p>	<ul style="list-style-type: none"> • Are all volunteer positions described in writing? If not, why not? • Are these complete? (Do the descriptions indicate: purpose, responsibilities, necessary time commitment, training plan, lines of supervision or staff liaison, qualifications needed, and benefits to the volunteer?) • How current are these descriptions?



4.A “snapshot” report on volunteers active right now, with the following information:	Analysis Questions
<ul style="list-style-type: none"> • How many • Percentages by age range • Percentages by gender • Percentages by race or ethnicity • Occupations held elsewhere (present or past, if now retired) • Percentages by length of service as a volunteer here <input type="checkbox"/> Fully provided. <input type="checkbox"/> Partially provided. (Explain.) <input type="checkbox"/> Not available. (Why?)	<ul style="list-style-type: none"> • How diverse is our volunteer corps now? • Are we satisfied with this diversity?
5. Goals and objectives for the current year.	Analysis Questions
<input type="checkbox"/> Fully provided. <input type="checkbox"/> Partially provided. (Explain.) <input type="checkbox"/> Not available. (Why?)	<ul style="list-style-type: none"> • Are there items relating to the quality of service and to the impact on the work of the agency, as well as on the number of volunteers or hours?
6. Volunteer program reports for the past year.	Analysis Questions
<input type="checkbox"/> Fully provided. <input type="checkbox"/> Partially provided. (Explain.) <input type="checkbox"/> Not available. (Why?)	<ul style="list-style-type: none"> • Do these truly reflect the activity and impact of the volunteer program?
7. Print out of Agency Web site information related to volunteer involvement.	Analysis Questions
<input type="checkbox"/> Fully provided. <input type="checkbox"/> Partially provided. (Explain.) <input type="checkbox"/> Not available. (Why?)	<ul style="list-style-type: none"> • How visible are volunteers throughout our Web site? • Is it easy for someone to learn how to volunteer with us on the site? • Can prospective volunteers express interest or even apply online? • Do we post information about volunteer position vacancies or skills needed, and keep it current?

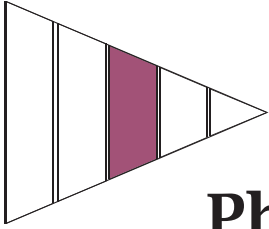


8. The following items also reflect important volunteer program procedures and activities, though not all are applicable to every organization. Check those you can provide.	Analysis Questions
<input type="checkbox"/> Volunteer Program Budget <input type="checkbox"/> Volunteer Manual <input type="checkbox"/> Policies and Procedures <input type="checkbox"/> Most recent recruitment activity <input type="checkbox"/> Agency annual report (Are volunteers mentioned?) <input type="checkbox"/> Date and agenda of last volunteer orientation <input type="checkbox"/> Date and agenda of last volunteer training session <input type="checkbox"/> Most recent volunteer recognition activity <input type="checkbox"/> Volunteer application form <input type="checkbox"/> Confidentiality statement <input type="checkbox"/> Background check confirmations <input type="checkbox"/> Computer records <input type="checkbox"/> Accident reports	<p>In each case, ask:</p> <ul style="list-style-type: none"> • Do we have it? • If "yes": Is this satisfactory or does it meet our needs? • If "no": Do we need it?

After the Review

Make all of these materials available upon request to any of the Audit Teams working on any of the Phases of the Audit, especially those completing the Audit Scoresheets (see next chapter).

Having done the work of compiling everything, start an archive for these documents, with an index. Make a commitment to adding new materials as they are developed. On an annual basis, review everything to make sure key materials are still current, accurate, and relevant. If not, revise!



Phase 3: Gathering Constituent Opinions

The heart of the *Volunteer Management Audit* process is the completion of the Audit Scoresheet, which is organized by the twelve elements of a successful volunteer program:

Planning and Resources

Staffing

Volunteer Work Design

Recruitment

Interviewing and Screening

Orientation and Training

Volunteer/Employee Relations

Supervision

Recognition

Recordkeeping and Reporting

Evaluation

Volunteer Input

Within each element, the Scoresheet gives a series of assessment statements expressing basic standards for volunteer involvement, based on generally accepted practices in the field of volunteer administration. Although each element requires a distinct set of decisions and actions, all are interrelated. This is why you will find some overlapping items as you proceed through the assessment statements. Also, some program tasks could be categorized under more than one management element.

In recognition of the fact that some organizations may not be able to administer the full Audit Scoresheet because of the time it requires, there are two versions in this book. Both are found in Section II: Audit Tools, completely ready for you to print out and duplicate for distribution to your Audit Teams:

The **Complete Audit Scoresheet**—with full standards statements. (See Section II, pages A1 to A40.)

The **Abbreviated Audit Scoresheet**—with single-sentence statements to rate, derived from the complete version. (See Section II, pages B1 to B11.)

The Sequence of Steps

Here are the steps to complete the process of gathering constituent opinions, regardless of which version you select. More information on each step follows.



1. Read this entire book carefully and decide which options you feel will work best for your situation.
2. Select your Audit Teams and prepare them.
3. Copy enough Audit Scoresheets for everyone.
4. Conduct the Audit.
5. Tally and compile the scores.
6. Hold the scoring assessment meeting.
7. Invite additional members to develop an action plan.
8. Implement the action plan.

Audit Teams

Form Audit Teams of three members per team. Ideally, each team should consist of one administrator, one direct-service volunteer and one front-line employee. For a small agency, one team may suffice. If it seems more effective, the team could add one or two people, specifically another volunteer or the volunteer program manager.

For larger organizations and to involve more people in the assessment process, you can have several Audit Teams working concurrently to administer the Audit. Teams can have mixed membership as above, or you can have a team of administrators, one of volunteers, and one of employees, who can compare their various perspectives later. In larger agencies with several departments, be sure to mix and match team members so that you get the full perspective.

The volunteer manager can be part of a team, can observe the process, or can withdraw until the analysis phase.

The instructions for administering the Complete *Volunteer Management Audit* Scoresheet follow below. Instructions for the Abbreviated version of the scoresheet begin on page 15. In both cases, the basic information has been repeated on the actual Scoresheet so that your Audit Teams will have the instructions in front of them when you distribute copies.

Scoresheet Instructions: Complete Version

As already noted, the Complete Audit Scoresheet is organized by the twelve elements of a successful volunteer program. Within each element, there are a series of assessment statements expressing basic *standards* for volunteer involvement, based on generally accepted practices in the field of volunteer administration. The statements are arranged as choices 1 to 4, with 1 being the absence or the lowest level of action, and 4 being the most sophisticated or complex action.

Each Audit Team works with a single Audit Scoresheet, selecting one response to each item through discussion and debate among the three team members. Allow two to three hours for this session. Although you may have to “sell” the two-to-three hour timeframe, this is the meat of the process and requires time for useful debate.

Remember that the Audit is designed as a generic tool to apply to the widest number and types of organizations. It is not expected that many organizations will assess themselves at the “highest” (4) level



for every item—nor is that level appropriate for all situations. The important thing is to understand, for each item, why your organization is at a particular level and whether this is the correct level for you.

Because there is so much variation in the way organizations operate, one or more standards either may not be applicable to you or may be handled in ways other than options 1, 2, 3 or 4. For these situations, the response "none of the above" is provided as an alternative, but the Audit Team must insert a statement explaining this choice of response.

Encourage each Team to keep notes of their discussion of key items. These will help in the analysis later.

One issue that may arise is: "How do we know the answer to this?" The Team may have to refer to the Materials Review (see page 9) to look at samples of policy statements, job descriptions, etc. It may even be necessary to do some investigative research by asking others in the agency.

Scoresheet Instructions: Abbreviated Version

The Abbreviated Audit Scoresheet is divided into the same twelve elements of volunteer management as the Complete Audit Scoresheet, lifting out the assessment statements expressing basic *standards* for volunteer management and presenting them as a list. While most of the standards statements are the same as in the complete Audit, some are reworded or combined. The descriptions of the "12 Elements of Volunteer Management" have been lifted out and provided in Section II page C-1 as an optional hand-out to accompany the shortened Scoresheet.

Form Audit Teams as described on page 8 and 14. Tell the Team to rate the organization's current level of achievement of each each statement, from their perspective. They should score each item from 1 to 5: "1" meaning not at all or only minimal achievement; "5" meaning completely or outstanding performance. They can use the column on the right for recording general notes about each element as they work through the statements.

If the teams do not completely understand a standards statement, they can look at the corresponding section on the Complete Audit Scoresheet to see more detail. As with the complete Audit, the teams may need to refer to the Materials Review (page 9) or speak with various knowledgeable people as research.

Point of View

For both version of the Scoresheet, there are a number of perspectives from which you can ask respondents to assess performance level. It is up to you which points of view have the most meaning in your setting. Here are your choices:

- ◆ Tell everyone to assess the standards statements purely from their own personal experience with the volunteer program. So they can respond for their unit only, even if they are not sure it is the same throughout the agency.



- ◆ Let everyone respond as they think an objective observer might answer, given a broad perspective of the agency. So, for example, even if one Audit Team member had a bad experience in relation to one of the standards, if s/he knows that others in the agency have fared better, s/he should answer the way it seems the standard is upheld on average.
- ◆ Ask everyone to respond to the Audit from the point of view of a volunteer: What do they think volunteers know or experience in relation to the standard?
- ◆ You can even allow each Team to decide their point of view for themselves, but to make a note on their Scoresheet as to which they selected. It is critical that you know what their perspective was when you assess the responses.

Some Variations

You can be creative in adapting the Audit process just outlined, both with the complete and the abbreviated versions. Here are some ideas:

- ◆ Give each team member a separate Audit Scoresheet and begin with everyone completing the assessment individually. Then have the three team members compare their responses, discussing and debating each ranking until they reach consensus for one "team score." This method is quite workable, but it means that each team member must spend from 30 to 60 minutes alone to do the Audit and then still must spend two to three hours in the group session to reach consensus.
- ◆ Deal with one element at a time, perhaps over several months. However, it may be best to cluster related elements, since both the rankings and the implied action plans resulting from them are interrelated. Some clusters might be:

Volunteer Work Design + Recruitment

Volunteer Work Design + Volunteer/Employee Relations + Supervision

Evaluation + Recordkeeping and Reporting

Orientation and Training + Supervision + Evaluation

Recognition + Volunteer Input

Volunteer/Employee Relations + Evaluation + Volunteer Input

Evaluation + Staffing + Training and Orientation



A Special Note to Those Using the Audit as a Starting Point in Developing a Volunteer Program

Use the abbreviated version of the Scoresheet. The standards statements under each element are an excellent guide to what must be put in place to create a successful volunteer program. Go over each item and ask: “Do we have a plan for implementing this standard?” Your recommendations then would concentrate on any item receiving a “no” response. Spend the majority of your team’s time on the elements of “Planning and Resources,” “Staffing,” “Volunteer Work Design,” and “Volunteer/Employee Relationships.”

Tallying the Scores: Complete Audit

Each Audit Team will be writing the level number of their response to every standard into the boxes in the right-hand column of the Scoresheet. At the end of each section there is a space to total up the score for that Element. The Audit Team(s) may be satisfied simply by scoring each individual statement without tallying up each category or comparing it to the other categories. After all, the importance of the process is the discussion and recommendations, not the aggregate “score.” On the other hand, some agencies may find it useful to compare elements.

At the end of the Scoresheet is a tally page, with instructions to the Audit Team. The Element scores should be transferred to the tally sheet and divided by the number of standards under each Element (already entered for you on the tally sheet) to obtain the average score.

Any “None of the above” response should be noted as shown and the equivalent number subtracted from the equation used to obtain the average score. For example:

Element #1: Planning/Resources has 13 standards to score and has a total score of 26

$$\begin{array}{r} \text{Total Score} \\ \underline{37} \end{array} \div \begin{array}{r} \text{Number of Standards (13)} \\ \underline{13} \end{array} = \begin{array}{r} \text{(Average Score)} \\ \underline{2.85} \end{array}$$

or, if there are any “None of the Above” responses:

$$\begin{array}{r} \text{Total Score} \\ \underline{30} \end{array} \div \left(\begin{array}{r} \text{Number of} \\ \text{Standards} \\ \underline{13} \end{array} - \begin{array}{r} \text{“None of the above”} \\ \text{Responses} \\ \underline{2} \end{array} \right) = \begin{array}{r} \text{(Average Score)} \\ \underline{2.72} \end{array}$$

If more than one team has administered the Audit Scoresheet, all responses should be collated and scored as an aggregate. However—particularly if you have formed teams of all volunteers, all staff, etc.—it may also be useful to report the scores of each team separately, in order to compare perspectives.

Do not ignore notes made by the Teams during the process! These should be compiled and reported as written, clustered under each element.

It may also be helpful to chart the scores on a bar graph for a visual comparison. Continuing to use Element #1 as an example, if the total score is 37, divided by the number of standards, 13, then the Average Score for Element #1 is 2.85. On the bar graph provided, shade in the Planning and Resources row up to approximately 2.85, like this:



COMPARISON BAR GRAPH							
Average Scores							
Elements	1.0	1.5	2.0	2.5	3.0	3.5	4.0
#1: Planning Resources							

When all the average scores have been graphed, high scoring elements and low scoring elements will be evident.

Compiling and reporting the Audit Scoresheet tally is a clerical task. It can be done by anyone. Spend valuable team time on the analysis of the process (see next chapter).

Tallying the Scores: Abbreviated Audit

The Audit Team(s) can add up the total of their ratings for each element as they work through the Abbreviated Audit Scoresheet. On the last page is a chart for compiling the “Grand Tally.” Transfer the scores and consider “where you are” for each element. The higher the number, the more advanced the level of accomplishment, although you should exercise the same caution in assuming that a “5” is automatically better as a response for your organization. Your circumstances may require a different approach.

	Your Score	Highest Score Possible
Element 1:	___	55
Element 2:	___	30
Element 3:	___	35
Element 4:	___	35
Element 5:	___	15
Element 6:	___	30
Element 7:	___	25
Element 8:	___	25
Element 9:	___	25
Element 10:	___	20
Element 11:	___	40
Element 12:	___	20
Total Tally:	___	<i>out of a possible: 355</i>

Remember, however, that the Working Notes may be the most important part of the Abbreviated Audit so be sure to spend as much time examining those as necessary.



Thank Your Teams

Even though the Audit is only half finished at this point, it is an excellent time to say thank you to everyone who has helped you up to now. Whether the same Audit Teams are continuing to Phase 4 or you are planning to invite a new group of people for the analysis and action planning, take the opportunity to celebrate having come this far.

Here is a sample thank you note that you can personalize at any point in the Audit process. It's always best to write these individually and avoid the tone of a form letter.

A word of thanks...

Dear _____:

Thank you so very much for your contribution as a member of our Volunteer Management Audit Team! We know that this process took time out of your busy schedule, and we want to assure you that it was time very well spent.

This formal assessment of the way in which we work with volunteers will produce strategic plans for strengthening our services. While we have a volunteer program staff [fill in actual title] to recruit and coordinate volunteers, in truth every person in this organization is part of the team that supports, trains, and thanks the members of the community who choose to share their talents here. Even experienced volunteers must help welcome newcomers. So your input into the Audit was vital!

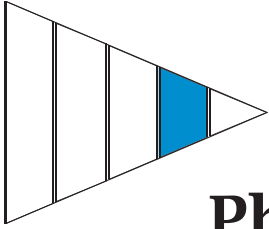
We hope you benefited from this opportunity, too. Perhaps you were introduced to some of the complexities of volunteer administration or felt recognized for your past successful teamwork here. If you wish to discuss any aspect of the Audit or have other ideas for ways we can evolve community service, please know that my door is always open.

In appreciation,

Director of Volunteer Services [actual title]



Phase 3: Gathering Constituent Opinions



Phase 4: Analyzing the Data

Moving from Information to Useful Analysis

When your Audit team has provided your organization with the completed Scoresheet Tally, you have taken the first step in becoming aware of the areas of strength and weakness in the volunteer program. The next step is to invite additional people to join the Audit team in the assessment of the Scoresheet results. This assures that those who administered the Audit do not rationalize their rankings. You may want to involve an objective outside facilitator to assure the most productive discussion. Contact your local Volunteer Center or local association of volunteer administrators.

This analysis is the most important step in the entire process. It is critical that everyone has an opportunity to comment on the findings of the Audit and to discuss concerns and/or recommendations openly.

The assessment team should represent the key leadership of your organization. This group should have no more than seven to twelve participants because this is a strategy planning meeting, not a workshop. Some participants might include:

- ◆ The executive director
- ◆ The board president or chair
- ◆ The volunteer program manager
- ◆ One or more key direct-service volunteers
- ◆ A department head or unit supervisor

Consider whether you may want these same people to continue working as a group after the Audit process to help you develop and implement strategies for change.

Schedule at least a two-hour session with your selected assessment team to discuss the Audit scores.

Ask the highest-ranking person in the meeting to report on the results of the Audit. Use a prepared flipchart or overhead of the tally sheets and/or bar graphs. Remind everyone that the goal of the Audit was not necessarily to score a “perfect 4,” but to analyze whether the organization is succeeding in obtaining the level of volunteer involvement it wants. Ask the group (especially those who were not part of the Audit team) to give their overall reactions to the Audit results. Use questions such as the following:



- Were there any surprises?
- Were some suspicions confirmed?
- Were some positive things confirmed?
- Were there differences of opinion among the Audit team(s) based on whether the evaluator was a volunteer or an employee? By any other characteristic?
- What obviously needs attention for improvement?
- Who should be responsible for next steps?

You'll find a handout with a list of such Critical Questions in Section II: Audit Tools on page E-1. In addition, keep alert for these possible issues:

- When the team develops its priorities, is it recognizing the interconnection of the various volunteer program elements? For example, if it ranks "Recruitment" as an area needing attention, is there also concern expressed for "Volunteer Work Design" and some of the "Planning" standards? It's important to understand the connection and the team may need some education as to why.
- Is the team assigning proper responsibility for the next steps? For example, is everything being expected of the volunteer program manager or will the work be shared by all those in the agency who can truly help?
- Do the future plans of the agency as a whole take into consideration current trends and issues in volunteerism? The Audit may raise the team's consciousness about the evolving definition of "volunteer" and they may want to tap into new types of volunteering.

Reporting the Assessment

After all the data gathering and discussion, it is time to write a summary report with the results. Of course this an important planning tool for the leader of the volunteer program. It should also be critical reading for the organization's executives. But there are other ways to make the most of this report:

- ◆ Share it with anyone who participated in the Audit process, along with your thanks for their contribution and an invitation to give you any further suggestions—or any offers of help with the next steps. This is not only good manners, but it confirms your initial promise that the process is indeed open, honest, and shared.
- ◆ Distribute it to department heads, board officers, and other key agency personnel, even if they did not themselves participate in the assessment process. Again, invite their comments and suggestions. Doing this demonstrates your belief that the volunteer program is an organization-wide responsibility.
- ◆ Use the report to schedule meetings with those departments, units, or staff members for which the Audit results identified areas needing improvement. Be careful not to lay blame, but to stress the importance of growing stronger.



Phase 4: Analyzing the Data

- ◆ Summarize the report and send it (can be by e-mail) to all volunteers, since the whole point of the Audit is to improve the way the organization works with them. Let them know that a copy of the full report is available to anyone interested, and solicit any additional comments they may want to express.
- ◆ In your next recognition event, make use of the highlights of the assessment to applaud anything that was found to be outstanding.

To give you an example of how to approach writing your report, see the “Model Analysis” for the fictional “Hometown Agency” starting on page 24.

More Thank You's

Once again, the completion of the analysis is a great opportunity to acknowledge the contributions of the people who gave you their time and good thinking.



MODEL ANALYSIS

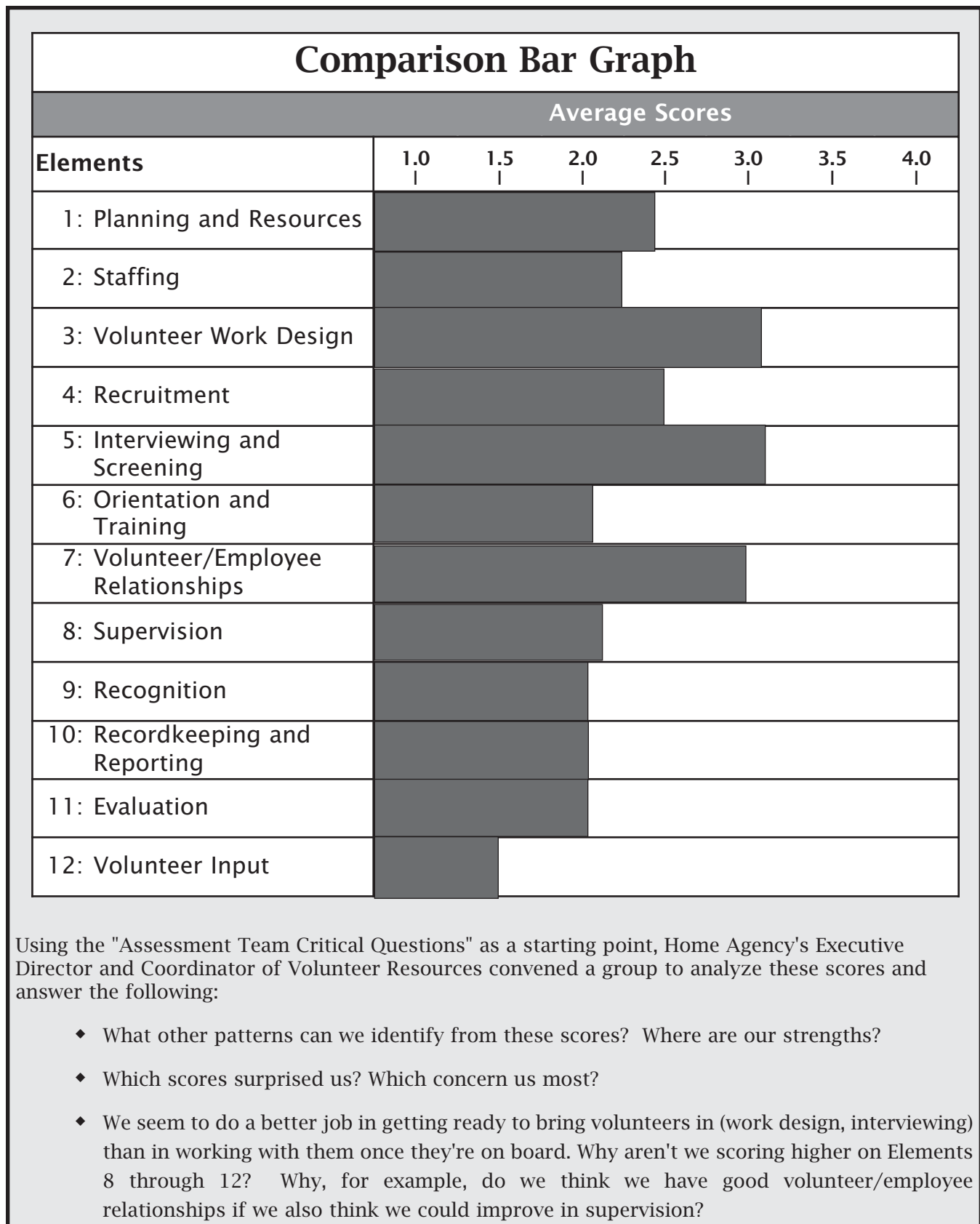
Hometown Agency

After completing the full Audit Scoresheet, the Audit Teams at Hometown Agency submitted the following results, along with other notes of their discussion on specific standards statements.

Average Scores	Comments
<p>Element #1: Planning/Resources</p> <p>Total Score Number of Standards Average Score <u> 32 </u> ÷ <u> 13 </u> = <u> 2.46 </u></p>	<p>We realized that we have never really defined who we consider to be a volunteer, nor what our "vision" is, even though we have an infrastructure in place.</p>
<p>Element #2: Staffing</p> <p>Total Score Number of Standards Average Score <u> 20 </u> ÷ <u> 9 </u> = <u> 2.22 </u></p>	<p>We've been trying to get away with less than adequate staffing.</p>
<p>Element #3: Volunteer Work Design</p> <p>Total Score Number of Standards Average Score <u> 22 </u> ÷ <u> 7 </u> = <u> 3.14 </u></p>	<p>In general, we do a good job of defining volunteer work.</p>
<p>Element #4: Recruitment</p> <p>Total Score Number of Standards Average Score <u> 20 </u> ÷ <u> 8 </u> = <u> 2.5 </u></p>	<p>We're concerned about our response to C., regarding diversity. And only the VPM does any recruiting.</p>
<p>Element #5: Interviewing and Screening</p> <p>Total Score Number of Standards Average Score <u> 19 </u> ÷ <u> 6 </u> = <u> 3.16 </u></p>	<p>Because we work with vulnerable clients, we feel good about the way we do screening.</p>
<p>Element #6: Orientation and Training</p> <p>Total Score Number of Standards Average Score <u> 19 </u> ÷ <u> 9 </u> = <u> 2.11 </u></p>	<p>It surprised us to discover how little we do!</p>



<p>Element #7: Volunteer/Employee Relationships</p> <p>Total Score Number of Standards Average Score</p> <p><u> 15 </u> ÷ <u> 5 </u> = <u> 3.0 </u></p>	<p>We think the staff is quite concerned about working relationships.</p>
<p>Element #8: Supervision</p> <p>Total Score Number of Standards Average Score</p> <p><u> 13 </u> ÷ <u> 6 </u> = <u> 2.16 </u></p>	<p>We realized that we couldn't answer some of these items, so wonder if supervision might be a gap.</p>
<p>Element #9: Recognition</p> <p>Total Score Number of Standards Average Score</p> <p><u> 10 </u> ÷ <u> 5 </u> = <u> 2.0 </u></p>	<p>Other than the annual luncheon, we couldn't identify other ways we say thank you.</p>
<p>Element #10: Recordkeeping and Reporting</p> <p>Total Score Number of Standards Average Score</p> <p><u> 10 </u> ÷ <u> 5 </u> = <u> 2.0 </u></p>	<p>We know we could do better here.</p>
<p>Element #11: Evaluation</p> <p>Total Score Number of Standards Average Score</p> <p><u> 16 </u> ÷ <u> 8 </u> = <u> 2.0 </u></p>	<p>This is the first time we've looked at the volunteer program.</p>
<p>Element #12: Volunteer Input</p> <p>Total Score Number of Standards Average Score</p> <p><u> 6 </u> ÷ <u> 4 </u> = <u> 1.5 </u></p>	<p>This made us realize that we don't always view volunteers as community reps.</p>
<p>The scores above were then transferred onto the Comparison Bar Graph, as follows:</p>	





- ◆ Having recognized that we have never defined a “volunteer” nor articulated a vision for volunteer involvement, how can we take action to fill those gaps?
- ◆ Is there a correlation between our lack of stated goals and objectives and our limited accomplishment in recordkeeping, reporting, and evaluation?
- ◆ What exactly are our staffing concerns? Would a change in staffing (amount, schedule, or something else) affect the other areas of the Audit in which we scored low?
- ◆ What are the implication of these scores to other staff members in the agency (other than to those in Volunteer Resources)?
- ◆ Our lowest ranking is in Volunteer Input. What can we do about that? Is this connected to our relatively low score under Recognition?
- ◆ What should be priority action steps for the next few months?

After the analysis session, the Coordinator of Volunteer Resources was able to write a report following this outline:

Report on the Volunteer Management Audit

*Hometown Agency
Conducted in May 20xx*

- I. Summary of the Audit process and listing of participants
- II. Average scores by element and bar graph
- III. General observations
 - A. Overall assessment by participants of Hometown Agency's volunteer management processes.
 - B. Strengths: What we do well
 - C. Weaknesses: What needs to be improved
- IV. Priority issues for attention
 - A. Staffing
 1. There is no clerical support for the volunteer resources office.
 2. Many volunteers need a staff contact in the evenings and on weekends.
 - B. Orientation and training
 1. Lack of consistent introduction process for new volunteers.
 2. Need to explore creating training modules for key volunteer assignments.
 - C. Supervision
 1. Want to revisit what we are asking of staff who supervise volunteers.
 2. Plan to designate a specific contact person to each volunteer.



D. Recognition

1. Want to brainstorm ideas for informal recognition throughout the year (for staff, too!)

E. Recordkeeping and Reporting

1. Investigate available software programs for tracking volunteer data.
2. Begin requiring written activity reports from volunteers.

F. Evaluation

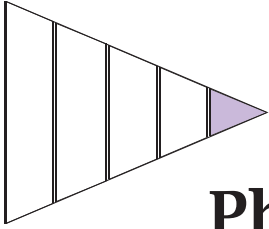
1. Set dates for recurring Audit follow-ups.
2. Develop plans for volunteer performance assessments.

G. Volunteer Input

1. Convene representative volunteers to talk about how we might involve them better as our ambassadors.
2. Suggest that all units invite volunteers to their staff meetings, when possible.

V. Next Steps

- A. What the Coordinator of Volunteer Resources needs to do next.
- B. What is needed from other agency staff.
- C. Implied resource needs.



Phase 5: Developing an Action Plan

Moving from the Scoresheet tallies to a full action plan for strengthening volunteer involvement requires more time and thought, additional meetings, and ongoing monitoring. It also calls for yet another group of people to help in the planning—ideally representatives of the constituents who will be expected to implement the plans! If there is already a volunteer program advisory council of some sort, this would be a very appropriate role for them to fill.

The steps are the same as for any other type of strategic planning: identifying issues; determine goals and objectives; identifying barriers and resources; selecting realistic actions to implement change; and creating a work plan with deadlines and assigned responsibilities.

An Action Plan Worksheet is provided in Section II on pages F1-F4 for your use.

Step #1: Identify Issues

Review the twelve volunteer management elements for issues that surfaced. Rank them in terms of which ones require the highest priority for attention. Be sure to clarify why the group is ordering the list in this way.

Step #2: Determine Goals and Objectives

You can't do everything at once, nor will all your plans be fulfilled at the same time. So it is important to work with your planning team to agree on achievable, realistic goals and objectives for both the short term and long term.

Step #3: Identify Barriers and Resources

Ask the group to identify the barriers keeping the organization from resolving the issues. Identify and focus only on those you can directly influence.

Use the same process for identifying available resources.

Step #4: Develop Action Steps

Discuss actions that can be taken to address the areas needing attention. Be as specific as possible, and make sure someone is taking accurate notes. Note that it is sometimes as important to identify good things that could be replicated or expanded as to focus on weak areas needing change.



Assign one or two individuals to put the recommended actions into a written plan and to suggest a timetable for implementation. Determine an agreed-upon deadline for completing the written plan (perhaps in one month) and schedule a follow-up session to review and finalize the plan prior to submitting it for formal adoption by the organization—ideally by the board of directors.

Step #5: Set the Plan in Motion

Once you have begun to implement the action plan, check in periodically with your team. Use them for support and advocacy.

One Year Later

Re-administer the Audit, with a *different* team of assessors! See what has changed during the year.

A Word about Performance Evaluation

The Audit presented here is focused on the practices and processes of volunteer program design and management—it is not an assessment of the quality of work contributed by volunteers or the volunteer program manager, nor does it identify measurable outcomes. Performance evaluation must be done separately, both for the overall volunteer program and for the effectiveness of individual volunteers. However, the results of this Audit have a direct bearing on performance evaluation. Only when an organization has laid the groundwork for successful volunteer involvement can meaningful results be expected from the work of volunteers.

For example, if there are no goals and objectives for volunteer involvement, or if volunteer work is not crafted well, or if lines of supervision and communication are unclear, then how can a volunteer accomplish anything of substance? The organizational infrastructure, which this Audit assesses, allows volunteers to fulfill their potential. Once you are confident that these basic standards are in place, you can move on to examine level of performance.

Resources to Help Develop or Strengthen Your Volunteer Program

Now that you have assessed the present status of volunteer involvement in your organization, and developed a plan to improve those areas the Audit identified as needing attention, where can you find expertise in volunteer management? There are many resources available to you.

The Internet offers a wealth of technical assistance information. Start by going to the Energize Web site:

www.energizeinc.com

This site will give you hundreds of free pages of articles, program examples, Web sites by category, and links to all the professional organizations in the volunteer field. Use the site as a portal to find resources on- and off-line. The site includes a full online bookstore of print and electronic books on all aspects of volunteer management.



You can also subscribe to *e-Volunteerism: The Electronic Journal of the Volunteer Community*, the only truly international publication for practitioners in the field (www.e-volunteerism.com).

Most communities offer one or more of the following local resources:

- ◆ Contact the Volunteer Center in your area, if you have one. This volunteerism clearinghouse and technical-assistance provider has been established to help organizations expand their volunteer efforts. In some places the name may vary. Many Volunteer Centers are divisions of or are funded by a local United Way. For the most current listing of volunteer centers and other resource organizations in North America and around the world, look under “Centers for Resources and Information” on this page of the Energize Web site: <http://www.energizeinc.com/prof.html>
- ◆ Look for a local “DOVIA”—Directors of Volunteers in Agencies—a professional association for people who manage volunteer programs in a wide range of settings. Start by contacting any volunteer program manager nearby, such as a hospital director of volunteer services or a staff member in your local Girl Scout council, who might be knowledgeable about such professional groups.
- ◆ RSVP (Retired and Senior Volunteer Program) staff also can be helpful.
- ◆ Find out if your state has a State Office of Volunteerism (again, it can have a variety of names) or a state or provincial association of volunteer administrators. These are also listed on the Energize Web site.

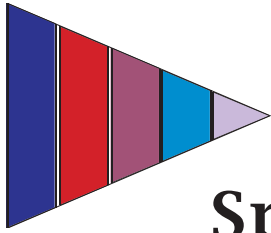
In the United States, two major organizations publish journals and hold conferences on volunteer management for practitioners in any type of setting (a number of groups specialize in specific fields, such as hospitals, justice programs and museums):

- ◆ Association for Volunteer Administration (AVA), P.O. Box 32092, Richmond, VA 23294, (804)-346-2266, www.avaintl.org
- ◆ Points of Light Foundation, 1400 I Street, NW, Suite 800, Washington, D.C. 20005, (202) 729-8000, www.pointsoflight.org

In Canada, find provincial centres by contacting Volunteer Canada, 330 Gilmour Street, Second Floor, Ottawa, ON, K2P 0P6, 1-800-670-0401, www.volunteer.ca/. In the UK, there is a volunteer development agency in each of the countries (see list at www.energizeinc.com/prof/volctr/uk.html), as there is in each state or territory of Australia (www.volunteeringaustralia.org). A growing number of countries around the world have such resources available.



Phase 5: Developing an Action Plan



Special Uses for the Audit

The *Volunteer Management Audit* has been designed primarily for use within a single agency to assess an existing volunteer program. However, its content obviously has applications to any number of volunteer-related situations. Already noted is its value to any organization in the early stages of starting a new volunteer program. This chapter presents ideas for several special ways to employ the Audit.

By a Volunteer Center or Other Volunteerism Consultant

The *Volunteer Management Audit* can be tool for the work any technical assistance provider does with community organizations. It offers an outside, neutral framework within which you can guide agency decision-makers to assess their volunteer management practices. Some ways to use the Audit are:

1. Ask the client agency's staff to read through the Scoresheet (complete version) prior to one of your consultation meetings. Then discuss their reactions, both to the scope of the standards statements and to their sense of how their agency might be scored today.
2. Conduct the Materials Review in its full form as described on pages 9 to 12. Guide the agency staff in answering the assessment questions. Add your own opinions and advice. Bring along sample materials from other programs. (Of course get permission to share these first, and then be on the lookout for more great materials at each Review you conduct. It will feel like high praise to be asked: "May I share this with other organizations looking for excellent models?")
3. Offer to be the Audit Administrator. This means that you will do all or some of the following:
 - ◆ Guide the process, assisting the volunteer program manager and/or agency executives in planning for the Audit and selecting the Audit Teams.
 - ◆ Give the instructions to the Teams for completing the Scoresheets and be available to answer questions as a neutral third party. It may be easier for staff and volunteers to raise issues with you in confidence which you can then report anonymously.
 - ◆ Chair the scoring and data analysis sessions.
 - ◆ Write the report of the results.
 - ◆ Facilitate the strategic planning sessions to assure that the agency develops a solid action plan.



4. Work with your local association of volunteer program managers to implement the ideas described in the next section. If most of the members commit to conducting Audits, assist them in compiling the final report and in publicizing the information.

By An Association of Volunteer Program Managers (DOVIA)

The *Volunteer Management Audit* can be the focus of a regular meeting of an association of volunteer program managers, instead of the usual speaker. There are several ways a DOVIA¹ can use the Audit, including:

1. Introduce the Audit to the group with the recommendation that everyone attempt to do the process back home. The meeting can review the instructions and allow members to discuss what they see as potential obstacles, such as management resistance.
2. Select one or more of the twelve elements for closer review. Have each person complete these sections individually first, scoring each standard in terms of his or her own agency. Then divide into small groups to see similarities and differences among the agencies represented. With the full group, debrief the exercise. If there seem to be certain items in which just about everybody scored themselves “low,” discuss how the DOVIA might arrange for training on this topic.
3. After one member agency has completed the Audit process, ask that volunteer program manager to share the experience with everyone: How did it work? What was harder than expected? What was easier? Have there been positive outcomes?

There are other ways a DOVIA can work collectively to use the Audit effectively in advocating for support of volunteer efforts:

4. As an association, invite everyone’s Executive Director to a special meeting at which the Audit is introduced and encouraged.
5. Two members can buddy up and become the Audit Administrator in each other’s agency (see what this means on the previous page directed at Volunteer Centers and consultants). Even better, enlist at least three people—the more the merrier—and assign everyone to an agency at random, but not in direct exchange with their counterpart (so that the process does not feel personal).
6. Agree that as many members as possible will conduct their own Audits within a certain time period. At the end, compile all the results and summarize the “state-of-volunteerism” in your community. Write a report that is distributed to all participating agencies (allowing them to compare themselves to the aggregate scores) and also used to show funders what needs to be improved through training or other resources.

¹ “DOVIA” stands for “Directors of Volunteers in Agencies” and is often used generically to refer to such associations, regardless of the formal name of the group in a specific community.



For Use in an Academic Course

The *Volunteer Management Audit* can provide the framework for an introductory course on volunteer management. Instructors can adapt any of the suggestions just listed for how the Audit can be used in a DOVIA meeting to the demands of the classroom.

Another application of the Audit is as the basis of a field assignment for students taking coursework in volunteer management. Here is an example of how one instructor, Sarah Jane Rehnborg, crafted a learning exercise from the material for the graduate-level course she teaches entitled “Community Engagement and the Management of Volunteers,” at the RGK Center for Philanthropy and Community Service, which is part of the LBJ School of Public Affairs at the University of Texas at Austin. (Thanks to Dr. Rehnborg for allowing this to be included here.)

Community Engagement and the Management of Volunteers

Sarah Jane Rehnborg, PhD

Service Program Audit and Report

This assignment is designed to increase your understanding of how groups and organizations actually engage volunteers in the work of the organization. Through your audit experience you will analyze the management systems, assess the organization’s culture, and identify key issues facing the organization as it strives to provide meaningful service opportunities designed to fulfill the group’s goals and objectives. It is important that you relate the case study to the topics, concepts and issues we consider in the course.

You may choose any registered nonprofit agency or public sector organization that purposefully and systematically engages volunteers in the work of the organization. To be utilized for the purpose of the case study, the group or organization selected must be able to identify a point person or small committee that is primarily responsible for the day-to-day management and operations of the volunteer program. The volunteer/service initiative must be a conscious strategy selected by the group or organization for the accomplishment of defined goals or objectives.

To gather all of the information necessary to complete this assessment, it would be wise to alert your cooperating agency to the possibility of a minimum of two agency visits. You may want to share the audit tool with the group in advance for their review and consideration, but assure your contact that the audit tool will serve as a guide for your interview. A follow-up appointment will enable you to double-check your assessments and serve to help you accurately reflect the information you acquire.



The analysis/report and presentation may be done individually or as a two-person team. The report should be a readable, concise document of about 10 to 12 double-spaced pages in length (or about 25 pages for a report developed by a two-person team). In addition, the paper should contain a one-page (only!) single-spaced executive summary. Each team will make a presentation on their analysis/report in class. Class presentation will include highlights of the findings, assessments of the perceived effectiveness of the program and recommendations for enhancements.

Volunteer Program Management Audit and Organization Assessment

The *Volunteer Management Audit* tool by Susan Ellis is provided to guide (but not dominate!) your assessment. At a minimum, your analysis should include the following sections:

1. Background

- ❖ Why has this group or organization selected to engage volunteers?
- ❖ Where did the “idea” for a program emerge—from the board, the executive director, a staff person or a volunteer, and how was the idea “institutionalized”?
- ❖ How has the board and other leadership demonstrated their support for the program?
- ❖ Is there a written philosophy statement guiding the work of the volunteer initiative?
- ❖ What words and terms are used to “name” volunteers? How are they referred to in discussion?
- ❖ Who is responsible for coordination of the volunteer effort and how significant is this position within the organization?
- ❖ How is this significance tangibly demonstrated (title, office, pay scale, training opportunities, etc.)?

This section would correspond generally to the questions and issues outlined in Element #1, Planning/Resources and Element #2, Staffing in the *Volunteer Management Audit*.

2. Volunteer Program Management Systems

Attending generally to issues and question in Elements #3, Volunteer Job Design; #4, Recruitment; #5 Interviewing/Screening; #6 Orientation/Training; #7 Volunteer/Staff Relationships; #8 Supervision; and #9 Recognition, explore the systems that are in place to facilitate the effective engagement of volunteers within the organization.

- ❖ To what extent is each of these systems operational?
- ❖ How widely dispersed within the group or organization is the responsibility for assuring that volunteers are an integral aspect of the group’s staffing?



- ❖ Who/what groups comprise the volunteer workforce—students, community restitution persons, senior adults, interns, national service members, etc.?
- ❖ How significant are the assignments given to volunteers?
- ❖ Are they critical to the ongoing functioning of the group, or would it be more appropriate to consider the assignments “window-dressing”?
- ❖ What is the relationship between your assessment of your response to the last question and the effectiveness of the systems designed to support the program?
- ❖ How are new staff oriented to the volunteer component of the organization?
- ❖ Is “working with volunteers” incorporated into the job descriptions of employees?
- ❖ Are board members regarded as volunteers?
- ❖ Are there systems in place to consistently support and facilitate the work of the board and if so, who is responsible for board management?
- ❖ Are board members providing direct service, or is their role confined to policy and fund raising?

3. Evaluation and Assessment

Questions and concerns addressed in sections #10 Recordkeeping/Reporting, #11 Evaluation and #12 Volunteer Input of the *Volunteer Management Audit* will shape the focus of this section of your assessment.

- ❖ How does the group assess the impact of the volunteer/community resource component of its program?
- ❖ Are records kept, and if so what types of records are maintained?
- ❖ Are outcome measures used to determine accountability and how effective are these measures?
- ❖ Where and how is the community resource component of the organizations functioning reported?
- ❖ Is the board aware of the impact of service volunteers on the work of the organization, and again, how?

4. Organizational Culture

- ❖ What kind of culture exists in the agency? What are the norms, expectations, relationships, rules of behavior—and how is this information communicated?
- ❖ Is the culture the same or different for different classifications of workers, i.e. staff, volunteers, board members, funders, clients?
- ❖ What “unspoken” perceptions influence the organization and management of the volunteer initiative?
- ❖ Does the organization attend to the satisfaction of volunteers (or for that matter staff), and if so, how?
- ❖ Does the volunteer contribution matter, and how do you know?
- ❖ Is this a place where you would want to serve? Why or why not?



5. Recommendations for Enhancement

- ❖ Based on your assessment of this program and your knowledge of the field, what recommendations would you make to enhance or improve this volunteer program?
- ❖ What steps would the agency need to take to operationalize these recommendations?
- ❖ What are the pros and cons of this line of action?
- ❖ Based on what you know, how feasible is this line of action?
- ❖ How would these recommendations enhance the capacity of this organization to more effectively achieve its mission through the non-monetary resources available from the community?

Variations on this Assignment

Some organizations function as “intermediary” organizations within the volunteer community, that is, their primary role is to:

- ❖ promote service opportunities (volunteer centers); or
- ❖ utilize service experiences as a way to facilitate education (service learning); or
- ❖ foster and enhance the organization’s image in the community through community involvement (corporate community affairs).

To achieve these objectives, some of these groups create volunteer programs to support their service initiative, others create volunteer advisory committees to assist with these efforts and others rely entirely on salaried staff to support the volunteer/service initiative.

It is possible, and relevant to the objectives of this class, to perform an audit on these types of groups, but doing so does somewhat change the assignment. Consequently, students selecting to perform audits in these areas will need to meet separately with the instructor to explore the ramifications of these audits and to determine the organization of the report.



Section II: Audit Tools

This section provides you with the forms and handouts you will need to conduct the Audit. Because these are intended to be copied and distributed separately, each item is numbered in a self-contained way.

You will find:

- A. The Scoresheet for the Complete Volunteer Management Audit, pages A1 to A40
- B. The Scoresheet for the Abbreviated Volunteer Management Audit, pages B1 to B11
- C. Handout: The descriptions of "The 12 Elements of Volunteer Management", page C1
- D. Handout: "Teaser Checklist: Are We Doing the Best We Can with Volunteer Involvement?", page D1
- E. Assessment Team Critical Questions, page E1
- F. Action Plan Worksheet, pages F1 to F4

The Volunteer Management Audit Scoresheet (Complete Version)

Thank you for agreeing to participate in this "Volunteer Management Audit." The time you spend working with your team to complete this Scoresheet will result in identifying what we need to do to strengthen volunteer involvement here. Perhaps this assessment process will also increase your own understanding of best practices in working with volunteers. You are making an important contribution by sharing your perspective and ideas.

Date of Assessment: _____

Audit Team Members: _____

Instructions

The Audit Scoresheet is organized by the twelve elements of a successful volunteer program:

Planning and Resources

Staffing

Volunteer Work Design

Recruitment

Interviewing and Screening

Orientation and Training

Volunteer/Employee Relations

Supervision

Recognition

Recordkeeping and Reporting

Evaluation

Volunteer Input

Within each element, there are a series of assessment statements expressing basic *standards* for volunteer involvement, based on generally accepted practices in the field of volunteer administration. The statements are arranged as choices 1 to 4, with 1 being the absence or the lowest level of action, and 4 being the most sophisticated or complex action.

Your Audit Team should work together with a single Audit Scoresheet, selecting one response to each item through discussion and debate among all of you. Allow two to three hours for this session.

The Audit is designed as a generic tool to apply to the widest number and types of organizations. It is not expected that many organizations will assess themselves at the "highest" (4) level for every item nor is that level appropriate for all situations. The important thing is to understand, for each item, why your organization is at a particular level and whether this is the correct level for you. The main purpose of the *Volunteer Management Audit* is as a *discussion starter*. This is an opportunity to examine and analyze how effectively your organization incorporates volunteers into your operations.

Because there is so much variation in the way organizations operate, one or more standards either may not be applicable to you or may be handled in ways other than options 1, 2, 3, or 4. For these situations, the response "none of the above" is provided as an alternative, but the Audit Team must insert a statement explaining this choice of response.

Do keep notes of any discussion of key items. These will help in the analysis later.

You may want to know:**◆ What do we do if we don't know an answer?**

If you do not have enough information to score a statement, ask to see the various documents compiled in the earlier Materials Review phase of the process or do some investigative research by speaking with various knowledgeable people in your organization.

◆ What if we have different responses because of team members' different degree of contact with the volunteer program?

Use your differences to reach consensus as to what occurs in the organization, on average, and assign the appropriate score. Remember that the Audit is more important for talking than for scoring, and that you can (and should) make notes whenever there is disagreement.

◆ What score do we give ourselves if we have the standard or policy but we don't uphold it uniformly?

Reach a consensus with your Team as to the “average” level of performance, but make a note recording the issue of inconsistency.

◆ What score do we give ourselves if we cannot find the answer, even after reviewing printed materials and speaking to others?

Chances are that an inability to uncover information means nothing is happening in this area—or inadequate reports are being made. Score a “1” for that item.

Tallying Your Scores

As you finish with each element, add up your scores for that section. At the end of the Scoresheet is a worksheet for calculating average ratings and for graphing the scores for a visual comparison. The Team should keep working notes: questions, fresh ideas, comments, or other thoughts.

Element #1: Planning and Resources	
<i>Planning is the key to success for all organizational projects, and volunteer program development is no exception. Planning for volunteers, who are your organization's unpaid personnel, includes a variety of decisions about: climate/readiness for volunteers; goals and objectives; budget and resources; staff preparation; and an implementation plan.</i>	
<p>A. We have articulated why we want volunteer involvement.</p> <p>1 We have not formally discussed why we want to involve volunteers.</p> <p>2 We seek volunteer involvement largely because of insufficient funds.</p> <p>3 We seek volunteers because they have something unique to contribute to our organization, in addition to helping us do more with our available funds.</p> <p>4 We have written a statement of philosophy about why our organization seeks volunteer involvement.</p> <p><input type="checkbox"/> None of the above. In our situation...</p>	<p>L E V E L</p> <p>↓</p> <div style="border: 1px solid black; width: 40px; height: 20px; margin: 0 auto;"></div>
<p>B. We have defined what we mean by the term “volunteer.”</p> <p>1 We have not defined what we mean by “volunteer.”</p> <p>2 We consider a volunteer to be someone who provides services by choice and without receiving wages or other benefits from our organization.</p> <p>3 In addition to direct-service volunteers, we recognize that members of our board of directors are volunteers as are other supporters such as members of advisory groups, auxiliaries, and special event or fundraising committees.</p> <p>4 In addition to the above, we consider many types of community resources as volunteers, including students earning academic credit, court-referred individuals, and others, as long as they do not go on our payroll.</p> <p><input type="checkbox"/> None of the above. In our situation...</p>	<p>L E V E L</p> <p>↓</p> <div style="border: 1px solid black; width: 40px; height: 20px; margin: 0 auto;"></div>
<p>C. We can express our vision for the future of the volunteer program.</p> <p>1 We have not thought in the long-term about volunteer involvement here.</p> <p>2 We hope that our volunteer program will continue to “grow,” in whatever ways it can.</p> <p>3 We can picture a future volunteer corps that is more diverse and skilled and supports our work as we evolve.</p> <p>4 We have defined a strategic plan to assure that our volunteer involvement will meet our future needs and tap into new sources of volunteers as time goes on.</p> <p><input type="checkbox"/> None of the above. In our situation...</p>	<p>L E V E L</p> <p>↓</p> <div style="border: 1px solid black; width: 40px; height: 20px; margin: 0 auto;"></div>

<p>D. We have developed long-range and short-range goals and objectives for the volunteer program and for the work of volunteers.</p> <p>1 We have no formal goals and objectives for the volunteer program or for the work of volunteers.</p> <p>2 We have written goals and objectives that relate mainly to the volunteer program's growth, such as target numbers of volunteers.</p> <p>3 We have written goals and objectives for volunteers that, in addition to numerical targets, relate to accomplishing meaningful work that supports the organization's clients and paid staff.</p> <p>4 Work-related goals and objectives for volunteers are coordinated annually with the goals and objectives of the entire organization and of each unit/program function. These goals and objectives are approved by our organization's governing body.</p> <p><input type="checkbox"/> None of the above. In our situation...</p>	<p>L E V E L</p> <p>↓</p> <p><input type="checkbox"/></p>
<p>E. Input from top administrators and middle managers, line staff, volunteers, and clients has been and continues to be utilized in designing/continuing enhancement of the volunteer program</p> <p>1 Input is present from one of the above groups.</p> <p>2 Input is present from two of the above groups.</p> <p>3 Input is present from three of the above groups.</p> <p>4 Input is present from all four of the above groups.</p> <p><input type="checkbox"/> None of the above. In our situation...</p>	<p>L E V E L</p> <p>↓</p> <p><input type="checkbox"/></p>
<p>F. We have articulated policies and procedures for volunteer involvement.</p> <p>1 We have no policies and procedures for volunteer involvement.</p> <p>2 We apply policies and procedures already in place for employees to volunteers as situations arise.</p> <p>3 We have written specific policies anticipating situations relevant to volunteer involvement, particularly those delineating the roles of paid staff and of volunteers.</p> <p>4 In addition to clarifying roles, we have set standards for employees and volunteers regarding confidentiality, accountability, causes for termination and other matters.</p> <p><input type="checkbox"/> None of the above. In our situation...</p>	<p>L E V E L</p> <p>↓</p> <p><input type="checkbox"/></p>

<p>G. Employees have been trained to work with volunteers and to understand the needs and motivations of volunteers.</p> <p>1 Formal training for staff in how to work with volunteers has not been developed.</p> <p>2 Training is provided to staff who will supervise volunteers directly before volunteers are assigned to them.</p> <p>3 Training on teamwork with volunteers is regularly provided to employees at every level of the organization.</p> <p>4 In addition to providing training to staff in working with volunteers, we regularly evaluate employees on their ability to work productively with volunteers and, when necessary, provide additional training to improve performance.</p> <p><input type="checkbox"/> None of the above. In our situation...</p>	<p>L E V E L</p> <p>↓</p> <p><input type="checkbox"/></p>
<p>H. We have developed a risk-management plan and have provided appropriate insurance coverage for volunteer needs.</p> <p>1 We have not considered the legal and insurance issues connected to volunteer involvement.</p> <p>2 We handle legal and insurance matters as they arise, on a case-by-case basis.</p> <p>3 We have specifically—discussed volunteers with our insurance carrier and have purchased appropriate insurance necessary to protect volunteers and our organization in advance.</p> <p>4 We have developed a risk-management plan by analyzing possible liability scenarios of each volunteer assignment area; providing appropriate training and supervision; and carrying out other preventive actions.</p> <p><input type="checkbox"/> None of the above. In our situation...</p>	<p>L E V E L</p> <p>↓</p> <p><input type="checkbox"/></p>
<p>I. Budgeting is based on consideration of the needs of the volunteer program.</p> <p>1 We allocate funds to the volunteer program based on resources available after the other units have been budgeted.</p> <p>2 We allocate funds to the volunteer program based on the number of paid employees assigned to it.</p> <p>3 We allocate funds to the volunteer program based on the number of volunteers we anticipate involving this year and their support needs, in addition to amounts needed to support paid employees assigned to the program.</p> <p>4 In addition to funds that support administrative needs, we reimburse volunteers for their out-of-pocket expenses.</p> <p><input type="checkbox"/> None of the above. In our situation...</p>	<p>L E V E L</p> <p>↓</p> <p><input type="checkbox"/></p>

<p>J. Beyond money, we have allocated the other necessary resources for the volunteer program.</p> <p>1 We have no space and equipment specifically designated for the volunteer program.</p> <p>2 We have provided an office and equipment for the volunteer program manager, who may request the use of other rooms in the facility when they are not needed by other units.</p> <p>3 In addition to the volunteer program manager's office, we have provided centralized space and furnishings for volunteers to meet and leave their personal belongings while on site.</p> <p>4 In addition to the volunteer program office, work space, storage space, access to equipment and other resources are available to volunteers within each unit to which they are assigned.</p> <p><input type="checkbox"/> None of the above. In our situation...</p>	<p>L E V E L</p> <p>↓</p> <p><input type="checkbox"/></p>
<p>K. We have defined the interrelationships of direct-service volunteers and other volunteers who support us, such as the board of directors, advisory council, auxiliary or fundraising group.</p> <p>1 There is no formal relationship between direct-service volunteers and other volunteers who support us and they are completely different people.</p> <p>2 Individuals can choose to apply for more than one role, in which case they clearly understand what each different assignment entails.</p> <p>3 Each group of volunteers is seen as a resource for the others, and we find opportunities to combine the various groups of volunteers for training and recognition.</p> <p>4 Appropriately-qualified direct-service volunteers are consciously invited to serve on the board or as advisors and fundraisers, as well as vice versa.</p> <p><input type="checkbox"/> None of the above. In our situation...</p>	<p>L E V E L</p> <p>↓</p> <p><input type="checkbox"/></p>
<p>L. We have considered the interrelationship of our volunteer involvement with other agency functions: public relations; fundraising; client outreach/marketing; public education; or other work.</p> <p>1 We have defined how the volunteer department will interact with one of the above departments/activities.</p> <p>2 We have defined how the volunteer department will interact with two of the above departments/activities.</p> <p style="text-align: right;"><i>next page →</i></p>	

<p>L. (continued)</p> <p>3 We have defined how the volunteer department will interact with three of the above departments/activities.</p> <p>4 We have defined how the volunteer department will interact with all four of the above departments/activities.</p> <p><input type="checkbox"/> None of the above. In our situation...</p>	<p>L E V E L</p> <p>↓</p> <p><input type="checkbox"/></p>
<p>M. Whenever we plan something new, we consider how volunteers can be involved and the impact of the new activity on current volunteers.</p> <p>1 We do not consider volunteers in our planning process.</p> <p>2 We consider ways in which volunteers can be involved in helping a new project succeed.</p> <p>3 In addition to the option of recruiting new volunteers for new needs, we consider the impact planned programs will have on current volunteers.</p> <p>4 We incorporate volunteers into our planning process, not only as subjects for discussion but also by including active volunteers in the planning itself.</p> <p><input type="checkbox"/> None of the above. In our situation...</p>	<p>L E V E L</p> <p>↓</p> <p><input type="checkbox"/></p>
<p>Total Score for Element #1: Planning & Resources</p>	<p><input type="checkbox"/></p>

Element #2: Staffing

By definition, volunteers are part-time staff with widely varying schedules. Add to this the diversity and backgrounds of the people who volunteer, and the resulting work force is a logistical challenge. A volunteer program must have a clearly-designated coordinator to handle all the activities outlined in these twelve management elements.

<p>A. At least one specific individual has been designated as volunteer program manager and has been given a comprehensive written job description for this role.</p> <p>1 We have not designated anyone within our organization to be responsible for volunteers or the volunteer program.</p> <p>2 We have designated an individual to attend to the needs of volunteers, but those duties are not included in his/her written job description.</p> <p>3 A staff member is formally assigned on a part-time basis to coordinate volunteers, in addition to his/her primary duties.</p> <p>4 At least one staff member (full- or part-time) is formally designated with the primary duty of coordinating volunteers.</p> <p><input type="checkbox"/> None of the above. In our situation...</p>	<p>L E V E L</p> <p>↓</p> <p><input type="checkbox"/></p>
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<p>B. We have provided staffing as required by the demands of the size and goals of our volunteer program.</p> <p>1 As our answer to A above was 1, we have no one officially assigned to the work and somehow juggle the demands among whoever is available at the moment.</p> <p>2 Our part-time or full-time volunteer manager position is based largely on what we can afford.</p> <p>3 Based on the number of volunteers in our program and the work we expect the volunteer office to coordinate directly, we have one or several staff assigned to volunteer management.</p> <p>4 We have appropriate staff available during regular work hours, but because some volunteers work weekends and evenings, we have also provided adequate staff support for them at those times.</p> <p><input type="checkbox"/> None of the above. In our situation...</p>	<p>L E V E L</p> <p>↓</p> <p><input type="checkbox"/></p>
<p>C. The volunteer program has appropriate clerical support.</p> <p>1 No paid clerical support is provided to the volunteer program (we expect the volunteer program manager to do this personally or to recruit clerical volunteers).</p> <p>2 The volunteer program has access to the paid clerical support of other departments, as necessary.</p> <p>3 Clerical support is assigned to the volunteer program, but is shared with another department.</p> <p>4 One or more full-time secretaries/clerical staff are assigned to the volunteer program.</p> <p><input type="checkbox"/> None of the above. In our situation...</p>	<p>L E V E L</p> <p>↓</p> <p><input type="checkbox"/></p>
<p>D. We regularly reconsider the staffing of the volunteer program.</p> <p>1 We have no plan for reconsidering our staffing level in the volunteer program.</p> <p>2 We feel that we cannot add more staff to the volunteer program and therefore expect the program to grow by recruiting volunteers to be managers of other volunteers.</p> <p>3 We feel that we cannot add more staff to the volunteer program and therefore are willing to "cap" the number of volunteers and the scope of their involvement, since we know that effective volunteer services requires agency support.</p> <p>4 We have a plan for reconsidering the staffing of the volunteer program as it evolves and are prepared to add staff as warranted by the growing size and goals of the volunteer program.</p> <p><input type="checkbox"/> None of the above. In our situation...</p>	<p>L E V E L</p> <p>↓</p> <p><input type="checkbox"/></p>

<p>E. The position of volunteer program manager has been given status equal to that of other supervisory or management staff.</p> <p>1 The position/function of volunteer manager does not appear on the organizational chart.</p> <p>2 The volunteer manager's position on the organizational chart is on the same level as line/program staff.</p> <p>3 The position of volunteer manager appears at a middle management level.</p> <p>4 The position of volunteer manager appears at the top management level.</p> <p><input type="checkbox"/> None of the above. In our situation...</p>	<p>L E V E L</p> <p>↓</p> <p><input type="checkbox"/></p>
<p>F. The salary of the volunteer program manager is equivalent to that of other supervisory or management staff in our organization and not based on an external measure of what someone with the same title earns in another, non-comparable setting.</p> <p>1 The volunteer manager's compensation is not based on a comparison with compensation of other staff.</p> <p>2 The volunteer manager's compensation is below or on a level with line/program staff.</p> <p>3 The volunteer manager's compensation is commensurate with other supervisory staff.</p> <p>4 The volunteer manager's compensation is commensurate with other department heads or top administrators.</p> <p><input type="checkbox"/> None of the above. In our situation...</p>	<p>L E V E L</p> <p>↓</p> <p><input type="checkbox"/></p>
<p>G. Money has been budgeted for the volunteer program manager to enhance and upgrade skills.</p> <p>1 The volunteer program manager is not encouraged by our organization to upgrade skills in volunteer management practices.</p> <p>2 The volunteer program manager is encouraged to upgrade skills, but funding is not available for this purpose through our organization.</p> <p>3 Funds are allocated to upgrade the volunteer program manager's skills, including funds for membership and participation in volunteer management professional associations.</p> <p>4 Funds are allocated for upgrading the volunteer program manager's skills, as well as the skills of other volunteer program staff and key volunteers.</p> <p><input type="checkbox"/> None of the above. In our situation...</p>	<p>L E V E L</p> <p>↓</p> <p><input type="checkbox"/></p>

<p>H. The volunteer program manager is evaluated regularly on her/his leadership and vision, as well as on the numerical growth of the volunteer program.</p> <p>1 The volunteer program manager is not evaluated.</p> <p>2 The volunteer program manager is evaluated periodically, largely on whether the volunteer program is growing in size.</p> <p>3 The volunteer program manager is evaluated regularly, based on his/her achievement of previously established work goals.</p> <p>4 The volunteer program manager is evaluated regularly, based on his or her achievement of previously established goals and on his/her vision for development of innovative volunteer projects.</p> <p><input type="checkbox"/> None of the above. In our situation...</p>	<p>L E V E L</p> <p>↓</p> <p><input type="checkbox"/></p>
<p>I. Volunteers are part of the volunteer program management team.</p> <p>1 Volunteers are not involved in the management of the volunteer program.</p> <p>2 Volunteers handle clerical work for the volunteer program, but they do not participate in management functions.</p> <p>3 Volunteers assist with or handle various volunteer program management activities, such as recruitment and orientation.</p> <p>4 In addition to sharing the daily administrative work of the volunteer program, volunteers participate in decision-making about the goals and activities of the volunteer program.</p> <p><input type="checkbox"/> None of the above. In our situation...</p>	<p>L E V E L</p> <p>↓</p> <p><input type="checkbox"/></p>
<p>Total Score for Element #2: Staffing</p>	<p><input type="checkbox"/></p>

<p>Element #3: Volunteer Work Design</p>	
<p><i>Developing volunteer assignments that are meaningful to the organization and attractive to prospective volunteers requires both planning and vision. It means analyzing what needs to be done (whether to assist staff or to provide a service directly to clients) and then creatively designing tasks doable in short bursts of time, by a variety of people with different skills. Expectations and qualifications for such volunteer positions need to be defined in writing.</i></p>	
<p>A. We design volunteer assignments effectively.</p> <p>1 We wait until volunteers arrive and then assign them whatever tasks need doing at that time.</p> <p>2 We design assignments as new volunteers offer unexpected skills or as special situations arise.</p> <p style="text-align: right;"><i>next page →</i></p>	

<p>A. (continued)</p> <p>3 We determine what help is needed by the paid staff and design volunteer assignments to provide that help.</p> <p>4 In addition to helping employees and putting volunteer skills to use, we identify needs that our clients or customers have for which volunteers can provide services, apart from the primary work of the staff.</p> <p><input type="checkbox"/> None of the above. In our situation...</p>	<p>L E V E L</p> <p>↓</p> <p><input type="checkbox"/></p>
<p>B. We have written position descriptions for volunteer assignments.</p> <p>1 There are no written position descriptions for volunteers.</p> <p>2 There are written position descriptions for some, but not all volunteer assignments.</p> <p>3 There are written position descriptions for all individual direct-service volunteers, developed by the employees or volunteers who will supervise each position.</p> <p>4 There are written volunteer position descriptions for all direct-service volunteers (including descriptions for those giving service in groups) and for members of our board of directors, advisory council and various special committees.</p> <p><input type="checkbox"/> None of the above. In our situation...</p>	<p>L E V E L</p> <p>↓</p> <p><input type="checkbox"/></p>
<p>C. We update our volunteer job descriptions annually.</p> <p>1 When we have written a job description, we rarely revise it.</p> <p>2 We revise volunteer job descriptions whenever someone calls our attention to something that is out of date.</p> <p>3 We review and revise volunteer job descriptions annually.</p> <p>4 In addition to annual updating of volunteer job descriptions, we add, revise and drop volunteer assignments annually on the basis of their priority to the organization's clients, volunteers and employees.</p> <p><input type="checkbox"/> None of the above. In our situation...</p>	<p>L E V E L</p> <p>↓</p> <p><input type="checkbox"/></p>

<p>D. We have developed a variety of volunteer role options, allowing involvement by people with varying time availabilities and with diverse backgrounds.</p> <p>1 We have one type of assignment for volunteer participation.</p> <p>2 We have developed several roles for volunteers, allowing for people with varied skills and interests.</p> <p>3 We have designed volunteer work that can be performed on a long-term ongoing basis, on a short-term basis, or on a one-time basis. We also can accommodate individuals and groups.</p> <p>4 We have designed a variety of volunteer position descriptions, as described above, including some that have different levels of responsibility, so that we can involve people with advanced skills and willingness to commit intensive time.</p> <p><input type="checkbox"/> None of the above. In our situation...</p>	<p>L E V E L</p> <p>↓</p> <p><input type="checkbox"/></p>
<p>E. Every area or unit of our organization has developed assignments for volunteers.</p> <p>1 We limit volunteer utilization to one particular service or function only.</p> <p>2 We permit every unit or department to decide individually whether or not to request volunteer assistance.</p> <p>3 We expect every unit to develop roles for qualified volunteers.</p> <p>4 We involve qualified volunteers throughout every unit of the organization, including working in top administration to support key managers.</p> <p><input type="checkbox"/> None of the above. In our situation...</p>	<p>L E V E L</p> <p>↓</p> <p><input type="checkbox"/></p>
<p>F. We have designed volunteer assignments so that we can be flexible in responding to the needs of a wide variety of volunteers.</p> <p>1 Most of our volunteer assignments have pre-determined qualifications and established schedules.</p> <p>2 A significant number of our assignments can be modified to match the needs or skills of prospective volunteers.</p> <p>3 Some volunteer assignments can be performed on weekends or in the evenings to accommodate volunteers who are not available during the work week.</p> <p>4 We also are able to offer virtual (online) assignments, off-site work, and other creative variations to accommodate willing volunteers.</p> <p><input type="checkbox"/> None of the above. In our situation...</p>	<p>L E V E L</p> <p>↓</p> <p><input type="checkbox"/></p>

<p>G. We have provided "career ladders" for those volunteers who wish to advance in responsibility.</p> <p>1 Most of our assignments are entry-level and there are few ways for a volunteer to "move up."</p> <p>2 Volunteers can ask to be reassigned to more challenging work.</p> <p>3 Over time, effective volunteers naturally assume more responsibility, such as training new volunteers to their area.</p> <p>4 We have assignments for volunteers at the managerial level and proactively offer such opportunities to volunteers who have demonstrated their skills (and we allow them to remain in their current assignment if that's what they really prefer).</p> <p><input type="checkbox"/> None of the above. In our situation...</p>	<p style="text-align: center;">L E V E L</p> <p style="text-align: center;">↓</p> <p style="text-align: center;"><input type="checkbox"/></p>
<p>Total Score for Element #3: Volunteer Work Design</p>	<p style="text-align: center;"><input type="checkbox"/></p>

Element #4: Recruitment

Recruitment is the process of encouraging people to give their time and energy to an organization as volunteers. Successful recruitment requires the support of the entire organization and is closely tied to overall public relations and marketing efforts.

<p>A. We have designed and implemented an ongoing volunteer recruitment plan.</p> <p>1 We do not recruit actively. We respond to people who come to us on their own.</p> <p>2 We publicize our desire for volunteers in our organization's newsletter or through other internal communications only.</p> <p>3 In addition to our internal sources, we have registered our need for volunteers in various community and online data banks and volunteer opportunity directories.</p> <p>4 We target our most desired prospective volunteer sources and actively employ a variety of outreach techniques to let people know we need volunteers.</p> <p><input type="checkbox"/> None of the above. In our situation...</p>	<p style="text-align: center;">L E V E L</p> <p style="text-align: center;">↓</p> <p style="text-align: center;"><input type="checkbox"/></p>
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<p>B. We are tapping into the growing number of sources of volunteer participation, including: corporate-employee volunteer programs, school-based community-service programs, special days of service, court-related alternative-sentencing projects, families volunteering together, self-help groups, etc.</p> <p>1 We are satisfied with our traditional sources of volunteers.</p> <p>2 We are not aware of such trends in volunteer involvement and therefore have not reached out to any new sources.</p> <p>3 We have begun to tap into some of these sources but believe that many either are not volunteers or are inappropriate for our setting.</p> <p>4 We use the broadest definition of volunteers as community resources and are recruiting from most of the sources we identify.</p> <p><input type="checkbox"/> None of the above. In our situation...</p>	<p>L E V E L</p> <p>↓</p> <p><input type="checkbox"/></p>
<p>C. We actively seek racial, ethnic, age and other diversity in our volunteer corps.</p> <p>1 Our volunteers have similar demographic profiles but we hope diversity will occur naturally over time.</p> <p>2 We have identified under-represented populations and are targeting our recruitment efforts to reach out to those prospective volunteers.</p> <p>3 Our volunteer recruitment materials reflect the diversity of our volunteer corps and we have established wide referral contacts to ensure an ongoing flow of candidates representing our full community.</p> <p>4 In addition to recruiting volunteers of different races, ages, and sexes, we actively reach out to people with disabilities, people of low income and others who may need additional support (which we provide) to become volunteers.</p> <p><input type="checkbox"/> None of the above. In our situation...</p>	<p>L E V E L</p> <p>↓</p> <p><input type="checkbox"/></p>
<p>D. We have developed a variety of materials especially for volunteer recruitment.</p> <p>1 We have no materials that describe our need for volunteers.</p> <p>2 Our agency brochures include some mention of volunteer opportunities but nothing is specifically-designed for recruitment.</p> <p>3 We have some material written expressly as volunteer-recruitment tools.</p> <p>4 We have a variety of brochures, fliers, slides and other materials that can be used to recruit volunteers in different settings.</p> <p><input type="checkbox"/> None of the above. In our situation...</p>	<p>L E V E L</p> <p>↓</p> <p><input type="checkbox"/></p>

<p>E. Our volunteer recruitment clearly describes our needs and expectations.</p> <p>1 We emphasize our need for general help from volunteers and do not give details about the work to be done.</p> <p>2 We describe volunteer assignments but minimize the work so prospective candidates are not scared away.</p> <p>3 We describe volunteer assignments in detail, including the minimum time commitment and qualifications we are seeking.</p> <p>4 We describe how a volunteer benefits from service with us, in addition to describing volunteer assignments, time commitments and qualifications.</p> <p><input type="checkbox"/> None of the above. In our situation...</p>	<p>L E V E L</p> <p>↓</p> <p><input type="checkbox"/></p>
<p>F. We have established ongoing relationships with community groups that can serve as sources of volunteers.</p> <p>1 We recruit most volunteers directly, as individuals.</p> <p>2 We do public speaking at various community centers and civic groups to inform them of volunteer opportunities.</p> <p>3 We have formed partnerships in which various community groups provide services for us as a project for their members.</p> <p>4 We have developed ongoing referral relationships with organizations which regularly inform their constituents about volunteering in our agency and refer prospective volunteers to us year round (such as universities, RSVP, and after-school youth programs).</p> <p><input type="checkbox"/> None of the above. In our situation...</p>	<p>L E V E L</p> <p>↓</p> <p><input type="checkbox"/></p>
<p>G. Everyone participates in the volunteer recruitment effort.</p> <p>1 No one is specifically responsible for volunteer recruitment.</p> <p>2 The volunteer program manager is the person who handles recruitment.</p> <p>3 Volunteers and paid staff are also encouraged to recruit volunteers as part of their community activities.</p> <p>4 Our top administration also assists in the recruitment effort, together with other staff and volunteers, and makes sure that agency public relations materials include mention of volunteer opportunities.</p> <p><input type="checkbox"/> None of the above. In our situation...</p>	<p>L E V E L</p> <p>↓</p> <p><input type="checkbox"/></p>

<p>H. We make effective use of the Internet for volunteer recruitment.</p> <p>1 Our agency Web site does not mention volunteer involvement here and we do not use the Internet for recruitment.</p> <p>2 Our agency Web site does not give much information about volunteering but we have registered our volunteer opportunities with local and national online registries.</p> <p>3 In addition to registering with online directories, we have an area of our agency's Web site devoted to volunteer participation, including full descriptions of what volunteers do and how someone can get involved.</p> <p>4 Prospective volunteers can learn about our current assignment openings online and can express interest or complete an application form online, too.</p> <p><input type="checkbox"/> None of the above. In our situation...</p>	<p style="text-align: center;">L E V E L</p> <p style="text-align: center;">↓</p> <p style="text-align: center;"><input type="checkbox"/></p>
<p>Total Score for Element #4: Recruitment</p>	<p style="text-align: center;"><input type="checkbox"/></p>

<p>Element #5: Interviewing and Screening</p>	
<p><i>Effective initial interviewing of prospective volunteers prevents many types of supervision and management problems. It also allows candidates to be matched with the most appropriate and appealing assignment for them.</i></p>	
<p>A. An interview is held with each prospective volunteer to determine qualifications, expectations, and a mutually-acceptable assignment.</p> <p>1 Interviews are not conducted with prospective volunteers before assignment and all applicants are accepted.</p> <p>2 Candidates are interviewed, but we expect to accept everyone.</p> <p>3 Prospective volunteers are interviewed to assess their qualifications and expectations, and assignments are mutually determined if the interview is successful.</p> <p>4 In addition to screening new volunteers based on qualifications and personality, we check references and comply with any legally required background checks.</p> <p><input type="checkbox"/> None of the above. In our situation...</p>	<p style="text-align: center;">L E V E L</p> <p style="text-align: center;">↓</p> <p style="text-align: center;"><input type="checkbox"/></p>

<p>B. We follow-up with each volunteer applicant.</p> <p>1 There is no follow-up with volunteer applicants. It is expected that volunteer applicants with sufficient motivation will call back to determine the status of their placement.</p> <p>2 Follow-up is done for applicants we wish to accept, but not for those we cannot place.</p> <p>3 Follow-up is done on applicants we accept or reject, based on how critically we need their help and upon time availability.</p> <p>4 We aim to inform applicants either immediately or within 30 days of the interview as to whether they have been accepted, not accepted or placed on a waiting list. Those on our waiting list are contacted at regular intervals.</p> <p><input type="checkbox"/> None of the above. In our situation...</p>	<p>L E V E L</p> <p>↓</p> <p><input type="checkbox"/></p>
<p>C. We have developed criteria for screening volunteers.</p> <p>1 We accept all applicants.</p> <p>2 We screen candidates largely on the basis of personality.</p> <p>3 We screen candidates based on documented skills or past experience, as well as on their personality.</p> <p>4 We screen candidates based on their qualifications and personality, and we are in compliance with all legal qualifying factors such as police or background checks, health screening, or other requirements.</p> <p><input type="checkbox"/> None of the above. In our situation...</p>	<p>L E V E L</p> <p>↓</p> <p><input type="checkbox"/></p>
<p>D. We are in compliance with all legal screening requirements such as police background checks, health exams, or other relevant issues.</p> <p>1 We are not aware of any legal screening requirements.</p> <p>2 We ask for and check references given by applicants.</p> <p>3 We do whatever checks or exams are required by law to do for our particular type of setting or local government.</p> <p>4 We are in legal compliance when we do initial screening of new volunteers and also re-check police records and update health exams over time, particularly when we transfer a volunteer to a new position that may involve new risks.</p> <p><input type="checkbox"/> None of the above. In our situation...</p>	<p>L E V E L</p> <p>↓</p> <p><input type="checkbox"/></p>

<p>E. We are willing to turn down volunteer applicants.</p> <p>1 We accept all applicants.</p> <p>2 We do not officially turn down applicants. Instead, we place them on our waiting list indefinitely.</p> <p>3 When we feel we must reject a prospective volunteer, we usually tell him or her that the program is full.</p> <p>4 As with applicants for employment, we have developed a set of basic qualifications (including reference checks, when appropriate) and are willing to tell prospective volunteers if they do not meet them. We encourage these applicants to seek other volunteer opportunities more suited to their qualifications.</p> <p><input type="checkbox"/> None of the above. In our situation...</p>	<p>L E V E L</p> <p>↓</p> <p><input type="checkbox"/></p>
<p>F. We are able to be flexible with our acceptance structure when necessary.</p> <p>1 If volunteers cannot fit into our interviewing and screening requirements, we do not accept their services.</p> <p>2 We are able to modify our interviewing and screening requirements so that we adapt to special situations such as very short-term assignments or a great number of volunteers for a one-day event.</p> <p>3 We are also able to modify our procedures for prospective volunteers who are not going to come into direct client contact or who will work off-site.</p> <p>4 In addition, we are able to develop ways to collaborate with existing community groups who want to offer their services to us without necessarily asking their members to join our volunteer program as individuals.</p> <p><input type="checkbox"/> None of the above. In our situation...</p>	<p>L E V E L</p> <p>↓</p> <p><input type="checkbox"/></p>
<p>Total Score for Element #5: Interviewing and Screening</p>	<p><input type="checkbox"/></p>

Element #6: Orientation and Training	
<p><i>Orientation is the overview of the total organization necessary for every volunteer, regardless of specific assignment. It places the work in context and allows for consistent introduction of policies, procedures, rights and responsibilities. Training of volunteers should be customized to the requirements of each position description and the background each volunteer brings to the organization. There is initial, start-up training, plus the need for ongoing, in-service training. Much training is dependent upon giving clear instructions and is integrated into supervision.</i></p>	
<p>A. A standardized orientation is provided to help volunteers become familiar with the purpose, structure and policies of the organization.</p> <p>1 There is no standardized orientation for volunteers.</p> <p>2 Volunteers are made familiar with the agency's physical facilities but not the purpose, structure and policies of the organization.</p> <p>3 A standardized orientation, including information on the organization's purpose, structure and policies, is offered sporadically to volunteers.</p> <p>4 Volunteers are provided a standardized orientation to the organization's purpose, structure and policies within the first two months of beginning work with us.</p> <p><input type="checkbox"/> None of the above. In our situation...</p>	<p>L E V E L</p> <p>↓</p> <p><input type="checkbox"/></p>
<p>B. Segments of our volunteer orientation program are utilized to introduce others to our organization.</p> <p>1 The volunteer orientation program is for direct-service, long-term volunteers only.</p> <p>2 We utilize applicable segments of the volunteer orientation program to orient other categories of volunteer staff such as episodic/one-time volunteers, student interns, stipended workers and loaned executives.</p> <p>3 We have integrated the orientation of new employees with the orientation of volunteers so that applicable segments of the information are provided consistently to everyone.</p> <p>4 In addition to the above, we utilize segments of the volunteer orientation program to introduce board members to our organization.</p> <p><input type="checkbox"/> None of the above. In our situation...</p>	<p>L E V E L</p> <p>↓</p> <p><input type="checkbox"/></p>

<p>C. We have put our key policies and requirements into writing so that they are conveyed consistently to everyone.</p> <p>1 Our organization's key policies and other requirements have not been put into writing.</p> <p>2 A few key policies and other requirements are in writing but are not readily accessible in a single document.</p> <p>3 We have a volunteer manual which contains key policies and other requirements, but some sections are out of date.</p> <p>4 We have a complete volunteer manual which is updated regularly.</p> <p><input type="checkbox"/> None of the above. In our situation...</p>	<p>L E V E L</p> <p>↓</p> <p><input type="checkbox"/></p>
<p>D. Training has been designed for volunteers based on each position description.</p> <p>1 Little or no training is provided for volunteers.</p> <p>2 We train volunteers periodically, but training is not based on individual job descriptions or skills.</p> <p>3 Training has been well designed in some units, and volunteers assigned to those units receive the training they need.</p> <p>4 Volunteers in every unit receive appropriate training that is tailored to their responsibilities.</p> <p><input type="checkbox"/> None of the above. In our situation...</p>	<p>L E V E L</p> <p>↓</p> <p><input type="checkbox"/></p>
<p>E. We adapt our training to assure that groups and people giving one-time volunteer service are as effective (and welcomed) as possible.</p> <p>1 We do whatever we can to give instructions to groups and one-time volunteers, based on who is available at the time to do this.</p> <p>2 We assign an experienced volunteer or a paid staff member to work closely with groups or one-time volunteers in order to give them guidance.</p> <p>3 We have developed clear, written project descriptions and detailed instruction sheets to give groups and one-time volunteers a helpful overview of our expectations as well as to anticipate possible questions.</p> <p>4 In addition to an assigned guide and clear instructions, groups and one-time volunteers are welcomed at the start of their service with a brief version of the volunteer orientation program and are given a chance to ask questions.</p> <p><input type="checkbox"/> None of the above. In our situation...</p>	<p>L E V E L</p> <p>↓</p> <p><input type="checkbox"/></p>

<p>F. Provision has been made for continued, in-service training of volunteers.</p> <p>1 Volunteers receive training at the start of their assignments but ongoing training is not offered.</p> <p>2 Provisions have been made for updated training of volunteers in their assignment areas.</p> <p>3 Periodic, general in-service training sessions are held for volunteers to increase their general knowledge of other aspects of our work.</p> <p>4 We help individual volunteers increase their skills through training and move them into new assignments and/or assignments of greater responsibility, including encouraging their attendance at relevant community workshops.</p> <p><input type="checkbox"/> None of the above. In our situation...</p>	<p>L E V E L</p> <p>↓</p> <p><input type="checkbox"/></p>
<p>G. The training of volunteers is integrated with the training of the paid staff.</p> <p>1 Volunteers and employees are trained separately, including in-service sessions.</p> <p>2 Volunteers are invited to attend employee training sessions and vice versa, but training content is directed at one or the other as the primary audience.</p> <p>3 Some joint in-service training is designed and conducted to meet the needs of volunteers and employees.</p> <p>4 Like employees, volunteers are offered off-site training, conference and other educational opportunities.</p> <p><input type="checkbox"/> None of the above. In our situation...</p>	<p>L E V E L</p> <p>↓</p> <p><input type="checkbox"/></p>
<p>H. Volunteers are involved in the design of their training.</p> <p>1 Volunteer training is designed and conducted by our employees.</p> <p>2 Volunteers are asked to evaluate the training they receive from our employees, and this input is used to improve the training.</p> <p>3 Volunteers participate in planning training sessions; in selecting topics, speakers and so on; and in evaluating training.</p> <p>4 Experienced volunteers are utilized as trainers of other volunteers, together with volunteer participation in training design, planning and evaluation.</p> <p><input type="checkbox"/> None of the above. In our situation...</p>	<p>L E V E L</p> <p>↓</p> <p><input type="checkbox"/></p>

<p>I. We use Internet technology in volunteer training.</p> <p>1 We do not use Internet technology in volunteer training.</p> <p>2 We use e-mail to keep volunteers informed of important information.</p> <p>3 We have a designated area of our Web site which we use for volunteer training and information exchange, such as posting questions and answers, articles of interest, audiotapes of presentations, etc.</p> <p>4 We offer distance learning through online courses, interactive online discussions, and other means as the technology develops.</p> <p><input type="checkbox"/> None of the above. In our situation...</p>	<p style="text-align: center;">L E V E L</p> <p style="text-align: center;">↓</p> <p style="text-align: center;"><input type="checkbox"/></p>
<p>Total Score for Element #6: Orientation and Training</p>	<p style="text-align: center;"><input type="checkbox"/></p>

Element #7: Volunteer/Employee Relationships

The interrelationship of volunteers and employees can be the single biggest obstacle to effective volunteer involvement, unless steps are taken to encourage teamwork. This requires training, evaluation and administrative attention. It is also important to pay attention to the relationships between long-time volunteers and newcomers.

<p>A. The climate within our organization is conducive to productive volunteer involvement.</p> <p>1 The paid staff have not been prepared to work with volunteers.</p> <p>2 Those staff working directly with volunteers have been trained, whereas those not working directly with volunteers do not see this as an area of concern to them.</p> <p>3 Employees throughout the agency, regardless of their position or their need to interact with volunteers, have been trained in the basics of working with volunteers and accept their responsibility for creating a receptive climate for volunteers.</p> <p>4 In addition to training employees, we also train volunteers in how to work as a team with paid staff.</p> <p><input type="checkbox"/> None of the above. In our situation...</p>	<p style="text-align: center;">L E V E L</p> <p style="text-align: center;">↓</p> <p style="text-align: center;"><input type="checkbox"/></p>
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<p>B. We consider ability to work with volunteers to be an important element of successful employment with our organization.</p> <p>1 Our employee job descriptions and our employment interview process seldom or never address the employee's experience and ability in working with volunteers.</p> <p>2 We include a statement about working with volunteers in selected employee job descriptions and ask job candidates about their backgrounds in working with volunteers; however, we do not assess employee performance on this factor.</p> <p>3 We include the responsibility for effective working relationships with volunteers in most employees' job descriptions, and we offer regular training for employees on how to supervise volunteers.</p> <p>4 In addition to employee job descriptions and training, we enforce our concern for effective volunteer/employee teamwork by including this area in the annual performance assessment of employees.</p> <p><input type="checkbox"/> None of the above. In our situation...</p>	<p>L E V E L</p> <p>↓</p> <p><input type="checkbox"/></p>
<p>C. We give recognition to those staff who work well with volunteers and we take action to improve the performance of those who are weak in this area.</p> <p>1 There is no recognition or consequence for employees who have good or poor relationships with volunteers.</p> <p>2 Employees who do well or poorly in working with volunteers are given feedback only by the volunteer program manager.</p> <p>3 Employees who do well or poorly in working with volunteers are commended or reprimanded by their immediate supervisor.</p> <p>4 An employee who works successfully with volunteers receives public attention at recognition events, together with internal recognition of this skill during performance assessments and when promotion opportunities arise.</p> <p><input type="checkbox"/> None of the above. In our situation...</p>	<p>L E V E L</p> <p>↓</p> <p><input type="checkbox"/></p>
<p>D. Volunteers participate in staff meetings.</p> <p>1 Volunteers are not involved in staff meetings.</p> <p>2 Volunteers are permitted to observe staff meetings.</p> <p>3 Volunteers are asked to make reports at staff meetings.</p> <p>4 Volunteers are encouraged to participate fully in staff meetings.</p> <p><input type="checkbox"/> None of the above. In our situation...</p>	<p>L E V E L</p> <p>↓</p> <p><input type="checkbox"/></p>

<p>E. We assure good volunteer-to-volunteer relationships.</p> <p>1 We do not monitor volunteer-to-volunteer relationships and expect volunteers to get acquainted among themselves.</p> <p>2 We make a point of introducing new volunteers to experienced volunteers and make clear that all assignment areas are of equal value.</p> <p>3 We involve experienced volunteers in welcoming and training newcomers, but do not elevate some volunteers over others because of years of service, money raised or given, or other characteristics.</p> <p>4 We monitor that teamwork is developing and, when necessary, we offer training in diversity or other human resource skills to all volunteers.</p> <p><input type="checkbox"/> None of the above. In our situation...</p>	<p style="text-align: center;">L E V E L</p> <p style="text-align: center;">↓</p> <div style="border: 1px solid black; width: 40px; height: 20px; margin: 0 auto;"></div>
<p>Total Score for Element #7: Volunteer/Employee Relationships</p>	<div style="border: 1px solid black; width: 40px; height: 20px; margin: 0 auto;"></div>

<p>Element #8: Supervision</p>	
<p><i>As with employees, volunteers need support from those in a position to see the total picture and who know what work needs to be done. A key aspect of the supervision of volunteers is access to someone in charge during the time the volunteer is on duty. Not all volunteers are supervised. Some require liaison or reporting contact.</i></p>	
<p>A. Provision has been made for supportive supervision of volunteers, based on agency and volunteer needs.</p> <p>1 We do not assign specific supervisors to specific volunteers; whoever is on hand answers volunteer questions when needed.</p> <p>2 Theoretically we have assigned specific supervisors to most volunteers, but communication between them occurs only sporadically.</p> <p>3 Most volunteers have been assigned specific supervisors who communicate instructions and monitor work progress as necessary.</p> <p>4 We have designated a supervisor for each volunteer and they communicate together regularly to establish a feedback cycle on work progress, performance quality, possible obstacles and issues, and appreciation for work completed.</p> <p><input type="checkbox"/> None of the above. In our situation...</p>	<p style="text-align: center;">L E V E L</p> <p style="text-align: center;">↓</p> <div style="border: 1px solid black; width: 40px; height: 20px; margin: 0 auto;"></div>

<p>B. We have provided for the supervision of volunteers who work on a variety of schedules.</p> <p>1 Volunteers who work outside of regular office hours do not have a supervisor at those times.</p> <p>2 We have assigned volunteer team leaders for shifts such as evenings and weekends, and those key volunteers report to the staff during regular work hours.</p> <p>3 The volunteer program manager is permitted flex time to supervise volunteers who work different schedules.</p> <p>4 Staff from various departments have been designated as officially responsible for supervising volunteers working shifts such as evenings and weekends.</p> <p><input type="checkbox"/> None of the above. In our situation...</p>	<p>L E V E L</p> <p>↓</p> <p><input type="checkbox"/></p>
<p>C. We have a procedure for supervising volunteers who do not work on site or who work online.</p> <p>1 Volunteers who work off-site or online are not assigned to a specific supervisor and are communicated with sporadically.</p> <p>2 Off-site or online volunteers are encouraged to call or stop in whenever they can.</p> <p>3 Off-site or online volunteers have a designated supervisor and are expected to report in at regular intervals.</p> <p>4 Off-site or online volunteers have a designated supervisor and maintain regular, two-way communication, including the opportunity to participate in on-site meetings or workshops.</p> <p><input type="checkbox"/> None of the above. In our situation...</p>	<p>L E V E L</p> <p>↓</p> <p><input type="checkbox"/></p>
<p>D. Provisions have been made for providing a supportive agency contact or staff liaison for volunteers who work on committees or in consultation roles.</p> <p>1 Some committee and consultant volunteers in our organization do not have a designated staff liaison.</p> <p>2 Employees have been designated to work with committee and consultant volunteers, but the supervision role is undefined.</p> <p>3 Committees and consultant volunteers report regularly to a designated employee.</p> <p>4 There is a designated staff liaison for every committee and consultant volunteer, with staff and volunteers supportive of each other's efforts and with two-way feedback on a regular basis.</p> <p><input type="checkbox"/> None of the above. In our situation...</p>	<p>L E V E L</p> <p>↓</p> <p><input type="checkbox"/></p>

<p>E. Volunteers are kept busy at productive work.</p> <p>1 There is often no work prepared for volunteers to do.</p> <p>2 Some work is prepared for volunteers, but it is often insufficient to fill the available time.</p> <p>3 Volunteers have sufficient work to be kept busy during their shifts.</p> <p>4 Volunteers have sufficient regular work to do, and we have additional standby tasks for volunteers with free time.</p> <p><input type="checkbox"/> None of the above. In our situation...</p>	<p>L E V E L</p> <p>↓</p> <p><input type="checkbox"/></p>
<p>F. We communicate and enforce work standards.</p> <p>1 We are grateful for any work done by volunteers.</p> <p>2 We establish expectations for work performance and communicate these standards to all volunteers.</p> <p>3 We give feedback, support and training to help volunteers meet the expected work standards.</p> <p>4 We give volunteers recognition for work performed well and take steps to correct work not up to standards, up to and including reassignment or termination.</p> <p><input type="checkbox"/> None of the above. In our situation...</p>	<p>L E V E L</p> <p>↓</p> <p><input type="checkbox"/></p>
<p>Total Score for Element #8: Supervision</p>	<p><input type="checkbox"/></p>

<p>Element #9: Recognition</p>	
<p><i>Recognition is a form of compensation for volunteer efforts. It includes thanking volunteers for their efforts and welcoming volunteers' input. An organization can provide annual formal recognition through certificates and dinners, but equally important are daily support and informal expressions of appreciation.</i></p>	
<p>A. Volunteers—including the board of directors—are appropriately recognized by the organization.</p> <p>1 We do not have a formal agency-wide volunteer recognition process.</p> <p>2 We have one major volunteer recognition event annually, to which we invite mainly direct service volunteers.</p> <p>3 In addition to our one annual event for ongoing volunteers, we thank individuals and groups throughout the year for their special volunteer contributions.</p> <p style="text-align: right;"><i>next page →</i></p>	

<p>A. (continued)</p> <p>4 In addition to an annual event, we find ways on a year-round basis, particularly in the units in which volunteers work, to show volunteers they are appreciated, including opportunities for promotion.</p> <p><input type="checkbox"/> None of the above. In our situation...</p>	<p>L E V E L</p> <p>↓</p> <p><input type="checkbox"/></p>
<p>B. We find many ways to say thank you all year round.</p> <p>1 We rarely say thank you to volunteers except at formal events.</p> <p>2 We consciously make a point of greeting volunteers by name each time they arrive and saying thank you each time they leave.</p> <p>3 We make it clear that we see volunteers as part of staff by making sure they receive copies of important memos and e-mails, are permitted access to staff facilities such as a lounge or coffee area, and are included in planning meetings as appropriate.</p> <p>4 We give credit by name to volunteers who contributed to a project, service or report; we consider volunteer suggestions seriously; and we take action on volunteer recommendations.</p> <p><input type="checkbox"/> None of the above. In our situation...</p>	<p>L E V E L</p> <p>↓</p> <p><input type="checkbox"/></p>
<p>C. We provide feedback to volunteers on the quality and value of their work.</p> <p>1 We rarely comment individually to volunteers about the quality or value of their work to our organization.</p> <p>2 We thank volunteers for their work on a continual basis.</p> <p>3 We thank volunteers and we also take the time to offer constructive criticism so that they can further develop their skills.</p> <p>4 We thank volunteers, offer feedback and make sure volunteers know what has happened since they last contributed their efforts.</p> <p><input type="checkbox"/> None of the above. In our situation...</p>	<p>L E V E L</p> <p>↓</p> <p><input type="checkbox"/></p>

<p>D. We find opportunities to share the accomplishments of volunteers with the public, our funders and other supporters.</p> <p>1 We share information about volunteer contributions, mainly among staff and volunteers.</p> <p>2 We publicize accomplishments of volunteers to the press, generally in conjunction with our annual recognition event; we participate in our local National Volunteer Week activities.</p> <p>3 We find opportunities throughout the year to mention volunteer contributions publicly, including on our Web site and at community events; we nominate volunteers for local and national awards.</p> <p>4 In addition to public recognition, we include a formal summary of volunteer accomplishments in our agency annual report and in reports to funders, legislators and other supporters.</p> <p><input type="checkbox"/> None of the above. In our situation...</p>	<p>L E V E L</p> <p>↓</p> <p><input type="checkbox"/></p>
<p>E. Our top administrators demonstrate support for the volunteer program in tangible ways.</p> <p>1 Our top administrators have very little contact with volunteers or the volunteer program.</p> <p>2 The volunteer program manager has access to administration upon request and executives attend the annual volunteer recognition event.</p> <p>3 Our top administrators work with the volunteer program manager to establish goals, expect and read volunteer program reports regularly, and encourage other staff to create a positive climate for volunteers.</p> <p>4 In addition to item #3, our top administrators have developed position descriptions for volunteers to assist them directly and to provide personal recognition to individual volunteers for special achievements.</p> <p><input type="checkbox"/> None of the above. In our situation...</p>	<p>L E V E L</p> <p>↓</p> <p><input type="checkbox"/></p>
<p>Total Score for Element #9: Recognition</p>	<p><input type="checkbox"/></p>

Element #10: Recordkeeping and Reporting

If volunteers are important to the work of the organization, it is important to know what volunteers are doing. Documenting their work assists in recruitment, training, recognition and even fundraising. Recordkeeping is also necessary for insurance coverage and to support the income-tax deduction claims of volunteers. Once records are kept, they are of little meaning if they are not reported. Reports of the cumulative achievements of volunteers should be shared with volunteers, as well as with administration, other staff and funding sources.

A. Records are kept for each volunteer and all services performed.

- 1 No records are kept on volunteers.
 - 2 Records are kept sporadically on volunteers, without a consistent format or process.
 - 3 Records are kept on individual and group volunteers, but the volunteer program must adapt to the existing software used to manage fundraising and donor data..
 - 4 Complete records are kept on volunteers and their service with us, managed by software designed for the special needs of a volunteer program.
- None of the above. In our situation...

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B. We keep records on the work volunteers contribute.

- 1 We do not attempt to keep records on volunteer activities.
 - 2 We require volunteers to sign in and sign out and therefore keep track of hours contributed, but we do not keep records on the type or nature of services provided by volunteers
 - 3 We have a data-collection system that allows us to identify what most volunteers have accomplished in any given period.
 - 4 Our data-collection system includes records on the activities of all categories of volunteers, including the board of directors, occasional volunteers, student interns and others.
- None of the above. In our situation...

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C. We expect volunteers to report on their activities.

- 1 We do not ask for any information from volunteers except for their hours of service.
- 2 We ask for periodic reports on volunteers' activities but do not follow up with volunteers who did not submit one.
- 3 We also require regular reports from volunteers in some units and/or from those who work off site.

next page →

<p>C. (continued)</p> <p>4 We require regular reports from volunteers in any assignment, follow up with those who do not submit reports and are willing to enforce this standard by removing non-reporting volunteers from their assignments, if necessary.</p> <p><input type="checkbox"/> None of the above. In our situation...</p>	<p>L E V E L</p> <p>↓</p> <p><input type="checkbox"/></p>
<p>D. We expect reports from the volunteer program manager on the progress and activities of the volunteer program.</p> <p>1 We do not require reports from the volunteer program manager.</p> <p>2 We ask the volunteer program manager for a written report on the volunteer program annually or semi-annually.</p> <p>3 We require a monthly written report on the volunteer program and meet with the volunteer program manager to discuss progress.</p> <p>4 In addition to summary reports from the volunteer program manager, we expect each unit to comment in its own reports on volunteer as well as employee activities and accomplishments.</p> <p><input type="checkbox"/> None of the above. In our situation...</p>	<p>L E V E L</p> <p>↓</p> <p><input type="checkbox"/></p>
<p>E. We use the volunteer program report.</p> <p>1 It is questionable whether the volunteer program report is read or utilized by anyone.</p> <p>2 The report is provided to the volunteer program manager's immediate supervisor.</p> <p>3 The report is shared with all department heads.</p> <p>4 The report is shared with all department heads, volunteers and employees.</p> <p><input type="checkbox"/> None of the above. In our situation...</p>	<p>L E V E L</p> <p>↓</p> <p><input type="checkbox"/></p>
<p>Total Score for Element #10: Recordkeeping and Reporting</p>	<p><input type="checkbox"/></p>

Element #11: Evaluation

Because volunteer time is too valuable to waste, it is imperative to evaluate the impact of volunteer services regularly and to discover whether those services are still the most meaningful ones to deliver. Along with program evaluation, it also is helpful to conduct individual performance reviews with volunteers. This practice maintains standards for the program and also recognizes each volunteer.

<p>A. The volunteer program is evaluated annually, based on goals and objectives developed to benefit the agency's clients, staff and volunteers.</p> <p>1 The volunteer program is not evaluated.</p> <p>2 The volunteer program is evaluated periodically, but not against any goals and objectives.</p> <p>3 The volunteer program is evaluated annually against quantitative goals and objectives (such as assessing the number of new volunteers), and adjustments are made as needed.</p> <p>4 The volunteer program is evaluated annually in terms of its impact on the goals and objectives of the entire organization, and on accomplishments achieved; adjustments are made as needed.</p> <p><input type="checkbox"/> None of the above. In our situation...</p>	<p>L E V E L</p> <p>↓</p> <p><input type="checkbox"/></p>
<p>B. Volunteer assignments are assessed regularly.</p> <p>1 Once we establish a volunteer assignment, it is permanently part of the volunteer program.</p> <p>2 New volunteer assignments are assessed at the end of one year to determine if they should be retained and/or modified.</p> <p>3 All volunteer assignments are assessed annually to determine if they still are accurately described and meaningful.</p> <p>4 Volunteer assignments are adapted or even eliminated if the annual assessment shows they are no longer the most meaningful work for volunteers.</p> <p><input type="checkbox"/> None of the above. In our situation...</p>	<p>L E V E L</p> <p>↓</p> <p><input type="checkbox"/></p>
<p>C. We ask a range of stakeholders for their assessment of the volunteer program: clients, volunteers, managers, and line staff.</p> <p>1 We survey one of the constituent groups above.</p> <p>2 We survey two of the constituent groups above.</p> <p>3 We survey three of the constituent groups above.</p> <p>4 We survey all of the constituent groups above.</p> <p><input type="checkbox"/> None of the above. In our situation...</p>	<p>L E V E L</p> <p>↓</p> <p><input type="checkbox"/></p>

<p>D. The Board of Directors is engaged in evaluating volunteer involvement.</p> <p>1 The Board rarely, if ever, schedules any time on its agenda to discuss volunteer involvement.</p> <p>2 The Board occasionally discusses volunteers, if a special request is made for their consideration.</p> <p>3 On at least an annual basis, the Board reviews the status and outcomes of volunteer involvement and makes recommendations.</p> <p>4 There is a Board committee assigned ongoing responsibility for monitoring volunteer involvement and for helping the volunteer program manager.</p> <p><input type="checkbox"/> None of the above. In our situation...</p>	<p>L E V E L</p> <p>↓</p> <p><input type="checkbox"/></p>
<p>E. Individual performance reviews of volunteers are conducted regularly.</p> <p>1 Performance evaluations are not conducted with volunteers.</p> <p>2 Performance evaluations of individual volunteers are conducted at irregular intervals, usually when there is a problem.</p> <p>3 Regular performance reviews are conducted with most volunteers.</p> <p>4 Regular performance reviews are conducted with most volunteers, during which a mutual decision is made to continue the same assignment, accept a promotion, change to a different assignment or even to no longer be a volunteer. Written records of these decisions are kept in each volunteer's personnel file.</p> <p><input type="checkbox"/> None of the above. In our situation...</p>	<p>L E V E L</p> <p>↓</p> <p><input type="checkbox"/></p>
<p>F. Individual performance reviews are opportunities for feedback from volunteers.</p> <p>1 Volunteers are evaluated by their supervisors without any two-way assessment.</p> <p>2 Volunteers participate in their individual performance reviews by assessing their own activities in comparison with their supervisors' assessment.</p> <p>3 Volunteers evaluate the support given by their supervisors as part of the individual performance review, in addition to their own and their supervisors' assessment of their work.</p> <p>4 The individual performance review includes the request for feedback from the volunteer about any aspect of the organization which s/he thinks can be improved to function more effectively.</p> <p><input type="checkbox"/> None of the above. In our situation...</p>	<p>L E V E L</p> <p>↓</p> <p><input type="checkbox"/></p>

<p>G. Volunteers are satisfied with their work in our organization.</p> <p>1 We do not know whether volunteers are satisfied with their work in our organization.</p> <p>2 We retain most volunteers for at least the period of time to which they originally committed when interviewed, and so we assume they are satisfied.</p> <p>3 We retain many volunteers for longer than the original time commitment and therefore assume they are satisfied.</p> <p>4 We regularly ask volunteers about their level of satisfaction, and we take action appropriate to their responses.</p> <p><input type="checkbox"/> None of the above. In our situation...</p>	<p>L E V E L</p> <p>↓</p> <p><input type="checkbox"/></p>
<p>H. We learn from volunteers who are leaving.</p> <p>1 We do not attempt to interview volunteers who leave our agency.</p> <p>2 We ask volunteers who leave to complete an optional written feedback questionnaire.</p> <p>3 We conduct exit interviews will volunteers who are leaving.</p> <p>4 We make a point of contacting ex-volunteers several months after they leave to get their feedback after some time has passed.</p> <p><input type="checkbox"/> None of the above. In our situation...</p>	<p>L E V E L</p> <p>↓</p> <p><input type="checkbox"/></p>
<p>Total Score for Element #11: Evaluation</p>	<p><input type="checkbox"/></p>

<p>Element #12: Volunteer Input</p>	
<p>Some organizations want help from volunteers, but not input. Volunteers are in a position to observe an organization and can take more risks in criticizing. They also are effective community advocates when they observe things going well. It is important to create a channel for volunteer comments. Also, having the opportunity to voice opinions and make suggestions encourages greater participation in all aspects of the volunteer program.</p>	
<p>A. We have clearly established channels for volunteers to voice opinions and make suggestions.</p> <p>1 We have no formal channel for volunteer input.</p> <p>2 We ask volunteers to speak with their supervisors or to the volunteer program manager when they observe something that troubles them or that they believe deserves positive recognition; there are no clear procedures on how to address the input that volunteers provide.</p> <p style="text-align: right;"><i>next page →</i></p>	

<p>A. (continued)</p> <p>3 Volunteers are asked to channel their observations, input and suggestions through their supervisors or the volunteer manager, and we have a procedure for acting on this input.</p> <p>4 We regularly ask volunteers directly if they have any comments or suggestions, in addition to having a procedure to handle unsolicited input through their supervisors and the volunteer manager.</p> <p><input type="checkbox"/> None of the above. In our situation...</p>	<p>L E V E L</p> <p>↓</p> <p><input type="checkbox"/></p>
<p>B. Volunteers are part of the decision-making process for the volunteer program.</p> <p>1 All decisions about the volunteer program are made by the paid staff.</p> <p>2 Most decisions about the volunteer program are made by the paid staff, although we ask for volunteer recommendations whenever possible.</p> <p>3 We have established a volunteer advisory council which works closely with the volunteer program manager to make plans together for the volunteer program.</p> <p>4 In addition to having a volunteer advisory council, administrative volunteers are assigned to volunteer-program management roles that require leadership decisions.</p> <p><input type="checkbox"/> None of the above. In our situation...</p>	<p>L E V E L</p> <p>↓</p> <p><input type="checkbox"/></p>
<p>C. We see volunteers as a source of information about the community at large.</p> <p>1 We never ask volunteers for their input on new agency initiatives.</p> <p>2 We allow volunteers to give input on new agency initiatives, but we do not make a point of it.</p> <p>3 We consciously convene volunteers as a focus group to get their reactions to new initiatives.</p> <p>4 We ask volunteers to serve as community representatives on planning teams.</p> <p><input type="checkbox"/> None of the above. In our situation...</p>	<p>L E V E L</p> <p>↓</p> <p><input type="checkbox"/></p>

<p>D. We utilize the ability of volunteers to be public educators on our organization's behalf.</p> <p>1 We do not consider volunteers as public educators on our organization's behalf.</p> <p>2 We recognize that volunteers are in a position to speak about our organization to the community, and we hope they have accurate information about us.</p> <p>3 We make sure that volunteers have agency brochures and/or other information allowing them to represent us accurately.</p> <p>4 We periodically update volunteers on our organization's activities and future plans and ask volunteers to talk about these things to their friends and community contacts.</p> <p><input type="checkbox"/> None of the above. In our situation...</p>	<p style="text-align: center;">L E V E L</p> <p style="text-align: center;">↓</p> <p style="text-align: center;"><input type="checkbox"/></p>
<p>Total Score for Element #12: Volunteer Input</p>	<p style="text-align: center;"><input type="checkbox"/></p>

SCORING THE VOLUNTEER MANAGEMENT AUDIT

Use this tally sheet to record your team's assessment ranking for each of the standards. The right-hand column is for noting special considerations, minority opinions or ideas that surfaced during your discussion.

If you had any "None of the Above" responses, derive your average score after subtracting the number of such ratings from the original number of questions.

Average Scores	Comments
<p>Element #1: Planning/Resources</p> <p>Total Score Number of Standards Average Score _____ ÷ <u>13</u> = _____</p> <p><i>If there are any "None of the Above" responses:</i></p> <p># of Standards "None of the Above" New # of Standards <u>13</u> - _____ = _____</p> <p>Total Score New # of Standards Average Score _____ ÷ _____ = _____</p>	
<p>Element #2: Staffing</p> <p>Total Score Number of Standards Average Score _____ ÷ <u>9</u> = _____</p> <p><i>If there are any "None of the Above" responses:</i></p> <p># of Standards "None of the Above" New # of Standards <u>9</u> - _____ = _____</p> <p>Total Score New # of Standards Average Score _____ ÷ _____ = _____</p>	
<p>Element #3: Volunteer Work Design</p> <p>Total Score Number of Standards Average Score _____ ÷ <u>7</u> = _____</p> <p><i>If there are any "None of the Above" responses:</i></p> <p># of Standards "None of the Above" New # of Standards <u>7</u> - _____ = _____</p> <p>Total Score New # of Standards Average Score _____ ÷ _____ = _____</p>	

Element #4: Recruitment

Total Score _____ ÷ Number of Standards 8 = Average Score _____

If there are any "None of the Above" responses:

of Standards 8 - "None of the Above" _____ = New # of Standards _____

Total Score _____ ÷ New # of Standards _____ = Average Score _____

Element #5: Interviewing and Screening

Total Score _____ ÷ Number of Standards 6 = Average Score _____

If there are any "None of the Above" responses:

of Standards 6 - "None of the Above" _____ = New # of Standards _____

Total Score _____ ÷ New # of Standards _____ = Average Score _____

Element #6: Orientation and Training

Total Score _____ ÷ Number of Standards 9 = Average Score _____

If there are any "None of the Above" responses:

of Standards 9 - "None of the Above" _____ = New # of Standards _____

Total Score _____ ÷ New # of Standards _____ = Average Score _____

Element #7: Volunteer/Employee Relationships

Total Score _____ ÷ Number of Standards 5 = Average Score _____

If there are any "None of the Above" responses:

of Standards 5 - "None of the Above" _____ = New # of Standards _____

Total Score _____ ÷ New # of Standards _____ = Average Score _____

Element #8: Supervision

$$\begin{array}{rcl} \text{Total Score} & \div & \text{Number of Standards} \\ \underline{\quad\quad} & \div & \underline{6} & = & \text{Average Score} \\ & & & & \underline{\quad\quad} \end{array}$$

If there are any "None of the Above" responses:

$$\begin{array}{rcl} \text{\# of Standards} & - & \text{"None of the Above"} & = & \text{New \# of Standards} \\ \underline{6} & - & \underline{\quad\quad} & = & \underline{\quad\quad} \end{array}$$

$$\begin{array}{rcl} \text{Total Score} & \div & \text{New \# of Standards} \\ \underline{\quad\quad} & \div & \underline{\quad\quad} & = & \text{Average Score} \\ & & & & \underline{\quad\quad} \end{array}$$

Element #9: Recognition

$$\begin{array}{rcl} \text{Total Score} & \div & \text{Number of Standards} \\ \underline{\quad\quad} & \div & \underline{5} & = & \text{Average Score} \\ & & & & \underline{\quad\quad} \end{array}$$

If there are any "None of the Above" responses:

$$\begin{array}{rcl} \text{\# of Standards} & - & \text{"None of the Above"} & = & \text{New \# of Standards} \\ \underline{5} & - & \underline{\quad\quad} & = & \underline{\quad\quad} \end{array}$$

$$\begin{array}{rcl} \text{Total Score} & \div & \text{New \# of Standards} \\ \underline{\quad\quad} & \div & \underline{\quad\quad} & = & \text{Average Score} \\ & & & & \underline{\quad\quad} \end{array}$$

Element #10: Recordkeeping and Reporting

$$\begin{array}{rcl} \text{Total Score} & \div & \text{Number of Standards} \\ \underline{\quad\quad} & \div & \underline{5} & = & \text{Average Score} \\ & & & & \underline{\quad\quad} \end{array}$$

If there are any "None of the Above" responses:

$$\begin{array}{rcl} \text{\# of Standards} & - & \text{"None of the Above"} & = & \text{New \# of Standards} \\ \underline{5} & - & \underline{\quad\quad} & = & \underline{\quad\quad} \end{array}$$

$$\begin{array}{rcl} \text{Total Score} & \div & \text{New \# of Standards} \\ \underline{\quad\quad} & \div & \underline{\quad\quad} & = & \text{Average Score} \\ & & & & \underline{\quad\quad} \end{array}$$

Element #11: Evaluation

$$\begin{array}{rcl} \text{Total Score} & \div & \text{Number of Standards} \\ \underline{\quad\quad} & \div & \underline{8} & = & \text{Average Score} \\ & & & & \underline{\quad\quad} \end{array}$$

If there are any "None of the Above" responses:

$$\begin{array}{rcl} \text{\# of Standards} & - & \text{"None of the Above"} & = & \text{New \# of Standards} \\ \underline{8} & - & \underline{\quad\quad} & = & \underline{\quad\quad} \end{array}$$

$$\begin{array}{rcl} \text{Total Score} & \div & \text{New \# of Standards} \\ \underline{\quad\quad} & \div & \underline{\quad\quad} & = & \text{Average Score} \\ & & & & \underline{\quad\quad} \end{array}$$

Element #12: Volunteer Input

$$\text{Total Score} \div \text{Number of Standards} = \text{Average Score}$$

$$\underline{\hspace{2cm}} \div \underline{4} = \underline{\hspace{2cm}}$$

If there are any "None of the Above" responses:

$$\# \text{ of Standards} - \text{"None of the Above"} = \text{New \# of Standards}$$

$$\underline{4} - \underline{\hspace{2cm}} = \underline{\hspace{2cm}}$$

$$\text{Total Score} \div \text{New \# of Standards} = \text{Average Score}$$

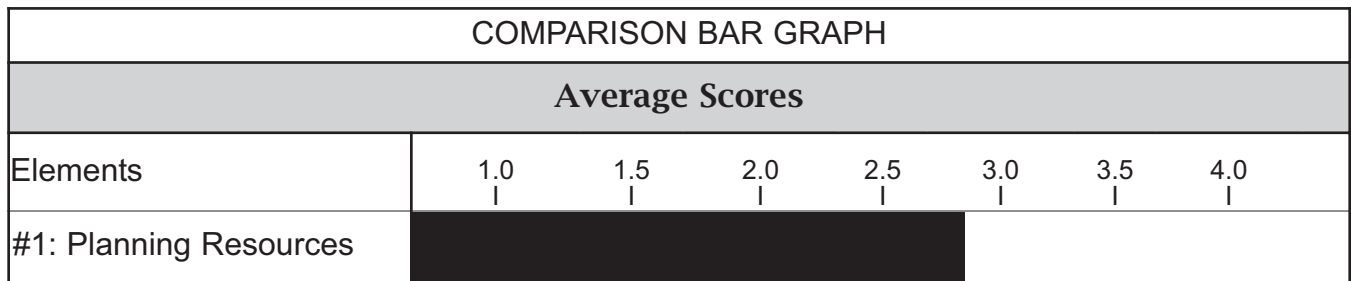
$$\underline{\hspace{2cm}} \div \underline{\hspace{2cm}} = \underline{\hspace{2cm}}$$

Graphing the Results

Since the Audit is primarily a discussion starter, you may believe that the score for each individual statement provides you with enough information to analyze the Audit. However, you may want to use your average scores to do some comparisons of your achievement levels for each element. In the Bar Graph provided on the next page, shade the bar for each element up to the average score. See the example below. After shading the score for each element, you will have a visual representation of your achievement levels, and high scoring elements and low scoring elements will be evident.

Example:

Element #1 has a *Total Score* of 37, divided by 13 *Standards*, so the *Average Score* for that element is 2.85. On the bar graph, shade in the Planning and Resources row up to approximately 2.85, like this:



Comparison Bar Graph							
Average Scores							
Elements	1.0 	1.5 	2.0 	2.5 	3.0 	3.5 	4.0
1: Planning and Resources							
2: Staffing							
3: Volunteer Work Design							
4: Recruitment							
5: Interviewing and Screening							
6: Orientation and Training							
7: Volunteer/Employee Relationships							
8: Supervision							
9: Recognition							
10: Recordkeeping and Reporting							
11: Evaluation							
12: Volunteer Input							

The Volunteer Management Audit Scoresheet (Abbreviated Version)

Thank you for agreeing to participate in this "Volunteer Management Audit." The time you spend working with your team to complete this Scoresheet will result in identifying what we need to do to strengthen volunteer involvement here. Perhaps this assessment process will also increase your own understanding of best practices in working with volunteers. You are making an important contribution by sharing your perspective and ideas.

Date of Assessment: _____

Audit Team Members: _____

Instructions

This Audit Scoresheet is organized by the twelve elements of a successful volunteer program:

- | | |
|--|--|
| <ul style="list-style-type: none"> Planning and Resources Staffing Volunteer Work Design Recruitment Interviewing and Screening Orientation and Training | <ul style="list-style-type: none"> Volunteer/Employee Relations Supervision Recognition Recordkeeping and Reporting Evaluation Volunteer Input |
|--|--|

Within each element, the Scoresheet gives a series of assessment statements expressing basic standards for volunteer involvement, based on generally accepted practices in the field of volunteer administration. The descriptions of the 12 elements are provided in the accompanying handout.

Rate the organization's current level of achievement for each statement, from your perspective. Score each item from 1 to 5: 1 meaning not at all or only minimal achievement; 5 meaning completely or outstanding performance. Use the column on the right for recording general notes about each element as you work through the statements.

Note that the main purpose of the *Volunteer Management Audit* is as a discussion starter. This is an opportunity to examine and analyze how effectively your organization incorporates volunteers into your operations. The ratings you assign in comparison to the highest possible scores are less important than determining what is really needed in your situation.

You may want to know:

- ◆ **Why is this Scoresheet labeled "Abbreviated Version"?**

This is an abbreviated version of a longer scoresheet included with the book, the *Volunteer Management Audit*. If you do not completely understand a standards statement here, ask to see the corresponding section on the complete Audit Scoresheet for more details.

- ◆ **What do we do if we don't know an answer?**

If you do not have enough information to score a statement, ask to see the various documents compiled in the earlier Materials Review phase of the process or do some research by speaking with various knowledgeable people in your organization.

- ◆ **What if we have different responses because of team members' different degree of contact with the volunteer program?**

Use your differences to reach consensus as to what occurs in the organization, on average, and assign the appropriate score. Remember that the Audit is more important for talking than for scoring, and that you can (and should) make notes in the right column whenever there is disagreement.

- ◆ **What score do we give ourselves if we have the standard or policy but we don't uphold it uniformly?**

Reach a consensus with your Team as to the "average" level of performance, but make a note in the right column recording the issue of inconsistency.

- ◆ **What score do we give ourselves if we cannot find the answer, even after reviewing printed materials and speaking to others?**

Chances are that an inability to uncover information means nothing is happening in this area—or inadequate reports are being made. Score a 1 for that item.

Tallying the Scores

Add up the ratings for all the statements within each element, and then add together the twelve sub-totals to calculate your Grand Tally on the last page. The higher the number, the more advanced the level of accomplishment, although you should exercise some caution in assuming that a "5" is automatically better as a response for your organization. Your circumstances may require a different approach.

Element #1: Planning and Resources		
Rating	A. We have articulated why we want volunteer involvement and can express our vision for the future of the volunteer program.	Working Notes
	B. We have defined what we mean by the term “volunteer.”	
	C. We have developed long-range and short-range goals and objectives for the volunteer program and the volunteers.	
	D. Input from top administrators and middle managers, line staff, volunteers, and clients has been and continues to be utilized in designing/continuing enhancement of the volunteer program.	
	E. We have articulated policies and procedures for volunteer involvement.	
	F. Employees have been trained to work with volunteers and to understand the needs and motivations of volunteers.	
	G. We have developed a risk-management plan and have provided appropriate insurance coverage for volunteer needs.	
	H. Sufficient financial resources have been budgeted for the short- and long-term needs of the volunteer program.	
	I. We have defined the interrelationships of direct-service volunteers and other volunteers who support us, such as the board of directors, advisory council, auxiliary or fundraising group.	

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Rating	J. We have considered the interrelationship of volunteer involvement with other agency functions: public relations; fundraising; client outreach/marketing; public education; or other work.	Working Notes
	K. Whenever we plan something new, we consider how volunteers can be involved and the impact of the new activity on current volunteers.	
_____	Total for element. (Highest possible score: 55)	

Element #2: Staffing

Rating	A. At least one specific individual has been designated as volunteer program manager and has been given a comprehensive written job description for this role.	Working Notes
	B. We have provided staffing as required by the demands of the size and goals of our volunteer program.	
	C. The volunteer program has appropriate clerical support.	
	D. The position of volunteer program manager has been given status equal to that of other supervisory or management staff.	
	E. The volunteer program manager is evaluated regularly on her/his leadership and vision, as well as on the numerical growth of the volunteer program.	
	F. Volunteers are part of the volunteer program management team.	
_____	Total for element. (Highest possible score: 30)	

Element #3: Volunteer Work Design		
Rating	A. We design volunteer assignments based on the needs of clients and staff as well as on the interests of volunteers.	Working Notes
	B. We have written position descriptions for volunteer assignments.	
	C. We update our volunteer position descriptions annually, creating new assignments and eliminating old ones as necessary.	
	D. We have developed a variety of volunteering options, allowing involvement by people with varying time availabilities and with diverse backgrounds.	
	E. Every area or unit of our organization has developed assignments for volunteers.	
	F. We have designed volunteer assignments so that we can be flexible in responding to the needs of a wide variety of volunteers.	
	G. We have provided a "career ladder" for volunteers who wish to advance in responsibility.	
_____	Total for element. (Highest possible score: 35)	

Element #4: Recruitment		
Rating	A. We have designed and implemented an ongoing volunteer recruitment plan and have produced various recruitment materials to use in outreach.	Working Notes
	B. We are tapping into the growing number of sources of volunteer participation, including: corporate-employee volunteer programs, school-based community-service programs, special days of service, court-related alternative-sentencing projects, families volunteering together, self-help groups, etc.	

Rating	C. We actively seek racial, ethnic, age and other diversity in our volunteer corps.	Working Notes
	D. We clearly describe our needs and expectations when we recruit so that prospective applicants can be informed about volunteering here before they apply.	
	E. We have established ongoing relationships with various community groups who provide a regular flow of new volunteers (example: RSVP or a university career center) or who provide service as a team working together (example: a clown troupe or a horticulture club).	
	F. Everyone in the agency participates in the volunteer recruitment effort whenever they are out in the community.	
	G. Our agency Web site describes available volunteer opportunities and current vacancies.	
_____	Total for element. (Highest possible score: 35)	

Element #5: Interviewing and Screening

Rating	A. An interview is held with each prospective volunteer to ascertain skills and interests, discuss expectations, and determine a mutually-acceptable assignment.	Working Notes
	B. We have developed criteria for screening volunteers and we are willing to turn down volunteer applicants.	
	C. We are in compliance with all legal screening requirements such as police background checks, health exams, or other relevant issues.	
_____	Total for element. (Highest possible score: 15)	

Element #6: Orientation and Training		
Rating	A. A standardized orientation is provided to help volunteers become familiar with the purpose, structure and policies of the organization.	Working Notes
	B. We have put our key policies and requirements into writing so that they are conveyed consistently to everyone.	
	C. Training has been designed for volunteers based on each position description.	
	D. We adapt our training to assure that groups and people giving one-time volunteer service are as effective (and welcomed) as possible.	
	E. Provision has been made for continued, in-service training of volunteers, which is also combined whenever appropriate with paid staff training.	
	F. Volunteers are involved in the design of their training.	
_____	Total for element. (Highest possible score: 30)	

Element #7: Volunteer/Employee Relationships		
Rating	A. We consider ability to work with volunteers to be an important element of successful employment with our organization and have put this responsibility into the job descriptions of employees.	Working Notes
	B. We train employees on how to work effectively as a team with volunteers.	
	C. We train volunteers on how to work effectively as a team with employees.	
	D. We give recognition to those staff who work well with volunteers and we take action to improve the performance of those who are weak in this area.	
	E. We take steps to assure good volunteer-to-volunteer relationships, particularly between long-time volunteers and newcomers.	
_____	Total for element. (Highest possible score: 25)	

Element #8: Supervision		
Rating	A. Provision has been made for supportive supervision of volunteers, based on agency and volunteer needs.	Working Notes
	B. We have a procedure for supervising volunteers who do not work on site or who work online.	
	C. Provisions have been made for providing a supportive agency contact or staff liaison for volunteers who work on committees or in consultation roles.	
	D. Volunteers are kept busy at productive work whenever they are on duty.	
	E. We are prepared to terminate a volunteer for cause and have a procedure for doing so, including a grievance process.	
_____	Total for element. (Highest possible score: 25)	

Element #9: Recognition		
Rating	A. Volunteers—including the board of directors—are appropriately recognized by the organization.	Working Notes
	B. We find informal ways to say thank you all year round.	
	C. We provide feedback to volunteers on the quality and value of their work.	
	D. We find opportunities to share the accomplishments of volunteers with the public, our funders and other supporters.	
	E. Our top administrators demonstrate support for the volunteer program in tangible ways.	
_____	Total for element. (Highest possible score: 25)	

Element #10: Recordkeeping and Reporting		
Rating	A. Confidential personnel records are kept for each volunteer.	Working Notes
	B. We keep records on the work that volunteers contribute, both what they do and what results or impact their service has had.	
	C. We expect volunteers to report regularly on their activities.	
	D. We expect reports from the volunteer program manager on the progress and activities of the volunteer program, and we pay attention to what those reports say.	
_____	Total for element. (Highest possible score: 20)	

Element #11: Evaluation		
Rating	A. The volunteer program is evaluated annually, based on goals and objectives developed to benefit the agency's clients, staff and volunteers.	Working Notes
	B. Volunteer assignments are assessed regularly.	
	C. We ask a range of stakeholders for their assessment of the volunteer program: clients, volunteers, managers, and line staff.	
	D. The Board of Directors is engaged in evaluating volunteer involvement.	
	E. Individual performance reviews of volunteers are conducted regularly.	

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	F. Individual performance reviews are also opportunities for volunteers to provide feedback on their assessment of our agency and how we have supported them.	
	G. Volunteers are satisfied with their work in our organization.	
	H. We conduct exit interviews with volunteers who are leaving.	
_____	Total for element. (Highest possible score: 40)	

Element #12: Volunteer Input		
Rating		Working Notes
	A. We have clearly established channels for volunteers to voice opinions and make suggestions about anything in the agency.	
	B. Volunteers are part of the decision-making process for the volunteer program.	
	C. We see volunteers as a source of information about the community at large and periodically ask for their perspective on issues.	
	D. We utilize the ability of volunteers to be public educators on our organization's behalf by involving them in speaking engagements or in community meetings.	
_____	Total for element. (Highest possible score: 20)	

Grand Tally

Transfer the total score for each element here and then compare your ratings to the highest rank possible for that element. What can you conclude from these scores? Be sure to summarize your notes here as well.

Grand Tally			
Element	Our Score	Highest Possible Score	Comments
Element #1: Planning/Resources		55	
Element #2: Staffing		30	
Element #3: Volunteer Work Desing		35	
Element #4: Recruitment		35	
Element #5: Interviewing/Screening		15	
Element #6: Orientation/Training		30	
Element #7: Volunteer/Employee Relations		25	
Element #8: Supervision		25	
Element #9: Recognition		25	
Element #10: Recordkeeping/Reporting		20	
Element #11: Evaluation		40	
Element #12: Volunteer Input		20	
Total		out of a possible score of 355	

12 Elements of Volunteer Management

Element #1: Planning and Resources

Planning is the key to success for all organizational projects, and volunteer program development is no exception. Planning for volunteers, who will be your organization's unpaid personnel, includes a variety of decisions about: climate/readiness for volunteers; goals and objectives; budget and resources; staff preparation; and an implementation plan.

Element #2: Staffing

By definition, volunteers are part-time staff with widely varying schedules. Add to this the diversity and backgrounds of the people who volunteer, and the resulting work force is a logistical challenge. A volunteer program must have a clearly-designated coordinator to handle all the activities outlined in these thirteen management elements.

Element #3: Volunteer Work Design

Developing volunteer assignments that are meaningful to the organization and attractive to prospective volunteers requires both planning and vision. It means analyzing what needs to be done (whether to assist staff or to provide a service directly to clients) and then creatively designing tasks doable in short bursts of time, by a variety of people with different skills. Expectations and qualifications for such volunteer positions need to be defined in writing.

Element #4: Recruitment

Recruitment is the process of encouraging people to give their time and energy to an organization as volunteers. Successful recruitment requires the support of the entire organization and is closely tied to overall public relations and marketing efforts.

Element #5: Interviewing and Screening

Effective initial interviewing of prospective volunteers prevents many types of supervision and management problems. It also allows candidates to be matched with the most appropriate and appealing assignment for them.

Element #6: Orientation and Training

Orientation is the overview of the total organization necessary for every volunteer, regardless of specific assignment. It places the work in context and allows for consistent introduction of policies, procedures, rights and responsibilities.

Training of volunteers should be customized to the requirements of each position description and the background each volunteer brings to the organization. There is initial, start-up training, plus the need for ongoing, in-service training. Much training is dependent upon giving clear instructions and is integrated into supervision.

Element #7: Volunteer/Employee Relationships

The interrelationship of volunteers and employees can be the single biggest obstacle to effective volunteer involvement, unless steps are taken to encourage teamwork. This requires training, evaluation and administrative attention. It is also important to pay attention to the relationships between long-time volunteers and newcomers.

Element #8: Supervision

As with employees, volunteers need support from those in a position to see the total picture and who know what work needs to be done. A key aspect of the supervision of volunteers is access to someone in charge during the time the volunteer is on duty. Not all volunteers are supervised. Some require liaison or reporting contact.

Element #9: Recognition

Recognition is a form of compensation for volunteer efforts. It includes thanking volunteers for their efforts and welcoming volunteers' input. An organization can provide annual formal recognition through certificates and dinners, but equally important are daily support and informal expressions of appreciation.

Element #10: Recordkeeping and Reporting

If volunteers are important to the work of the organization, it is important to know what volunteers are doing. Documenting their work assists in recruitment, training, recognition and even fundraising. Recordkeeping is also necessary for insurance coverage and to support the income-tax deduction claims of volunteers. Once records are kept, they are of little meaning if they are not reported. Reports of the cumulative achievements of volunteers should be shared with volunteers, as well as with administration, other staff and funding sources.

Element #11: Evaluation

Because volunteer time is too valuable to waste, it is imperative to evaluate the impact of volunteer services regularly and to discover whether those services are still the most meaningful ones to deliver. Along with program evaluation, it also is helpful to conduct individual performance reviews with volunteers. This practice maintains standards for the program and also recognizes each volunteer.

Element #12: Volunteer Input

Some organizations want help from volunteers, but not input. Volunteers are in a position to observe an organization and can take more risks in criticizing. They also are effective community advocates when they observe things going well. It is important to create a channel for volunteer comments. Also, having the opportunity to voice opinions and make suggestions encourages greater participation in all aspects of the volunteer program.

Teaser Checklist:

Are We Doing the Best We Can with Volunteer Involvement?

Test your understanding of our volunteer involvement by indicating your opinion next to each item below:

Y = Yes

N = No

? = I don't know

Our organization...

- Has access to highly skilled volunteers as on-call consultants or advisors.
- Lists current volunteer opportunities with free Internet registry sites.
- Participates in local National Volunteer Week celebrations.
- Has a volunteer corps that reflects the diversity of our community.
- Knows what volunteers are saying about us to their friends.
- Provides training for staff who work with volunteers.
- Is tapping into the new trends in volunteerism such as singles and families as volunteers, online service (virtual volunteering), and student service-learning.
- Invites financial donors to participate as volunteers to increase their long-term loyalty.
- Fulfills legal requirements for screening volunteers.
- Benefits from national and local days of service like "Make a Difference Day."
- Is implementing the best practices of volunteer management.
- Sees the connection between direct-service volunteers, fundraising volunteers, board members, student interns, loaned executives, and other people who contribute time and talent to us without going onto our payroll.
- Gets and uses input from volunteers on how we might improve our services.
- Can create useful assignments for volunteers who offer us unexpected skills.
- Has a vision for what we would like the volunteer program to look like in 10 years.

Do these questions make you wonder if you are maximizing volunteer involvement on behalf of your agency? They should! Volunteerism is all about tapping the community to help meet agency needs. The only limits are imagination and not providing effective support once volunteers have been recruited. (If you answered N or ? to more than half the questions, a *Volunteer Management Audit* may need to be in your future!)

*Volunteer Management Audit***Assessment Team Critical Questions**

Examine the scores determined by the Audit Team(s) for each Element of effective volunteer management and answer the following questions:

1. Overall, are we satisfied with the Audit scores?
2. Are any responses surprising? How?
3. Do any responses indicate weak areas?
4. What positive things were confirmed?
5. Were there differences of opinion among the Audit team(s) based on whether the evaluator was a volunteer or an employee? What might this mean?
6. Were there differences of opinion by any other characteristic? What might this mean?
7. How do the findings of this Audit relate to the strengths and weaknesses of the rest of our organization?
8. What should receive priority attention for improvement?
9. How do volunteers fit into other future planning for our organization?
10. Who should be responsible for next steps?

Volunteer Management Action Plan Worksheet

Priority Rank ▾	Issues	Goals and Objectives	Barriers	Resources	Action Steps	Who/When
	Materials Review					
	Planning and Resources					
	Staffing					
	Volunteer Work Design					

Volunteer Management Action Plan Worksheet

Priority Rank ▾	Issues	Goals and Objectives	Barriers	Resources	Action Steps	Who/When
	Recruitment					
	Interviewing and Screening					
	Orientation and Training					
	Volunteer/Employee Relations					

Volunteer Management Action Plan Worksheet

Priority Rank ▾	Issues	Goals and Objectives	Barriers	Resources	Action Steps	Who/When
	Supervision					
	Recognition					
	Recordkeeping and Reporting					
	Evaluation					

Volunteer Management Action Plan Worksheet

Priority Rank ▾	Issues	Goals and Objectives	Barriers	Resources	Action Steps	Who/When
	Volunteer Input					
	Other					
	Other					
	Other					