



*R*esource Kit for Managers of Volunteers

By: Betty Stallings

Written for

*the
Volunteerism
Project*

of the San Francisco Bay Area

Resource Kit for Managers of Volunteers

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Resource Kit for Managers of Volunteers

Designed for you:

- **New Managers of Volunteers (paid/nonpaid)**
- **Volunteer Centers to use as a resource in assisting Managers of Volunteers and new or developing programs**
- **Organizations developing new or expanded volunteer programs**
- **Small to medium size organizations with minimal staff time designated to managing volunteers**
- **Seasoned Managers of Volunteers as a refresher course**

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Acknowledgements

This resource book is filled with the wisdom of many authors in the field of Volunteer Management. My goal, as author and compiler of this book, was to take the fundamental information in the field and present it in the most succinct, user-friendly format possible. It was written for the busy Manager of Volunteers who has few resources to initiate and manage a volunteer program.

Particular appreciation and credit go to Susan Ellis, Rick Lynch, Steve McCurley, Sue Vineyard and Marlene Wilson, the authors and trainers who have most impacted my journey into volunteer management training.

I also wish to extend my deep appreciation to the funders of this project: The San Francisco Foundation, The James Irvine Foundation and The United Way, and to Nora Silver, The Volunteerism Project Director, who gave me the support and encouragement to create this Resource and whose guidance and editing were invaluable.

Dedication

This Resource Kit is lovingly dedicated to my mentor and friend, **Marlene Wilson**, in deep appreciation of her significant commitment and contributions to the field of Volunteer Management.

Resource Kit for Managers of Volunteers

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Preface

The purpose of this Resource Kit is to provide leaders and managers of today's volunteers with a succinct, practical guide to the fundamentals of developing a volunteer program. This guide covers the 3 R's of Volunteer Management: **READY?** — **RECRUIT** and **RETAIN**, and an appendix which includes a section for local resource information on volunteering and an extensive annotated bibliography on books, videos, and publications in the field.

Many national organizations prepare and publish information and forms for their affiliates' use in setting up volunteer programs. There are, however, thousands of small to medium size organizations which do not have access to these nationally developed resources. Often their programs are managed by people with little or no experience in the field of volunteer management. It is primarily for these individuals and organizations that this Kit has been written.

Each chapter, where appropriate, will cover 4 areas:

- **Thought-provoking questions** to assist the organization in spotting its strengths and weaknesses
- **Basic principles** on each topic
- **Selected forms, models, examples** related to this topic area
- **Specific references** for further information on the topic.

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Section I

Are You Ready?

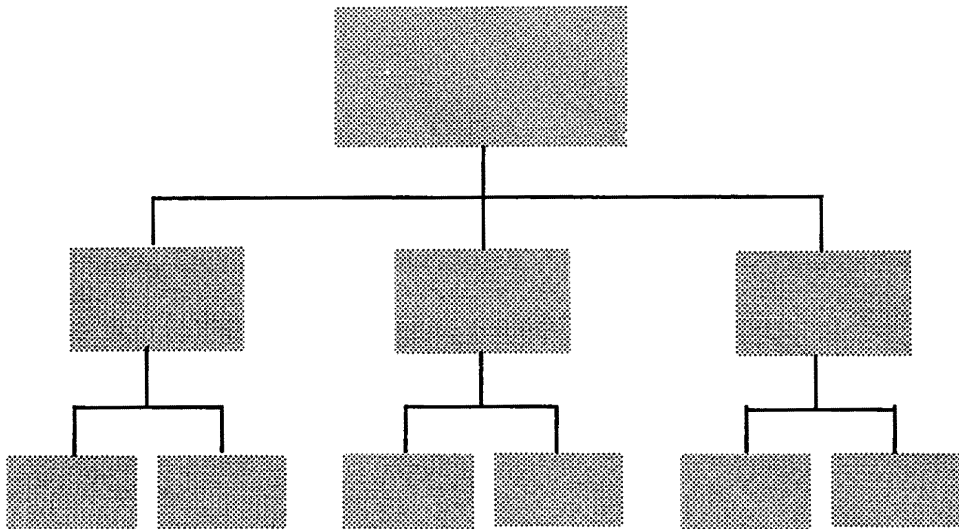
Many volunteer organizations, anxious to get on to recruitment and retention, miss the most significant issue in volunteer management—making certain that the organization is **ready** to utilize its volunteers well. Having an effective Manager of Volunteers, a planned program, a supportive environment and a good product (volunteer jobs) will greatly enhance your organization's success at recruiting and retaining volunteers.

Section I includes a look at key information, tools and resources for the following topics:

- Chapter 1 The Position of Manager of Volunteers
- Chapter 2 Volunteer Program Assessment
- Chapter 3 Forms and Recordkeeping System
- Chapter 4 Volunteer Insurance and Tax Issues
- Chapter 5 Planning and Budgeting for Volunteer Programs
- Chapter 6 Volunteer/Staff Relations
- Chapter 7 Designing Volunteer Jobs

Chapter 1

The Position of Manager of Volunteers



Chapter 1

The Position of Manager of Volunteers

This section is primarily a resource for organizations setting up new volunteer programs, organizations launching an effort to hire a Manager of Volunteers, and for volunteer leaders who are feeling lack of clarity about their job responsibilities.

Purposes of this chapter:

- * To understand the changing, challenging and significant role of a Manager of Volunteers
- * To explore the options for staffing the position
- * To identify organizational issues that may be affecting the impact of the Manager of Volunteers
- * To examine the job functions, skills and qualities of a Manager of Volunteers

Included in this section:

Thought-Provoking Questions	I-5
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Thought-Provoking Questions Regarding the Position of Manager of Volunteers

- 1. What title have you given to the person who is responsible for the volunteer program?**
- 2. Do you have a written job description for your Manager of Volunteers? Does it accurately portray the responsibilities and functions of the job?**
- 3. If the person has other key responsibilities within the organization, how many hours is he/she expected to work on the volunteer program? Is this reasonable as it relates to the expectations for the job?**
- 4. Where is the Manager of Volunteers placed on the organizational chart? What message does this send to the organization?**
- 5. What staff support or agency resources does the Manager of Volunteers receive? (i.e. clerical, P.R., fundraising, etc.)**
- 6. If an in-house person was selected to be the new Manager of Volunteers, was his/her time extended or was he/she relieved of other tasks to be able to carry out the duties of this position?**
- 7. What is the average length of time a Manager of Volunteers stays in that position in your organization?**
- 8. What volunteer management training and resources are made available to your Manager of Volunteers?**
- 9. Does the Manager of Volunteers have a budget for his/her program?**

The Challenging Role of the Manager of Volunteers

The job of today's Manager of Volunteers can be challenging and rewarding but often the position is misunderstood with respect to: (1) the professional and personal skills needed to be an effective Manager of Volunteers and (2) the administrative and staff support needed by the Manager of Volunteers to implement a successful program. The following points highlight some of the unique characteristics and challenges faced by today's Managers of Volunteers.

- Managers of Volunteers have a challenging job of people management, with added complications stemming from the fact that they do not have a pay check with which to reward their workers at the end of a work period. They must become experts at understanding and providing a motivational environment for each volunteer. Thus, in many ways, they need to be more skilled as managers than those supervising salaried employees.
- The Manager of Volunteers is frequently given low status and low pay for this very difficult job, thus creating the likelihood for frequent burnout and high job turnover.
- Today's Manager of Volunteers is involved in a fiercely competitive market for the use of people's free time. He/she must have a product (volunteer job) that is so enticing that the prospective volunteer would choose that activity over any other use of his/her free time.
- The profile of the volunteer is changing and the Manager of Volunteers must be able to lead the organization through the transition to new ways of utilizing volunteer resources.
- The Manager of Volunteers' job, unlike any except the Executive Director's, involves responsibilities on both the inside and outside of the organization.
- The Manager of Volunteers must be adept at supervising and keeping records on many types of people, working on different schedules at all levels of the organization.
- A good Manager of Volunteers must be able to translate what he/she knows about volunteerism to his/her organization. This requires excellent communication and training skills.
- Managing volunteers frequently involves working long and flexible hours, since many volunteer events are not held during normal working hours now that so many volunteers are employed.
- Managers of Volunteers frequently do not get many resources or training to assist them in their role.
- The job of a Manager of Volunteers can be a lonely one as he/she infrequently has support personnel or anyone within the organization who performs a similar role.

Source: Stallings, Betty B., *Building Better Skills*

Options for Staffing A Manager of Volunteers' Position

Agency budgets, priorities and/or staff availability (paid and volunteer) generally impact an organization's choice of one of the following models for staffing the Manager of Volunteers position.

1. Full-Time Position as Manager of Volunteers

The ideal - but only infrequently does a small organization have this luxury.

2. Part-time Position, Manager of Volunteers (with no other duties)

The value of this option is that the person will not be splitting time with other activities in the organization.

3. Part-time Position, Manager of Volunteers (with other major areas of responsibility in the agency)

Frequently in this situation, volunteer management is given as an add-on responsibility and the staff person primarily sees him/herself in other role(s), squeezing in volunteer management as time allows.

4. Decentralized Model

All staff members recruit and manage their own volunteers, as needed or desired. (Very little quality control, usually very disjointed efforts.)

5. Volunteer Position, Manager of Volunteers

These are difficult folks to find. They need time, skills and dedication. Agency must supply them with the necessary resources to succeed. This may be a shared position among a number of volunteers.

Issues Impacting a Manager of Volunteers' Effectiveness

Position title

In 101 Ideas for Volunteer Programs (1988), Sue Vineyard and Steve McCurley illustrate the variety of ways one can name the person who is in charge of his/her volunteer program. Picking one name from any column, one instantly sees the variety possible:

1. Volunteer	1. Development	1. Coordinator
2. Community	2. Resources	2. Administrator
3. Human +	3. Affairs +	3. Director
4. Personnel	4. Involvement	4. Officer
5. Field	5. Services	5. Manager
	6. Relations	6. Specialist
		7. Chair

Some tips to consider in name selection

1. It is confusing to outsiders if you call a person Volunteer Manager, as it may appear that he/she, too, is a volunteer when he/she is most often paid staff. It is best to call the position - Director, Manager or Coordinator of Volunteers.
2. If a person has several roles, give him/her two or three separate titles and calling cards to avoid confusion and the sense that the volunteer job is an insignificant add-on.
3. The title you select frequently indicates where this person will fit in the organizational chart. Staying tuned to today's titles, it would seem that the pecking order from bottom to top would be:

Coordinator of Volunteers

Manager of Volunteers

Director (or Administrator) of Volunteers

Time allotted for the job

The amount of time allocated for staff to manage the volunteer program says a great deal about the weighted importance of this effort. Assigning a person 5-10 hours a week to develop and direct a volunteer program of any size is unrealistic. This situation usually occurs when the person appointing or hiring someone to perform this job does not understand the skills and responsibilities of the job.

If you are initiating a program, or wishing to alter yours to make it more realistic, visit similar organizations which appear to have an excellent volunteer program and determine how much staff time is involved in managing it. (Your local Volunteer Center should be able to direct you to such an organization.)

Placement of the position in the organization

Where the volunteer staff person is placed on the organizational chart gives a significant clue as to the relative importance given to this aspect of the organization. A real distinction appears to be between whether the person is considered to be on the management or on the support staff. Organizations in which the person is considered on par with other management staff, in position and wages, will attract the best qualified people and frequently have the most outstanding programs. The decision of Manager of Volunteers' placement frequently stems from the relative value placed on volunteer efforts within an organization.

Budget

Frequently, in small organizations, the staff person in charge of volunteers must "beg, borrow or steal" any funds to support the volunteer program. The message given by the organization is, "Volunteers are free." We know this is not true. Even in the smallest of programs, it is recommended that there be a special budget for expenses such as travel, recognition, printing, etc. Folding the expenses into other programs will never allow you to determine how much money is available to support volunteer services.

Staff support

An important question to ask when developing the position of Manager of Volunteers is, "How much staff support will be available to him/her?" Minimally, there should be some clerical support for a designated number of hours a week. The important thing is to make certain that clerical people are aware of this time. Often they can become resentful because these duties are simply added on to their full-time job. One clear way to destroy a volunteer program is to thrust staff unwillingly into provision of the volunteer program without providing training and support to them.

Job Functions of a Manager of Volunteers

Program Planning and Administration
Recruitment and Public Relations
Interviewing and Screening
Orientation and Training of Volunteers and Staff
Supervision
Motivation and Recognition
Evaluation
Recordkeeping and Reporting
Other Responsibilities

Skills and Qualities to Seek in a Manager of Volunteers

Depending on your particular organization, some of these skills and qualities may be more important than others. Thus, you may wish to prioritize them in relation to your specific needs.

- **Strong management and organizational skills**
- **Strong interpersonal and communication skills**
- **Enthusiasm about volunteering**
- **Experience as a volunteer**
- **Good P.R. skills**
- **Public speaking ability**
- **Flexible, adaptable personality**
- **Time and stress management skills**
- **Good listener**
- **Familiar with or readily able to connect with community resources**
- **Successful leadership experience**
- **Administrative experience**
- **Staff training, interviewing and supervision experience**
- **Other qualities and skills needed in your setting**

Manager of Volunteers

Sample Job Description:

MAJOR RESPONSIBILITIES:

Create, direct and manage a volunteer program

- 1. Plan, develop, implement and evaluate the agency/organization volunteer program.**
- 2. Provide volunteer management training for paid and unpaid staff who work with and/or supervise volunteers.**
- 3. Investigate, create and develop meaningful and appropriate volunteer positions within the agency/organization.**
- 4. Recruit and place volunteers in appropriate volunteer positions within the agency/organization.**
- 5. Advocate increased agency-wide commitment to volunteerism.**

Adapted from: The Volunteer Administrator... Complete your Management Team, p.7, published by:
Volunteer Administrator's Network of Central Ohio, 1987

Director of Volunteer Services

Sample Job Description:

Reports to:

(designated administrator)

Supervises:

Volunteer Services Department personnel including primary responsibility for all in-service volunteers throughout the organization.

Basic function:

Provides direction, coordination, and consultation for all volunteer services programs within the organization. Plans, develops, and manages volunteer services so that the organization will derive full benefit from the important resources available to it through a consistently well-managed corps of volunteers that will be a valuable resource in achieving the organization's mission.

Duties and responsibilities:

- Evaluates the need for volunteer services within the organization in conjunction with the requesting department.
- Directs the recruitment, interviewing, selection, and placement of volunteers to meet the organization's needs.
- Develops and supervises volunteer orientation, training, and performance evaluation to ensure consistent, high quality service to the organization.
- Develops goals and objectives for the Volunteer Services Department and monitors progress toward their achievement.
- Directs the development of a department manual containing policies and procedures and reviews the material periodically in order to make necessary revision on a timely basis.
- Prepares and administers the department's budget.
- Directs the development of written assignment descriptions and procedures for volunteer guidance and coordination of volunteer services.
- Serves as a consultant to administration and other departments in areas relating to volunteerism.
- Directs the development of appropriate recognition, retention, and motivation programs for volunteers.

- Plans and schedules volunteer service placements and changes in assignments.
- Maintains appropriate volunteer personnel records and reports to document volunteer services and hours.
- Communicates regularly with administration regarding volunteer services in the organization.
- Establishes and maintains good relationships with professional peers and participates in relevant continuing education programs to enhance professional growth.
- Keeps informed about current state and federal laws that apply to the organization and volunteer services.

Required education and skills:

- A baccalaureate degree preferred, with a major in the behavioral sciences, personnel administration, business management, or communications.
- Prior experience of three to five years in supervision or management, preferably in a similar organization.
- The ability to relate to persons of all ages and of diverse backgrounds, skills, and abilities.
- A high level of verbal and written communication skills.
- A demonstrated commitment to volunteerism, which could include actual volunteer experience.
- Management and organizational skills to carry out the responsibilities of the position.

Source: Strategies For Success in Volunteer Service Administration, pp.19 & 20, published by: *The Ohio Society of Directors of Volunteer Services*, 1990

Continuing Professional Development

To remain current about the skills needed in this career, Managers of Volunteers need to annually assess their skills and deficiencies as they relate to this job. With the assistance of their job supervisor, they can develop a plan to enhance their professional development. Volunteer management training opportunities are available through AVA (Association For Volunteer Administration) national and regional trainings, Points of Light Foundation National Conference, regional DOVIA's (Directors of Volunteers in Agencies), Volunteer Center training programs, or other Nonprofit Management Assistance Programs often offered through local United Ways and The Support Center. Your local Volunteer Center is a good source of information on regional training opportunities and may also have a lending library of books and videos in the volunteer management field.

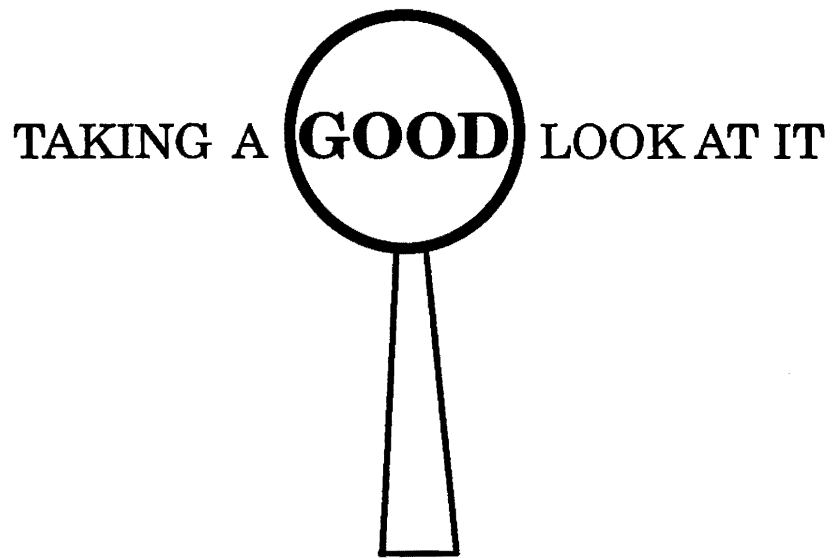
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- The Volunteer Administrator...Complete Your Management Team, (Published by: Volunteer Administrator's Network of Central Ohio, 1987). Volunteer Administrators' Network c/o CALLVAC Services, Inc. 370 South Fifth Street, Columbus, Ohio 43215.

Chapter 2

Volunteer Program Assessment



Chapter 2

Volunteer Program Assessment

Purposes of this chapter:

- * To expand awareness of the need, uses and values for volunteer program assessment
- * To broaden awareness of assessment potential by staff, volunteers and clients
- * To provide tools to access information for an assessment

Included in this section:

Thought-Provoking Questions	II-5
The Benefits of Conducting a Volunteer Program Assessment	II-6
Volunteer Program Assessment: Five Essential Components	II-6
Annual Assessment of Program Goals	II-7
Demographics and Variety of Volunteer Utilization	II-7
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Thought-Provoking Questions Regarding Volunteer Program Assessment

- 1. How does the staff feel about utilizing volunteers?**
- 2. What were you able to accomplish organizationally this year due to the support of volunteers?**
- 3. What was the volunteer turnover this past year?**
- 4. What is the demographic profile of your volunteers?**
- 5. Is your organization making good use of non-traditional volunteers from special populations, such as youth or seniors?**
- 6. What are the signs of administrative support (or lack of support) in your organization?**
- 7. Do you conduct exit interviews with your volunteers?
What kinds of useful information did you, or could you, glean from these interviews?**

The Benefits of Conducting a Volunteer Program Assessment

Taking the time to go through a formal assessment process may seem an overwhelming task and a questionable use of very limited time. However, I continually hear from participants in my workshops that performing an assessment was the turning point in the development of their organization's volunteer program. If we are totally engrossed in the daily pressures of operating a volunteer program, we often lose sight of the larger picture and the problems or resistance which may be dramatically impacting our effectiveness in leading a volunteer program. If people are spending many volunteer hours, and our organization is allocating funds to support the program, then we also need to clearly show that it is making a difference. Among its many benefits, a good assessment will assist you in:

- (1) identifying your program's strengths/weaknesses
- (2) anticipating or explaining problems within the program
- (3) improving the morale and involvement of volunteers and staff
- (4) discovering which staff or assignments have the highest volunteer turnover
- (5) uncovering what new or enhanced services in the organization are directly or indirectly related to volunteer work

Following the assessment, the volunteer program manager can utilize the data as a basis for planning.

Volunteer Program Assessment: Five Essential Components

A simple numbers game (i.e., how many volunteers enrolled and how many hours of service they gave) does not give the full picture of what was truly accomplished, the quality of that work, and how the organization benefitted from volunteer efforts. It is, therefore, recommended that organizations annually or bi-annually engage in a program assessment. Depending on the nature and size of your organization, you may want to design the assessment on a formal basis with written questionnaires and assessment forms or on a more informal basis through focus groups, interviews, etc. Either way, it is recommended that you gather the following information:

Essential components of a volunteer program assessment

1. Annual assessment of program goals
2. Demographic picture of your volunteers
3. Assessment of volunteer program by:
Staff, Volunteers, Clients (if appropriate)
4. Assessment of administrative support
5. Overall agency program assessment (i.e., How close are you to a model volunteer program?)

Source: Stallings, Betty B., Building Better Skills

Annual assessment of program goals

Chapter 5, Planning and Budgeting, will deal specifically with the process involved in establishing goals and objectives. What is most important to note here is that there are more significant things to measure than numbers (e.g., What are the anticipated achievements in the program? What services were we able to provide that would have been prohibitive without volunteers? What P.R. impact was made through the contributions of volunteers?). Once establishing goals in the form of achievements, not merely numbers, will enable you to share the qualitative value of volunteers in your organization with your Board of Directors, funders and the community.

Demographics and variety of volunteer utilization

By completing the form, Profile of the Volunteer Program (next page) you will be able to determine:

- (1) The general demographic data on your volunteers and
- (2) The variety of ways volunteers are utilized in your organization.

At a glance you can also determine other information:

- (1) Is your volunteer usage primarily in one area (i.e., direct service, support), or are you using volunteers broadly in your organization?
- (2) Are you making good use of short term or group volunteers (the ways most people today are saying they want to be involved as volunteers)?
- (3) Do you have a diverse volunteer base? (i.e., gender, ethnicity, age, etc.) How does it compare with the demographics of the community which you serve?
- (4) Do your volunteers come from any particular town or geographic area? (This information will need to be added to the questionnaire, tailoring it to appropriate cities, counties, etc. of your geographic service area.)

From this data you may wish to develop goals to broaden your use of volunteers in a special area or to increase your representation of a specific population group by a certain percentage. In today's world of an increasingly diverse population, it is particularly important to note your success in creating a volunteer base which closely reflects the community you serve.

Profile of Volunteer Program

(Indicate numbers)

Type of Work Done		Geographic Areas Represented	
• Direct client service	_____	• City A	_____
• Policy-making	_____	• City B	_____
• Support services	_____	• City C	_____
• Professional services	_____		
• Advisory	_____		
• Interns	_____		
• Short term	_____		
• Group volunteering	_____		
• Work at home	_____		
• Auxiliary	_____		
• Other	_____		
Occupations		Ethnic Background	
• Working full-time	_____	• Asian/Pacific Is.	_____
• Working part-time	_____	• Black/Afr. Am.	_____
• Student	_____	• White	_____
• Retired	_____	• Native American	_____
• Unemployed	_____	• Hispanic	_____
• Other	_____	• Other	_____
Gender		Age	
• Male	_____	• 12	_____
• Female	_____	• 13-17	_____
		• 18-24	_____
		• 25-34	_____
Income Level		• 34-45	_____
• Low income	_____	• 46-54	_____
• Medium income	_____	• 55-64	_____
• High income	_____	• 65 & over	_____

Date Prepared _____ By _____

Adapted from: At The Heart: The New Volunteer Challenge to Community Agencies,
Nora Silver, 1988, Appendix p. 2c.

Assessment of Volunteer Program by Staff, Volunteers and Clients

How do the staff and volunteers rate their experiences in your volunteer program? By designing questionnaires similar to the ones on the next few pages, much useful information will surface such as resistance by certain staff, volunteer satisfaction or dissatisfaction, and any patterns in dissatisfaction (i.e., staff in certain positions hold similar feelings, volunteers in certain jobs have either low or high satisfaction).

An additional method of getting an assessment of the volunteer's experience is to conduct an exit interview. It is advisable to hold an interview with each departing volunteer to gather feelings about his/her volunteer experience and any recommendations he/she might have for the program. Examples of exit interview forms are found in Chapter 11 - Supervision, Evaluation, and Dismissal of Volunteers.

Responses from clients regarding their experiences with volunteers are generally obtained informally or unsolicited rather than through a formalized assessment. It is helpful to encourage and include their comments in the overall agency assessment, but a word of caution is needed. If you do not gather representative samples or if you use random comments you may tend to get extreme responses (i.e., very positive or very negative).

VOLUNTEER ASSESSMENT OF THE VOLUNTEER PROGRAM

As part of our continued effort to improve our volunteer program, we would like your responses to the following questions. All responses will be kept completely confidential. Do not sign the survey unless you wish to.

1. How long have you been volunteering with us? _____
2. What is the best experience you have had while volunteering with us? What is the worst experience?

3. To what extent do you think volunteers are accepted by the staff at our agency?
 Well accepted Generally well accepted, but some exceptions
 Mixed reception Generally not well, but some exceptions Not well accepted
4. To what extent do you think volunteers are involved in decisions that will affect their volunteer work?
 Well involved Sometimes involved Not well involved
5. To what extent do you think volunteers are accepted by clients?
 Well accepted Mixed reception Not well accepted
6. To what extent do you think volunteers feel comfortable with the assignments they are given?
 Comfortable Not very comfortable Don't Know
7. Do you feel that volunteers receive sufficient orientation about our agency when they begin work?
 Yes No Don't Know
8. Do you feel that volunteers receive enough training in how to carry out their assignments?
 Yes No Don't Know
9. In your experience, does your volunteer job match the description of work given to you when you were interviewed?
 Yes Somewhat No
10. Do you find your volunteer work to be interesting, challenging, and rewarding?
 Yes Somewhat No
If you answered "No," do you have any comments on why that is? _____
11. Do you think that volunteers are provided with sufficient feedback by those they work with?
 Yes Somewhat No Don't Know
12. Do you think volunteers have sufficient opportunity to advance in responsibility in this agency?
 Yes No Don't Know
15. Can you think of any new areas with which volunteers might be of help in our agency?

16. Can you suggest any ways that we might use to recruit new volunteers?

17. Overall, how would you rate our volunteer program? (Please circle. 1 = Terrible, 7 = Great)
1 2 3 4 5 6 7
18. Use the space below to make any other comments regarding our utilization of volunteers, or any additions you would like to make to your answers to the above questions:

Please return this questionnaire to _____ by _____.

Pilot Project/ Volunteer Service Area Evaluation (By Volunteer)

The Volunteer Services Department strives to meet the needs of volunteers and the hospital departments requesting volunteer help. To assist in fulfilling those needs, please complete this survey. When this survey form has been completed, please return it to the Volunteer Services Department by _____.

SERVICE AREA _____

SHIFT: MORNING ___ AFTERNOON ___ EVENING ___ WEEKEND ___

NAME (OPTIONAL) _____ DATE _____

LENGTH OF TIME VOLUNTEERING IN THIS SERVICE AREA. _____

PLEASE LIST YOUR PRIMARY DUTIES IN THIS SERVICE AREA.

DESCRIBE THE TRAINING YOU RECEIVED FOR YOUR WORK IN THIS SERVICE AREA.

DO YOU FEEL THAT YOU WERE ADEQUATELY TRAINED FOR YOUR DUTIES? _____

PLEASE EXPLAIN.

WHAT OTHER SKILLS OR INFORMATION WOULD BE HELPFUL TO YOU?

DOES THIS POSITION MEET WITH YOUR EXPECTATIONS, INTERESTS, AND ABILITIES? _____

WHICH OF YOUR DUTIES DO YOU ENJOY THE MOST, AND WHY? _____

WHICH OF YOUR DUTIES DO YOU ENJOY THE LEAST, AND WHY? _____

DO YOU EVER FEEL THAT YOU HAVE EITHER TOO MUCH OR TOO LITTLE TO DO? PLEASE EXPLAIN: _____

IN YOUR ACTIVITY: _____ A FEW PEOPLE ASSIGN WORK TO YOU.
 _____ ONE PERSON ASSIGNS WORK TO YOU.
 _____ YOU FIND WORK YOURSELF.

DESCRIBE A TYPICAL FRUSTRATING EXPERIENCE YOU HAVE HAD AS A VOLUNTEER IN THIS SERVICE AREA.

PLEASE PUT A CHECK MARK UNDER THE RESPONSE YOU SELECT FOR EACH QUESTION.

	ALWAYS	USUALLY	SELDOM	NEVER
1. DO THE EMPLOYEES WITH WHOM YOU WORK:				
a) GIVE CLEAR INSTRUCTIONS AND ANSWER QUESTIONS?	_____	_____	_____	_____
b) EXPRESS APPRECIATION TO YOU FOR WHAT YOU DO AS A VOLUNTEER?	_____	_____	_____	_____
c) MAKE YOU FEEL WELCOME AND PART OF THE TEAM?	_____	_____	_____	_____
2. DOES YOUR SERVICE AREA SUPERVISOR COMMUNICATE WITH YOU?	_____	_____	_____	_____
3. DO YOU GO HOME WITH A FEELING OF SATISFACTION ABOUT YOUR VOLUNTEER ASSIGNMENT?	_____	_____	_____	_____
4. DO YOU FEEL YOU ARE MEETING THE NEEDS OF THIS SERVICE AREA?	_____	_____	_____	_____
5. DO YOU EVER FEEL THAT YOU HAVE EITHER TOO MUCH OR TOO LITTLE TO DO?	_____	_____	_____	_____

DO YOU FEEL THAT VOLUNTEERS MAKE A WORTHWHILE CONTRIBUTION TO THIS DEPARTMENT? _____

Source: *Strategies for Success in Volunteer Services Administration*, p. 65, published by: *The Ohio Society of Directors of Volunteer Services*, 1990

STAFF ASSESSMENT OF VOLUNTEER UTILIZATION

This form is to allow you to provide feedback regarding our utilization of volunteers. Please answer all questions as completely as possible. Do not sign the survey unless you wish to. All responses will be kept confidential.

1. Are volunteers involved in your area of direct responsibility or in your department?
 Yes No Don't know
2. In your experience, are the volunteers with our agency adequately qualified for their positions?
 Yes No Don't know
3. How would you describe the utilization of volunteers in our agency by other staff?
 Well utilized Generally well utilized, but some bad use
 Generally not well utilized Don't know
4. Are the volunteers with our agency adequately trained for their responsibilities?
 Yes No Don't know
5. Do you think our staff has been adequately trained in how to work with volunteers?
 Yes No Don't know
6. What else should be done to help our staff work better with volunteers?

7. How would you describe the reaction of our clients to the volunteers?
 Favorable Mixed Unfavorable Don't know
8. What benefits do you think we have gained from the utilization of volunteers?

9. What problems have we created with the use of volunteers?

10. How has your own work load changed as a result of our utilizing volunteers?
 Lessened Remained the same Increased
 Changed in type of work being done
11. How would you describe the assistance you have received from the volunteer director?
 Helpful Not helpful Don't know
12. Use the space below to make any comments regarding our utilization of volunteers, any additions you would like to make to your answers to the above questions, or any suggestions you have about how we might make better use of volunteers.

Please return this questionnaire to _____ by _____.

**Pilot Project/
Volunteer Service Area Evaluation
(By Staff)**

The Volunteer Services Department strives to meet the needs of volunteers and the hospital departments requesting volunteer help. To assist in evaluating those needs, please complete the survey. When this survey form has been completed, please return it to the Volunteer Services Department by _____.

SERVICE AREA _____

PERSON COMPLETING FORM (OPTIONAL) _____

LENGTH OF SERVICE IN THIS DEPARTMENT _____

ARE THE VOLUNTEERS ASSIGNED TO YOUR DEPARTMENT MEETING THE DEPARTMENT'S NEEDS? _____

PLEASE EXPLAIN:

DESCRIBE THE PRIMARY TASKS VOLUNTEERS PERFORM IN YOUR DEPARTMENT:

WHAT ADDITIONAL TASKS WOULD YOU LIKE TO HAVE VOLUNTEERS PERFORM IN YOUR DEPARTMENT?

DO YOU HAVE ENOUGH VOLUNTEERS TO MEET YOUR NEEDS? _____

DO YOU FEEL THE VOLUNTEERS WERE ADEQUATELY TRAINED FOR YOUR DEPARTMENT? _____

PLEASE EXPLAIN:

WHO WAS RESPONSIBLE FOR THEIR TRAINING? _____

DO YOU FEEL THAT VOLUNTEERS ARE MADE TO FEEL WELCOME AND A PART OF THE HEALTH CARE TEAM? _____

PLEASE EXPLAIN:

WHAT SUGGESTIONS DO YOU HAVE FOR THE VOLUNTEER PROGRAM IN YOUR AREA?

DO YOU THINK THIS VOLUNTEER SERVICES PROGRAM SHOULD BE CONTINUED? _____

PLEASE EXPLAIN:

THANK YOU FOR YOUR PARTICIPATION IN THIS EVALUATION SURVEY.

Source: *Strategies for Success in Volunteer Services Administration*, pp. 68-69, published by: *The Ohio Society of Directors of Volunteer Services*, 1990

Assessment of Administrative Support

Administrative support of the volunteer program can be partially determined by assessing the administrator's attitudes and action in the following areas:

- * Placement, salary level and title of the Manager of Volunteers
- * Understanding of the job responsibilities of a Manager of Volunteers
- * Budget and/or staff resources assigned to the volunteer program
- * Care in the selection of the Manager of Volunteers
- * Evaluation criteria for volunteer program (quality? quantity?)
- * Direct and indirect interaction with volunteers in the organization (i.e., participating in orientation, personal use of volunteers)
- * Training opportunities and resources in management of volunteers directed to Managers of Volunteers and staff
- * Recognition for staff who utilize volunteers well (if administrators don't recognize and reward their staff's utilization of volunteers (i.e., in their job evaluation), staff may not interpret utilizing volunteers as an important activity.)

When there is lack of support:

Often an agency administrator values the volunteer program and is working to achieve its excellence. Occasionally, however, only lip service is given to the program, or the motivation to establish a volunteer program is primarily because it was mandated or because it might save the organization money.

If, as a Manager of Volunteers, you are attempting to run an effective volunteer program within this kind of noncommittal support to the program, you have several options:

- (1) Influence and educate the administrator as to the value of a well-managed volunteer program and the need for his/her greater support of it. (Hard to do. You must be persistent and dedicated to the cause.) You may wish to share some of the written materials found in the bibliography of this Resource Kit.
- (2) Become a super worker and do it despite the lack of support. (You'll be heading for early burnout or martyrdom! Neither is recommended!)
- (3) Set minimal, reasonable goals and be satisfied with their completion. (You may wish to document your achievements and describe some of the barriers to reaching higher goals.)
- (4) Seek the support of other Managers of Volunteers and get their suggestions for changing a less-than-supportive administrative environment into a more supportive one.
- (5) Utilize internal staff who support the volunteer program effort by enlisting their endorsement and support for changes necessary to enhance the volunteer program.

Overall Assessment of Your Volunteer Program

Rating yourself on the form, How Close Are You to a Model Volunteer Program? (next pages) will give you some ideas of areas on which you may wish to focus as you use this Resource Kit to strengthen your volunteer program. Each category is the ideal state for a model volunteer program. (I've never found a straight A program yet!) References for more detailed volunteer assessment forms are found in the reference section of this chapter.

How Close Are You to a Model Volunteer Program?

Instructions: Rate your volunteer program against each of the components of an Ideal Volunteer Program (A = Excellent; B = Good; C = Poor). Note methods of improving your ratings in each area.

Component of Ideal Volunteer Program	Rating	Suggestions for Improvement
Strong, positive motivations to have volunteer program		
Written agency philosophy statement		
Written policies and procedures for volunteer program		
Volunteers involved in planning and evaluating volunteer program		
Good staff/volunteer relations		
Peer recruitment		
Good client/staff relations		
Short and long range plan for volunteer program		
Volunteer recruitment plan		
Formal and informal volunteer recognition		
Systematic and regular volunteer performance reviews		

Component of Ideal Volunteer Program	Rating	Suggestions for Improvement
Written job descriptions and/or contracts with volunteers		
Volunteer recordkeeping system in place		
Paid volunteer coordinator		
Agency orientation sessions/manual		
Diversity among agency volunteers		
Strong support/direction of volunteer program by Executive Director		
Creative utilization of volunteers		
Staff trained to use volunteers		
Place for volunteers to work		
Time to supervise volunteers		
Agency has good visibility and reputation		

Source: Adapted from Unknown

Further References

Volunteer program assessment

- Silver, Nora, At The Heart: The New Volunteer Challenge to Community Agencies (The San Francisco Foundation, 1988).
- Vineyard, Sue, Evaluating Volunteers, Programs and Events (Heritage Arts Publishing, 1988).
- The Volunteer Administrator.. Complete Your Management Team (Published by: Volunteer Administrator's Network of Central Ohio, 1987). Volunteer Administrators' Network c/o CALLVAC Services, Inc., 370 South Fifth Street, Columbus, Ohio 43215.
- Volunteer Program Certification Manual (Published by the Volunteer Center of Akron, Ohio, 1988). 500 West Exchange Street, Akron, Ohio 44302.

Chapter 3

Forms and Recordkeeping System

VOLUNTEER ASSESSMENT OF THE VOLUNTEER PROGRAM

As part of our annual effort to improve our volunteer program, we would like your response to the following questions. All responses will be kept completely confidential. Do not sign the survey unless you wish to.

- How long have you been volunteering with us? _____
- What is the best experience you have had while volunteering with us? What do we want to improve?

- To what extent do you think volunteers are accepted by the staff of our agency?
 Well accepted Somewhat well accepted, but some exceptions Not well accepted
 Not accepted Generally not well, but some exceptions
- To what extent do you think volunteers are involved in decisions that affect their volunteer work?
 Well involved Somewhat involved Not well involved
- To what extent do you think volunteers are accepted by clients?
 Well accepted Somewhat accepted Not well accepted
- To what extent do you think volunteers that communicate with the neighborhood they are placed?
 Completely Not very satisfactorily Don't know
- Do you feel that our volunteers could be better coordinated with our agency when they begin work?
 Yes No Don't know
- Do you feel that volunteer activities are enough to help in how to stay on our own program?
 Yes No Don't know
- In your experience, does your volunteer job sound like the description of work given to a volunteer?
 Yes Somewhat No
- Do you find your volunteer work to be interesting, challenging, and rewarding?
 Yes Somewhat No
If you answered "No," do you have any comments on why that is?

- Do you think our volunteers are provided with sufficient feedback by those they work with?
 Yes Somewhat No
- Do you think volunteers have sufficient opportunity to advance in responsibility to others?
 Yes No Don't know
- Can you think of any new ways in which volunteers might be of help to our agency?

- Can you suggest any ways that we might use to recruit new volunteers?

- Overall, how would you rate our volunteer program? (Please circle 1 - Terrible, 7 - Good)
1 2 3 4 5 6 7
- Use the space below to make any other comments regarding our activities of volunteers. You would like to make in your answer to the above questions.

Please return this questionnaire to _____ by _____

Individual Volunteer Service Log

NAME _____ HOME TELEPHONE _____
ADDRESS _____
FILL IN THE SQUARES OF SERVICE BY DATE. ADD TOTAL FOR MONTHS.
YEAR _____

DAY	MONTH											
	JAN	FEB	MAR	APR	MAY	JUN	JUL	AUG	SEP	OCT	NOV	DEC
1												
2												
3												
4												
5												
6												
7												
8												
9												
10												
11												
12												
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21												
22												
23												
24												
25												
26												
27												
28												
29												
30												
31												
MONTHS' TOTALS _____												
YEARS' TOTAL _____												

AN EXAMPLE OF A VOLUNTEER APPLICATION

Name _____ Address _____
City _____ State _____ Zip _____
Home Phone _____ Office Phone _____
Business Address _____
Business Phone _____
This information is used only for administrative purposes of the Ohio Volunteer Emergency Program. (It will be kept in a file used by the O.A. E.P. which is not available to the public.)

Please check one: New Volunteer Active (see Remarks) Suspended
 Reserves (subject to activation status) Active on Public Roster

Age Group (optional): 18-24 25-34 35-44 45-54 55-64 65-74 75-84

Is it necessary for you to have your physical activity in any way?
 Yes No

If "Yes," what is your limitation?

Occupation: _____
If employed on previous program, please list the position and the name of the employer.

Are you a National Guard member? Yes No
Are you a member of the National Guard, Coast Guard, or other military service?

Are you able to speak, read, or write in English?
 Yes No

Special Training: _____
Special Skills: _____
Interests: _____

Signature: _____ Date: _____
Address: _____
City: _____ State: _____ Zip: _____

Chapter 3

Forms and Recordkeeping System

Purposes of this chapter:

- * To share tips in developing a useful recordkeeping system
- * To identify 4 major categories for keeping records:
 - Initial volunteer enrollment
 - Individual volunteer work records
 - Effects of volunteer involvement
 - General management records
- * To share examples and models for recordkeeping forms which can be modified for your own purposes

Included in this section:

Thought-Provoking Questions	III-5
General Guidelines for Developing a Recordkeeping System	III-6
Suggested Categories for a Recordkeeping System	III-7
Sample Forms	III-9
Computer Programs for Volunteer Recordkeeping Systems	III-25
Further References	III-29

Thought-Provoking Questions Regarding Volunteer Management Forms and Recordkeeping System

- 1. How many hours did volunteers contribute to your organization last year?**
- 2. What was the percentage of volunteer turnover last calendar year?**
- 3. What is the ratio of males/females among your volunteers?**
- 4. How many new volunteers were recruited last year?**
- 5. What was the best recruitment source of volunteers last year?**
- 6. How many clients were served by volunteers last calendar year?**

General Guidelines for Developing a Recordkeeping System

1. Every volunteer program is unique, and therefore one cannot utilize a standardized system of recordkeeping.
2. A recordkeeping system should be developed to answer important questions related to or impacting:
 - * **Program effectiveness** (i.e., new programs initiated, hours and money saved, services given)
 - * **Accountability** (to funders, board of directors, volunteers)
 - * **Recognition** of volunteer effort
 - * **Diversity** (age, ethnicity, gender) among volunteers
 - * **Variety of volunteer job opportunities**
 - * **Volunteer turnover rate**
 - * **Staff support/resistance**
 - * **Agency and volunteer program planning**
 - * **Others** (You must determine your own needs for information)
3. All forms, records and procedures should be part of an integrated system which is user-friendly for all involved.
4. On your application form, you should have a specific purpose for asking all questions so that your form can be a legal screening device.
5. Many systems for inputting, matching and tracking volunteers are now available on computer programs. A list of some available ones for purchase appears at the end of this chapter.
6. Many volunteers resist keeping statistical records/forms. To avoid this, clearly state the reason they are important and their uses (i.e., "We need this information to give our funders so that they will continue to support this program"). You may also wish to send or post monthly narrative and/or statistical reports to those involved in reporting the data.
7. Periodically review a form or procedure to determine if it still accomplishes what it was originally intended to do. Discard any which no longer serve a useful purpose.
8. It is suggested that records be kept for 7 years, corresponding to IRS and agency audit time periods. Any material that would be helpful to future volunteer administrators should not be discarded.
9. If forms are designed to be used by other people, add an instruction sheet. A loose leaf file of any forms and corresponding instructions for use should be available to new volunteers and paid staff.
10. A monthly progress report should include both statistics and a narrative of volunteer impact. Sending such a report to your Executive Director, even if it is not required, can greatly enhance your efforts at seeking support for the volunteer program.

Suggested Categories for a Recordkeeping System

(Sample forms follow. You may adapt them to meet your needs.)

- 1. Initial Volunteer Enrollment**
skills, interest, time availability, emergency consent form

- 2. Individual Volunteer Work Records**
hours worked
performance evaluations
exit interview form
types of jobs held in the organization and dates

- 3. Effects of Volunteer Involvement**
total number of hours
numbers of people served
changes influenced by volunteer activity

- 4. General Management Records**
volunteer program assessment reports/forms
annual plan
copies of all forms
orientation manual
training materials
recognition activities
recruitment flyers
policies and procedures manual

Adult Volunteer Application Form

NAME _____ DATE _____
(LAST) (FIRST) (MIDDLE)

ADDRESS _____ CITY _____ STATE _____ ZIP _____
BIRTH DATE _____
(YEAR OPTIONAL) _____ HOME PHONE _____ WORK PHONE _____

IF PRESENTLY EMPLOYED, NAME OF FIRM _____

POSITION _____ WORK HOURS & DAYS _____

CONTACT IN CASE OF EMERGENCY:

(NAME) (RELATIONSHIP) (HOME PHONE) (WORK PHONE)

FAMILY PHYSICIAN _____ PHONE _____

LIMITATIONS RELATED TO HEALTH _____

HOW DID YOU BECOME INTERESTED IN OUR VOLUNTEER PROGRAM?

HAVE YOU VOLUNTEERED FOR THIS ORGANIZATION BEFORE? YES__ NO__

EDUCATION _____

VOLUNTEER EXPERIENCE _____

WORK EXPERIENCE _____

INDICATE HOBBIES/SKILLS/SPECIAL INTERESTS/FOREIGN OR SIGN LANGUAGE SKILLS:

PLEASE GIVE ANY OTHER INFORMATION YOU FEEL PERTINENT TO YOUR APPLICATION

Adult Volunteer Application Form, Page 2

PERSONAL OR PROFESSIONAL REFERENCES (PLEASE EXCLUDE RELATIVES)

1. NAME _____ PHONE _____
ADDRESS _____ CITY _____ STATE _____ ZIP _____

2. NAME _____ PHONE _____
ADDRESS _____ CITY _____ STATE _____ ZIP _____

INTEREST/SKILLS: (Please indicate with a check mark which you would be willing to share as a volunteer here.)

Clerical Skills: typing filing phone receptionist using copier
 librarian record updating numerical updating computer
 mailings alphabetizing cash register other (specify: _____)

Communication Skills: public speaking journalism public relations research
 photography calligraphy foreign language graphic arts other
(specify: _____)

Patient Care Services (as applicable to organization):

infant/child care escort service, transport messenger service read to patients
 feeding patients visiting, listening patient/family consolation
 other (specify: _____)

Personal Skills to Use or Teach: drawing painting knitting crocheting
 macrame sewing crafts needlework leather work gardening baking
 special event host handyman repairs tour guide
 musical instrument (specify: _____)

Additional Skills/Comments: _____

THE ABOVE INFORMATION IS ACCURATE AND CORRECT TO THE BEST OF MY KNOWLEDGE.

SIGNATURE _____ DATE _____

YOUR SIGNATURE INDICATES YOUR APPROVAL FOR US TO CHECK REFERENCES AND CONTACT YOUR PHYSICIAN REGARDING YOUR PHYSICAL AND EMOTIONAL HEALTH. THE ORGANIZATION IS NOT OBLIGATED TO PROVIDE A PLACEMENT, NOR ARE YOU OBLIGATED TO ACCEPT THE POSITION OFFERED.

OPPORTUNITIES FOR VOLUNTEERS ARE PROVIDED WITHOUT REGARD TO RELIGION, CREED, RACE, NATIONAL ORIGIN, AGE, OR SEX.

Source: Strategies for Success in Volunteer Service Administration, pp. 86 and 87, published by: *The Ohio Society of Directors of Volunteer Services of the Ohio Hospital Association*, 1990

AN EXAMPLE OF A VOLUNTEER APPLICATION

Mr. Mrs. Miss Ms. Rev. Dr.

Date: _____
Month Day Year

_____ Last Name First Name Middle Initial _____ If married, spouse's name and rank or title, if appropriate
 Check preferred mailing address: Home Business

Home Address: _____
(Including Number, Street, City, State, Zip Code)

Business Address: _____
 Home Phone: (____) _____ Office Phone: (____) _____ Social Security Number: _____

This information is used only to determine diversification of Red Cross volunteers. Completion is optional. (Ethnic grouping is that used by the U.S. EEOC when requesting certain employment information.)

Please check one: Black (not Hispanic) White (not Hispanic) Hispanic
 American Indian or Alaskan Native Asian or Pacific Islander

Age Group (optional) Are you a student? Full Time Part Time No
 _____ Under 18 Is it necessary for you to limit your physical activity in any way?
 _____ 18-25 _____ 46-55 Yes No
 _____ 26-35 _____ 56-65 If "Yes," what is your limitation? _____
 _____ 36-45 _____ Over 65 _____

Occupation: _____
 If licensed to practice a profession, please list the profession and the state in which licensed.

Are you a licensed driver? Yes No

List previous experiences (volunteer, paid, or educational) that would be helpful in working with people.

Activity	Organization	Date
_____	_____	_____
_____	_____	_____
_____	_____	_____

List any skills, hobbies, or interests you have that might be helpful in your volunteer work: _____

If you are able to speak fluently, or read or write, any language other than English, please list the language(s):

Speak Fluently: _____ Read: _____ Write: _____
 Speak Fluently: _____ Read: _____ Write: _____

Individuals to be notified in case of emergency:

Name _____ Relationship _____
 Address _____ Phone _____

Name _____ Relationship _____
 Address _____ Phone _____

Example of Volunteer Interest Checklists

Please check the group(s) you are most interested in working with:

- | | | |
|---|---|---|
| <input type="checkbox"/> Adults | <input type="checkbox"/> Ethnic Groups | <input type="checkbox"/> Sick people |
| <input type="checkbox"/> Children | <input type="checkbox"/> Juvenile offenders | <input type="checkbox"/> Veterans |
| <input type="checkbox"/> Disaster victims | <input type="checkbox"/> Mentally handicapped | <input type="checkbox"/> Young people |
| <input type="checkbox"/> Disadvantaged groups | <input type="checkbox"/> Physically handicapped | <input type="checkbox"/> Other (identify) _____ |
| <input type="checkbox"/> Elderly | <input type="checkbox"/> Prisoner/parolees | |

Please check the type of place where you feel you would like to work:

- | | | |
|--|--|---|
| <i>In the community:</i> | <input type="checkbox"/> Hospitals | <input type="checkbox"/> Health and Safety |
| <input type="checkbox"/> Blood center | <input type="checkbox"/> General | <input type="checkbox"/> Nursing |
| <input type="checkbox"/> Bloodmobile | <input type="checkbox"/> Mental | <input type="checkbox"/> Safety |
| <input type="checkbox"/> Clinics | <input type="checkbox"/> Veterans | <input type="checkbox"/> Public Affairs |
| <input type="checkbox"/> Courts/Correction | <i>In the Red Cross Unit:</i> | <input type="checkbox"/> Service to Armed Forces and Veterans |
| <input type="checkbox"/> Day care center | <input type="checkbox"/> Blood Services | <input type="checkbox"/> Training |
| <input type="checkbox"/> For children | <input type="checkbox"/> Clerical | <input type="checkbox"/> Volunteer Personnel |
| <input type="checkbox"/> For elderly | <input type="checkbox"/> Community Services | <input type="checkbox"/> Youth Services |
| <input type="checkbox"/> Drug abuse center | <input type="checkbox"/> Disaster Services | |
| | <input type="checkbox"/> Financial Development | |

Please check the kind of activity you are most interested in:

- | | | |
|---|--|---|
| <input type="checkbox"/> Accounting | <input type="checkbox"/> Friendly visiting with homebound or elderly | <input type="checkbox"/> Speaking |
| <input type="checkbox"/> Administration | <input type="checkbox"/> Fund raising | <input type="checkbox"/> Teaching |
| <input type="checkbox"/> Committee work | <input type="checkbox"/> Health education | <input type="checkbox"/> Telephoning homebound or elderly |
| <input type="checkbox"/> Consulting | <input type="checkbox"/> Health planning | <input type="checkbox"/> Translating |
| <input type="checkbox"/> Counseling | <input type="checkbox"/> Nursing | <input type="checkbox"/> Tutoring |
| <input type="checkbox"/> Crafts/Recreation programs | <input type="checkbox"/> Public affairs | <input type="checkbox"/> Typing/Clerical work |
| <input type="checkbox"/> Data processing | <input type="checkbox"/> Receptionist | <input type="checkbox"/> Word processing |
| <input type="checkbox"/> Driving | <input type="checkbox"/> Record keeping | <input type="checkbox"/> Writing |
| <input type="checkbox"/> Financial affairs | <input type="checkbox"/> Sewing/Knitting | <input type="checkbox"/> Youth leader |
| <input type="checkbox"/> Food service | | |

If you checked teaching in section above, please indicate the type of courses you are most interested in teaching:

Courses related to:

- | | | |
|---|--|---|
| <input type="checkbox"/> Babysitting | <input type="checkbox"/> Disaster preparation and operations | <input type="checkbox"/> Home nursing |
| <input type="checkbox"/> Boating | <input type="checkbox"/> First aid | <input type="checkbox"/> Nutrition |
| <input type="checkbox"/> Care of infants and children | <input type="checkbox"/> Fund raising | <input type="checkbox"/> Preparation for parenthood |
| <input type="checkbox"/> CPR | <input type="checkbox"/> Health care | <input type="checkbox"/> Swimming |

Would you be willing to be trained to do any of the volunteer jobs you have checked? Yes _____ No _____

Approximately how much time do you feel you could give? _____

Availability:

- | | | | |
|-----------------------------------|----------------------------------|-------------------|--|
| <input type="checkbox"/> Daytime | <input type="checkbox"/> Daily | What Hours? _____ | Would you be willing to serve in time of disaster? |
| <input type="checkbox"/> Evenings | <input type="checkbox"/> Weekly | | |
| <input type="checkbox"/> Weekdays | <input type="checkbox"/> Monthly | | Yes _____ No _____ |
| <input type="checkbox"/> Weekends | | | |

I understand that the above information is voluntarily supplied and may be used and disclosed for Red Cross purposes and that as a Red Cross volunteer I will not be paid for my services.

Teen Volunteer Application Form

NAME _____ DATE _____

(LAST) (FIRST) (MIDDLE)
ADDRESS _____ CITY _____ STATE _____ ZIP _____

AGE _____ DATE OF BIRTH _____ HOME PHONE _____

PARENT'S NAME _____ WORK PHONE _____

CONTACT IN CASE OF EMERGENCY:

(NAME) (RELATIONSHIP) (HOME PHONE) (WORK PHONE)

NAME OF SCHOOL _____ GRADE (circle) 9 10 11 12

GRADUATION YEAR _____ CAREER INTEREST _____

PRESENT EMPLOYMENT _____

WORK PHONE _____ HOURS _____

VOLUNTEER EXPERIENCE _____

INTERESTS, SKILLS, SCHOOL ACTIVITIES _____

FAMILY PHYSICIAN _____ PHONE _____

LIMITATIONS RELATED TO HEALTH _____

REFERENCES: Please choose your references from among the following: family physician, teacher, minister, principal, employer, adult volunteer here

1. NAME _____ PHONE _____
ADDRESS _____ CITY _____ STATE _____ ZIP _____

2. NAME _____ PHONE _____
ADDRESS _____ CITY _____ STATE _____ ZIP _____

I WANT TO VOLUNTEER: SUMMERS ONLY YEAR ROUND LIMITED SCHOOL PROJECT

APPLICANT'S SIGNATURE _____ DATE _____

PARENT'S SIGNATURE _____ DATE _____

Your signature indicates your approval for your child's participation in the teen volunteer program, your acknowledgment that he or she is in good health, and your consent for us to contact your child's physician.

Opportunities for volunteers are provided without regard to religion, creed, race, national origin, age, or sex.

NOTE: Some organizations require additional school verification of class work.

Source: *Strategies for Success in Volunteer Service Administration*, p. 89, published by: *The Ohio Society of Directors of Volunteer Services of the Ohio Hospital Association*, 1990

Individual Volunteer Service Log

NAME _____ HOME TELEPHONE _____

ADDRESS _____

FILL IN THE HOURS OF SERVICE BY DATE. ADD TOTAL FOR MONTHS.

YEAR _____

MONTH

	JAN	FEB	MAR	APR	MAY	JUN	JUL	AUG	SEP	OCT	NOV	DEC
DAY												
1.												
2.												
3.												
4.												
5.												
6.												
7.												
8.												
9.												
10.												
11.												
12.												
13.												
14.												
15.												
16.												
17.												
18.												
19.												
20.												
21.												
22.												
23.												
24.												
25.												
26.												
27.												
28.												
29.												
30.												
31.												

MONTHS' TOTALS

YEAR'S TOTAL _____

Source: *Strategies for Success in Volunteer Service Administration*, p. 43, published by: *The Ohio Society of Directors of Volunteer Services of the Ohio Hospital Association*, 1990

Volunteer Time Sheet

Month of: _____

Volunteer: _____ Supervisor: _____

TIME	MON	TUES	WED	THUR	FRI	SAT	SUN	TOTAL HOURS
IN								
OUT								
IN								
OUT								
IN								
OUT								
IN								
OUT								
IN								
OUT								
IN								
OUT								
IN								
OUT								
IN								
OUT								

Source: VOLUNTEER, The National Center now merged with The Points of Light Foundation, 736 Jackson Place, Washington, D.C. 20503

Master Volunteer Time Log

Department _____

Month _____

At the start of the month, please register. At the end of each day, please fill in the number of hours of volunteer time that you have donated that day:

Name	1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16	17	18	19	20	21	22	23	24	25	26	27	28	29	30	31	Total
1. _____																																
2. _____																																
3. _____																																
4. _____																																
5. _____																																
6. _____																																
7. _____																																
8. _____																																
9. _____																																
10. _____																																
11. _____																																
12. _____																																
13. _____																																
14. _____																																
15. _____																																
16. _____																																
17. _____																																
																Monthly Total											<input style="width: 100%; height: 15px;" type="text"/>					

Source: McCurley, Steve, *Volunteer Management Forms*, p. 13, *Heritage Arts Publishing*, 1988

Volunteer Assignment Master Log

Month/Position/Department

This is a multiple-use form for tracking volunteer assignments. If labeled by "Month" in the upper right hand corner, the form becomes a month-by-month master list of all volunteers. If labeled "Position", the sheet records all volunteers working in a particular job. If labeled "Department", the form records all volunteers assigned to that department.

	NAME	DEPARTMENT/ POSITION	STARTING DATE	ENDING DATE	NOTES
1.					
2.					
3.					
4.					
5.					
6.					
7.					
8.					
9.					
10.					
11.					
12.					
13.					
14.					
15.					
16.					
17.					
18.					
19.					
20.					
21.					
22.					
23.					
24.					

Source: McCurley, Steve, *Volunteer Management Forms*, p. 11, *Heritage Arts Publishing*, 1988

Computer Programs for Volunteer Recordkeeping Systems
(A list compiled by United Way of America, 1992)

Match Point
Patrick Saccomandi
Resource Match, Inc.
4911 North Fifteenth Street
Arlington, VA 22205
(703) 276-0542

Volunteer Information Profile
(VIP)
Sara Storm
Hewitt-Anderson Co.
P. O. Box 42858
Tucson, AZ 85733
(602) 326-5664

The Volunteer Equation
John H. Schill
The R. U. R. Group, Inc.
333 Troy Circle -V
Knoxville, TN 37919
(615) 588-5950

M & A
Frank M. Myers
Myers & Associates, Inc.
P. O. Box 560
Dover-Foxcraft, ME 04426
(207) 564-2740

The Volunteer Office Program
Richard D. Sefts
RDS & Associates
P. O. Box 9
Westerville, OH 43081
(614) 891-1186

Razor's Edge
Johnnie Short
Blackbaud Microsystems
900 Johnnie Dodds Blvd.
Mt. Pleasant, SC 29464
(803) 881-4700

SAM
Daniel J. Wagener
Main Street Softworks
7128 Westbrook
Dallas, TX 75214
(214) 824-4413

Vbase
Gary M. Fitzpatrick
201 Sunnyside Lane
Florence, CO 81226
(719) 784-6404

Source: The United Way of America, 1992

SOFTWARE PACKAGES

	MP	VEQ	VOP	SAM	VIP	VB	M&A	RE
Features:								
Collects info on volunteers	X	X	X	X	X	X	X	X
Collects info on agencies	X	X	-	-	-	-	-	X
Matches volunteers to needs	X	X	X	X	X	*1	X	X
Matches agencies to volunteers	X	X	-	-	-	-	-	X
Menu-driven	X	X	X	X	X	-	X	X
On-line help screens	X	X	X	X	X	-	X	X
User manual	X	X	X	X	X	X	X	X
Custom reports	X	X	X	X	X	X	X	X
Labels	X	X	X	X	X	X	X	X
Mail Merge	X	X	X	X	X	-	X	X
Support:								
Technical support	*2	*2	X	*3	*4	X	X	*4
Upgrades	X	X	X	X	X	X	X	X
On-site training	X	X	X	X	X	X	X	X
Multiuser:								
Network version	X	X	-	X	X	-	X	X
Vendor information:								
Clients	120	41	100	35	90	0	4	900
Company Staff	3	7	3	2	6	1	3	160
Contact list of customers	X	X	X	X	X	-	X	X
Site visits	X	X	X	X	X	-	X	X
Demonstrations	*5	*5	*6	*5	*5	*5	*5	*7

(X) = Yes (-) = No

MP = Match Point
 VEQ = Volunteer Equation
 VOP = Volunteer Office Program
 SAM = SAM
 VIP = Volunteer Information Profile
 VB = VBase
 M&A = Meyers & Associates
 RE = Razor's Edge

*1 = matches on 4 criteria
 *2 = telephone/modem support
 *3 = toll-free telephone/modem support
 *4 = toll-free telephone support
 *5 = demo diskette available
 *6 = 30 day money back guarantee
 *7 = on-site demonstration w/representative

Source: The United Way of America, 1992

Support

Technical Support

Technical support supplements the help screens and user's manual. These services are usually provided via the phone and/or modem. The costs for support may be part of a maintenance plan or toll-free for a period of time. Check with each relevant vendor. The support offered will be important to the success of your automation efforts.

Upgrade

In order to meet the changing needs of customers, software must be enhanced and improved. Vendors may provide these upgrades free but most will likely charge a fee. Frequent upgrades can be troublesome and may be a sign of problems with the software.

On-site training

Software training that is provided by the vendor, for a fee, at your office site. This is for additional staff aside from those who must attend the Project IMPACT training.

MultiUser

Network version

This will enable a number of users to access the program simultaneously and will cost more than a single user version.

Vendor info

Clients

The number and types of clients that use a particular software will offer important insight as to appropriateness of the program to your needs, customer satisfaction and support, product quality, etc.

Company staff

The number of staff may indicate — not guarantee — the availability of technical support and whether you'll receive timely responses to questions and problems. This is not a guarantee.

Contact list of customers

Vendor will provide a list of current users for you to contact and verify their satisfaction or dissatisfaction with their software. Talk to as many users as you can. Talk to them about the kind of support they've received. How easy is it to learn to use the software? What kinds of problems have they had?

Site visit and demonstrations

To verify that the software does what it claims to do, you should arrange to see a demonstration of the software at a customer site (if there is one within reasonable traveling distance). Alternatives to the site visit would be to have a representative demonstrate the program in your office or get a demo copy of the software that outlines certain features and capabilities. Check with vendors for "evaluation or inspection" copies of their software which would allow you to examine a working program at your office — without representative.

Glossary

Features

Collects info about volunteers

Enables you to track and analyze data about volunteers. Ease of entry and retrieval of information will be critical.

Collects info about agencies

Enables you to track and analyze data about agencies. Most programs do not track agency information. The ability to store information about volunteer job descriptions as data fields is an important consideration when matching agencies to volunteers.

Matches volunteers to agencies

Matches volunteers to available volunteer positions. All the programs that you consider should enable you to perform this task. The ease with which you can accomplish this is important.

Matches agencies to volunteers

Matches agency opportunities to volunteers. This feature is useful for agencies with positions to fill on a regular basis from new and current volunteers.

Menu-driven

A menu-driven software package enables you to use features by selecting commands from a menu of options as opposed to memorizing complex command language making the program less intimidating.

On-line help screens

This option offers text explaining various program features and functions when you run across something you don't understand. This can be a useful training tool.

User manual

Provides important technical information about the software. Manuals written clearly without excessive use of technical jargon will be more effective and less intimidating.

Standard reports

Standard reports provide information that is requested by most users and will save time and effort.

Custom reports

Allows you to create tailored reports. For advanced users.

Labels and mail merge

Common features provided by most programs that will create form letters and mailing labels directly from your database. Ease of use and compatibility with label forms are important.

Source: The United Way of America, 1992

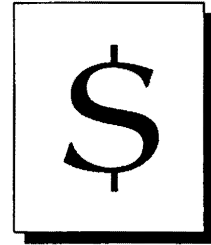
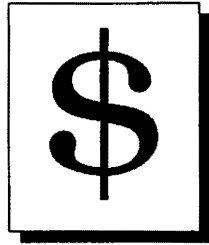
Further References

Forms and recordkeeping systems

- Ellis, Susan and Katherine H. Noyes, Proof Positive: Developing Significant Volunteer Recordkeeping Systems (Energize Books, 1980).
- McCurley, Steve, Volunteer Management Forms (Heritage Arts Publishing, 1988).

Chapter 4

Volunteer Insurance and Tax Issues



Chapter 4

Volunteer Insurance and Tax Issues

Purposes of this chapter:

- * To introduce Managers of Volunteers to their role in insurance protection and risk management
- * To share key points about insurance issues related to volunteers
- * To review existing laws regarding tax deductions for volunteers and to provide the address and phone number to get an annual update of this information
- * To provide sample forms for volunteers to use in keeping track of their related tax deductions

Included in this section:

Thought-Provoking Questions	IV-5
Key Liability Issues	IV-6
Insurance Protection	IV-6
Risk Management	IV-7
Tax Deductions for Volunteers	IV-8
Volunteer Protection Laws	IV-10
Volunteer Tax Recordkeeping Form	IV-11
Further References	IV-13

Thought-Provoking Questions Regarding Insurance and Tax Issues

- 1. Is your organization liable for negligent acts of its volunteers?**
- 2. Can the volunteer be given compensation for injuries incurred while on the job as a volunteer for your organization?**
- 3. Can a Manager of Volunteers be sued for negligent acts of a volunteer he/she supervises?**
- 4. If volunteer assignments involve use of a car, do you have appropriate insurance coverage?**
- 5. What insurance coverage does your organization provide for volunteers who work in your organization?**
- 6. Can a volunteer who is donating professional services deduct the time on his/her income tax?**
- 7. What types of expenditures can volunteers deduct on their income tax? What kind of records do they need to verify them?**
- 8. Whom can you call for legal advice relating to your work with volunteers?**
- 9. What are the current national/state laws regarding liability issues related to volunteering?**

Key Liability Issues

1. Since each state varies in legal interpretation and laws regarding liability, it is always best to consult your insurance agent and/or lawyer regarding the establishment and changes in any program utilizing volunteers, any special events, coverage for your Board of Directors, etc.
2. Managers of Volunteers can respond to issues of legal liability by two methods: **Insurance Protection** and **Risk Management**.

Insurance protection

It is the responsibility of each organization to determine insurance needs for its volunteers. The Director of Volunteers should be cognizant of the following:

The Organization's Liability Policy

Acts of negligence by volunteers may be covered by the organization's Comprehensive General Liability Policy in cases of injury or damage to the property or a client. Such insurance can be extended to cover libel, slander, mental anguish and other personal injury as distinguished from physical injury.

Personal Liability Coverage

Having coverage under the volunteer's own policy is an option for additional protection and in some cases may be considered if there is no other coverage. It is suggested that the agency examine the policy and keep a copy of it in its legal records file.

Insurance Plan Specific to Volunteers

There are insurance plans available in which only accidents incurred while volunteering for the organization are covered.

Workers' Compensation

In some states, injuries sustained by volunteers in an organization would be covered by Workers' Compensation, with limits set by state statute. A few states allow an organization to voluntarily include the volunteer in the workers' compensation program, in which case they have a standard endorsement called a voluntary compensation endorsement.

Directors and Officers (D&O) Liability

This coverage is for volunteer board members and protects their personal assets against wrongful action claims which may be brought against the agency board of directors.

Use of Private Automobile by Volunteers

Key points:

- (1) It should be confirmed that the volunteer has a valid driver's license and that the vehicle is suitable for transportation. It is advisable to make a copy of the license and keep it on file.

- (2) The organization should carry Non-owned and Hired Car Liability Insurance which would be excess over the volunteer's insurance and basic when there is no other coverage.
- (3) Driving assignments for volunteers should be restricted to the scope of the assignment as stated in the assigned job description. Transportation of clients/patients should be restricted.

Volunteer Professional Liability

Some "professional volunteers," particularly those helping in the health care, counselling, legal or financial field, may be sued for malpractice. Consult your insurance agent to determine need and availability of the coverage.

Umbrella Insurance Policies

Joining with other agencies in the purchase of insurance, or coming under a policy of a national organization for its affiliate organizations can save money on increasingly high premiums for insurance. United Ways and Chambers of Commerce are good prospects for offering this group insurance savings, as are associations of similar service providers.

Risk management

Keeping an organization as risk-free as feasible from the possibility of accidents and injury is a shared responsibility within the agency. The Manager of Volunteers, however, can assist in minimizing potential risk by:

- (1) providing careful screening of volunteers
- (2) including safety training (can be included in orientation, training, and/or manual)
- (3) inspecting areas where volunteers work
- (4) supervising
- (5) occurrence reporting (i.e., volunteers should receive instructions for reporting incidents or situations that may present liability concern)

For the best protection, you should have a written risk management plan and should document all of the above.

3. Almost all rules limiting the liability of volunteers are state laws. Congress has never enacted a federal law applying to all volunteers. Because the states have acted independently, the laws differ widely in terms of the volunteers they cover and how much protection they provide. The table on page IV-10 is taken from a pamphlet, "Answers to Volunteers' Liability and Insurance Questions," produced by Nonprofits' Risk Management and Insurance Institute, 1991. Because laws are changing constantly, it is always recommended that you get updated information upon which to make insurance decisions.

Tax Deductions for Volunteers

Can an attorney who provides free legal assistance to a local housing organization claim on his/her tax return the estimated value of his service? Can a doctor who volunteers at a free clinic claim a charitable deduction for the estimated value of the service rendered to the clinic? Can a teacher who volunteers as a tutor on behalf of a literacy organization claim a charitable deduction for the estimated value of the service provided for the organization? The answer to all of these questions is "No." Volunteers MAY NOT deduct the value of their volunteer time or services.

There are a number of tax benefits available to volunteers however. In preparing tax returns, volunteers may deduct unreimbursed out-of-pocket expenses directly related to their volunteer service if they itemize deductions.

Volunteer service or other charitable donations must have been contributed to what the Internal Revenue Service terms a "qualifying organization." This includes government agencies and organizations operated only for charitable, religious, educational, scientific or literary purposes. Certain organizations that foster national or international amateur sports competitions are also included. A general rule is that, when deducting volunteer-related expenses, organizations or companies operated "for-profit" do not qualify.

Examples of the types of expenditures that volunteers may deduct on their tax returns include:

- bus and cab transportation expenses
- parking costs and toll fees
- the cost and expenses of upkeep of special uniforms.
- telephone bills
- supplies purchased to perform volunteer duties
- automobile mileage and expenses for gas and oil
- dues, fees or assessments made to a qualified organization
- noncash contributions of property (e.g. clothing, books, household items, equipment, etc.)

Person or couples who volunteer as foster parents may deduct unreimbursed expenses paid to provide foster care. These expenses must be amounts spent in support of the children placed in their homes by a charitable organization.

Volunteers may deduct automobile expenses at a standard rate of 12 cents per mile (1992) or on an actual expense basis. Volunteers may not deduct general automobile repair and maintenance expenses. Good recordkeeping for transportation-related costs is a must for volunteers who intend to claim automobile-related deductions.

A charitable deduction is denied for travel expenses (including amounts expended for meals and lodging) while away from home, whether paid directly or by reimbursement, *unless* there is no significant element of personal pleasure, recreation or vacation in the travel.

The "out-of-pocket" requirement eliminates from deduction any amount that is to the direct benefit of the taxpayer (or taxpayer's family) rather than to the organization. Items for which a volunteer receives reimbursement may be deducted only to the extent that actual expense exceeds the amount of reimbursement.

In general, the following guidelines should be followed when claiming charitable deductions on tax returns.

1. Cash contributions must be an amount actually paid during the taxable year, not just a pledge.
2. Contributions must be made to a qualifying organization.
3. Unreimbursed expenses must be the actual out-of-pocket amount.
4. The volunteer must maintain records which include the name of the organization contributed to and details about each contribution.
5. Where possible, especially for large gifts, a statement of donation should be obtained from the donee organization.

More detailed information can be obtained from the Internal Revenue Service. Check the blue pages of the phone book for the appropriate contact. Publication #526 "Charitable Contributions" can be obtained from the IRS Forms Office 1- 800-424-FORM.

Source: VOLUNTEER, The National Center, 1991. This organization is now merged into The Points of Light Foundation, 736 Jackson Place, Washington, D. C. 20503

Volunteer Protection Laws

State	Directors and Officers			Volunteers Generally				Sports
	Org.	Std	Conds	Org.	Std	Auto Ex.	Conds	Y/N
Alabama	●	W		●	W			
Alaska	○	GN						
Arizona	●	GN						
Arkansas	●	GN		○	GN	i	i,X	Y
California								
Colorado	●	W		●	GF			Y
Connecticut	●	R						
Delaware	●	GN		●	GN	i		
D.C.								
Florida	●	R						
Georgia	●	W		●	W			Y
Hawaii	●	GN						
Idaho	●	W						
Illinois	●	W		○	W			Y
Indiana	●	GN						Y
Iowa	●	W		●	W			
Kansas	●	W	I	●	W		I,i	Y
Kentucky	●	W		●	W			
Louisiana	●	W		●	W			Y
Maine	●	GN		●	GN			
Maryland	●	GN	I	●	GN		I,i	Y
Massachusetts	○	GN						Y
Michigan	●	org. can amend articles						
Minnesota	●	R		●	R			Y
Mississippi	●	GF		●	GN	Y	X	Y
Missouri	●	GN		●	GN		X	
Montana	●	W		●	W			
Nebraska	●	W						Y
Nevada	●	GN		●	W			Y
New Hampshire	○	W		●	GN	Y		Y
New Jersey	●	GN		●	GN	Y		Y
New Mexico	●	R						Y
New York	○	GN						
North Carolina	●	R		●	GN	Y	i	
North Dakota	●	GN		●	GN	Y		Y
Ohio	●	W		●	W			
Oklahoma	●	GN						
Oregon	●	GN						
Pennsylvania	○	GN		○	GN	Y		Y
Rhode Island	●	W		●	W	Y		Y
South Carolina	○	R					I	
South Dakota	●	W		●	W	Y		
Tennessee	●	GN						Y
Texas	○	R		○	R	i	i	
Utah	●	W	X	●	W	y	I	
Vermont	●	R						
Virginia	●	W						
Washington	●	R						
West Virginia	●	R						
Wisconsin	●	W		●	W	Y		
Wyoming	●	W						

Org (Type of Organizations)	Std (Liability Standard)	Conds (Conditions)	Feb. 1992
● Most nonprofits	W Willful/Wanton	I Organization must have insurance	
○ Certain nonprofits (at least charitable)	R Recklessness	i Liability limited to insurance	
	GN Gross Negligence	X Significant limitations apply	

Auto Excl.: Does not apply to motor vehicle accidents.

Sports: Y for "yes" only if there is a law other than what applies to volunteers generally.

Further References

Liability and insurance

A lawyer or insurance agent associated with your organization

- Ellis, Susan, From The Top Down, (Energize Books, 1986). pp.118-125.
- Nonprofits' Risk Management and Insurance Institute - numerous publications (e.g., Am I Covered For...? A Guide to Insurance For Non-Profits, 1984 by Terry Chapman, Mary Lai and Elmer Steinbock)
Write to: NRMII, 1731 Connecticut Avenue, NW, Suite 200,
Washington, DC 20009 or call: (202) 462-8190.
- The Society For Nonprofit Organizations' Resource Center - numerous publications (e.g., Risk Management: Strategies for Managing Volunteer Programs, 1988 by Sarah Henson and Bruce Larson). Write for catalogue: 6314 Odana Road, Suite 1, Madison, Wisconsin 53719.

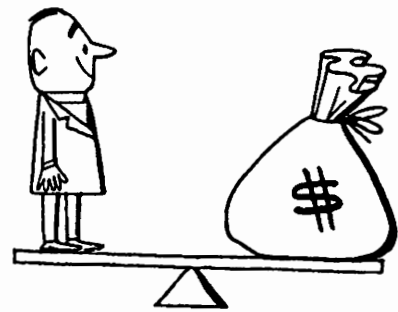
Tax deductions

- More detailed information can be obtained from the IRS Service. Publication #526 - "Charitable Contributions" can be obtained from the IRS Forms Office 1-800-424-FORM



Chapter 5

Planning and Budgeting for Volunteer Programs



Chapter 5

Planning and Budgeting for Volunteer Programs

Purposes of this chapter:

- * To have Managers of Volunteers become aware of the significance of their role in planning for the agency's use of volunteers
- * To share planning outlines and examples
- * To indicate items which should be part of a budget for managing a volunteer program
- * To explore options for determining the value of volunteer time

Included in this section:

Thought-Provoking Questions	V-5
Planning for Your Volunteer Program	V-6
MBO (Management By Objectives) Planning	V-7
Summary Planning Example	V-8
Long Range Strategic Planning	V-8
Summary Outline of Steps in Strategic Planning	V-9
Budgeting for a Volunteer Program	V-10
Determining the Value of Volunteer Time to the Organization	V-11
Further References	V-13

Thought-Provoking Questions Regarding Planning And Budgeting

- 1. What would you like to accomplish in your volunteer program within the next 6 months?**
- 2. As the Manager of Volunteers, are you at the “planning table” of your organization? (i.e., are you consulted on agency strategic plans which involve or impact volunteering in your organization?)**
- 3. As a Manager of Volunteers, do you have funds allocated to your program?**
- 4. What system do (or will) you use to determine the value of volunteer time contributed to your organization?**
- 5. Does your organization’s long range plan make reference to the use of volunteers in the future?**
- 6. Are you experienced or knowledgeable about the planning process?**

Planning For Your Volunteer Program

You are most likely at one of two places with regards to your volunteer program: (1) initiating a new program or (2) enhancing or strengthening an existing program. In both cases you will want to engage in some form of planning.

Most of this Resource Kit deals with significant components of a volunteer program which must be planned as you design your own unique program (i.e., job design, recruitment, screening, training, evaluating, recognizing, etc.). **It is important that you establish the vision of the program you wish to eventually create** and then do some realistic planning as to how you will achieve that desired state. This section is not an in-depth look at the planning process; rather it is a reminder that it is an important step in the successful development of any program.

Two examples of planning models and a planning sample based on MBO (Management by Objectives) follow this page. Learning to set goals, objectives, action steps, time lines, and responsibilities will greatly assist you in monitoring and in celebrating your progress. If you are unfamiliar with or inexperienced in planning, you may wish to read some of the resources listed under planning at the end of this chapter and/or you may choose to attend a seminar on the topic.

MBO (Management By Objectives) Planning

Planning is the systematic decision-making process in which you set goals for your program, then plan strategies for reaching those goals. It involves a seven-step "ladder," each "rung" being more concrete and specific than the last. The steps are:

Organization and volunteer program mission statement

Review your Board's statement of why your organization exists, who it serves, and how it provides a needed, unique service. The mission, or philosophy, of your volunteer program should complement this mission statement and should give guidance to you in the development of your program. (Your volunteer program mission may include such phrases as, "Our program's purpose is to utilize the unique talents, skills and knowledge of volunteers to extend services offered to our clients and to educate the public about our cause.")

Volunteer program goals

Goals are generally 1-3 year targets for your program (e.g., to develop a formal training program for volunteers in the organization).

Objectives

Objectives are specific measurable statements of **results** you want within a specific time frame (e.g., by March 1992, we will initiate our first 3 hour volunteer training for counselors).

Action plan (strategies and tactics)

Action planning is the who and how of accomplishing your objectives (e.g., Who will write the training module? Where will you have a training site? What will be the date for the training, etc.).

Budget and control

This step involves determining the cost and resource allocation and totaling it into a budget document. It also involves determining how actual performance differs from plans (i.e., time lines, budgets, job descriptions). When you have a written budget and action plans, you should periodically check to make sure things are being done in a timely, cost-efficient manner.

Evaluating performance (appraisal)

This is when you review your success or failure and efficiency in reaching your objectives.

Restating goals and objectives

Based on your program evaluations, you can re-examine and rewrite your program goals and objectives.

Source: Stallings, Betty B., Building Better Skills

Summary Planning Example From a Volunteer Center

Agency Mission:	Promote and recognize volunteering in the Livermore/Amador Valley.
Goal of Volunteer Program:	Plan and implement an annual community-wide volunteer recognition event.
Objectives:	By May 1992, plan and sponsor a recognition event which will honor a minimum of 20 diverse local volunteers at a community presentation.
Action Plan:	Volunteer Advisory Board to plan an event at the local Macy's Department Store for Spring 1992.
Budget:	\$250 (awards and invitations) arrange for food, music, facility to be donated.
Evaluation:	Hold an evaluation session for key planners. Get feedback from recipients, Macy's, entertainers, etc. Begin planning for next year's event.

Long Range Strategic Planning

The following planning design is a common planning method which focuses on group-identified critical issues (central issues or questions that your organization or program will have to resolve if it is to survive/thrive in the next 3-5 years). Common examples of critical issues facing a volunteer program are:

- (1) the changing profile of today's volunteer (i.e., more sophisticated, diverse, interested in short-term volunteer assignments)
- (2) the need to run a more business-like system to manage a growing number of volunteers
- (3) the resistance of salaried staff to utilizing volunteers
- (4) the challenge of recruiting a more diverse base of volunteers

Summary Outline of Steps in Strategic Planning

1. Review **mission/philosophy** of organization and volunteer program
2. What is the **vision for the future** of the volunteer program?
3. **Strategic planning steps:**
 - a. What are **mandates/givens** that shape what you can and cannot do?
 - b. Who are your **constituencies**? What do they want and/or expect from you? How are you meeting their expectations? What will they want from you in the future? (You may need to perform an assessment to gather these answers - see Chapter 2)
 - c. **External analysis:** What are trends and changes external to your organization that might be having an impact on your volunteer program? Which are threats and which are opportunities for you?
 - (1) educational trends
 - (2) religious
 - (3) economic
 - (4) demographic/social
 - (5) funding
 - (6) media
 - (7) political
 - d. **Competitive analysis:** Who are competitors for your volunteers? Where do they/you have the edge?
 - e. **Internal analysis:** What are the strengths and weaknesses of your organization and volunteer program, and what are their implications for your program's future?
 - (1) Funding
 - (2) Administrative support
 - (3) Board of Directors
 - (4) Marketing/public relations
 - (5) Image
 - (6) Planning
 - (7) Internal communication
 - (8) Others pertinent to your organization
 - f. Determine **critical issues** you must address
4. **Goals** you want to set in order to address vision or critical issues
5. Establish annual **objectives** (measurable statements of what is to be done)

6. **Action plans and implementation strategy.** Assignment of time lines, responsibilities, etc.
7. **Budget projections** for plan
8. Determine a **performance review and appraisal of the plan** (i.e., What is the method to evaluate, review, update or modify the goals and objectives and review the performance of those accountable for specific elements of the plan?)

Budgeting for a Volunteer Program

Volunteers are not free. To effectively run a volunteer program, an organization must have some funds designated for that purpose and where possible some other staff assigned to direct the program.

Included in the budget should be costs related to:

Personnel

- Salary
- Benefits

Operating Costs

- Furniture and equipment
- Telephone
- Supplies
- Printing and reproduction
- Postage
- Insurance
- Recognition
- Enabling funds (reimbursement for volunteer out-of-pocket expenses)
- Travel and professional development
- Volunteer training

Determining the Value of Volunteer Time to the Organization

Method I - Rate per hour method

A simple but generally unsatisfactory method is to multiply the number of annual volunteer hours by a monetary figure. The figure used may be minimum wage, the appropriate hourly rate for each job or the average wage in the organization. All of these undervalue volunteers because there is no consideration for the fact that the true cost of staff also includes benefits such as vacation, insurance, health and pension plans. It is better, however, to use one of these methods than to use none at all.

example: 1026 volunteer hours given in 1991 multiplied by
average agency wage: \$8.50/hr.
value of donated volunteer time: \$8,721.

Method II - The Karn equivalency model*

A second method, formulated by G. Neil Karn, is an equivalency model which assesses the true value of volunteers. To use his formula, Karn suggests that each volunteer position must be analyzed and assessed as to the duties performed, and the knowledge, skills, and abilities demanded by the position.

Next, the compensation figure of a comparable paid job that is closely parallel to the volunteer position is used to establish a base hourly rate for each volunteer position.

Allowance is also made for paid time off and benefits to compute the actual hourly wage of the comparable paid position.

Karn's formula and a form for determining it is on the following page.

* G. Neil Karn, Money Talks: A Guide to Establishing the True Dollar Value of Volunteer Time, pp.1-7, *The Journal of Volunteer Administration*, Winter (1982-83)

True Dollar Value of Volunteers Worksheet

Volunteer Job Title: _____

- I. Equivalent Salaried Job Classification
(Based on a comparison of the tasks and responsibilities described in the volunteer job description with those of an equivalent employee)
Equivalent Salaried Job Title: _____
- II. Annual Salary for Equivalent Salaried Classification: \$ _____
- III. Value of Benefits Package:
- | | |
|--------------------------------|-----------------|
| FICA | \$ _____ |
| Health Insurance | \$ _____ |
| Life Insurance | \$ _____ |
| Workers Compensation Insurance | \$ _____ |
| Retirement | \$ _____ |
| Other Benefits: | \$ _____ |
| Total Value of Benefits | \$ _____ |
- IV. Annual Salary and Benefits Package =
Total annual compensation package: \$ _____
- V. Established Annual Work Hours for
Agency: _____ hours/week x 52 weeks = _____ hours
- VI. Hours Paid but Not Worked Annually:
- | | |
|------------------------------|-------------|
| Annual Leave | _____ hours |
| Paid Holidays | _____ hours |
| Paid Sick Leave | _____ hours |
| Total hours paid/not worked: | _____ |
- VII. Established Annual Hours minus Hours Paid but not Worked =
Actual Work Hours Annually: _____ hours
- VIII. Total Annual Compensation Package + Actual Work Hours Annually = _____
True Dollar Value of each hour of volunteer time in this job description: \$ _____

G. Neil Karn, Money Talks: A Guide to Establishing the True Dollar Value of Volunteer Time, pp.1-7, *The Journal of Volunteer Administration*. Winter (1982-83).

Further References

Planning and budgeting for volunteer programs

- Ellis, Susan, From The Top Down (Energize Books, 1986). Chapter 13, "Considerations in Planning," pp.13-24; Chapter 3, "Budgeting and Allocating Resources," pp. 25-40; and Chapter 11, "The Dollar Value of Volunteers," pp.135-154.
- Lynch, Rick, Precision Management (Abbott Press, 1988). Chapter 12, "Looking Out The Window," pp. 212-230.
- McCurley, Steve and Rick Lynch, Essential Volunteer Management (VM Systems and Heritage Arts Publishing, 1989). Chapter 2, "Planning for a Volunteer Program," pp.17-26.
- Morrison, Emily, Skills for Leadership (Jordon Press, 1983). Chapter 11, "Management By Objectives," pp.151-165.
- Wilson, Marlene, The Effective Management of Volunteer Programs (Volunteer Management Associates, 1976). Chapter 5, "Planning and Evaluation," pp. 75-101.

Chapter 6

Volunteer/Staff Relations



Chapter 6

Volunteer/Staff Relations

Purposes of this chapter:

- * To appreciate the significance of good staff/volunteer relations
- * To be able to identify and detect any symptoms of staff resistance
- * To have an understanding of potential causes of staff resistance
- * To understand the role of the Manager of Volunteers in volunteer/staff relations
- * To learn numerous ways to promote strong volunteer/staff relations within an organization

Included in this section:

Thought-Provoking Questions	VI-5
Significance of Good Volunteer/Staff Relations	VI-6
Symptoms of Staff Resistance	VI-7
Reasons for Staff Resistance	VI-7
Role of Manager of Volunteers in Volunteer/Staff Relations	VI-8
Methods of Promoting Good Volunteer/Staff Relations	VI-9
Further References	VI-11

Thought-Provoking Questions Regarding Volunteer/Staff Relations

- 1. Can volunteers be dismissed (fired) from your organization?**
- 2. Have the staff members been trained in the effective use and supervision of volunteers?**
- 3. Do management level personnel use volunteers?**
- 4. Are employees ever evaluated on their use of volunteers?**
- 5. What percentage of your staff members are enthusiastic about using volunteers in their program(s)?**
- 6. Do you have diversity among the volunteers serving your organization?**
- 7. Does the organization delegate significant tasks to the volunteers?**
- 8. Is there a high turnover of volunteers serving your organization?**
- 9. Do your volunteers and staff feel a part of a team effort?**
- 10. Does the staff have a role in the planning and evaluation of the agency's volunteer program?**
- 11. Do you have a written policy manual for the volunteer program?**
- 12. Are volunteers well-screened before being invited to be part of the team?**

Significance of Good Volunteer/Staff Relations

Effective operation of a volunteer program requires that there is a supportive working relationship between staff and volunteers. If either group does not understand the needs of the other, or if either group is distrustful of the other, the volunteer program will not function effectively.

Often your biggest challenge is to convince your administrator or boss that you need to spend time building team support and countering any resistance before bringing (more) volunteers into your organization.

As Manager of Volunteers, if you do not attend to this matter, your careful work of job design and recruitment may all be for naught. If the volunteer experiences resistance when entering or working in the organization, he/she will quickly leave and find a more inviting environment. If you have staff who for a variety of reasons are not supportive of volunteers, you may begin to experience the "revolving door syndrome" with volunteers. Due to the subtle and not-so-subtle forms of resistance, staff members can sabotage your best efforts to establish a good program.

There are many symptoms which a sensitive Manager of Volunteers can begin to detect in an organization. These must be surfaced and dealt with. Staff have many reasons to resist volunteers in their organization, some of which have resulted from poor previous experiences and some from lack of resources and training to do the job well. For whatever reasons, the Manager of Volunteers must deal with them and begin to make joint plans to counter the issues that are causing resistance.

It is equally necessary that the volunteers understand the needs and concerns of staff. You need to think of the volunteer/staff relationship not as a contest between two groups, but rather as a relationship involving the staff, the volunteers, and the Manager of Volunteers. The role of the Manager of Volunteers in the relationship is to keep working with staff and volunteers to maintain balance and understanding.

Symptoms of Staff Resistance

The following observations may be related to staff and/or administrative resistance:

- * high turnover in volunteers
- * few volunteers in organization
- * volunteers "look" like staff (no diversity)
- * reference to "**your** volunteer program" or "**your** volunteer" (referring to Manager of Volunteers) rather than "**our** volunteer program"
- * many reasons to keep volunteers out (i.e., confidentiality and legal issues)
- * lack of any rewards for staff who use volunteers well (i.e., not included in annual evaluation)
- * no training on use of volunteers in the organization
- * management not using volunteers
- * many staff choosing not to use volunteers
- * work space not adequate for volunteers
- * Manager of Volunteers' position is low level and poorly paid
- * volunteers given mostly menial jobs

Do you notice any of these in your organization?

Reasons for Staff Resistance

When staff members are given an opportunity to express their feelings, they give many reasons for their lack of receptiveness to volunteers. Some are:

- * fear of job replacement
- * loss of control (volunteers may not do the job well)
- * lack of involvement in the planning of the volunteer program
- * no way to dismiss a volunteer who is not working out well
- * lack of clarity in staff and volunteer jobs
- * volunteers take too much time
- * no rewards for doing the job well
- * volunteering is not a priority for the top administrator
- * no skills to supervise volunteers
- * no quality control on volunteers brought into the organization
- * volunteers are too needy, take up personal time
- * bad former experiences with volunteers
- * others _____

Source: Stallings, Betty B., Building Better Skills

Role of Manager of Volunteers in Volunteer/Staff Relations

It is a primary role of the Manager of Volunteers to assure that volunteers and staff are able to work effectively and agreeably together. There are 3 areas on which to focus:

- (1) Volunteers, staff and the organization should all feel that the benefits of volunteering are worth the work involved. This is the magic of balancing needs and benefits so that everyone wins. The Manager of Volunteers is the person who needs to monitor this delicate balance.
- (2) The staff must have the feeling of control over the process of volunteer utilization, including the ability to shape how volunteers will be involved and the ability to screen out volunteers they feel are not suitable for their jobs.
- (3) Managers of Volunteers must develop a climate of acceptance that says "We are proud of **our** volunteers" rather than, "**Your** volunteer is not working out," which reveals a sense that the volunteers belong to the Manager of Volunteers and that he/she is responsible when things go wrong.

The next page is a list of methods and suggestions for promoting good volunteer/staff relations.

Methods of Promoting Good Volunteer/Staff Relations

1. Make certain there are **clear written policies** regarding volunteers — policies that endorse their involvement and delineate their roles and relationships with paid staff.
2. **Plan with staff** for the involvement of volunteers, **not for them**. Help staff members identify tasks they would like to delegate — their “dream” and “drudge” lists.
3. **Plan common experiences** for the staff and volunteers (i.e., staff meetings, social occasions, etc.) so that they will get to know one another better.
4. Have **written job descriptions** for volunteers that outline work to be done, reporting relationships, schedules, expectations. Make certain that both the volunteer and supervising staff member have a copy of it. It should be reviewed and may be modified as they begin to work together.
5. Allow **staff to have the final say on the jobs** they want the volunteers to perform, skills needed to do those jobs, and the final selection of the volunteer.
6. **Orient all staff** to volunteers and volunteerism. Help them understand the types of people who volunteer, their diverse motivations, range of skills, abilities, interests and needs. Let them voice their fears and reservations. Take their concerns seriously.
7. Hold an **annual assessment** of the volunteer program, getting input from the staff, volunteers and administration.
8. Encourage **organizational recognition** be given to **staff people** who have worked effectively with volunteers.
9. **Ensure that volunteers have**, or develop, the **skills** needed to do the job. Require training, if necessary.
10. **Orient and train volunteers to what paid staff do**, their skills, training, motivations, needs, and pressures.
11. Provide **joint recognition** of the volunteers and staff. (Support the notion that, as a team, they accomplished many things.)
12. Maintain **supportive relationships** with all staff and teach them to trust that you're looking out for their interests. Learn to mediate without taking sides. Be a “win-win” person.
13. Let your **enthusiasm**, personal commitment and energy be contagious: about volunteers, about the program, about the good work paid staff do. Be a continuous promoter.
14. Keep yourself and your volunteers **focused on the mission**, purpose and the values of the program. “Keep the dream alive.”

Source: Stallings, Betty B., Building Better Skills

Futher References

Volunteer/staff relations

- Ellis, Susan J., From The Top Down, (Energize Books, 1986). pp. 61-73.
- Vineyard, Sue and Steve McCurley, 101 Ideas for Volunteer Programs, (Heritage Arts Publishing, 1986). pp. 62-65.
- Wilson, Marlene, The Effective Management of Volunteer Programs, (Volunteer Management Associates, 1976). pp.181-196.

Chapter 7

Designing Volunteer Jobs



Chapter 7

Designing Volunteer Jobs

Purposes of this chapter:

- * To appreciate the significance of job design in an organization
- * To think expansively when thinking job design
- * To learn methods of involving staff in the design of volunteer jobs
- * To assess agency's managerial readiness for using volunteers
- * To learn to write job descriptions

Included in this section:

Thought-Provoking Questions	VII-5
Significance of Job Descriptions	VII-6
Designing Volunteer Jobs within an Organization	VII-7
Methods of Staff Involvement in Designing Jobs	VII-8
Volunteer Services Needs Assessment Form	VII-9
Staff Participation in Designing Volunteer Jobs	VII-11
Agency and Managerial Readiness	VII-12
Contents of a Volunteer Job Description	VII-12
Elements in a Job Description	VII-13
Volunteer Job Descriptions - Sample	VII-14
Further References	VII-15

Thought-Provoking Questions Regarding Volunteer Job Design

- 1. Do you have written job descriptions for volunteer positions?**
- 2. Who gets copies of the job descriptions?**
- 3. How are new volunteer jobs designed in your organization?**
- 4. If salaried staff develop jobs, are they trained in job design and the implications of the changing profile of today's volunteers?**
- 5. How often are your jobs reviewed and redesigned, or discarded, if needed?**
- 6. Have you developed volunteer work suitable for short-term volunteers, families, groups, people who are home-bound?**
- 7. What are the key elements to be included in volunteer job descriptions?**
- 8. Have you designed new ways to utilize volunteers in your organization within the last year?**

Significance of Job Descriptions

Designing jobs and writing job descriptions are the most important activities performed in volunteer management. If you think about it, the volunteer jobs you offer are your organization's **product** (i.e., what you are trying to sell to prospective volunteers).

If they are challenging, useful and thoughtful activities, people will say "yes" to your recruitment. If they are not, people know that there are a thousand other ways to spend their time.

Written job descriptions have multiple functions:

- (1) They serve as marketing tools for recruitment.
(The job is what you are selling to prospective volunteers.)
- (2) They serve as the primary guide for screening volunteers.
(Without written qualifications and experience needed in a job, Managers of Volunteers may take any willing person to fill a job.)
- (3) They are the basis for supervision and evaluation.
(Without a written job description, it is very difficult to have any credible evaluation of a volunteer's work.)
- (4) They serve as a contract between the volunteer and the agency.
(With a written job description, the volunteers know what they are saying "yes" to.)
- (5) They give information about job responsibility, etc. to co-workers of volunteers. (This gives role clarity to both paid and nonpaid staff.)

One of the key reasons why people leave organizations is because they entered the organization with an unclear notion of what was expected. Without written job descriptions, most job information is shared verbally, leaving the door wide open for misunderstandings. With job descriptions, information can be communicated, reviewed, and re-evaluated periodically.

Source: Stallings, Betty B., Building Better Skills

Designing Volunteer Jobs within an Organization

Potential job areas

When you are thinking about job design, you need to think expansively. "In what ways could we utilize volunteers in our organization?" You may wish to categorize them in the following way:

Ongoing Help:

- Direct assistance to clients
- Office, clerical
- PR, outreach, fundraising
- Board of directors, advisory councils

Short-term Help:

- Management assistance (research, surveys)
- Professional assistance (legal, accounting, photography)
- Short-term (specific skills needed, on-call, or short duration)
- Short-term (non-specific skills — group projects where peoplepower is needed, i.e., clean-up day for an agency)

Jobs for Evenings and Weekends:

Since many people are now employed, it is advisable for you to categorize jobs which can be accomplished during these times.

Source: Stallings, Betty B., Building Better Skills

Methods of staff involvement in designing jobs

Staff Needs:

Most jobs are built around the needs identified by staff.
(See Volunteer Service Needs Assessments, next page)

One caution here: Be certain to educate staff about:

1. Who are today's volunteers, trends impacting who volunteers and for what, and
2. How to put together a good job description.

Do not assume that staff members know these things.

Agency Planning:

The Manager of Volunteers in an organization should be "at its planning table" so that he/she can always ask the question, "How will these plans impact the volunteer program?" He/she should be there to advise the organization on the feasibility of building volunteers into any new program or service. Too often he/she is told about the need for volunteers in an unrealistic time frame.

Staff Retreat:

When your organization is looking for new, creative ways to utilize volunteers in support or expansion of your organization, a retreat focused on that topic is the ideal way to deal with it. (See form, Staff participation in designing volunteer jobs, which outlines an exercise which frequently brings forth new ideas.) Basically, you are asking your staff to release work from their job that they are unable to do because of time or that they would rather not do because it is not a skill they have developed or one that they enjoy. Along with this released information, you ask the staff to dream about what they would like to accomplish, but have no time to do. The combined information from these exercises will create many new ways to utilize volunteers in your organization. And there will be less resistance because the staff was involved in designing them.

Source: Stallings, Betty B., Building Better Skills

Volunteer Services Needs Assessments

DEPARTMENT _____ DATE _____

NAME _____ TITLE _____

DESCRIBE THE FUNCTIONS OF YOUR DEPARTMENT.

SUGGEST SOME WAYS IN WHICH VOLUNTEERS COULD ASSIST YOUR STAFF IN PERFORMING THESE FUNCTIONS.

LIST SKILLS NEEDED TO PERFORM THESE DUTIES.

DESCRIBE OTHER KINDS OF VOLUNTEER SERVICES THAT COULD BE UTILIZED BY YOUR DEPARTMENT.

HOW FREQUENTLY DO YOU NEED VOLUNTEER SERVICES?

DAILY WEEKLY MONTHLY OTHER

AT WHAT TIMES DO YOU NEED VOLUNTEER SERVICES?

STARTING TIME: _____ AM PM ENDING TIME: _____ AM PM

WHO WILL SUPERVISE VOLUNTEERS?

NAME _____ PHONE _____

NAME _____ PHONE _____

DESCRIBE THE TRAINING VOLUNTEERS WILL NEED.

WHO WILL TRAIN VOLUNTEERS? _____

NAME

PHONE

OTHER COMMENTS:

Source: *Strategies for Success in Volunteer Service Administration*, p. 61, published by: *The Ohio Society of Directors of Volunteer Services of the Ohio Hospital Association*, 1990

Staff participation in designing volunteer jobs

(Suggested Retreat Outline)*

1. Ask staff to list all of the duties of their jobs.
2. Ask staff to put an asterisk next to tasks which:
 - * they feel unqualified to perform
 - * they would rather not be doing
3. Have staff list the things they would like to do but at the present time do not have the time or skills to perform.
4. Write all tasks that surfaced in numbers 1 and 2 on flip charts around the room.
5. In a brainstorming session, have staff list on flip charts, programs, services, etc. they would like the organization to be performing.
6. Have all staff study the flip charts and begin to develop some new, interesting, creative, potential volunteer jobs from the released tasks and dreams of the staff.
7. Have a small committee refine the jobs and develop potential job descriptions.

* This is a modification of a process suggested by author/trainer Ivan Scheier in Winning With Staff (Boulder: NICOV) 1978.

Agency and managerial readiness

Before bringing volunteers into the organization, you should be able to feel reassured that you can comfortably integrate them into the organization. Among the questions the agency must answer are:

- (1) Is there adequate work space for the volunteers?
- (2) Has the staff been trained in supervision of volunteers and has extra time been allotted for carrying out this responsibility?
- (3) Do you know how volunteer training will be handled?
- (4) Do you have a written job description that has been given to and approved by the volunteer's supervisor?
- (5) How will the volunteers be included into the flow of office communication?
- (6) Have agency policies been established regarding volunteers?
- (7) Is the board actively involved and supportive of volunteer usage in your organization?

Contents of a Volunteer Job Description

The job description is your planning tool to help your volunteers understand the results to be accomplished, the tasks that are involved, the skills that are required, and other important details about the job. A job description provides an organized means of creating continuity in a job from one volunteer to the next. It is also a living document that should be revised as your program changes, or as the volunteer develops during his/her service with the agency.

An ideal job description should contain the following categories:

Job Title

Supervisor

Goal or Purpose of the Position

Major Responsibilities

Time Commitment

Qualifications: (required and desired)

Training and or Preparation Required

Time Commitment

Work Location

Benefits

Dates (when job description was written and dates when reviewed or modified)

Source: Stallings, Betty B., *Building Better Skills*

Elements of a Volunteer Job Description

Job Title:

What would the job title be for a paid staff person performing the same type of duties as the ones that a volunteer is being sought to perform?

Reports to:

What is the name of the person who will be the head supervisor over the volunteer selected to fill the position and what is that person's title?

Purpose:

What is the purpose of the organization? Why was this position created? How does it relate to others in the organization? What programs or activities will the volunteer be involved in? Why is this position important?

Major Responsibilities:

What are the "ideal" qualifications that you seek in a volunteer for this position?

Training and/or Preparation:

Are there certain skills that the volunteer will be able to obtain through training and/or on-the-job experience? Does the position require that the volunteer attend specific training activities or complete a certain number of training hours?

Time Commitment:

How many hours of commitment are needed or how many days per week, or in the case of special events, dates and times needed? If applicable, where should the volunteer report?

Benefits:

Does the sponsoring agency or group provide reimbursement for expenses, special uniforms, free meals? Will the volunteer be allowed any special benefits — tickets to cultural events, opportunities to meet influential people? Or, will job training lead to acquisition of marketable skills?

Contact Information:

Whom and where should an interested volunteer write or call?

Source: VOLUNTEER, The National Center, 1991. This organization is now merged into The Points of Light Foundation, 736 Jackson Place, Washington, D. C. 20503

Volunteer Job Descriptions — Sample

Job Title: Phone Receptionist

Supervisor: Office Manager

Time Commitment: 4 hours a week in regular morning or afternoon shifts during office hours (Mon-Fri, 9-5)

Duties:

- Answer telephone in agency office
- Act as receptionist for office visitors
- Do miscellaneous office jobs as directed by staff (copying, collating, mailing, etc.)

Qualifications:

The volunteer must:

- Have a pleasant phone voice
- Be a skillful listener
- Have the ability to work independently
- Be willing to accept a variety of office tasks
- Be supportive of agency philosophy and be comfortable with issues related to the work of the agency

Training:

- Orientation to agency
- On-the-job training with the Office Manager/Supervisor and experienced volunteers
- Required on-going training meetings with all office volunteers (2 hours/month)

Importance of Job to the Organization's Purpose:

The agency receives many calls for information as well as business calls and calls from clients. The phone receptionist volunteer serves the agency's constituency by providing information and referral to callers and by forwarding business and client calls to the proper staff person.

Further References

Designing volunteer jobs

- McCurley, Steve and Rick Lynch, Essential Volunteer Management (Heritage Arts Publishing, 1989). Chapter 3, "Creating Volunteer Jobs," pp.27-38.
- Wilson, Marlene, The Effective Management of Volunteer Programs (Volunteer Management Associates, 1976). Chapter 6, "Designing Jobs and Recruiting to Fill Them," pp.101-120.

Section II

Recruit

With: (1) an organization which is enthusiastic and prepared to effectively utilize volunteers, (2) well-thought-through job descriptions, and (3) clarity on skills and characteristics of potential volunteers, you are now ready to locate and invite qualified volunteers to join your team.

Section II looks at the process and tools for:

Chapter 8 **Recruiting Today's Volunteers**

Chapter 9 **Screening through the Interview Process**



Chapter 8

Recruiting Today's

Volunteers

Chapter 8

Recruiting Today's Volunteers

Purposes of this chapter:

- * To expand participants' sense of who volunteers and why
- * To discover the impacts of demographic trends on volunteering
- * To examine two major types of recruitment
- * To learn the 3 key elements in every recruitment message
- * To focus on the recruitment of special populations

Included in this section:

Thought-Provoking Questions	VIII-5
Who Volunteers?	VIII-6
Why Do People Volunteer?	VIII-7
Demographics and their Impact on Recruitment	VIII-8
Methods of Recruitment: Non-targeted and targeted	VIII-11
Recruitment Strategy Worksheet	VIII-13
Recruitment Techniques	VIII-14
Preparing a Recruitment Message	VIII-16
Preparing a Public Service Message	VIII-18
How to Contact Clubs and Service Groups	VIII-18
The Recruiter of Volunteers, Qualities of a Good Recruiter	VIII-19
Recruiting Volunteers from Special Populations	VIII-20
Further References	VIII-23

Thought-Provoking Questions Regarding Recruiting Today's Volunteers

- 1. What methods of recruitment seem to bring the best response for your organization?**
- 2. What are some of the benefits your organization gives to its volunteers? Do you mention these benefits in your recruitment message?**
- 3. Do you generally take any volunteer who responds to your recruitment efforts?**
- 4. Who are the best recruiters of volunteers in your organization? What makes them so effective? What qualities do you look for in volunteer recruiters?**
- 5. Do you, as Manager of Volunteers, do most of the volunteer recruitment?**
- 6. How effective have you been in recruiting special populations of volunteers (i.e., disabled, students, low-income, unemployed, seniors)?**
- 7. What success have you had in reaching service or church-related groups to respond to your volunteer needs?**
- 8. What changes have you noticed in your potential volunteer pool? How have you altered your recruitment strategies to accommodate these changes?**

Who Volunteers?

When approaching recruitment it is important to be aware of the wide range of people who volunteer:

- Elementary, junior high and senior high school students
- College students of all ages
- Employed men and women
- At-home mother or father
- Singles
- Retired and pre-retired folks
- People new to an area
- People at all levels of income
- Families
- Professional volunteers
- People in transition from one career or life phase to another
- Parents in their children's activities
- People with particular hobbies or interests
- Former clients
- People working off fines
- Groups (service, Scouts, 4-H, Lions, church)
- Unemployed
- Disabled
- People of diverse ethnic/cultural backgrounds

Why Do People Volunteer?

Understanding a person's motivation for volunteering is key to placing him/her in the right volunteer position. Listed below is a sampling of some of the needs that people can meet through volunteer activity:

- Be challenged
- Gain experience for a career change
- Develop new skills and interests
- Meet new people
- Earn credit for school
- Network and PR for business
- Improve community, impact a cause one cares about
- Get acquainted with your community
- Gain leadership skills
- Receive recognition
- Make a difference
- Have FUN
- Escape from life stresses
- Continue to use skills after retiring
- Donate professional skills
- Add variety and spice to life
- Gain self-esteem and self-confidence
- Socialize

Demographics and their Impact on Recruitment

To be an effective volunteer recruiter today, one must be able to identify the key social, demographic, educational, religious and economic values which are or soon will be impacting your ability to attract and keep today's volunteers. Depending on your geographic area, the clients you serve, the socio-economic nature of your volunteer base, etc., you need to examine the trends to which you must respond and the challenges and opportunities each presents to your programs.

This is by no means an exhaustive list of current trends and implications but rather it is a sampling of some of the current trends and some beginning thoughts on implications for volunteering in the 90's. You will want to personalize this to your organization. The next time your organization is doing strategic planning, suggest that they look at the trends and issues that will be impacting your organization's capacity to recruit and retain volunteers in the future.

(For an in-depth look at trends, see additional references: T. Seita's book, Leadership Skills For The New Age of Non Profits and M. Wilson's book, You Can Make A Difference.)

Demographic trends

Understanding the changing needs and interests of various age groups will challenge you to re-think job development and outreach to these various age groups. With the population aging, coupled with a lowering birth rate and a dramatic increase in ethnic diversity in our population, volunteer organizations are faced with new challenges of:

1. effectively tapping into a growing senior population who today are tempted by paid employment and/or leisure time pursuits,
2. a myriad of diverse populations whose definitions of the helping process vary by culture,
3. a sandwich generation of individuals who have been squeezed by the needs of their adult children and aging parents and who are unable to be the mainstay of volunteering as they were in former years and
4. a large, highly-educated population of Baby Boomers whose values and needs are impacting every aspect of life, including volunteering.

Workstyle and work value trends

1. two parents working
2. increase in working from the home
3. sequencing in and out of the job market, particularly women
4. early retirement, forced and voluntary

Source: Stallings, Betty B., Building Better Skills

Educational Trends

1. educational institutions requiring service learning
2. need for internships for work experience
3. frequent training and re-training necessary during the lifetime of employment

Religious trends

1. return to religion due to:
 - * rise in ethnically diverse populations
 - * increase of elderly in population
 - * return of Baby Boomers to church after they have children

Technological trends

1. Rapidly advancing "high tech" developments at the workplace

Impact on recruitment

Because of increasing time constraints, people in most age categories desire **short-term** volunteer opportunities.

Many more **professional skills** are available from volunteers.

Family or two-generational **volunteering** (or childcare provisions) is becoming more important as people have less time to spend with family.

Training is a major motivation for many people volunteering due to rapid change in technology & adult transitions to new careers. In the J.C. Penney's study on volunteer motivation (1987), 70% of non-volunteers indicated that training would be a significant motivator to entice them into volunteering.

Career experience is a major motivator for youth.

Because of time problems, people can no longer take on large, long-term jobs, therefore **job-sharing** is attractive.

Strong **competition** for volunteer jobs will be felt from businesses seeking youth and retired individuals to fill entry-level job openings.

Nonprofit organizations will be recruiting from a much smaller base if they do not learn to effectively reach out to **ethnically diverse populations**.

In recession times, volunteers may have to be **reimbursed** for out-of-pocket expenses.

With the **population aging**, this is where we will be getting the bulk of our volunteers. Greater understanding of recruitment and motivations of seniors will be necessary to be more effective with these folks. A study done in Marin County, Ca. discovered that individuals were not likely to volunteer as seniors if they had not already established the pattern earlier in their life.

Source: Stallings, Betty B., Building Better Skills

People are no longer interested in serving on long-term committees, but rather on time-limited **task forces**.

People are no longer interested in involving themselves in agencies, but rather in **causes that impact their lives** or the lives of their family or friends.

People who work daily in the "high tech" world look to volunteering as a way to get some "**high touch**" into their lives.

Religious groups are excellent sources of volunteers since religious people tend to volunteer at higher percentages than do others and there is currently a **return to religion** in our country.

Because of the rapid pace and limited time in many peoples' lives today, organizations need to become more adept at **sequencing volunteers** in and out of organizations and developing systems to re-invite people after they have been on a **volunteer sabbatical** due to other life pressures.

Organizations will need to develop many of their jobs into internships or service learning opportunities and proactively recruit volunteers at educational institutions.

If nonprofit organizations are to serve as training grounds for individuals, they will need to keep up with advancing technology so that volunteers will have training experiences with state-of-the-art equipment, not 10-year-old passed down equipment.

Source: Stallings, Betty B., Building Better Skills

Methods of Recruitment

There are two basic methods of planning your recruitment program: non-targeted and targeted.

Non-targeted recruitment

This form of recruitment is best used when the volunteer positions you are attempting to fill fit one of two categories:

- (1) a large number of volunteers is needed for a clean-up day, a large event
- (2) the volunteer job does not require any specific skills or lengthy commitment (i.e., helpers at a one-day Special Olympics event)

Recruiting in these situations calls for as wide a distribution of information as possible. Dissemination of information is usually done through:

- Posters
- Speakers' bureaus
- Notices in newsletters (corporate, church, club)
- Radio talk shows or PSAs (Public Service Announcements)
- TV appearances or PSAs
- Mass production of flyers or brochures widely distributed
- Group recruitment
- Booth at volunteer fairs and other events

Flyers can be distributed widely in such places as:

- Libraries
- Bulletin boards in churches, stores, businesses, etc.
- Senior centers
- Medical/dental waiting rooms
- Laundromats
- Chambers of commerce
- Bill stuffers
- Volunteer fairs and community events
- Door-to-door
- On cars
- Schools and universities
- Vocational and adult education bulletin boards
- Volunteer centers

- Coffee houses
- Professional organizations
- Cable TV programs
- Grocery bag stuffers
- Community centers
- Housing projects/neighborhoods
- Health clubs
- Recreation centers
- Bus/train stations
- Shopping malls

Targeted recruitment

When you are looking to fill a volunteer position which requires that a person have particular skills, experience, aptitude, attitude, interests, etc., you will want to target your recruitment efforts to reach people who will most likely have these characteristics and interests. Rather than publicizing the need to the world, as is done with the non-targeted approach, you will want to consider the job request and the qualities and skills of the "desired" volunteer and ask yourself these questions:

- (1) **What types of people are apt to have these characteristics?**
Any particular age, gender, educational background?
Where would they most likely work or be involved in recreational activities?
- (2) **What benefits would they receive by performing this volunteer job?**
What will motivate them to do this job (i.e., networking opportunities, meeting new friends)?
- (3) **How will we reach this volunteer with our need?**
Where do they live, work, shop, play?
What do they read, watch, listen to, attend?
- (4) **What are effective techniques to reach these good prospects?**
Person to person, through a service club, church?
- (5) **Who, from our organization, would they most likely respond to for recruitment?**
A peer, an authority figure, a friend?

Answering the above questions regarding your volunteer job and the people most likely to be good candidates for the position will help you develop a targeted recruitment plan to find the best-suited candidate for the job.

Utilizing the form on the following page will assist you in designing a recruitment strategy for any volunteer position. Investing your time up front in this planning phase will save you countless hours of handling situations which often arise when you have the wrong person in the job.

Recruitment Strategy Worksheet

Volunteer job description (summary):

Skills and qualities needed to perform this job:

What types of people are most apt to have these qualities?

(age, gender, educational level, experiences - What types of people have made the best volunteers in this position previously?)

What are the best sources for finding my needed volunteer(s)?

(service clubs, corporations, colleges, youth clubs, etc.)

What techniques or methods would be most appropriate to gain access to them?

(friend or colleague to personally ask, speak to Rotary, talk to classes at the local college, PSA on teen radio station, etc.)

What benefits will these volunteers receive by doing this job (i.e., what exchange are we offering them)?

(work experience, networking opportunities, making a difference etc.)

Who is the best person to do the recruitment and why?

Source: Stallings, Betty B., Building Better Skills

Resource Kit - The Volunteerism Project - Betty Stallings - 1992

Recruitment Techniques

There are numerous techniques to reach potential volunteers. Thinking through what types of people you are trying to reach should guide your choice of outreach methods. **Examples include:**

Slide show (12 minutes or less) depicting ways volunteers are used in your organization

Pre-retirement talks at local corporations

Reunion of former volunteers ("We'd love to have you back if your schedule now would allow it.")

Satisfied volunteers sharing their experiences at any kind of group (youth, service clubs, churches, etc.)

Sending regular listings of your needs to group or groups' bulletin boards, newsletters, corporations who support volunteering, etc.

Businesses buying ads in newspaper recruiting for your volunteers

Contact college instructors to announce your needs in their classrooms when their curriculum matches your needs (i.e., photography, counselling, video recording, accounting)

Recruit a whole group or organization to be involved in a project(s) with your organization (i.e., adopt-a-group)

Stuffers in bills, grocery bags, etc.

Flyers posted in key posting areas around town

Bring a friend "Each one bring one" day at your organization (Each volunteer brings a friend who might be interested in volunteering at your organization)

Speak at Newcomers Club once a year and have flyer in **Welcome Wagon** handouts

Article or want ad in the newspaper

TV or Radio PSA, Cable TV program

Be available as a **fill-in speaker** for service club lunches

Speaker's Bureau (trained volunteer leaders)

Specific recruitment brochure

Send information on jobs to: Volunteer Centers, AARP (American Association of Retired People), NRTA (National Retired Teacher's Association), Junior League, Chamber of Commerce, AAUW (American Association of University Women), PTA's (Parent/Teacher Associations), fraternities and sororities

Volunteer Fairs or booths at community events

Telethons

Story about your volunteers in the paper

Contact appropriate **professional societies** (such as those for doctors, CPA's, lawyers, and ethnic organizations such as Black Social Workers)

Contact **high schools** having a service requirement for graduation

Contact centers or programs for **disabled people**

Contact organizations serving the **unemployed**

Contact **career classes** at schools

Notify labor **unions** of your volunteer needs

Notify **court referral programs** of your volunteer needs

Preparing a Recruitment Message*

Every recruitment effort should have a compelling message to attract potential volunteers. **Each message should contain three parts:**

1. The statement of need

This part of the message should state why the job is important to the clients of the organization, not to the organization itself.

Example of need stated in terms of the organization:

The Senior Lunch Program needs people to cook meals for seniors on Tuesdays.

Example of a need stated in terms of the clients:

“Many Seniors in our community cannot afford to get a balanced meal and are suffering from malnutrition and therefore need...”

Often the most effective way to share the client need in a presentation or PSA is to use a question (i.e., Are you aware that 32% of our high school young people are dropping out of school before graduation?). After hearing this, prospective volunteers should feel a desire to do something about the problem.

2. How the volunteer can help the problem

The second piece of a recruitment message should state the activities the volunteer will perform within the context of the stated need.

“You can help solve this problem by offering to volunteer every Tuesday to help cook and serve meals to isolated seniors in our community.”

3. Benefits of the job

This section should indicate the exchange a person will receive for volunteering in your organization (i.e., how he/she can benefit for doing the job, the general benefits of working at your agency and/or the specific benefits of doing a particular job.

“You will enjoy a free meal with friends and will receive the satisfaction of enabling a senior to stay in his/her home for an extended period of time.

* Adapted from Essential Volunteer Management, (1989) by Rick Lynch and Steve McCurley, Chapter 4, “Recruitment,” pp. 41-58.

Examples of recruitment messages (taken from workshop participants)

- 1 out of 5 Americans can't read this message. By volunteering to teach an adult to read and write, you can open a world of opportunity for someone who might otherwise be limited - stuck! We'll provide the training, you set the time and place of the lessons. Call Project Read at (432)877-5329.
- Every 15 seconds a woman is beaten in this country. Every 15 seconds her partner shares in her loss of self-esteem. Their children are learning how to behave in relationships. You can help stop the cycle of violence and learn valuable communication skills by volunteering with Battered Women's Alternatives. In the next 15 seconds, you can make a difference!
- Infant car accident injury and death can be reduced by 75% with the use of infant car seats. You can make infant car seats available to new parents by volunteering to demonstrate these seats each Wednesday at North County Hospital. You will receive gratification from knowing you are helping to save the lives of our valuable resource — our children.

Source: Stallings, Betty B., Building Better Skills

Preparing a public service message

1. Media lists should be updated periodically in order to submit copy to the correct news editor or other appropriate person.
2. Know deadlines and submit copy as far in advance as possible.
3. Preparing copy - Place the organization's name, address, telephone number, name of person submitting copy and the dates the copy is to run at the top of each page submitted. (This may vary for your paper. Be sure to get their requested format.) Type using double-spacing on one side only of a standard sheet of paper. Use wide margins. Follow news format: who, what, when, where, why, how, and, if applicable, cost. List a contact person who is easy to reach. Be brief and to the point. Proofread copy carefully.
4. Guide for standard PSA:

10 seconds	25 words
20 seconds	50 words
30 seconds	75 words
60 seconds	150 words

How to contact clubs and service groups

1. Use attractive mail-outs followed by phone calls.
2. Develop a "contact" within clubs and let that person work for you.
3. Develop interesting presentations. Most clubs are constantly looking for programs.
4. Send an invitational letter to groups asking them to visit your office and view your programs.
5. When making presentations, take a volunteer along who can personally talk about the benefits of volunteering with your organization.

The Recruiter of Volunteers

Qualities of a good recruiter:

- Contagious enthusiasm
- Positive thinking
- Articulate
- Comfortable in front of groups
- Knowledgeable about agency and volunteer positions
- Dressed to blend, not offend
- Trustworthy, integrity
- Good problem solver
- Persuasive
- Sincere
- Flexible
- Good interviewing skills
- Organized
- Sense of humor
- Skills of bargaining, negotiation
- Adaptive
- Good listening skills
- Volunteer experience in your program (peer recruitment)

Source: Stallings, Betty B., Building Better Skills

Recruiting Volunteers from Special Populations

- Low Income
- Handicapped
- Unemployed
- College Students

Low income

Tips from Sue Vineyard (101 Tips for Volunteer Recruitment)

1. Design materials for ease of readability (visual, not verbal).
2. Structure work around 'job development' opportunities.
3. Emphasize self-help.
4. Provide reimbursement or minimize out-of-pocket losses.
5. Match recruiters with background of your volunteers.
6. Minimize jargon and paperwork.
7. Stress one-to-one personal recruitment techniques.
8. Work through churches and community centers.
9. Minimize time delays between their interest and job match.
10. Provide success examples.

Handicapped

(Summarized from the National Red Cross Volunteer Manual)

Now that more human service organizations are barrier-free, increasing numbers of disabled persons are able to become involved as volunteers. The criteria for their involvement should be as for all others, competence and suitability of the individual. It is helpful to indicate on any publicity that disabilities do not exclude individuals, but it is also advisable to take the time to offer personal invitations to disabled people. From a probable history of exclusion, some may need some extra encouragement and assurance that, in fact, they are welcome. For help in identifying people that might be interested in volunteer service, one should contact community agencies serving the disabled, rehabilitation offices within the Social Security Administration, clubs and other services for the handicapped, and local community agencies such as independent living centers.

Unemployed

To encourage the unemployed to volunteer, Sue Vineyard, in 101 Ideas for Volunteer Programs recommends:

1. Distribute brochures at job re-training programs, resume writing firms, counselors' offices.
2. Place notices at the unemployment office.
3. Advertise in help wanted ads.
4. Write job descriptions with specific tasks and skills that could translate to paid employment.
5. Emphasize re-training, career sampling and making contacts in recruitment pitch.
6. Document hours and skills of each volunteer.
7. Help volunteers develop a portfolio of skills and training.
8. Inform volunteers of other training courses available in the community.
9. Prepare letters of recommendation focusing on skills and accomplishments.
10. Provide them with any job leads known to you or your agency.

College students

College campuses offer a centralized resource and point of contact for seeking potential volunteers. College students usually volunteer through departmental internship programs which are typically short-term assignments. Recognizing there may be limitations associated with time (i.e., semester or quarter internships), the recruiter should be cognizant of:

1. The investment of volunteer training time balanced with the expected length of service.
2. The importance of recruiting at the close of the semester or quarter preceding the period of service.

You may wish to use student volunteers in positions which do not require a long-term commitment or extensive in-service training. Maximize the use of time available for their commitment by recruiting and training prior to the internship period.

College students are increasingly motivated to volunteer in community service agencies. Volunteering is deemed valuable experience by colleges reviewing entrance qualifications, by graduate schools reviewing applications, and by companies interviewing job seekers. Students themselves find volunteer experience a means of providing 'work-related' references and an opportunity to test interest and skills in their chosen area of interest.

Agencies interested in contacting college students for volunteer service positions can approach the college student by:

1. Offering placement slots through a form an internship program established in selected departments of the college, and
2. Placing notification and informational posters/bulletins in areas where students congregate, such as the library, student union, or job assistance bulletin boards.

An agency may also seek students as volunteers by directing inquiries to particular department heads or individual professors.

Further References

Recruiting today's volunteers

- McCurley, Steve and Rick Lynch, Essential Volunteer Management (VM Systems and Heritage Arts Publishing, 1989). Chapter 4, "Recruitment," pp. 41-57.
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- Seita, Trudy, Leadership Skills For The New Age of Non Profits (Heritage Arts Publishing, 1990). Chapter 1, "Trends Affecting The Volunteer Workforce," pp.7-28.
- Wilson, Marlene, You Can Make A Difference (Volunteer Management Associates, 1990). Chapter 9, "Impacting The Future," pp.143-161.

Chapter 9

Screening Through the Interview Process



Chapter 9

Screening Through the Interview Process

Purposes of this chapter:

- * To learn the purpose and values of taking time to personally interview prospective volunteers
- * To learn or review the 4 key steps in an interview
- * To learn techniques to say “no” to a prospective volunteer
- * To review the principles of 2 key skills in interviewing: open-ended questions and listening
- * To be sensitized to conducting non-discriminatory interviews
- * To learn how to prepare a contract between the volunteer and the organization

Included in this section:

Thought-Provoking Questions	IX-5
Purpose of the Interview	IX-6
Steps in the Interview Process	IX-6
Critical Skills in Interviewing	IX-8
Open-Ended Questions	IX-8
Listening Skills	IX-9
Non-Discriminatory Interviewing	IX-10
What We Can and Can't Ask	IX-11
Placement and Contracting	IX-12
Sample Agency/Volunteer Agreements	IX-13
Further References	IX-17

Thought-Provoking Questions Regarding Screening Through the Interview Process

- 1. Are volunteers who apply for volunteer positions in your organization interviewed?**
- 2. What information do you attempt to glean during the interview?**
- 3. Who interviews volunteers in your organization?
Are the people knowledgeable or trained in interviewing?**
- 4. What are open-ended questions and what are several that you use in your interview process with volunteers?**
- 5. Do you have an unwritten policy of accepting all volunteers that request to be a part of your organization?**
- 6. How do you close an interview when you determine that the prospective volunteer will not fit in your organization?**
- 7. What are some questions that you should avoid asking due to E.E.O.C. rules on hiring employees?**

Purpose of the Interview

The purpose of the interviewing process is for the applicant and the interviewer to become mutually acquainted so that each can determine if there is a good match between their interests.

Without this significant screening step, many misplaced or inappropriate volunteers begin to work for organizations, and both the volunteer and the organization find dissatisfaction in the long run. When you have the wrong person in the volunteer job, the efforts of the Manager of Volunteers are often distracted to the inevitable problems of poor performance, volunteer dissatisfaction, staff complaints, etc.

Taking the time to interview and screen volunteers enables you to determine:

1. If the volunteer has the needed skills, experience, motivation to do the job well
2. If the volunteer will fit into the culture of your organization
3. If the volunteer's motivational needs can be met, and
4. If your recruitment program seems to be attracting the right people

It is important to screen volunteers because:

1. It protects clients
2. The agency reputation is affected by volunteers
3. Of the potential impact on the morale of the staff
4. Volunteers suffer if they are misplaced
5. You can recognize high-risk and high-potential volunteers

Steps in the Interview Process

Preparation

Preparation for the interview includes:

- * Reviewing all available information about the applicant (It often helps to have the applicant fill out an application ahead of time.)
- * Reviewing all pertinent information on the agency and jobs
- * Formulating questions to bring out the desired information you need to screen for suitability for the job(s)
- * Scheduling adequate time (generally 1/2 hr.) and a comfortable, private place for interviewing
- * Casting aside your other work and distractions and asking for your calls to be held

Source: Stallings, Betty B., *Building Better Skills*

Opening/greeting

Opening the interview includes:

- * Putting the applicant at ease (warm greeting, introductions, establishing a rapport)
- * Clarifying the purpose of the interview
- * Establishing time frame for the interview

Body of the interview

If the interviewee is not familiar with your agency, you may wish to give him/her this information at the beginning of the interview. If he/she is familiar with your organization, you may wish to begin the interview with your questions which access information about his/her hobbies, interests, past jobs, motivators, dislikes, etc.

After getting a clear picture of the applicant, it is then appropriate to selectively share information about the possible jobs for which he/she might be suitable. If you conduct the interview in the reverse order, prospective volunteers may simply tell you what you want to hear in order to get an available job. If you have several applicants for the same job, be sure to ask each of them the core questions you have developed. During this information-giving phase of the interview, the applicant must be given the necessary information about the job or jobs to be done. His or her questions must be answered also. Information to be given includes job requirements, hours of service, place and conditions of work, training needed, purchase of uniform (if required), opportunities offered, supervision to be expected, etc. Be careful to explain the full requirements of the job: a common mistake is for interviewers to undersell the job or its requirements.

Closing the interview

The closing should be concise and upbeat. First review and summarize where you have been in your interview and then share what the next steps will be.

When the applicant is acceptable:

This is easy. The important thing is to be certain that the final choice is wholeheartedly the applicant's. Have you gently urged the applicant to accept your own decision? If there is agreement, be sure the applicant knows when and where to go for discussion and determination of the specific assignment.

When the applicant is unacceptable:

Rejection is not easy at any time, particularly when the would-be applicant is eager to be of help. When the interviewer has reached a decision that the applicant is unqualified for the job in question or for other service in the organization, the interview should be terminated as rapidly as possible, consistent with graciousness and tact. If the applicant has skills or experience which may qualify him/her for volunteer positions with other agencies, make the referral and, for courtesy sake, call the referral agency. If you have a volunteer center serving your area, you may wish to refer him/her there, since they have a large variety of volunteer jobs to share with prospective volunteers. Often the applicant will verbalize his/her

Source: Stallings, Betty B., *Building Better Skills*

disinterest in the job, but if not, you must, in a carefully impersonalized discussion, show the applicant that the job is unsuitable. Subterfuges, such as invoking a waiting list or mentioning vague future dates, disappoint, annoy and can make enemies unnecessarily.

Finally, in either case, in closing your interview you want to thank the person for his/her time and interest in your organization. It may be necessary to develop some interview termination techniques, since applicants sometimes do not know when it is time to leave. Standing up will usually be effective in terminating an interview.

Critical Skills in Interviewing

Open-Ended questions

Closed questions (Have you ever volunteered before?) usually require no explanation and can prevent getting at needed information. They are useful for obtaining specific answers such as yes or no. Closed questions typically begin with such words as: is, do, has, can, will or shall.

Can you work in the evenings?

Will you be moving in to your new new house soon?

Do you type?

Do you enjoy children?

Are Wednesdays alright?

Open-Ended questions usually require an explanation and are useful in obtaining information. They typically begin with such words as what, when, how, who, where, or which.

Tell me more about....

How did you do.....

What did you not like about....

What would you like to be different about....

When you are designing your interview questions, make certain that you have a number of open-ended questions such as:

Why are you interested in this job?

What type of supervision do you like to receive?

What would you describe as your ideal work setting?

How will this volunteer job fit into your life now?

Source: Stallings, Betty B., Building Better Skills

Listening skills

Listening is another critical skill for effective interviewing. It is distressing to learn that we generally only remember 50% of what was shared with us immediately after it is shared. Why is this, and what practices do we need to learn to become a good listener?

The practices of a good listener

1. Listens to understand what is meant - not to get ready to reply, contradict, or refute.
2. Knows that what is meant involves more than the dictionary meaning of the words that are used. It involves the tone of voice, the facial expressions, and overall behavior of the speaker.
3. Observes all this and is careful not to interpret too quickly. Looks for clues as to what the other person is trying to say, putting him/herself in the speaker's shoes, seeing the world as the speaker sees it, accepting the speaker's feelings as facts that have to be taken into account—whether the listener shares them or not.
4. Puts aside own views and opinions for the time being. Realizes that one cannot listen to him/herself inwardly and at the same time listen outwardly to the speaker.
5. Controls impatience knowing that listening is faster than talking. The average person speaks about 125 words a minute, but can listen to about 400 words a minute. The effective listener does not jump ahead of the speaker, but gives him/her time to tell his/her story.
6. Does not prepare to answer while listening. Wants to get the whole message before deciding what to say in turn. The last sentence of the speaker may give a new slant to what was said before.
7. Shows interest and alertness. This stimulates the speaker and improves performance.
8. Does not interrupt. Asks questions in order to secure more information, not to trap the speaker or force him/her into a corner.
9. Uses the technique of linking to build on what the interviewee has already said. This is called probing and it indicates to the interviewee that you are listening (e.g., "You indicated that your Red Cross volunteer experience was particularly pleasurable. Can you elaborate on why it was so pleasurable?").

Source: Stallings, Betty B., Building Better Skills

In Marlene Wilson's book The Effective Management of Volunteer Programs, she lists the following errors most often made by individuals interviewing prospective volunteers:

1. Asking leading questions.
2. Making decisions too early in the interview.
3. Following a stereotyped pattern of interviewing, without recognizing individual differences.
4. Lacking knowledge of precise job requirements.
5. Letting pressure of duties shorten the interview time.
6. Doing more talking than they should.
7. Failing to direct the interview and thereby wasting time.
8. Not knowing what to look for.
9. Tending to be overly influenced by individual factors rather than considering the person as a whole.
10. Lacking skill in asking questions and in probing.
11. Failing to describe the job and organization in sufficient detail.
12. Tending to be too routine, instead of adapting each interview to the individual.
13. Being interviewed by the candidate instead of doing the interviewing.
14. Not following up on placements to see if performance bears out the judgment of the interviewer.
15. The most frequent and difficult-to-overcome mistake—tending to judge the applicant solely on personality, overlooking other important factors.

Non-Discriminatory Interviewing

Legality only enters into the interviewing process in connection with paid employees; however, it is generally advised to use EEOC guidelines interviewing volunteers as well.

The Equal Employment Opportunity Commission requires in interviewing prospective employees that you ask yourself two questions:

1. Will the answer to this question, if it is used in making a selection, have a disparate effect by screening out minorities and /or members of one sex (i.e., will it disqualify a significantly larger percentage of members of one particular group than any other group)?
2. Is this information really needed to judge the applicant's competence or qualifications for the service assignment in question?

What we can and can't ask*

It may be **illegal to ask** (unless the employer has a legitimate reason for the question):

1. Race, color, religion, gender, national origin, age
2. Height, weight
3. Marital status, number of children, childcare problems
4. English language skill
5. Educational achievement
6. Arrest or conviction record
7. Discharge from the military
8. Indicators of economic status (social club memberships, etc.)
9. Property the applicant owns
10. Information on spouse
11. Physical limitations or disabilities

It is legal to ask:

1. Whether an applicant is a citizen. If not a citizen, whether an applicant's permitted residence will be long enough to fulfill expected commitment (such as a student visa).
2. An applicant's place of residence and length of time of residence in the city or state.
3. What languages are read, spoken, or written fluently by the applicant, if the assignment requires such skills, and as long as an applicant is not asked to indicate how the skills were acquired.
4. The name and address of a person to notify in the event of an emergency.
5. If minimum age is a criterion for acceptance, such as in a teen program or a particular assignment, the applicant may be asked, "Are you 14?" or "are you 21?"
6. In order to check prior volunteer records, it may be asked "Was your name the same as it is now?"
7. Questions about an applicant's employment history.
8. If pertinent to the assignment, an applicant may be asked, "Would you be willing to remain with a client during a denominational chapel service?"
9. If an applicant is of retirement age, he/she may be asked if he/she spends part of the year in another area?
10. Questions concerning convictions may be asked, if relevant to job functions to be performed.

* Summarized from: Strategies For Success In Volunteer Services Administration, pp.77-78, published by: *The Ohio Society of Directors of Volunteer Services of the Ohio Hospital Association*, 1990.

11. Questions about the applicant's experience in the armed services may be asked.
12. Questions about the applicant's prior volunteer experience, hobbies, and interests.
13. How the applicant was referred to the program.
14. Questions as to whether the applicant will be driving or using public transportation may be asked in order to determine an assignment that would result in dependable attendance or to provide information about or plan for volunteer parking.
15. Questions concerning mental or physical handicap, if they relate to the performance required in a particular assignment.
16. Questions concerning any health problems, if the questions are related to the performance required in a particular assignment.

Placement and Contracting

To enhance your agreement with volunteers, it is suggested that you consider contracting with them. This simply means creating a written agreement between the agency and the volunteer which defines what both parties have committed to for the volunteer job.

You can be as creative as you want in designing the format for such an agreement, just keep in mind that it should include both the volunteer's and the agency's responsibilities in the volunteer relationship. A contract is an excellent reference point for settling disagreements, and it also forms a basis for evaluation. It is important to note that this is not a legal document, but it should be respected as a good faith effort by both parties.

On the following pages there are some examples of contracts which may serve as models for your volunteer jobs.

Agency/Volunteer Agreement

This agreement is intended to indicate the seriousness with which we treat our volunteers. The intent of the agreement is to assure you both of our deep appreciation of your services and to indicate our commitment to do the very best we can to make your volunteer experience here a productive and rewarding one.

I. AGENCY

We, _____ (agency), agree to accept the services of
_____ (volunteer) beginning _____,
and we commit to the following:

1. To provide adequate information, training, and assistance for the volunteer to be able to meet the responsibilities of their position.
2. To ensure diligent supervisory aid to the volunteer and to provide feedback on performance.
3. To respect the skills, dignity and individual needs of the volunteer, and to do our best to adjust to these individual requirements.
4. To be receptive to any comments from the volunteer regarding ways in which we might mutually better accomplish our respective tasks.
5. To treat the volunteer as an equal partner with agency staff, jointly responsible for completion of the agency mission.

II. VOLUNTEER

I, _____, agree to serve as a volunteer and commit to the following:

1. To perform my volunteer duties to the best of my ability.
2. To adhere to agency rules and procedures, including record-keeping requirements and confidentiality of agency and client information.
3. To meet time and duty commitments, or to provide adequate notice so that alternate arrangements can be made.

III. AGREED TO:

Volunteer

Staff Representative

Date

Date

This agreement may be cancelled at any time at the discretion of either of the parties, but will expire automatically on _____ unless renewed by both parties.

Sample: Volunteer and Agency Agreement

Agreement between:

Livermore Public Library and Associated Volunteers

Livermore Public Library agrees:

To provide a director of volunteers who will hire, orient and train, supervise, and, if necessary, dismiss volunteers.

To provide a written job description for each volunteer assignment.

To train volunteers so that they may accept their assignments in confidence.

To offer continuing training and communication in order that the volunteer may maintain a continuing competence.

To offer the volunteer careful placement and an opportunity to change assignments on a prescribed basis.

That the staff will be understanding and cooperative, respecting the contribution the volunteer makes to the library.

To keep records of service and to provide regular rewards to volunteers.

The Associate Volunteer agrees:

To attend orientation and training sessions when scheduled, so as to become familiar with library policies and procedures and specific assignments.

To work a regular number of hours each week on a schedule acceptable to the library.

To be prompt and reliable in attendance, to notify volunteer director if unable to work as scheduled, and to keep an accurate record of hours worked.

To perform assignments in good spirit and to seek guidance when in doubt.

To respect the paid staff and strive to maintain a smooth working relationship with staff and other volunteers.

To exercise caution and confidentiality when acting in behalf of the Livermore Public Library.

To accept the library's right to dismiss a volunteer for poor performance, including poor attendance.

Signed

Date

Signed

Date

Further References

Screening through the interview process

- McCurley, Steve and Rick Lynch, Essential Volunteer Management (VM Systems and Heritage Arts Publishing, 1989). Chapter 5, "Screening and Interviewing," pp. 61-66.
- McCurley, Steve and Sue Vineyard, 101 Ideas for Volunteer Programs (VM Systems and Heritage Arts Publishing, 1986). Chapter 3, "Screening and Interviewing," pp. 32-36.
- Wilson, Marlene, The Effective Management of Volunteer Programs (Volunteer Management Associates, 1976). Chapter VII, "Interviewing and Placing Volunteers," pp 121-138.

Section III

Retain

The key to a successful volunteer program is to not only attract the right volunteers, but to create a supportive atmosphere which encourages them to keep serving the organization.

Satisfaction is heightened when volunteers are oriented and trained to do their jobs well, when they are effectively coached and given resources to do their jobs, and when they are given meaningful appreciation for their efforts. An organization that understands the motivational needs of its volunteers and provides appropriate volunteer experiences to meet these needs will be more successful in retaining its volunteers. Keeping that delicate balance is the **KEY** to retention.

Section III includes:

- | | |
|------------|---|
| Chapter 10 | Orientation and Training in Volunteer Programs |
| Chapter 11 | Supervision, Evaluation and Dismissal of Volunteers |
| Chapter 12 | Recognition |

Chapter 10

Orientation and Training in Volunteer Programs



Chapter 10

Orientation and Training in Volunteer Programs

Purposes of this chapter:

- * To learn what information should be included in a volunteer orientation session
- * To discover the essential pieces of information that should be included in a volunteer manual or handbook
- * To learn tips on volunteer job training and coaching
- * To look at ways to orient and train the staff in the effective utilization of volunteers

Included in this section:

Thought-Provoking Questions	X-5
Volunteer Orientation	X-6
What its Purpose is	X-6
Topics to Cover	X-6
Methods and Timing of Orientation	X-6
Volunteer Manual	X-7
Topics to Include	X-7
Training for Volunteers	X-8
Skills Training	X-8
Coaching Volunteers	X-9
Training of Staff in Utilization of Volunteers	X-9
Objectives in Staff Training	X-9
Methods and Times to Provide Staff Training	X-9
Training Tips.....	X-10
Further References	X-11

Thought-Provoking Questions Regarding Orientation and Training in Volunteer Programs

- 1. How are new volunteers oriented to your organization?**
- 2. Whose responsibility is it to orient new volunteers?**
- 3. What written materials are given to new volunteers?**
- 4. What policies have you developed in the volunteer program?
How are they presented to new volunteers?**
- 5. What method(s) are used to train new volunteers on their specific job?**
- 6. How well-versed are paid staff on the supervision and general management of volunteers?**
- 7. What methods and times do you train staff on the effective utilization of volunteers?**
- 8. Does your CEO see the value of training volunteers and staff?**

Volunteer Orientation

What its purpose is

The purpose of the orientation process is to make new volunteers feel welcomed and appreciated and to give them information which will assist them in performing their work effectively. Orientation involves giving volunteers an adequate background on the agency, its operation, and its procedures. Orientation is necessary because the volunteer needs to become a part of the organizational environment, a process which requires that the volunteer understand what the organization is about and how it operates.

Topics to cover

1. Description and history of the organization
2. Programs and clientele of the organization
3. Interaction of the agency with other organizations
4. Information about the volunteer program
5. Organizational chart and introduction of key staff (if possible)
6. Introduction to volunteer manual containing policies and procedures for the volunteers: recordkeeping, supervision, training, benefits, dress code, emergency procedures, performance appraisal and review procedures, system for notification of absences
7. Major activities and events sponsored by the organization
8. Tour of facility and orientation to the agency equipment

Each organization will need to develop its unique orientation session, but one question that author/trainer Steve McCurley suggests you ask yourself when preparing your orientation is, "What would I need to know about this organization to understand how it functions?" Armed with this information, a volunteer will be more quickly absorbed into the organization and can be an excellent ambassador for the organization in the community.

Methods and timing of orientation

Your choice of method will be somewhat determined by the size of your volunteer pool, your timing concerns, your training sessions and whether they are only offered at certain times during the year, etc. You will need to decide:

1. Should the orientation be formal or informal? — in groups or individually?
2. Should it be regularly scheduled (i.e., once a month) or as needed?
3. Is it required or optional?
4. How many staff will be involved in the orientation?

5. What materials will be given to the volunteer (i.e., orientation manual, policies and procedures manual, general information on the organization)?
6. Who is in charge of planning and organizing the orientation session?
7. Does it need to be given twice (afternoon and evening) to accommodate the schedules of volunteers?
8. What educational tools can you use to get information across (i.e., handouts, slides, tape, film, oral presentation)? Can you video the orientation and allow volunteers to check it out for home viewing?
9. How long shall the session last and should it be accomplished in several sessions?

There are no standard formats to follow, since each agency must deal with its unique characteristics. The important point is that there be a plan for orienting volunteers and a person in charge of making it happen. If you are a new Manager of Volunteers, you may want to talk to people in similar nonprofit organizations and get tips from them as to what has been successful.

Volunteer Manual

The Volunteer Manual serves as a detailed reference handbook which provides volunteers with valuable information about the organization and the volunteer program. Ideally, each long-term volunteer would receive his/her own copy, and short-term volunteers would receive a condensed version of this information. Because this information changes regularly, it is advised to produce it in a binder for ease of update. If it is only possible or practical to have an agency copy, then it is advisable to make the copy accessible to all volunteers. It is also advised to have new volunteers read the manual and sign off that they have read and understood it.

Topics to include

1. Philosophy (mission) of the organization
2. Purpose (philosophy) of the volunteer program
3. Welcome to the organization by the Executive Director and Board President
4. Any organizational policies that also impact the volunteers (i.e., use of agency facilities, equipment and services)
5. Policies that specifically involve volunteers (i.e., reimbursement policies, opportunities for promotion, consideration for paid positions, etc.)
6. Statement on confidentiality
7. General procedures (i.e., parking, fire drills, etc.)
8. Insurance coverage provided by the organization

9. Benefits to the volunteer (i.e., reduction in prices for services, free lunch when working, involvement in educational programs, etc.)
10. Procedures for dismissal and grievance procedure
11. Program descriptions
12. Organizational chart and a list of staff positions and their responsibilities
13. List of volunteers and phone numbers

Training for Volunteers

Skills training

Regardless of the job, there are three primary facets of job training:

1. the description of the purpose of the volunteer job
2. a description of the roles, tasks and responsibilities in the job
3. information on how the volunteer will interact with others in the system

Training should be designed to tell the volunteers:

1. How they are expected to perform their specific job and what authority they have in the decision-making process.
2. What they should not do in the job.
3. What they need to do in case an emergency or unforeseen situation occurs.
4. With whom they will be working and how their role and responsibilities fit with others.
5. How their job fits into the larger picture of agency services to clients.

Training can be given in a number of ways:

- On-the-job demonstration
- Lectures
- Written material
- Field trips
- Role-playing
- Simulations
- Case studies, etc.

It is important to apply as many different techniques as possible and to remember that **adults learn best when the training is practical and experientially based.**

Coaching volunteers

Many small organizations use the more informal on-the-job coaching method of training. For some organizations, this is in lieu of specific formal skills training. For others, it is an ongoing system which follows a more formal training session. It generally consists of three steps:

1. The coach (supervisor) demonstrates the skill.
2. The volunteer performs the skill while the coach observes.
3. The coach gives feedback.

Training of Staff in Utilization of Volunteers

Many problems in volunteer management stem from the fact that in most nonprofit organizations, the staff members are lacking in skills, support, knowledge and recognition with regard to their use of volunteers. If the Manager of Volunteers is the only one in the organization with the skills to utilize volunteers, the program will not be successful. **It is one of the primary roles of a Manager of Volunteers to work towards having an organization whose staff is eager and knowledgeable about using volunteers.** This involves planning for methods of providing education and training to the paid staff of the organization.

Objectives in staff training

1. Surface any objections and resistance to having volunteers working in the organization.
2. Get staff buy-in on the volunteer program through their involvement in the development and refinement of the program. (Make it "our" volunteer program.)
3. Develop the necessary skills to work successfully with volunteers (i.e., job design, supervision, delegation, recognition).

Methods and times to provide staff training

1. New staff orientations (Get on the agenda to provide some education and training in the use of volunteers.)
2. Staff meetings (Ask for a time slot quarterly in which you can provide some training.)
3. In-service trainings (Give a training to all staff utilizing volunteers. This may involve a 1/2 day training session or several hour or two-hour sessions spaced a week apart.)
4. Develop or purchase written materials on topics in volunteer management and distribute to staff.

5. Bring in outside trainers to focus on such topics as delegation, volunteer supervision, etc.
6. Involve staff in an annual evaluation of the program and use some of the time for training.

Training tips

1. In your training, involve staff who use volunteers well. They will have a major impact on other staff members' receptivity.
2. If you, as a Manager of Volunteers, are not well-versed in adult education or training, you may want to consider these two options:
 - *Bring in trainers from the community.
 - *Take courses, read books on the subject so that you can provide effective training. (A great beginning is Sue Vineyard's book, The Great Trainer's Guide.)
3. Educate your CEO as to the significance of your role of trainer and to your need for access to the staff to provide it.

Further References

Orientation and training in volunteer programs

- McCurley, Steve, Volunteer Management Policies (VM Systems and Heritage Arts Publishing, 1990).
- McCurley, Steve and Rick Lynch, Essential Volunteer Management (VM Systems and Heritage Arts Publishing, 1989). Chapter 6, "Orientation and Training," pp. 69-74.
- McCurley, Steve and Sue Vineyard, 101 Ideas For Volunteer Programs (VM Systems and Heritage Arts Publishing, 1986). Chapter IV, "Orientation and Training," pp.38-47.
- Vineyard, Sue, The Great Trainer's Guide (VM Systems and Heritage Arts Publishing, 1990).
- Wilson, Marlene, The Effective Management Of Volunteer Programs (Volunteer Management Associates, 1976). Chapter VIII, "Training: Designing Creative Learning Experiences," pp. 139-160.

Chapter 11

Supervision, Evaluation and Dismissal of Volunteers



Chapter 11

Supervision, Evaluation and Dismissal of Volunteers

Purposes of this chapter:

- * To learn the unique factors in volunteer supervision
- * To learn key steps in effective delegation
- * To explore methods of supervision
- * To explore the purposes of having volunteer evaluations and some suggested formats to follow in conducting one
- * To learn the reasons and process for dismissing a volunteer and possible alternatives to dismissal
- * To learn how to fire a volunteer (and survive!)

Included in this section:

Thought-Provoking Questions	XI-5
Supervision	XI-6
Uniqueness in Volunteer Supervision	XI-6
Delegation	XI-7
Methods of Supervision	XI-7
Evaluation and Feedback	XI-8
Purpose of Evaluations	XI-8
Sample Forms: Volunteer Evaluation	XI-9
Volunteer Termination	XI-13
Reasons for Resignation	XI-13
Exit Interview	XI-13
Exit Interview Forms	XI-15
Reasons for Dismissal	XI-21
Alternatives to Dismissal	XI-21
How To Fire A Volunteer (and Survive!)	XI-22
4 Essentials of Firing Volunteers	XI-22
Further References	XI-23

Thought-Provoking Questions Regarding Supervision, Evaluation and Dismissal of Volunteers

- 1. Are all volunteers in your organization assigned to a supervisor?**
- 2. What are some special aspects of supervising volunteers which make the process unique and, in some circumstances, more difficult?**
- 3. Are your staff members trained in volunteer supervision and delegation?**
- 4. What style of supervision is given to your volunteers? Is it adequate?**
- 5. Do you have any formal evaluation process established with your volunteers?**
- 6. Do you know why each volunteer leaves your organization?**
- 7. Have you ever had to fire a volunteer?**
- 8. Do you have written procedures to handle the process of firing?**

Supervision

The principles and techniques of good supervision apply to working with volunteers in a very similar fashion to working with any staff employee. There are, however, some **special aspects of volunteer supervision** which must be noted.

Uniqueness in volunteer supervision

1. Before volunteers begin to work with an organization, they should have the supervision and evaluation system explained to them so that it is not a surprise element dropped on them without notice. Paid employees generally assume that there will be supervision and evaluation of their work. Sometimes volunteers do not, and they need to have this explained to them up front. They will generally take this as a sign that the agency is serious about its volunteer program.
2. Another issue is to get initial clarity on who will be the volunteer's supervisor—the Manager of Volunteers or the person directly working with the volunteer. It is always advisable that the staff person working closely with the volunteer provide the supervision. However, both systems include models that work. It is essential to make certain that all parties are apprised as to who is the responsible party for the day-to-day supervision and management of the volunteer.
3. Those who manage and supervise volunteers must be very flexible and accommodating to respond to the special nature of the volunteer. This may often involve handling situations that do not occur in paid staff situations, such as those that arise because the volunteer position may have a lower priority than other things that are going on in the volunteer's life.
4. Volunteers do take the time of the staff who supervise them. This must be understood and planned for in the organization, or staff may become rightfully resistant of volunteers. Volunteers frequently do volunteer work to meet some of their social needs and may, therefore, take additional time from their supervisor to meet this need.
5. Learning a process of productive confrontation will be invaluable in dealing with more problematic supervisory situations. Often managers and supervisors find it more difficult to apply conflict management principles to dealing with volunteer staff. Reading Marilyn MacKenzie's Dealing With Difficult Volunteers will help you spot and deal with problem situations with volunteers.

Delegation

A key responsibility of a manager is delegating the work to be done. This can be particularly difficult when supervising volunteers who may do their work at home or at some location other than on-site. Therefore, supervisors of volunteers must be very adept at delegation.

Steve McCurley and Rick Lynch in their excellent book, Essential Volunteer Management, suggest when delegating to volunteers, you follow these **principles of good delegation**:

1. **Give the assignment in terms of results**
Don't just give activities for volunteers to follow; share with them what is to be accomplished.
2. **Define the level of control**
Indicate how much authority the volunteer has to make decisions or purchases without "checking in."
3. **Communicate any guidelines**
Volunteers should be forewarned about any parameters or constraints that must shape their decisions.
4. **Make resources available**
It is important that volunteers have assistance and resources that will enable them to successfully accomplish their tasks.
5. **Determine criteria for success**
It is important that the supervisor and the volunteer reach an agreement on how results will be judged.
6. **Set up checkpoints**
To be certain that the job is progressing, times should be established to check in on progress or on any need for change or additional support.

Methods of supervision

Depending on the formality, size and style of the organization, supervision systems can be quite varied. The key is availability to volunteers—whether that be in person, through written reports, or on the phone. Some system should be established and understood. **Various methods include:**

1. Manager has an **open time** during the week when volunteers can schedule time to see him/her or when the manager schedules specific appointments with volunteers.
2. **Monthly meetings** (lunch, breakfast, other) when there is an opportunity for group and individual supervision by the manager.
3. **Supervision by walking around** is often the supervision method in small, informal organizations.

4. When the volunteer works at home or at a site some distance from the supervisor, it is especially important to develop systems to keep the volunteer apprised of activities of the organization and to stay in touch with the progress of his/her volunteer work for you. Often the system involves establishing a regular time to call the volunteer as well as **requesting regular written reports** from the volunteer.

Evaluation and Feedback

Purpose of evaluations

1. Like employees, volunteers also like to know where they stand in regard to their skills and progress. (Polls show that many volunteers volunteer specifically to learn new skills or brush up dormant ones, so feedback is critical.)
2. Evaluations should be a two-way street: a chance for the agency to critique the volunteer, and a chance for the volunteer to share concerns and suggestions about the organization.
3. By implementing periodic evaluations of volunteers, the Manager of Volunteers adds credibility to the department as well as makes a statement that volunteers are held as accountable as paid staff.
4. At evaluation sessions, the Manager of Volunteers can detect signs of burnout or needs for new challenges, and can work with the volunteer to make adjustments in the volunteer's assignment.
5. Volunteers can add their written evaluation as substantive material to references or letters of reference.
6. Evaluation sessions are a great time to recognize and thank volunteers for their contributions to the organization.

Sample forms for volunteer evaluation follow.....

Volunteer Performance Evaluation

NAME OF VOLUNTEER _____ ASSIGNMENT _____

- RATINGS: 1. EXCEEDS REQUIREMENTS
 2. MEETS REQUIREMENTS
 3. NEEDS IMPROVEMENT
 4. DOES NOT MEET MINIMUM REQUIREMENTS

FACTORS CONSIDERED	RATINGS 1 2 3 4	COMMENTS
--------------------	--------------------	----------

JOB PERFORMANCE:

Applies knowledge and techniques as taught	---	---	---	---	
Accepts feedback positively	---	---	---	---	
Asks questions, shares concerns and ideas	---	---	---	---	

PEOPLE CONCERNS:

Adheres to confidentiality policy	---	---	---	---	
Relates well to clients and staff	---	---	---	---	
Is friendly and sincere	---	---	---	---	
Is courteous and tactful	---	---	---	---	
Cooperates with staff and co-workers	---	---	---	---	
Is neat, well-groomed, adheres to dress code, wears name badge	---	---	---	---	

RESPONSIBILITY & MOTIVATION:

Is dependable (works as scheduled)	---	---	---	---	
Is punctual	---	---	---	---	
Is loyal, willing to accept responsibility	---	---	---	---	
Attends offered training and education programs	---	---	---	---	

VOLUNTEER'S SIGNATURE: _____ DATE: _____

SUPERVISOR'S SIGNATURE _____ DATE: _____

Source: Strategies for Success in Volunteer Service Administration, p. 122, published by: *The Ohio Society of Directors of Volunteer Services of the Ohio Hospital Association*, 1990

Volunteer Termination

Volunteers, like paid employees, terminate their relationship with a particular organization through resignation or dismissal. In either case, it is recommended that accurate records and documentation be kept. Records may be needed to deal with any grievance procedures or to document a volunteer's past work record with the organization.

Reasons for resignation

- Move out of the area
- Volunteer job finished
- Personal or family health issues
- Changes in life situation (divorce, etc.)
- Family obligations
- Return to full-time work
- Loss of interest
- Dissatisfaction with organization, etc.
- Term is up
- Others _____

Exit Interview

It is advised, whenever possible, to have an exit interview with a volunteer leaving the organization. You can gain a great deal of information which can serve other purposes:

- Tracking retention
- Recognizing and thanking volunteers
- Locating problems within a particular department or aspect of the organization (i.e., many volunteers staying a short time/leaving early)
- Detecting any recruitment problems (i.e., not accepting the right kind of person for the job)
- Hopefully preventing any bad feelings traveling out to the community by apologizing for any problems caused by the agency
- Providing closure to the relationship

Exit Interview sample forms follow.....

EXIT INTERVIEW QUESTIONNAIRE

We are always striving to improve the performance of our volunteer management system. As one of our volunteers, we would appreciate your help in identifying areas in which we might do better. Please be as complete and honest as you can in answering the following questions—all of the information collected will be kept strictly confidential, but it will be utilized to ensure that others who volunteer will receive the best possible treatment.

How long did you volunteer with us? _____

Types of volunteer positions held:

1. _____
2. _____
3. _____
4. _____

Why are you leaving? (Check all that apply)

- | | | |
|--|--|---|
| <input type="checkbox"/> Job accomplished | <input type="checkbox"/> Moving to a new location | <input type="checkbox"/> Need a change |
| <input type="checkbox"/> Didn't like the job I was given | <input type="checkbox"/> Didn't feel well utilized | <input type="checkbox"/> Other time commitments |
| <input type="checkbox"/> Other: _____ | | |

What did you like best about volunteering with us?

What suggestions would you make for changes or improvements in our volunteer effort?

Overall, how would you rate your experience in volunteering with us?

TERRIBLE			AVERAGE			GREAT
1	2	3	4	5	6	7

Please return this form to:

Name: _____

Address: _____

Volunteer Exit Questionnaire

ASSIGNMENT _____

I LEFT BECAUSE _____

THE MOST SATISFYING PART OF MY ASSIGNMENT WAS _____

THE LEAST SATISFYING PART OF MY ASSIGNMENT WAS _____

THE ORIENTATION AND TRAINING I RECEIVED WAS _____

TO IMPROVE THE PROGRAM I WOULD _____

I WOULD RETURN IF _____

COMMENTS: _____

SIGNATURE (OPTIONAL): _____ DATE: _____

Source: *Strategies for Success in Volunteer Service Administration*, p. 124, published by: *The Ohio Society of Directors of Volunteer Services of the Ohio Hospital Association*, 1990

A SUGGESTED EXIT INTERVIEW FORM

(To be completed by the volunteer)

Date: _____

Name: _____ Telephone: _____

Address: _____

Reason for leaving the Red Cross: _____

Please indicate your most satisfying and least satisfying experiences in the Red Cross:

Most satisfying: _____

Least satisfying: _____

Was your work setting, office space, desk, phone, etc., satisfactory?

Yes No

Explain: _____

Were your working relationships with volunteer and/or paid staff satisfactory?

Yes No

Explain: _____

Do you feel that you had adequate support and supervision?

Yes No

Explain: _____

Do you feel that you received sufficient training for your position?

Yes No

Explain: _____

(over)

Do you feel that you made a significant contribution?

Yes No

Explain: _____

Do you feel that your work was appreciated?

Yes No

Explain: _____

Will you consider a volunteer position with the Red Cross in the future?

Yes No

Explain: _____

Additional Comments: _____

Volunteer's Signature

Interviewer's Signature

Source: The American National Red Cross, 1984

Reasons for dismissal

On rare occasions, Managers of Volunteers are faced with the unpleasant task of dismissing a volunteer. It should be noted that unless you have a good management system in place (clear job descriptions, orientation and supervision, etc.) it is very difficult to fire a volunteer. Most often firing is neglected, frequently with high costs to the individual and the organization.

Generally volunteers can be dismissed for the following reasons:

- Misconduct
- Unsatisfactory performance
- Breach of confidentiality
- Inappropriate behavior
- Disregard of policies and procedures
- Health unacceptable to the point of being a hazard to self and others
- Suitable assignment not available

Alternatives to dismissal

If the infraction is such that immediate dismissal is not called for, you may consider the following **alternatives to firing**:

1. Give a warning and develop a plan to improve behavior.
2. Provide additional training which may enable the volunteer to perform better.
3. Place in another more suitable job in the organization.
4. Refer to a Volunteer Center or other agency for more suitable placement.
5. Retire the volunteer. (This is the delicate situation in which a person is unable to do a satisfactory job due to increasing mental, physical or aging problems.) You might plan a nice retirement party honoring the volunteer for his/her service.
6. Reassign to a different person in the organization (if the problems stemmed from a poor personality match).

How to fire a volunteer (and survive!)

It might be difficult to imagine yourself firing a volunteer, and often it is nearly impossible to do because the organization does not have the appropriate systems in place to perform a termination. When in doubt, use standards in place in the organization for firing a paid employee. Remember, however, that a volunteer must be clearly informed of his/her role and responsibilities through a clear job description and must understand from the start of the relationship that certain standards and expectations must be met for the success and continuation of the relationship between the volunteer and the organization. Remember: volunteers fire organizations frequently when they do not meet up to the volunteers' expectations. Occasionally, too, volunteers must be dismissed from the organization.

4 essentials of firing volunteers:

- (1) As a part of orienting each volunteer, you should give him/her a copy of the agency policies on termination, including a policy on suspension and grievance procedures. This provides volunteers with forewarning that volunteers can be terminated. It also assures salaried staff that volunteers can be dismissed from the organization.
- (2) With few exceptions (i.e., observed harm to clients, theft, etc.), volunteers should not be fired until you have had an opportunity to provide an in-depth investigation, making certain that you have proof of violation of agency policies or performance standards. You may choose to suspend the volunteer while the investigation is taking place. Determine if there are any excusable or extenuating circumstances, and always document, in writing, your investigation and conclusions. It is advised that you confirm the termination in writing with the volunteer.
- (3) Firing volunteers should be handled fairly and with the utmost diplomacy. Don't apologize for your decision. Allow for an appeals process.
- (4) Provide notification to staff, clients and others who need to be informed that the volunteer will no longer be working at the organization.

Further References

Supervision, evaluation and dismissal of volunteers

- Lynch, Rick, Precision Management (Abbott Press, 1988). Chapter 7, "Delegating for Results," pp.123-139.
- MacKenzie, Marilyn, Dealing With Difficult Volunteers (VM Systems and Heritage Arts Publishing, 1988).
- McCurley, Steve and Rick Lynch, Essential Volunteer Management (VM Systems and Heritage Arts Publishing, 1989). Chapter 8, "Supervision Systems," pp. 97-106.
- McCurley, Steve and Sue Vineyard, 101 Ideas For Volunteer Programs (VM Systems and Heritage Arts Publishing, 1986). Chapter V "Leadership, Supervision and Recognition," pp. 47-60.

Chapter 12

Recognition of Volunteers



Chapter 12

Recognition of Volunteers

Purposes of this chapter:

- * To explore the difference between tangible and intangible forms of recognition
- * To learn essential tips for giving meaningful recognition
- * To expand ideas for recognition techniques
- * To learn creative, inexpensive ways to say, "I noticed you!"

Included in this section:

Thought-Provoking Questions	XII-5
Purpose of Recognition	XII-6
Tangible and Intangible Kinds of Recognition	XII-6
Volunteer Recognition Preferences	XII-8
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Thought-Provoking Questions Regarding Recognition of Volunteers

- 1. In what formal ways do you recognize volunteers?
What is your sense of volunteer appreciation of these efforts?**
- 2. Does the paid staff generally feel thanked and appreciated in your organization?**
- 3. Are volunteers made to feel welcomed and appreciated in your organization? In what informal ways are volunteers shown appreciation?**
- 4. What is the most creative or novel way a volunteer has been recognized in your organization?**
- 5. Whose responsibility is it to provide recognition for the volunteers in your organization?**
- 6. Do you have any funds to spend on recognition?**
- 7. Are the paid staff members who work with volunteers recognized and thanked for their efforts?**

Purpose of Recognition

There are 2 key purposes of recognition:

1. Recognition offers the organization an opportunity to reward and motivate volunteers who have made contributions of time.
2. Recognition is a means of highlighting and promoting a successful volunteer program within the community.

Tangible and Intangible Kinds of Recognition

Tangible rewards are generally things (plaques, pins) or events (recognition luncheon) which are the formal ways in which agencies recognize their volunteers.

Tangible recognition includes:

- Teas, luncheons, dinners
- Pins, certificates, plaques
- T-shirts or other items of clothing
- Photo displays
- Birthday cards/get-well cards
- Holiday parties
- Agency benefits (free admission to their museum, etc.)
- Free parking
- Letters of recommendation
- Newspaper articles
- Sponsorship at a workshop or conference

Although these are important ways that agencies thank their volunteers, they must not become so routinized that volunteers do not feel any particular pride in them. Having tangible recognition—sincerely and creatively presented—helps to overcome the inherent difficulties with these forms of recognition and helps to make the volunteer feel that he/she is special.

Intangible rewards are those everyday, informal ways you say to volunteers, "We're glad you are here." Examples include:

- Calling volunteers by their name
- Inquiring about volunteers' concerns
- Saying thank you every time they leave the agency
- Involving volunteers in staff meetings
- Asking for volunteers' opinions and ideas
- Giving new responsibilities or new challenges
- Teaching a new skill
- Phoning volunteers when they are sick
- Having a pleasant working environment
- Greeting volunteers each day with a friendly smile
- Spending time and effort in supervision
- Maintaining a personal interest in the volunteer
- Advocating for volunteers or volunteering within the agency
- Keeping volunteers informed about agency activities

The major reason volunteers give of their time is for the inner satisfaction and personal sense of fulfillment they derive from performing voluntary service. But those that serve also need and deserve the continual recognition and the acknowledgement of their worth and importance (such as by words of praise, in addition to annual recognitions or honor awards).

Volunteer Recognition Preferences

Penny Ream

"A Study of Volunteer Preference for Recognition Techniques
Used by Agencies and Employers"

Masters Thesis, Univ of Minnesota

May 1982

Table 13: Percentage of Participants who Rated Recognition Techniques "Very" or "Somewhat" meaningful

Recognition Techniques	Percentage
1. Discounts on memberships, tickets, or gift items	81.4%
2. Additional training for volunteer work	81.2
3. Personal development training	69.2
4. Luncheon with volunteers	68.9
5. Employee privileges	68.5
6. Volunteer job enhancement	68.0
7. Participation in staff activities	64.0
8. Individual luncheon with agency official	60.4
9. Social event with volunteers	60.2
10. Gift item with agency logo	59.0
11. Community recognition	55.6
12. Personalized gift item	55.1
13. Award pin	52.2
14. Award certificate	49.5
15. Gift item with universal volunteer logo	46.8
16. Participation in organized sports event	22.2

Survey of volunteers in 13 arts and culture agencies in Minneapolis and St Paul, MN.

Source: VM Systems, 1807 Prairie Ave., Downers Grove, Il. 60515

Tips for Giving Recognition

1. **The most important way we recognize a volunteer is to place him/her in the most suitable volunteer job.** The job itself is the greatest motivator, and it gives the volunteer the most satisfaction. Without a good job, most volunteers won't be around for the end of the year recognition.
2. A major trap we fall into in recognition is that frequently we want to give volunteers the kind of recognition that we like. The cardinal rule of recognition is that it **be meaningful to the recipient** (i.e., if a plaque would be meaningful to him/her and you don't happen to care about plaques, you go with what would please the volunteer).
3. Some of the best, most **creative recognition does not need to cost much money** (i.e., giving a banana to the "top banana," staff putting on a humorous skit for its volunteers, etc.).
4. **Formal awards should be given as personally as possible**, preferably by a person the volunteer knows or at least by a person who can pronounce the volunteer's name correctly.
5. The **"different strokes for different folks"** really holds true in volunteer recognition. For people motivated by social interaction, a social party and good food may be the best way to say, "Thank you." For people who are primarily motivated by being able to achieve and accomplish new projects, a new challenge, being sent to a seminar or being given a plaque may be the best form of recognition. For people motivated by the opportunity to use their power and influence to help accomplish some agency goals, very visible, public recognition such as a picture and article about them in the paper or an award named after them may fit the bill.
6. When you must **recognize all volunteers in one event**, make certain that you have elements that will please different types of people.
7. **Recognition should be given as soon after the activity as possible.** If someone chaired your event in the fall and your recognition event is in the spring, make certain that you do something in the way of appreciation before the event in spring.
8. **Using humor and creativity in recognition** demonstrates that you have put time and thought into personal recognition. And time is the greatest gift we give one another.
9. **Make certain that recognition is fair.** If you reward volunteers who are not performing well, you will de-motivate the volunteers who are performing well.
10. **The informal everyday acknowledgement of our volunteers is the most powerful and effective way of saying, "Thank you!"**

Source: Stallings, Betty B., Building Better Skills

Volunteer Recognition Ideas

- Send volunteers to workshops and conferences representing agency
- Make a video of a person volunteering, show at annual luncheon
- Humorous skit by paid staff on the role of volunteers in the agency
- Personalized gift baskets
- Tickets to something they like (sports, theatre) - get them donated!
- Card sent on the anniversary date of their becoming a volunteer
- Laminated copy of an article about them in the paper
- Recognize the paid and volunteer staff as a team in the recognition event
- Have a box entitled "A penny for your thoughts" for suggestions from volunteers
- Unique plaques with his/her picture as a volunteer on it
- A promotion to a higher-level volunteer position, more responsible job
- Discounts on tickets, gift items, medical services
- Articles about volunteers in local newspaper, their college alumni publication, newsletter at their work or through an organization
- Handwritten holiday notes to volunteers (Thanksgiving, etc.)
- Send 5 cent valentines all year long
- Invite volunteers to agency staff, planning and other significant meetings
- Have a bulletin board dedicated to activities and news of your volunteers
- Have a personalized coffee mug for each volunteer
- Leave candy kisses on volunteers' desks
- Develop creative, humorous awards to give at annual meeting
- Develop an in-house award named after your founding volunteer
- Send notes thanking family members for their support of the volunteer's efforts for your organization
- Involve volunteers in the long-range planning of your agency
- Have a birthday lunch once a month to celebrate all volunteer and paid staff birthdays that occurred during that month
- Nominate a volunteer for community recognition
- Give recognition items such as tote bags (You deserve a break!), rolls (You are on a roll), cupcakes (You Take the Cake), seeds (Thanks for helping us grow).

- Thank-you letter when they leave the organization
- A flower or helium balloon at volunteer's desk - "Just because"
- Volunteer portfolio for career development
- Coupons good for: one day off without an excuse, lunch with the Manager of Volunteers or Executive Director, 15 minute shoulder massage, etc.
- Skills training (i.e., computer, FAX)
- Letter of commendation to volunteer's boss
- Use of facilities for volunteer's service group
- Recognition gifts (see last page of this section for places to send for catalogues of special recognition gifts)


Source: Stallings, Betty B., *Building Better Skills*

Creative Ways to Recognize Volunteers


Let your volunteers know that they have your appreciation and support by giving them small gifts with attached notes. Use the following examples or come up with your own individualized ideas.

Original art and design by Jane Vincent


What a great idea!
Bright idea! Note stuck to a Christmas bulb




A Cracker Jack idea...
Box of CrackerJacks




Your ideas are so exciting I could just pop...
A balloon




Thanks for raisin' the tough questions!
Mini-boxes of raisins




Your great work has me wreathed in smiles!
Small grapevine wreath




I'm lucky to have you to help...
A rabbit's foot




No one holds a candle to you!
Scented votive candle or pack of birthday candles




You are a LIFESAVER!
Candy with a note




You're the apple of my eye!
Real or artificial apple - maybe tied with a bow




What an angel! Here's your halo...
Two silver pipe cleaners twisted together



Your vision is our guiding light!
Mini-flashlight



You have given our project the sweet smell of success!
Potpourri or sachet packet



Your presentation was right to the point...

Box of tacks or push-pins



Thanks! you've energized us!

Package of batteries



By any measure, you are a leader!

Tape measure or ruler



Sorry - I didn't mean to hurt your feelings.

A note with a band-aid attached



"Prescription" pep pills for tough jobs, cheer-up pills, etc....

M&M's in old medicine bottles



Thanks for your hard work... I know it has been a headache!

Small aspirin or tylenol packet



I'll help you see this project through...

Goofy joke glasses



I know you're feeling snowed under right now.

Inexpensive snow-globes



Don't worry... it will be fine.

OR

You're a doll!

Box of worry dolls



Many motivated and marvelous volunteers!

Marvelous and Motivated



You take the cake!

Cupcakes for a committee



Thanks for working your buns off!

Hot-Cross buns or cinnamon rolls for a committee meeting



More "thankful" ideas...

A toast to a job well done!

Plastic wine glass filled with jelly beans

Let me know when I can come out...

Construction paper doghouse

A noteworthy accomplishment!

Memo or note pads

Let's celebrate!

Party whistles

You are "berry" special!

Box of fresh berries or berry jam

Thanks to you, we'll soon have this project wrapped up!

Pretty wrapping paper and bows

Hugs and kisses...

Hershey's chocolate kiss

I'll stick with you...

Stick of gum

Thanks for sharing your creative juices...

Boxes of juice for committee members

Where to Purchase Volunteer Recognition Materials

California Assoc. of Hospitals
Volunteer Division
P. O. Box 1442
Sacramento, CA 95807-1422
(916) 443-7401

The Critter Collection
P. O. Box 59134
Potomac, MD 20859-9134
(301) 424-9249

Energize, Inc.
5450 Wissahickon Ave.
Philadelphia, PA 19144
(215) 438-8342

Harris Promotions, Inc.
7926 Queen Street
Wyndmoor, PA 19118
(215) 233-6101

Lincoln General Hospital
Junior Volunteer Program
2300 South 16th Street
Lincoln, NE 68502
(402) 473-5117

National Volunteer Center of
The Points of Light Foundation
736 Jackson Place
Washington, DC 20503
(202) 408-5162

Volunteer Action Center
9844 - 110 St.
Edmonton, Alberta Canada
T5K 1J2

Ontario Assoc. of Volunteer Bureaux
4 Robert Speck Parkway
Suite 330
Mississauga, Ontario
Canada L4Z 1S1
(416) 272-4955

Volunteer Bureau of Bergen Co.
64 Passaic
Hackensack, NJ 07601
(201) 489-9454

Volunteer Center of Memphis
2600 Poplar Avenue
Suite 410
Memphis, TN 38112

The Volunteer Collection
P. O. Box 600158
N. Miami Beach, FL 33160
(305) 944-4327

Thanks-A-Lot, Inc.
P. O. Box 3055
Shelby, NC 28151-3055
(704) 481-1176

TLC Services
P. O. Box 691
Mountain Ranch, CA 95246-0691
(209) 754-4548

Volunteer Center of Calgary
Suite 201
110 - 11th Ave. SE
Calgary, Alberta Canada
T2G 0X5

For type of items, prices, etc., write to the above mentioned organizations and request their brochure on recognition items.

Further References

Recognition of Volunteers

- McCurley, Steve and Rick Lynch, Essential Volunteer Management (VM Systems and Heritage Arts Publishing, 1989). Chapter 9, "Retention and Recognition," pp. 107-116.
- Vineyard, Sue, Beyond Banquets, Plaques and Pins: Creative Ways To Recognize Volunteers (VM Systems and Heritage Arts Publishing, 1989). Chapter 9, "Retention and Recognition," pp. 107-116.

Final Thoughts

Being a Manager of Volunteers today is a challenging, difficult position, but its inherent rewards make it potentially the most satisfying and significant job in the human service field. The act of inviting and placing a volunteer in your organization often has the tremendous ripple effect of impacting many lives over an extended time period— frequently well beyond your awareness.

Learning to place the right volunteer in the right job within an organization combines the art of intuition with the science and theory of good volunteer management. It is my hope that this Resource Kit enables you to have, at your fingertips, a summary of the best information in the field, presented in a user-friendly fashion. I encourage you to create a living and changing resource directory as you uncover articles, collect workshop handouts, etc., which would continue to complement and update this book.

I commend you for your choice of profession and extend to you my best wishes for much success in managing today's volunteers.

Betty Stallings

April, 1992

About the Author

Betty Stallings, MSW, is a national trainer, consultant, author and keynote speaker on volunteerism, fund raising, leadership and board development. A native of Philadelphia, Pennsylvania, she earned a B. S. Degree at Ohio Wesleyan University and an M.S.W. at The University of Wisconsin.



Formerly, Betty was the Founder and 13 year Executive Director of Pleasanton, California's Valley Volunteer Center, considered one of the nation's most effective, creative centers. While at the Center, she initiated numerous programs which have served as national models of volunteer utilization. Besides her professional work in the fields of fund raising and volunteerism, Betty volunteers for numerous health, educational and community activities and has received many citations and awards for these endeavors.

While at the Volunteer Center, Betty obtained hundreds of grants from major foundations and corporations, initiated successful signature fund raising events and raised financial and in-kind resources from individuals and small businesses in the community, totalling in the millions of dollars. In her popular book, *Getting to Yes in Fund Raising*, she has shared her many "secrets" for success.

Currently, Betty is a consultant in The Volunteerism Project. She also presents over 80 seminars, keynote talks and retreats annually at local, state and national nonprofit conferences.

Betty's rich background in fund raising and volunteer management, her broad-based experience as a volunteer and her humor, vitality and inspiration have made her a sought after trainer and speaker.

For information on workshops or keynote talks, Betty can be contacted at Stallings & Associates, 1717 Courtney Avenue, Suite 201, Pleasanton, California, 94588 or telephone/FAX number (510)426-8335.

the Volunteerism Project

A special project of:
The San Francisco Foundation
The James Irvine Foundation
The United Way

In collaboration with:

Volunteer Centers of Alameda County
Volunteer Center of Contra Costa
Volunteer Center of Marin
Volunteer Center of San Francisco
Volunteer Center of San Mateo County
Valley Volunteer Center

Goal:

To strengthen the capacity of the Bay Area volunteer referral and training system.

Objectives:

1. To stimulate outreach to new volunteers, including special populations (working people, seniors, youth, and people from diverse ethnic backgrounds).
2. To increase the capacity of volunteer centers to recruit and refer volunteers.
3. To increase the capacity of community agencies to place and utilize volunteers.
4. To strengthen the organizational capacity of individual volunteer centers.
5. To support networking and coordination among local volunteer centers.
6. To promote volunteer center visibility in the community, and to encourage volunteer center leadership and cooperation with other volunteer groups and organizations.

Project Information:

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Director
The Volunteerism Project
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(415) 495-3100

This Resource Kit for Managers of Volunteers is a product of The Volunteerism Project designed and offered to volunteer centers and community agencies to help develop stronger and better volunteer programs.

Annotated Bibliography of Resources

For: Leaders of Today's Volunteers

Prepared by Betty Stallings for The Volunteerism Project

This document includes the following categories of resources:

1. General Background, Philosophy and Benefits of Volunteering
2. Major Published Polls and Surveys on Volunteering
3. Comprehensive Books on Volunteer Management Skills
4. Single Focus Topics (liability, forms, recordkeeping, policies, recruiting, assessment and evaluation, volunteer committees, staff/volunteer relations, program design, marketing, accounting, training, difficult volunteers, recognition)
5. Special Populations of Volunteers (youth, seniors, handicapped)
6. Special Settings (schools, churches, corporations, public sector)
7. Selected Resources on Voluntary Boards of Directors
8. Video and Audio Tapes on Volunteering
9. Major Periodicals in the Field
10. Major Publishers and Other Sources for Ordering Books and Materials on Volunteering

1. General Background, Philosophy and Benefits of Volunteering

Bellah, Robert. Habits of the Heart. Harper & Row Publishers, 1986.

This landmark book explores the traditions Americans use to make sense of themselves and their society, and it presents one of today's major moral dilemmas: the conflict between our fierce individualism and our urgent need for community and commitment to one another.

Driver, David. The Good Heart Book: A Guide to Volunteering. 1989. 290 pp. Available through Volunteer Readership, The National Volunteer Center.

The author simplifies the process of becoming a volunteer by providing a step-by-step plan for getting involved. He includes such practical information as determining which area to volunteer in, selecting an organization, whom to contact, how to fit the new commitment into a busy life and how to avoid typical frustrations and burnout. Includes a very helpful directory of human care organizations, both local and national.

Ellis, Susan J. and Noyes, Katherine H. By the People: A History of Americans as Volunteers. Revised 1990. 432 pp. Available through Energize Books.

Far more than the first comprehensive history of volunteers, this thought-provoking book uses the historical context to illuminate many current issues of volunteerism. It uncovers the roots and charts the progress of our modern nonprofit organizations in fascinating detail, shattering many of the old stereotypes about volunteers. The book is not only fun to read: it will broaden your perspective and provide new insights on today's volunteer trends and the outlook for tomorrow.

O'Connell, Brian. America's Voluntary Spirit: A Book of Readings. New York, NY: The Foundation Center, 1983. 461pp./paper. Available through Volunteer Readership, The National Volunteer Center.

A must for anyone writing testimony, speeches and proposals, this book presents a collection of 45 selections that celebrate the volunteer sector's strengths and diversity. Culled from over 1,000 selections spanning 300 years, the writings define and characterize the role of philanthropy and voluntary activity in American society. Authors range from de Tocqueville, John D. Rockefeller, and Vernon Jordan to Max Lerner and Erma Bombeck.

Pard, Jane Mallory. Meaning Well Is Not Enough: Perspectives on Volunteering. Available through Volunteer Readership, The National Volunteer Center.

The author shares her insight about what volunteering is, why people volunteer and why they don't, what makes volunteer programs succeed or fail, and why volunteering is essential in our society.

Scheier, Ivan H. Exploring Volunteer Space: The Recruiting of A Nation. 1980. Available through Yellowfire Press.

This book presents a journey through the exciting, creative variations of volunteer involvement that create a vast potential for recruiting people in terms of their natural talent.

Wilson, Marlene. You Can Make A Difference. 1990. 210 pp. Available through Volunteer Management Associates.

This book shares many ways in which people are making a difference in their life through volunteer service to others. Readers, from teenagers to seniors, learn which volunteer projects are best suited to their special talents...who to call when it's time to get started...how to use volunteering as a way to learn new skills and help others simultaneously.

2. Major Published Polls and Surveys on Volunteering

Attitudes of Americans Over 45 Years of Age on Volunteerism. AARP. Washington, D.C. To receive a free copy of the study, call (202) 728-4248.

Giving and Volunteering in the Bay Area.

Survey conducted by Market Opinion Research, April 1990 and Follow-up Study, 1991 for Bay Area Strive for Five. Available through The Volunteerism Project, 425 Bush Street, Ste. 201, San Francisco, CA 94108.

Giving and Volunteering in the United States - Summary of Findings from a National Study. Available through Independent Sector, 1828 L Street N.W., Washington, D.C. 20036.

Survey conducted by the Gallup Organization for Independent Sector, 1988 and 1990 editions (earlier polls are also available from this source).

VOLUNTEERING: A National Profile. J. C. Penney. 1987. 6 pp.

Produced in cooperation with VOLUNTEER, this profile was developed from a 1987 national survey and contains information on volunteering not previously available. Includes percentage statistics on sex, age, marital status, household income, region, educational level, types of volunteer work, why people volunteer, incentives and the role of the employer.

3. Comprehensive Books on Volunteer Management

Ellis, Susan J. From The Top Down: The Executive Role in Volunteer Program Success. 1986. 185 pp/paper. Available through Energize Books.

A must for executives of volunteer-involving organizations, this book addresses management issues related to volunteers such as establishing policy for and about volunteers, budgeting funds and other resources, selecting volunteer program staff, the volunteer/salaried staff relationship, assuring teamwork between volunteers and employees, legal concerns, valuing and accounting for volunteer time and demonstrating commitment to volunteers.

Ellis, Susan J. and Noyes, Katherine H. No Excuses: The Team Approach to Volunteer Management. 68 pp. Available through Energize Books.

This book recognizes that a great many people who direct volunteers handle this role on a part-time basis and/or without any salaried staff help. To this audience, the book offers one way to cope successfully with the demands of volunteer management by recruiting a team of assistants from inside the organization and from the surrounding community. In specific and practical terms, the book outlines what directing volunteers really entails, who can help with what, and how to coordinate and supervise delegated work. A special appendix offers an extremely detailed job description of the role of Director of Volunteers, analyzing the multiple functions fully for the first time.

Fletcher, Kathleen Brown. The Nine Keys to Successful Volunteer Programs. 1987. 89 pp. Available through Volunteer Readership, The National Volunteer Center.

This book discusses nine keys that make a volunteer program work: good job design, staff commitment, well-planned recruitment, careful screening and selection, appropriate training, good supervision by staff, appropriate surveillance by the volunteer program manager, and systematic evaluation. Based on the author's many years of experience in the volunteer program management field as well as on general management theory and practice, it will be helpful to anyone managing volunteers.

McCurley, Steve and Lynch, Rick. Essential Volunteer Management. 1989. 136 pp. Available through Heritage Arts.

Intended for those who are in the process of developing a volunteer program or for those who have one that is not working well, this book is a basic text on operating a volunteer program. It provides an excellent, readable guide to effective volunteer management from planning for a volunteer program, creating volunteer jobs and recruitment to screening, training and empowering volunteers through supervising, retaining and recognizing an organization's volunteers. One chapter is devoted to volunteer-staff relations. A must for any volunteer program director's library shelf.

McCurley, Steve and Vineyard, Sue. 101 Ideas for Volunteer Programs. 1986. 72 pp. Available through Heritage Arts.

This book of lists combines the wit, wisdom and experiences of two of the most respected leaders in the field of volunteerism. The nearly 1,000 ideas presented offer creative, useful and effective ways to plan and administer volunteer programs. A part of the "Brainstorm Series," *101 Ideas* is the perfect addition to any collection on volunteer management.

Moore, Larry E., Editor. Motivating Volunteers. 1985. 264 pp. Available through Volunteer Readership, The National Volunteer Center.

Why do people volunteer? How do you keep volunteers in their jobs? Find out in this volume, which draws on the work of more than a dozen authorities. This is a comprehensive look at what prompts a volunteer to get involved and at how an agency can make that investment of time a profitable and rewarding one. A must for every volunteer administrator.

Seita, Trudy. Leadership Skills for the New Age of Nonprofits: Keeping Volunteers Happy in a Changing World. 1990. 154 pp. Available through Heritage Arts.

A book that could change the way you recruit, manage and retain volunteers and paid staff. It examines society in the '90s and discusses trends affecting the volunteer workforce. Outlining leadership skills necessary to deal with these changing times, the author includes information on developing a team approach, preparing staff, internal advocacy, recognition, evaluation, communication, delegation, crisis management, empowering, balance and much more.

Silver, Nora, Ph.D. At The Heart: The New Volunteer Challenge to Community Agencies. 1989. 178 pp/paper. Available through The San Francisco Foundation, 685 Market Street, Ste. 910, San Francisco, CA 94105.

An exciting book that challenges us to take seriously 8 key issues impacting our ability to attract and include today's "new" volunteers: change, boundaries, community, diversity, gender, professionalization, organizational development, and organizational culture. Suggests adaptive strategies and includes a special section on how to assess a volunteer program.

Vineyard, Sue. Secrets of Motivation: How to GET & KEEP Volunteers and Staff. 1991, 136pp. Available through Heritage Arts.

Typical "get-to-the-point" fun book from Sue that gives you minimum theory and maximum practical application! Dozens of suggestions under every heading: Motivation and Volunteering; the Volunteer of the 90's; Major Trends; Why People Volunteer; Retention and Satisfaction; Matching People and Work; Understanding Needs; Expectations; How to Keep Volunteers & Paid Staff; etc. 42 "Secrets" plus a section of over 300 ideas for motivating special folks and 75 hot new ideas for recognition! Wonderfully practical, great illustrations. The three R's of volunteering: Recruiting, Retaining, Recognizing!

Wilson, Marlene. Survival Skills for Managers. 1981. 264 pp. Available through Volunteer Management Associates.

The author uses her personal and professional experiences to provide a fresh, insightful approach to coping with the challenges and frustrations of today's workplace. She presents creative, positive ways to deal with the changing world of today's manager including sections on creativity—making people and programs come alive, problem-solving, power and negotiations, and conflict, stress and time management.

Wilson, Marlene. The Effective Management of Volunteer Programs. 1976. 197 pp. Available through Volunteer Management Associates.

This classic is an excellent resource and useful training tool, discussing current management theories on leadership, motivation, planning and evaluation, then applying them to tasks most often confronting the volunteer coordinator. It provides a solid understanding of how to approach job design, volunteer supervision, recruitment of professional volunteers and volunteer staff training.

4. Single Focus Topics

Liability:

Chapman, Terry S., Lai, Mary and Steinbock, Elmer L. Am I Covered...? A Guide to Insurance for Nonprofits. 1984. 176 pp. Consortium for Human Services. P.O. Box 1183, San Jose, CA 95108.

Basic information about insurance for nonprofits, including liability, workers' compensation, property and volunteer insurance. The book discusses the necessity of specific types of insurance, levels of coverage, calculation of premiums and availability.

Henson, Sarah and Larson, Bruce. Risk Management: Strategies for Managing Volunteer Programs. 1988. 132 pp. Available through Volunteer Readership, The National Volunteer Center.

This straightforward manual tells the director of a nonprofit organization everything about managing and lessening organizational risk, including information on special risks, legal agreements and contracts, by-laws, tax status, records. Includes forms, bibliography and glossary.

Tremper, Charles and Babcock, George. The Nonprofit Board's Role in Risk Management: More Than Buying Insurance. 1990. 20 pp. National Center for Nonprofit Boards Series

This book helps nonprofit organizations better understand the fundamentals of risk management and the board's critical role in controlling the wide range of risks that are inherent in all organizations such as property damage, personnel injury, employee grievances.

Tremper, Charles. Reconsidering Legal Liability and Insurance for Nonprofit Organizations. Madison, WI: The Society for Nonprofit Organizations, 1989. 213 pp. Available through Volunteer Readership, The National Volunteer Center.

Provides an overview of nonprofit organizations, legal liability, and risk management. Tremper presents analyses of the 25 propositions for change that the Nonprofit Sector Risk and Insurance Task Force considered in the course of adopting eight recommendations. Guidance in selecting among insurance policies and programs and suggestions for using alternative insurance arrangements is included. A FREE booklet which summarizes the eight recommendations titled "Recommendations of the Nonprofit Sector Risk and Insurance Task Force" is available from the National Center for Nonprofit Boards, 1225 19th St., NW, Washington, D.C. 20036.

Recordkeeping, forms, policies:

Ellis, Susan J. and Noyes, Katherine H. Proof Positive: Developing Significant Recordkeeping Systems. 1980. 50 pp. Available through Energize Books.

Proof Positive presents the basic elements of a volunteer recordkeeping system, and guidelines for developing forms and procedures to suit the needs of individual programs. Using a light, readable and practical style, this guidebook is filled with fresh and useful suggestions that both new and veteran volunteer administrators can apply immediately.

McCurley, Steve. Volunteer Management Forms. 1990. 19 pp. Available through Volunteer Readership, The National Volunteer Center.

This is a highly useful book, filled with forms to assist you in the operation of your volunteer program. The forms, covering all aspects of planning, managing, and evaluating a volunteer program include: a staff assessment survey on volunteer involvement; staff worksheet; request for volunteer assistance; volunteer position description; volunteer recruitment planning exercise; volunteer enrollment form; volunteer interview record; organization/volunteer agreement form; assignment master log; time sheet; expense report; contribution record; evaluation form; and more.

McCurley, Steve. Volunteer Management Policies. 1990. 24 pp. Available through Volunteer Readership, The National Volunteer Center.

This companion to the best-selling *Volunteer Management Forms* contains wording for policies and procedures related to various aspects of volunteer administration—firing volunteers, for example, confidentiality, evaluation and others. Contains more than 75 different sample policies.

Recruiting:

Macduff, Nancy. Episodic Volunteering: Building the Short-term Volunteer Program. 1991. 24 pp./paper. Available through Macduff/Bunt Associates.

This book is about developing effective strategies to recruit short-term volunteers by developing a renewable "episodic" volunteer program. To do so, the author stresses the necessity of viewing this as a different type of volunteering.

Macduff, Nancy. Volunteer Recruiting and Retention: A Marketing Approach. 1985. 196 pp. Available through Macduff/Bunt Associates.

Designed for the managers of volunteer programs who may have skills in one aspect of volunteer management but realize they need a whole array of skills, this manual is divided into specific areas of volunteer program management including marketing, needs assessment, planning, developing job descriptions, advertising, training, motivation, supervision and much more.

McCurley, Steve. Recruiting Volunteers for Difficult or Long-term Assignments. 1991. 14 pp. Available through Heritage Arts.

Frustrated by failed attempts to get volunteers to take on unique or lengthy assignments? This little gem is your answer! It defines the problem and then offers answers for recruitment: Expansion; Job Designs; Mass Media; Targeting; Team and Cluster Volunteering; Testing; Apprenticeships; Climate; Needs; Fun; Good Management; etc., plus a long list of references for those theorists who want more than just straight-forward solutions to this nagging (and growing) problem!

Vineyard, Sue and McCurley, Steve. 101 Tips for Volunteer Recruitment. 1988. 69 pp. Available through Heritage Arts.

This new booklet covers all aspects of recruiting volunteers, from planning the general recruitment campaign to specific tips for recruiting seniors and youths. It even suggests ways to recruit for the most impossible or difficult volunteer positions. Here is a complete and informative guidebook to finding volunteers you need in the quantities you have to have.

Assessment and evaluation:

Jacobson, Ann. Self-Study Guide for Volunteer Programs. 1990. 67 pp./paper, Available through Volunteer Readership, The National Volunteer Center.

A self-evaluation guide for those in the business of administering volunteer programs. This is a comprehensive manual which can be used as a "how-to" outline for self-evaluation in any area of volunteer linkage. Includes forms and worksheets.

Reigel, Bobette. Basic Feedback System: A Self Assessment Process for Volunteer Programs. 1977. 53 pp. Available through Volunteer Readership, The National Volunteer Center.

A structured self-assessment process designed for volunteer programs, *Basic Feedback* offers a process of gauging the function, performance, commitment and satisfaction levels of those involved with a volunteer program. Allows you to identify small problems as they emerge and take action to resolve them. Includes ready-to-use checklists and simple usage and scoring instructions.

Vineyard, Sue. Evaluating Volunteers, Programs and Events. 1988. 19 pp. Available through Heritage Arts.

This guide helps the reader understand evaluation and how to use it as a positive tool for growth and success. It includes sections on evaluating volunteers, programs and events. Sample forms.

Volunteer committees:

Justis, Jane. We Can't Keep Meeting Like This! A Guide to More Effective Meetings. 1990. 32 pp/paper. Available through Volunteer Readership, The National Volunteer Center.

This guide examines preparation, agenda, climate, roles, and types of meetings. It concludes with concrete suggestions for implementing good meeting practices. A must for every group that has too many or ineffective meetings.

Macduff, Nancy. Building Effective Volunteer Committees. 1985. 82 pp/paper. Available through Macduff/Bunt Associates.

While the leadership of voluntary organizations usually realize the importance of the board committee to the organization's effectiveness, committee work is often less than adequate. *Building Effective Volunteer Committees* presents an excellent ten-step process to building committee strength and effectiveness. With short narrative sections describing each step, the book contains useful reproducible forms to assist staff and committees in beginning the process.

Volunteer/staff relations:

MacKenzie, Marilyn. Curing Terminal Niceness: Building Healthy Volunteer/Staff Relationships. 1990. 32 pp. Available through Volunteer Readership, The National Volunteer Center.

The author describes how to build a productive partnership between volunteers and staff—i.e., recognize the differences, celebrate their unique contributions, skill and achievements—and offers practical tips on making partnerships happen in your agency. Includes checklists and worksheets.

Program design:

Macduff, Nancy. Designing Programs for the Volunteer Sector. 1989. 24 pp/paper. Available through Macduff/Bunt Associates.

Designed for anyone who is charged with developing and planning a program, this book outlines the process that answers the basic program planning questions and provides a system for organizing planning in the volunteer community. It walks the reader through the five steps: conducting a needs assessment, establishing objectives, selecting activities and techniques, administrative planning and budgeting, and evaluating the outcome.

Marketing:

Vineyard, Sue. Marketing Magic for Volunteer Programs. 1984. 151 pp/paper. Available through Heritage Arts.

Four steps to get what and whom you need...practical, easy, caring and effective! By one of the most popular, talented trainers and authors in the field today! She writes, "Marketing is neither mysterious hype nor hard...It's simply the magic tool that gets you what you need!" Now she helps the volunteer community put this tool to work for itself in practical, easy-to-follow steps!

Accounting:

Dalsimer, John Paul, CPA. Self-Help Accounting: A Guide for the Volunteer Treasurer. 1989. 104 pp. Available through Energize Books.

Designed for the non-accountant who accepts the responsibility of serving as volunteer treasurer of a nonprofit organization, this book is useful both to the small organization that has no paid accounting staff as well as to the treasurer of a larger organization that has a full-time accountant. It provides an excellent introduction to the vocabulary of organizational accounting. Basic government reporting and tax requirements are included.

Training:

Bradshaw, Anita. So You Want To Sponsor A Workshop...? 1988. 16 pp/paper. Available through Volunteer Readership, The National Volunteer Center.

A guide to developing and managing local training events by one of the most experienced and successful conference planners in volunteering. Using her own experience at national and state level, Anita Bradshaw shows you how to plan a successful training event, from site logistics to trainer negotiations to trouble-shooting. Complete with forms to help you work your way through the process.

Vineyard, Sue. The Great Trainer's Guide: How to Train (Almost) Anyone To Do (Almost) Anything. 1990. 184 pp/paper. Available through Heritage Arts.

An easy-to-read, practical guide for trainers, this book lists tips and how-to information on what training is and is not, clients, the management process, roles, what to avoid, communication, adult learning styles, motivations and

needs. It suggests training formats, methods and climate and discusses workshop planning, designing, execution, evaluation and problem trainees. Includes a section for independent trainers who want to start and manage their own business.

Difficult volunteers:

MacKenzie, Marilyn. Dealing With Difficult Volunteers. 1988. 32 pp. Available through Partners Plus.

Here is a how-to booklet for solving problems of troublesome volunteers. Offered is sound, practical advice. And case studies demonstrate a variety of problems and suggestions on how to fire a volunteer, in the event such a drastic move is necessary.

Recognition:

Vineyard, Sue. Beyond Banquets, Plaques and Pins: Creative Ways to Recognize Volunteers and Staff! 1981. 23 pp. Available through Heritage Arts.

Written from the viewpoint that the people to be recognized are our most priceless resource and deserving of our most creative and sensitive thinking, *Beyond Banquets* discusses what recognition is and is not, traditions of recognition, motivation. The book presents an excellent overview of creative, low-cost and no-cost ways to recognize volunteers, with special attention given to youth, seniors, working volunteers and hospital and church volunteers.

5. Special Populations of Volunteers

(Note: Most information on special populations is found in journals from special interest groups such as RSVP, AARP and in the key periodicals in the field of volunteering such as The Journal of Volunteer Administration and Voluntary Action Leadership.)

Youth and students:

Ellis, Susan. Children as Volunteers. 1991. 69 pp. Available through Energize Books.

This thoroughly innovative book is filled with examples and practical advice on how an organization can maximize volunteer input by using children. While there are many factors to consider before using children as volunteers, the benefits can be enormous. This guide clearly and concisely covers all the details of establishing such a volunteer program. More than just a "how-to" book, it is filled with ideas to stimulate the volunteer manager.

Meisel, Wayne and Hackett, Robert. Building a Movement: A Resource Book for Students in Community Service. 1986. Available through Volunteer Readership, The National Volunteer Center.

This book is designed to help you set up and maintain a strong service organization at your college or university. It focuses on the practical, everyday tasks involved in starting and running a student service organization. Includes useful profiles of successful projects and a list of college and university contacts.

Seniors:

Chambre, Susan Maisel. Good Deeds In Old Age: Volunteering by the New Leisure Class. 1987. 135 pp. Available through Volunteer Readership, The National Volunteer Center.

A must for the administrator of any program involving older volunteers, *Good Deeds* discusses the role volunteering plays in older people's lives; widowhood, retirement and volunteering; volunteering in relationship to the older person's need to "join" and to improve life satisfaction. Based on solid research, the book contains numerous charts and graphs. Index.

Handicapped:

Hensley, Gene and Host, Bobette W. Questions and Answers: Volunteering and the Education of Handicapped Children. 1983. 39 pp. Available through Volunteer Readership, The National Volunteer Center.

Provides basic information about volunteering in the area of handicapped children. Useful to both individuals and groups.

The National Volunteer Center. Involving the Handicapped as Volunteers: A Guidebook. 1984. 96 pp. Available through Volunteer Readership, The National Volunteer Center.

Designed for those interested in helping the handicapped become self-sufficient, this workbook contains worksheets, checklists and a complete resource listing for those who work with handicapped students. Based on the results of VOLUNTEER's three-year demonstration project that involved physically disabled high school students as volunteers, it puts the process of volunteer management into the context of the needs of the handicapped.

6. Special Settings

Schools:

Michael, Bernard, Editor. Volunteers in Public Schools. 1990. 152 pp. Available through Volunteer Readership, The National Volunteer Center.

This is the first overview ever compiled of volunteer activity in the nation's public schools. Topics cover how volunteers are used, what factors make programs successful, what research will enhance the ability to create effective programs and what directions national policy should take. It

includes full reports on 13 exemplary volunteer programs with details on the local economic environment, the size and type of school system, and the volunteer program.

Taranto, Susanne. Coordinating Your School Volunteer Program. 1983. 101 pp. Available through Volunteer Readership, The National Volunteer Center.

A practical workbook for teachers, parents, coordinators and others participating in or running school volunteer programs.

Churches:

Energize Associates. The Church Puzzle Game. 1989. 38 pp. Available through Energize Books.

This workbook provides an excellent tool for members of a religious congregation to understand how their church works. The game can help church leaders begin an organizational analysis of their church, understand their situation and identify areas that deserve further attention.

Morris, Marjorie. Volunteer Ministries. New Strategies for Today's Church. 1990. Available through Newton-Cline Press, 421 N. Sam Rayburn Freeway, Sherman, TX 75090.

This book shares how to design a volunteer management plan that's right for your church and describes what pitfalls to avoid in meeting the new challenges in volunteer management.

Wilson, Marlene. How to Mobilize Church Volunteers. 1983. 195 pp/paper. Available through Volunteer Management Associates.

Combining the principles of her first two books and applying them to church volunteering, Marlene Wilson uses her personal church experiences and numerous quotes and anecdotes to deal with a wide range of issues, including the theology of gifts and the history of volunteering within church settings. Bibliography and worksheets.

Corporations:

Heidrich, Katheryn Wiedman, Ph.D. Working With Volunteers in Employee Services and Recreation Programs. 1990. 88 pp/paper. Available through Volunteer Readership, The National Volunteer Center.

Written primarily for use by staff managing employee services and recreation programs in companies, the book is based on current research in the fields of leisure and volunteerism. It offers practical information about working with volunteers generally and provides many specific methods, techniques and suggestions. The reader thus may choose from alternatives that may work best in a particular setting. Each chapter ends with a checklist of questions.

The National Volunteer Center. Building Partnerships With Business: A Guide for Nonprofits. 1986. 27 pp. Available through Volunteer Readership, The National Volunteer Center.

This workbook is for all nonprofit and public agencies and organizations seeking noncash resources from the workplace. Strategies for approaching businesses and corporations for volunteers and other types of assistance are detailed and highlighted with case studies. Needs analysis, action plans, research techniques, successful approaches and follow-up make this resource a must for all agencies wanting to form partnerships with the workplace.

The National Volunteer Center. Evaluating Corporate Volunteer Programs. 1988. 32 pp. Available through Volunteer Readership, The National Volunteer Center.

This book is a must for anyone managing a corporate volunteer program. It walks the reader through the program evaluation process including data collection and activity reporting; process evaluation; impact evaluation; and ends with ways to implement the evaluation. The book includes useful forms, sample evaluations and ends with a volunteer program evaluation score-card.

Vizza, Cynthia, Allen, Kenn and Keller, Shirley. A New Competitive Edge: Volunteers from the Workplace. 1986. 263 pp. Available through Volunteer Readership, The National Volunteer Center.

The most comprehensive information available on the rationale for and benefits of employee volunteer programs. Findings from the 1985 Workplace in the Community national survey reinforce basic concepts and illustrate the variety of strategies undertaken by businesses to encourage and support worker involvement in the community. The book presents persuasive arguments for workplace volunteer programs, information on how programs are structured and administered, partnerships between the private sector and the community, organized labor's role in voluntary community involvement and small business volunteering. Includes profiles of 15 companies.

Public sector:

Brudney, Jeffrey L. Fostering Volunteer Programs in the Public Sector. 1990. 243 pp. Available through Volunteer Readership, The National Volunteer Center.

The author shows how private citizens and public agencies can work together to provide a broad spectrum of public services. He describes effective methods for managing volunteer programs sponsored by public agencies and demonstrates how they can enhance the quality and impact of government service. The book includes sections on understanding public sector volunteer programs, building effective volunteer programs, and promoting voluntary efforts.

7. Selected Resources on Voluntary Boards of Directors

Conrad, William R., Jr. and Glenn, William E. *The Effective Voluntary Board of Directors: What It Is and How It Works*. 1983. 244 pp. Available through Volunteer Readership, The National Volunteer Center.

This revised edition provides the ground rules for effective boards. Its clear management concept and system are appropriate and applicable for all nonprofit organizations. The book's great strength is its emphasis on practical examples, both in the text and in the helpful charts and diagrams.

Hardy, James M., Ph.D. *Developing Dynamic Boards: A Proactive Approach to Building Nonprofit Boards of Directors*. 1990. 194 pp. Available through Volunteer Readership, The National Volunteer Center.

Written for CEOs and board chairs of nonprofit organizations, this book provides a clear, no-nonsense approach to building a board of directors. Calling for a high degree of activity on the part of CEOs and board chairs in the development process, the book provides tested tools and techniques for developing dynamic boards. Includes examples, forms, charts, checklists and designs.

Houle, Cyril O. *Governing Boards*. 1989. 223 pp. Available through Volunteer Readership, The National Volunteer Center.

Presenting the latest information in the field and drawing on the author's participation on over 30 boards, the book provides the most comprehensive, authoritative, and up-to-date guidance on improving the effectiveness of governing boards in nonprofit and public organizations. The book discusses the human potential of the board, guidelines on the board structure, its relationship to paid staff, effective board operation and external relationships.

Howe, Fisher. *Fund Raising and the Nonprofit Board Member*. 1988. 13 pp. Available through Volunteer Readership, The National Volunteer Center.

Describes the five principles that each board member should understand so that the full board can carry out its responsibility to raise funds for the organization. Includes a useful checklist to help board members—including those reluctant to ask others for money—do as much as possible to help raise funds.

Independent Community Consultants. *The Nonprofit Board Book: Strategies for Organizational Success*. 1985. 240 pp/paper. Available through Volunteer Readership, The National Volunteer Center.

A must for developing an effective nonprofit governing board, *The Nonprofit Board Book* is organized around an overview of the board's role, organizing a board and the tasks and concerns of a board. In addition to essential information for the thinking board member, the book includes information on board power, responsibility and liability as well as basic information on how to hold an effective meeting, developing effective committees, board recruitment, oversight, board financial management. Contains excellent charts, sample forms, and flow charts. Comprehensive chapter bibliographies.

Ingram, Richard T. Ten Basic Responsibilities of Nonprofit Boards. 1988. 22 pp. Available through Volunteer Readership, The National Volunteer Center.

Describes the fundamental responsibilities of boards, focusing primarily on the whole board as one entity. Includes a helpful list of responsibilities of individual board members.

Nordhoff, Nancy; Larsen, Jo; Barber, Putnam and Craig, Dorothy P. Fundamental Practices for Success With Volunteer Boards of Non-profit Organizations. 1982. 133 pp. Available through Volunteer Readership, The National Volunteer Center.

Based on the premise that a board can work more effectively with existing resources and that an effective board is essential for an organization to survive, the book presents seven fundamental practices toward successfully accomplishing organizational goals. A valuable tool in the definition and evaluation of the role of the board.

O'Connell, Brian. The Board Member's Book. 1985. 208 pp. Available through Volunteer Readership, The National Volunteer Center.

This book is written for board members who want to make a difference by making the most of their volunteer efforts! By one of the nation's leading authorities, it is a practical guide to the essential functions of voluntary boards: legal responsibilities; finding, developing and recognizing good board members; relationships of board and staff; and a host of other topics! A perfect primer for your board leadership, both current and future.

8. Video and audio tapes

Overview of volunteerism:

A LEGACY OF CARING traces the involvement of Americans in their communities as volunteers from this Nation's beginning to present day. Narrated by Colleen Dewhurst, this 6-minute video was produced by IBM as a public service for VOLUNTEER. For information about borrowing, contact The Points of Light Foundation, 736 Jackson Place, NW, Washington, D.C. 20503 - (202)408-5162.

ORIENTATION TO VOLUNTEERISM provides information on the history of volunteerism, why people volunteer, why volunteers are needed and the management of volunteer programs. The 27-minute film is available from Penn State University, Audio-visual Department, 17 Willard Bldg., University Park, PA 16802 - (814)865-6314.

SELF-HELP IN THE BLACK COMMUNITY examines the self-help movement through the eyes of five Black self-helpers and professionals, describing why Blacks need self-help groups today and how the racial composition of certain groups affects the experiences of their minority members. This 30-minute VHS video produced in 1988 is available for \$25 prepaid from: The Self-Help Clearinghouse, c/o St.

Clares-Riverside Medical Center, Pocono Road, Denville, NJ 07834 - (201)625-7101. Make check payable to St. Clares-Riverside Foundation.

TO CARE: AMERICA'S VOLUNTARY SPIRIT provides an overview of philanthropy in the U.S. Produced by Independent Sector, the 25-minute video presentation was designed to increase public awareness, appreciation and support of the voluntary sector. For information on rental or purchase fees contact: Films Inc., 733 Green Bay Road, Wilmette, IL 60091 - (800)323-4222.

VOLUNTEERS IN LAUPERLAND is an upbeat music video providing six minutes of fun. A Cyndi Lauper-type character is shown volunteering in several different situations and emphasizes the importance of enjoying your work. This video can be purchased (\$35-\$40 in VHS, Beta, and 1/4" formats) from the Volunteer Center of Dallas, 2816 Swiss Avenue, Dallas, TX 75204 - (214)744-1194.

WHAT IF THE VOLUNTEERS DIDN'T examines the dynamics and theology of volunteerism. Experts in the field of volunteerism (including Winifred Brown, VOLUNTEER Board member) and individual volunteers are interviewed. Available in all formats, the video can be rented for \$5.00 or purchased (\$20-\$25) from Presbyterian Church (U.S.A.), Electronic Program Resources Division, Room 1935, 475 Riverside Drive, New York, NY, (212)870-3395.

YOU CAN HELP is a 28-minute video which documents how and why people volunteer. A good volunteer recruitment tool, the film shows volunteers in various activities. Available in 3/4" VHS format from the Volunteer Center-South Bay Harbor, 3915 Spencer, Torrance, CA 90503, (213)212-5009.

Board Development:

BOARDSMANSHIP: TAKING THE JOB SERIOUSLY is a moduled videotaped package designed to help train board members. The 30-minute videotape can be purchased from the Voluntary Action Center of United Way, 184 Salem Avenue, Dayton, OH 45406, (513) 225-3066.

NONPROFIT AND GOVERNMENTAL BOARDS: NEW DESIGN FOR LEADERSHIP are two videotapes by John Carver, developed to capture a new, more powerful approach to boardwork in a few "bite-size" visual presentations. These 15-minute videotapes are about strategic leadership. They help boards see how they can lead with values and vision. For more information about ordering contact: Carver Governance Design, P.O. Box 1190, Carmel, IN 46032, (317)846-2438.

Corporate Volunteerism:

BOISE CASCADE EMPLOYEE VOLUNTEER PROGRAM has devised a 7-minute videotape which provides information on how to start an employee volunteer program. Presented are discussions on what benefits can be derived by employees, the company, and the community. Available in 3/4" VHS format from Boise Cascade Corporation, One Jefferson Square, Boise, ID 83728, (208)384-7673.

EMPLOYEE COMMUNITY HELPS ORGANIZATION discusses the concept of forming a nonprofit organization for employee volunteer involvement. The ECHO program of Pacific Power and Light is focus of this video which includes information on specific projects serving seniors, youth and special populations. The liability insurance issue as well as fundraising is also covered. Contact Colleen Littell at Pacific Power and Light, ECHO, 920 S.W. Sixth Avenue, 400 Executive Building, Portland, OR 97204, (503)243-4775.

MONSANTO VOLUNTEERISM provides a general discussion of volunteerism in America and specific information on the development of Monsanto's Volunteer Clearinghouse in this 6-minute video. Contact: Monsanto, Community Affairs Department, 800 North Lynbergh Blvd., St. Louis, MO 63166, (314)694-2760.

NATIONWIDE INSURANCE COMPANY has produced this film to aid businesses interested in forming a volunteer network such as theirs. The 20-minute film shows how the company has organized a volunteer network to convey its philosophy while enabling them to become active in the legislative process. The film is available in 16-mm and videotape format for rent from Nationwide Insurance Company, Office of Government Relations, P.O. Box 1559, Columbus, OH 43272.

MODEL BLOCK PROGRAM depicts the community involvement effort of the Mutual Benefit Life Insurance Company in Kansas City, MO. The employee volunteer program's purpose is to help revitalize neighborhoods in the central area of Kansas City. The 13-minute video provides an overview of this successful program. Mutual Benefit Life received a 1986 President's Volunteer Action Award for this program. Contact Bennie Lewis at Mutual Benefit Life Insurance Company, 2345 Grand, Kansas City, MO 64108, (816)474-2345.

COMMUNITY INVOLVEMENT TEAMS AT LEVI'S depicts how plant managers and employees at over 100 Levi Strauss locations get involved in their communities with the support of the company. The presentation is available in slide/tape or video version and is seven minutes long. Contact Levi Strauss & Company, Community Affairs Department, 1155 Battery Street, P.O. Box 7215, San Francisco, CA 94120, (415)544-7587.

WIND BENEATH OUR WINGS depicts various volunteer activities of Exxon employees in New Orleans. Available for loan. Contact: John Reidy, Exxon Company USA, P.O. Box 60626, New Orleans, LA 70160, (504)561-3360.

MISS SCHOOL/MISS OUT chronicles the development of this incentive program to improve school attendance sponsored by Great American First Savings Bank which involves its employees (15-minutes). Contact: Rollie Ayers, Senior Vice President and Program Director, Marketing/Corporate Relations, Great American First Savings Bank, 600 B Street, Suite 800, San Diego, CA 92138, (619)231-6244.

VOLUNTEERS: MAKING A DIFFERENCE is an 18-minute tape that describes the variety of activities undertaken by employees through the Virginia Power/North Carolina Power employee volunteer program. Contact: Mary Jackson, Community Affairs, Virginia Power, P.O. Box 23161, Richmond, VA 23161, (804)771-3723.

Special Audiences Or Special Approaches Using Volunteers:

THE BEST OF YOU, THE BEST OF ME is a 28-minute videotape that illustrates intergenerational programs in action. Accompanied by an instructional guide. Available in all formats (VHS, BETA or Umatic Cassette) for purchase or rent. Contact: Generations Together, University of Pittsburgh, 121 University Place, Suite 300, Pittsburgh, PA 15260, (412)648-7150.

FINDING OUR WAY TOGETHER: PEOPLE WITH AIDS AND THEIR CAREGIVERS is a 30-minute videotape produced to address three specific questions: What is it like to live with AIDS? What kind of support do people with AIDS need? and What kind of support will enable caregivers to continue to provide care over time? The video can be ordered for \$40.00 from American Red Cross, Seattle-King County Chapter, 1900 25th Avenue South, Seattle, WA 98144-4708.

IF IT'S UP TO US is a 30-minute video that tells the story of eight people who "stick their necks out" in volunteer service to others as it provides information about The Giraffe Project. Available for purchase from PBS—call (800)344-3337. For information about The Giraffe Project, call or write Box 759, Langley, WA 98260, (206) 221-7989.

OLD FRIENDS is the title of the video which depicts the Gatekeeper Program to provide support to elderly persons. This is a volunteer effort that can be replicated by any community. The 15-minute video presentation can be obtained by contacting the National Association of State Units on Aging, 600 Maryland Avenue, SW, Washington, D.C. 20024, (202)484-7182.

A PORTRAIT presents dramatic case studies of innovative Red Cross Health Services programs. Recommended for staff and volunteer orientation. The videotape (in most formats) is available for purchase or loan from Frank Stanton Production Center, ATTN: Audio/Visual Library, 5816 Seminary Rd., Falls Church, VA 22041, (703)379-8160.

RSVP "RAP" VIDEO is an entertaining and educational promotional video for Retired Senior Volunteer Programs. It can be used for recruiting volunteers, showing how volunteers can become involved in the community, as well as changing the image of older people as old in mind and heart. (Length 2:27 minutes) Available for purchase from: Peninsula Retired Senior Volunteer Program, 1520 Aberdeen Road, Suite 109, Hampton, VA 23666.

SENTENCED TO HELP OTHERS is a 15-minute video that provides an introduction to community service as an alternative to incarceration. For information on purchase or rental contact: The Community Service Center, 1368 Lincoln Avenue, Suite 108, San Rafael, CA 94901, (415)459-2234.

VOLUNTEERS explores a few of the hundreds of ways that people from 14-100 can volunteer their services in medicine and health. The 15-minute film is available in all formats. Contact Trainex Corporation, P.O. Box 116, Garden Grove, CA 92642, (800)854-2485.

Insurance Issues:

AM I COVERED FOR...?—A GUIDE TO INSURANCE FOR NON-PROFITS was produced by SAFECO Insurance Companies, Seattle, WA. The 24-minute videotape provides information that nonprofit organizations need in order to manage their responses to changes in the insurance market. The video comes packaged with the book (same title) authored by Terry S. Chapman, Mary L. Lai and Elmer L. Steinbock and, a discussion guide. Contact Martin Scherr, United Way of America, 710 N. Fairfax Street, Alexandria, VA 22314, (703)836-7100.

Volunteer Program Development:

HELP VOLUNTEERS HELP YOU works to dispel the misconceptions some paid staff persons have about volunteers and provides an amusing presentation which lends a clearer understanding of volunteering. The 13-minute video was produced by the Volunteer Center of Greater Pomona Valley and can be purchased for \$60.00 from the Center: 375 S. Main, Suite 109, Pomona, CA 91766, (714)623-1284.

COLLEAGUES: THE VOLUNTEER/EMPLOYEE RELATIONSHIP is a training tool which provides information to 1) introduce employees to the factors involved in working successfully with volunteers; 2) offer specific guidelines for establishing teamwork between employees and volunteers; and 3) teach the basics of good supervision skills. The 43-minute video was produced by and can be purchased from ENERGIZE BOOKS, 5450 Wissahickon Avenue, Philadelphia, PA 19144, (215)438-8342.

CREATIVITY AND LEADERSHIP by Marlene Wilson. One of the constant challenges facing today's leaders is to remain creative...and to instill that same creativity in their staff. In this rapidly changing world, only those organizations that develop innovative solutions to new problems will remain viable and healthy. Understanding and overcoming resistance to change is the topic of this tape, including presentations on creative thinking and effective problem solving techniques. To preview, rent or purchase this video, contact Volunteer Management Associates, 1113 Spruce Street, Ste. 406, Boulder, CO. 80302

MAKING VOLUNTEER PROGRAMS WORK discusses the steps needed to develop a strong volunteer program. The 17-minute film is available in 1/2" VHS format. Contact Volunteer Program Director, Los Angeles County Public Library, 7400 E. Imperial Hwy., Box 7011, Downey, CA 90241, (213)940-8418.

MOTIVATING YOUR ORGANIZATION by Marlene Wilson. What motivates your people? How can they be stimulated to help the organization achieve its goals? Through lectures, graphics and role play, the first segment of this tape explores motivational theories as they impact both paid and volunteer staff

performance. Segment two addresses the atmosphere of any group or organization...discusses nine factors which determine...and demonstrates that climate...and demonstrates how a healthy climate affects motivation. To preview, rent or purchase this video, contact Volunteer Management Associates, 1113 Spruce Street, Ste. 406, Boulder, CO. 80302

RAISE YOUR HAND VOLUNTEER TELETHON is a recruitment campaign conducted in Memphis, TN which was televised on a public TV station. The 17-minute presentation provides information helpful to other communities interested in conducting a similar campaign. Contact the Memphis Volunteer Placement Program, 2300 Hernando Road, Memphis TN 38106, (901)320-2978.

RECRUITING AND INTERVIEWING VOLUNTEERS by Marlene Wilson is a 44-minute videotape that presents role plays to contrast inappropriate recruitment methods with effective techniques. To preview, rent or purchase this video contact Volunteer Management Associates, 1113 Spruce Street, Ste. 406, Boulder, CO. 80302

PLANNING YOUR ORGANIZATION'S FUTURE covers the practical steps necessary to sharpen skills needed for planning and evaluation of voluntary organizations. The 38-minute video features lessons on designing meaningful paid and volunteer jobs to increase program effectiveness. Contact Volunteer Management Associates for ordering information: 1113 Spruce Street, Ste. 406, Boulder, CO. 80302

TOGETHER: VOLUNTEER-TO-VOLUNTEER RELATIONSHIPS is a 38-minute training videotape. It guides the volunteer who manages other volunteers. It also features practical tips on how membership organizations can maintain a healthy and effective volunteer program. The purchase price of \$395.00 includes a Trainers Guide with camera ready handouts. A preview tape can be purchased for \$20.00. Order from Energize Books, 5450 Wissahickon Avenue, Philadelphia, PA 19144, (215)438-8342.

BASIC VOLUNTEER MANAGEMENT: BUILDING A BRIDGE FROM DREAMS TO REALITY is a video by expert Sue Vineyard. The tape is 1 hour and 15 minutes long (1/2"VHS), features a live audience. Contents include information on trends, planning, staffing, training, motivating, supervising and evaluating volunteer programs. The video comes with audience handouts, introductory remarks, training tips, and bibliography. Cost is \$98.00 plus \$2.00 postage and handling. Order from: Volunteer Readership, The National Volunteer Center, P.O. Box 221586, Chantilly, VA 22022 - (800)272-8306.

HOW TO RECRUIT TODAY'S VOLUNTEERS by Marlene Wilson. Recruiting today's volunteers is a challenging task. Not only are people's lives more complicated, but there is a wider array of skills and talents available for your organization. The key to successful recruiting is to know who's out there and what potential volunteers are looking for in the organizations for which they volunteer. This live one-hour workshop with Marlene Wilson will teach you what you *must* know in order to recruit today's volunteers:

- Demographics: How to recruit teenagers, babyboomers, the sandwich generation, seniors and early-retired persons. You'll learn what each group's specific needs are and how you can meet them.

- A new definition of recruitment that will increase your success dramatically.
- How to market your organization or cause to increase volunteer involvement.
- How change, creativity and attitudes affect recruitment.

Contact Volunteer Management Associates for ordering information:
1113 Spruce Street, Ste. 406, Boulder, CO. 80302

HOW TO DELEGATE TO TODAY'S VOLUNTEERS by Marlene Wilson.

Delegation is the key to success for today's managers. It is a crucial skill that needs to be learned and practiced. Matching the right person to the right task will help *you* avoid burnout and allow those you delegate to the opportunity to grow and flourish. This live one-hour workshop will teach you how to do it:

- Essential time management techniques to help you get more done with less effort and stay well.
- The symptoms and signs of burnout—and how to avoid it through delegation.
- How to plan and prioritize and avoid procrastination and perfectionism.
- How to delegate to volunteers based on their motivational needs.

Contact Volunteer Management Associates for ordering information:
1113 Spruce Street, Ste. 406, Boulder, CO. 80302

Youth Volunteers:

CAREER LINKS provides examples of community internships for high school students. Career Links is a program of the Valley Volunteer Center and local high schools. Contact the Valley Volunteer Center, 333 Division Street, Pleasanton, CA 94566, (510) 462-3570.

EVERYBODY CAN BE GREAT BECAUSE EVERYBODY CAN SERVE, produced by Youth Service America is a 13-minute video that documents the youth community service movement in the U.S. The video includes scenes from youth corps programs, high school programs, college programs and community programs. The VHS tape is \$12.50 (includes postage) and can be ordered from Youth Service America, 1319 F Street, NW, Suite 900, Washington, D.C. 20004, (202)783-8855.

GROWING THROUGH GIVING is a videotape specifically designed for high schools that are planning or implementing service learning programs. The 30-minute presentation features public and private school programs that enable students to share their skills and talents where they are needed in the community. **GROWING THROUGH GIVING** includes a discussion guide and is priced at \$50.00. Order from **THE VOLUNTEER CLEARINGHOUSE OF D.C.**, 1313 New York Avenue, NW, Washington, D.C. 20005, (202)638-2664.

HERO depicts an innovative program of the Volunteer Center in Houston, TX which involves teens and young adults in health-related volunteer activities which provide career exploration and job opportunities for training. (Length 15-minutes) Available for purchase. Contact: The Volunteer Center, 3100 Timmons Lane, Suite 100, Houston, TX 77027, (713)965-0031.

SPECIAL

The Game of Volunteer Management. 1990. Available through AARP,
Avalon Hill Game Company, 4517 Harford Road, Baltimore, MD
21214 - (301)254-9200.

9. Major Periodicals in the Field of Volunteerism

The Chronicle of Philanthropy

P.O. Box 1989
Marion, OH 43306-4089

Newspaper on philanthropy, grants, giving trends, management,
volunteerism, legislation, etc. Published 24 times per year.

The Journal of Volunteer Administration

P.O. Box 4584
Boulder, CO 80306

Quarterly journal of the Association for Volunteer Administration.
Articles on programs, professional growth, management.

Nonprofit & Voluntary Sector Quarterly

Association of Voluntary Action Scholars
Jossey-Bass Publishers
350 Sansome Street
San Francisco, CA 94104

Quarterly journal of the Association of Voluntary Action Scholars.

Non-Profit Times

P.O. Box 7286
Princeton, NJ 08543-7285

Monthly newspaper with articles on philanthropy, volunteering,
non-profit issues and developments.

Non-Profit World

Society for Non-Profit Organizations
6314 Odana Road, Suite 1
Madison, WI 53719

Magazine for the Society for Non-Profit Organizations. Contains
articles on non-profit management.

Voluntary Action Leadership
The National Volunteer Center / The Points of Light Foundation
736 Jackson Place, NW
Washington, D.C. 20503

Quarterly magazine devoted to volunteer management issues.

10. Major Publishers and Other Sources for Ordering Books and Materials on Volunteerism

Energize Books, (Principal: Susan J. Ellis)
(215)438-8342 or (800)272-8306
5450 Wissahickon Avenue, Lobby A
Philadelphia, PA 19144

Heritage Arts, (Principal: Sue Vineyard)
(708)964-1194
1807 Prairie Avenue
Downers Grove, IL 60515

Independent Sector
(202)223-8100
1828 L Street NW
Washington, D.C. 20026

Macduff/Bunt Associates, (Principal:Nancy Macduff)
(509)529-0244
821 Lincoln St.
Walla Walla, WA 99362

Marlborough Publications, (Principal: Judy Rauner)
P.O. Box 16406
San Diego, CA 92216

Minnesota Office on Volunteer Services
(612)296-4731
500 Rice Street
St. Paul, MN 55155

Partners Plus, (Principal: Marilyn MacKenzie)
(416)886-8585
9030 Leslie Street, Ste. 220
Richmond Hill, Ontario L 4B 1G2, Canada

Society for Nonprofit Organizations
6314 Odana Road, Ste. 1
Madison, WI 53719

The National Volunteer Center / The Points of Light Foundation
(703)276-0542
736 Jackson Place, NW
or (800)272-8306 Washington, D.C. 20503
To order direct: P.O. Box 221586, Chantilly, VA 22022

The Taft Group
(800)424-3761
5130 MacArthur Boulevard, NW
Washington, D.C. 20016

United Way of America, Volunteer Outreach Services Department
(703)836-7100
701 North Fairfax Street
Alexandria, VA 22314-2045

Vancouver Volunteer Centre
(604)731-6168
1625 West 8th Avenue
Vancouver, BC V6J 1T9, Canada

Volunteer Management Associates, (Principal: Marlene Wilson)
(800)944-1470
1113 Spruce Street, Ste. 406
Boulder, CO 80302

Yellowfire Press, (Principal: Ivan H. Scheier)
(505)988-7172
369 Montezuma, Ste. 177
Santa Fe, NM 87501



*R*esource Kit for Managers of Volunteers

By: Betty Stallings

Leader's Guide

Written for



*the
Volunteerism
Project*

of the San Francisco Bay Area

Resource Kit for Managers of Volunteers

Leader's Guide

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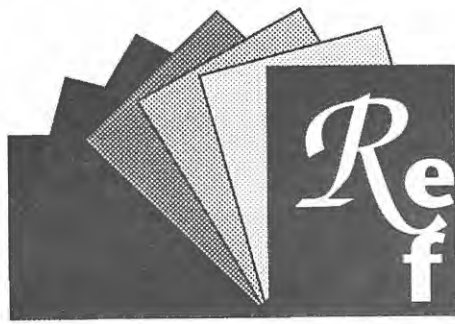


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Resource Kit for Managers of Volunteers

Leader's Guide

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Resource Kit for Managers of Volunteers

Introduction

While directing a Volunteer Center for 13 years, there were numerous occasions when I wished I had, at my fingertips, a resource of organized information on volunteer management which was easily accessible, comprehensive and "user-friendly." I felt that with such a resource, the Volunteer Center staff could serve in a significant role as trainer and consultant in volunteer management to the agencies served by their clearinghouse service. It was always my concern as a Volunteer Center director that unless we were devoting considerable time to enhancing and initiating excellence in volunteer management, much of our referral efforts would continue to have questionable results.

But, as so frequently happens in the everyday pressures of a nonprofit organization, desire and need for this resource remained simmering on the back burner.

Being a consultant with The Volunteerism Project in the San Francisco Bay Area has now given me the opportunity to create such a resource. And so, we offer to you, a practical, comprehensive guide to the key concepts and resources in the field of volunteer management.

This leader guide will explore methods to share this resource material with the organizations you serve. There is an infinite variety of volunteer programs, so, although the information presented is based on the foundations common to most volunteer management, each organization will need to alter some material and some forms or models to make them applicable to it.

I will look forward to hearing of additional information you wish to be included in the Kit and to hearing creative new ways you have made use of this resource.

Purpose of the Resource Kit

The purposes of the Resource Kit are primarily three-fold:

- 1. A Comprehensive Resource on Volunteer Management for Use by the Staff of Any Volunteer Center**

Over the last 10-15 years there has been an explosion of information in the field of volunteer management. It is difficult for a Volunteer Center to stay abreast of it, catalogue it and make it available for use by the organizations it serves. This Resource Kit has summarized available information and divided it into practical, usable concepts, forms, models, etc. It has also developed thought-provoking questions in each topic area. These can clarify problem areas for volunteer program managers. The format is such that the document, unlike a bound book, can be updated and added to by the center utilizing the information. It also includes a comprehensive annotated bibliography in the field of volunteer management so that further information can be found readily.

- 2. A Comprehensive Resource for Any Organization that Utilizes Volunteers**

All or parts of the Kit can also be used as a stand-alone guide for any organization that is initiating or enhancing its use of volunteers. It includes issues involving the role of a Manager of Volunteers, legal and tax concerns, as well as up-to-date information on trends and their impact on recruiting and retaining today's volunteers. For the new Manager of Volunteers, it is an excellent introduction to the field of volunteerism and a source of initiation into the critical skills required to do the job well.

- 3. A Comprehensive Resource for Use by Networks of Managers of Volunteers (i.e., DOVIA's, Hospital or School Volunteers, etc.)**

Groups of Managers of Volunteers who meet on a regular basis can use this resource as a guide for meeting topics or can use some of the material for features or columns in their newsletters. Sharing this resource with new members as they join the group would be an excellent way to initiate them into the field of volunteer management.

Format of the Resource Kit

The material in the Resource Kit is or can be organized in a three ring binder so that it is readily usable for duplicating, updating and enhancing. The user may wish to add journal articles in appropriate areas, add notes from workshops on the various topics, add new information on trends, tax law or insurance which may impact volunteering.

The sequence of the material is based on my training in basic volunteer management, entitled "The 3 R's in Volunteer Leadership" (Ready?—Recruit—Retain).

Each chapter, where appropriate, has four major resources:

- * **Thought-provoking questions** to promote and stimulate discussion on the topic and to assist in spotting organizational strengths and weaknesses
- * **Basic principles** on each topic
- * **Selected forms**, models, examples related to this topic area
- * **Specific references** for further information on the topic

The Resource Appendix includes a lengthy annotated bibliography in the field of volunteerism, divided by subject area. It also includes order forms for books, videos, and recognition items, and a listing of national organizations dealing with issues related to volunteering.

Local Volunteer Centers may wish to add a section on local resources.

Suggested Ways to Utilize the Kit with Nonprofit Organizations

1. Use Kit topics in a brown bag lunch series.
2. Sponsor a session for new Managers of Volunteers - introduce them to the field and get them grounded in the role and skills involved in the job.
3. Have a consultation with one organization on one or more topics in the Kit. This could be fee-based.
4. Do some training on some of the topics with like-setting organizations (i.e., schools, libraries, youth service).
5. Choose a topic. Volunteer Center staff gives some key pointers and then facilitates discussion among agencies who identify this as a key issue in their organization. (May be offered as a no-cost service or for a nominal fee.)
6. You may want to require a 2-hour overview of volunteer management for agencies that receive priority matching or referral service.
7. You may wish to provide training on the Kit as a free service or offer it at a reduced price for organizations who are "members."
8. Train some volunteers to lead informal training sessions on some of the topics in the Resource Kit.
9. Use the material at your own in-service training of Volunteer Center staff, since most staff dealing with the public should be in touch with the information in this resource.
10. Offer to do an in-service training for some organization that is having difficulty in its volunteer program or that is starting up a program.
11. At the end of each section, begin to add your own favorite resources as you come across them.
12. Add a section in the Kit for your agency newsletter for Managers of Volunteers, upcoming trainings, etc.
13. One person at the Volunteer Center should be assigned to keep the manual updated annually.
14. Have several loaner copies available for your agencies' use.
15. Use some information from the Kit to write brief articles on volunteer management principles for your newsletters, etc.
16. Develop a flyer telling organizations of this Kit and its potential uses and value to them. Enclose it often with any correspondence.
17. Send people information or examples of forms when they call asking for information (i.e., Where do I buy some recognition materials? - Send them the page on who makes recognition items, what they are, and how to write for them).

18. Sponsor a special breakfast session for agency Executive Directors and focus your comments on the role and issues of support, etc. for the Manager of Volunteers.
19. Be familiar enough with the material that you can guide people to the information most applicable to their needs.
20. Bring the Resource Kit and accompanying books to all of your training sessions so that organizations begin to see it as a good resource for them.
21. Sell, at a commission, the books that are essential for Managers of Volunteers to have as resources.
22. Hold a free session on assessing your volunteer program using the forms, etc. in the Kit. As individual problems arise, you may want to offer consultative services to help solve these problems.
23. If you find a new, effective way to utilize this Kit, please send it to me at the address on the "About the Author," Section IV in the Resource Kit.

Variables to Consider in Training With Small Groups

If you are arranging for small group training or facilitation on subjects in the Kit, you need to keep several questions or variables in mind:

1. Do you want uniformity or diversity in your groups?
2. Do you want all experienced or a mixture of new and experienced Managers of Volunteers in your group?

Having diversity within the group is always more challenging for the trainer, but can create additional stimulation to the session and can often enhance and stretch participants. More often, however, people like to discuss issues with people they feel are in similar circumstances or those who share common experiences (i.e., feeling unsupported in their role as Manager of Volunteers, having volunteer retention problems, etc.)

As you form groups, remember the diversity which rises from the:

1. experience and sophistication of the Manager of Volunteers
2. size of the organization
3. service focus of the organization
4. diversity of ways volunteers are used in the organization
5. staff/volunteer ratio
6. amount of time person devotes to volunteer management
7. volunteer Managers of Volunteers versus paid Managers of Volunteers
8. agency's positive or negative experiences with volunteers
9. age of volunteer program
10. educational level of Manager of Volunteers

Potential Roles for Volunteer Center Staff As Trainer, Consultant, Facilitator

The following are suggested roles that Volunteer Center staff can take as they share the volunteer management information with their organizations:

Consultant: A Volunteer Center staff, paid or volunteer, could be trained to provide a one-on-one consultation with an organization. A suggested approach might be to help the organization assess its program and then to provide some applicable resources towards a resolution of the problems (i.e., concepts from the Kit, sample forms and models and books or other resources). This could be a fee-based arrangement or could be provided as a service from a Volunteer Center, perhaps sponsored by a corporation or foundation when the service is in its initial stages.

Trainer: There are numerous topics which could be drawn from the Kit to be used in a mini-training series for various kinds of small groups. The groups could be homogeneous or diverse depending on the topics and environment desired. It would be important to do targeted marketing in order to attract the audience which could most benefit from the experience. You may want to send out a questionnaire to determine what the key issues are for some of your organizations and then build your curriculum and series based on the responses. You may wish to link up with the Junior League to involve or incorporate their trainers.

Facilitator: A very natural role for a Volunteer Center staff person would be that of a facilitator. Much like the brown bag series held at many Volunteer Centers, a topic would be selected, people may be given advance written information on the topic, and then the staff person would serve as a group facilitator for representatives from organizations to share information, experience and concerns about the selected topic.

Suggested Basic Format for Consulting and Training for Each Topic Area

I would suggest the following basic format for consulting or training around a topic area in the Resource Kit.

Review the Thought-Provoking Questions at the Beginning of Each Chapter

These questions are placed at the beginning of each chapter so that the user of the book or the consultant or trainer using the book with the client has some opportunity to get a sense of the strengths or weaknesses they might have in each area. "Ignorance is bliss" will disappear when they have some struggle answering these questions. The questions also serve to introduce some of the concepts discussed in the ensuing chapter and thus are a form of introduction to the chapter. It may be beneficial to have individuals in small groups discuss them if you are using the material with groups. It might also be helpful to discuss them in one session, and after there has been some time between the exposure to the learning and the present, have them discuss questions again to determine how much progress they have made in any one area. You will have to caution people about how much time it often takes to make these seemingly minor changes.

Share Key Concepts in Each Chapter

The trainer or consultant may wish to introduce some of the key concepts in each area, helping to tailor them to be applicable to the client or participant(s). Although many of the concepts are fundamental to basic volunteer management, organizations often have difficulty applying them to their particular situation or environment. This is where a trainer or consultant can become very helpful. If you are training, it may be useful to put the key concepts on overheads. This is also a way for you to have notes for the sequencing of the information.

Suggested Activities

We all know that adults are mostly experientially-based, practical learners. Information must be helpful to them for solving immediate problems. To really own a new skill, they must also experiment with it. Thus the need for activities which reinforce the learning. In the brief tips for each chapter, I have given a few suggested activities which would enhance the learning of each topic. You will also be able to develop some practical applications after you know your audience or client.

Referral to Other Sources

For organizations that wish more in-depth information on the topic, I have given specific references for each topic at the end of each chapter. You may wish to continually list new resources as you discover them. It is also a potential source of revenue if you provide commission sales on the books or resources you recommend for further work on each topic.

Local Resources

You may also want to add resources that are in your local area such as particular trainings, libraries which house books on volunteer management, local consultants and trainers, services of your Volunteer Center, etc.

Training/Consulting Tips for Chapter 1

The Position of Manager of Volunteers

Purpose of the Chapter:

- * To understand the changing, challenging, significant role of a Manager of Volunteers
- * To explore options for staffing the position
- * To identify organizational issues that may be affecting the impact of the Manager of Volunteers
- * To examine the job functions, skills and qualities of a Manager of Volunteers

This chapter would be excellent for a discussion with Executive Directors, individuals seeking a position as Manager of Volunteers, or for people holding such a position and not having clarity or support from their organization.

Suggested Activities:

- * Write (or re-write) a job description for your position as Manager of Volunteers.
- * Evaluate your skills and qualities as they compare to those needed in the position of Manager of Volunteers.
- * Discuss your effectiveness in your organization as it is impacted by:
 - position title
 - time committed to the job
 - placement on the organizational chart
 - budget for the volunteer program
 - staff support
- * Discuss methods to change the above factors if they are having a significantly negative impact on your effectiveness.

Additional References:

There are very few references on this topic. The strongest and most useful is Susan Ellis' book From The Top Down, which was written for Executive Directors to more thoroughly understand their role in establishing and supporting a volunteer program within their organization. Another excellent resource is Volunteer Administrator's Network of Central Ohio, The Volunteer Administrator...Complete Your Management Team. (To order write: CALLVAC Services, Inc., 370 S. Fifth Street, Columbus, Ohio 43215.)

Training/Consulting Tips for Chapter 2

Volunteer Program Assessment

Purpose of the Chapter:

- * To expand awareness of the need, uses and values for volunteer program assessment
- * To broaden awareness of assessment potential by staff, volunteers and clients
- * To provide tools to access information for an assessment

Suggested Activities:

- * Have participants plan an agency assessment:
 - gaining support from the Director
 - setting timeline
 - developing questionnaires or group/individual questions
 - planning a report-back system and/or form
- * Have participants develop an assessment form using those in the Kit as models but altering them to suit their particular needs, etc.
- * Have a second session about 2-3 months after the instructional session. Have them report back their findings. As trainer, you facilitate discussion as to interpretations and suggested responses.
- * Help them develop a written plan for proposed changes as a result of the survey/assessment questionnaires.

Additional References:

Currently the best published reference on performing an agency assessment is found in the back of the book, At The Heart: The New Volunteer Challenge to Community Agencies by Nora Silver. Additional references and forms are being developed by some national trainers and consultants in the volunteerism field and should be added to this section as soon as they are published.

Training/Consulting Tips for Chapter 3

Forms and Recordkeeping System

Purpose of the Chapter:

- * To share tips in developing a useful recordkeeping system
- * To identify 4 major categories for keeping records:
 - initial volunteer enrollment
 - individual volunteer work records
 - effects of volunteer involvement
 - general management records
- * To share examples and models for recordkeeping forms which can be modified for your own purposes

Suggested Activities:

- * Have participants think through what information is necessary to gather in order to determine whether they have an efficient volunteer program within their organization.
- * Have participants develop or revise any necessary forms or systems to keep track of the needed information.
- * If you are working with a small group of agency people, ask them to bring copies of their forms and systems to share with other participants.
- * Analyze an organizations's forms and systems related to their stated need for various types of information (i.e., do they have the best system to collect the information needed).
- * Bring in a computer expert to talk about the potential for types of records to be kept on computer files.

Additional References:

The key references for volunteer recordkeeping are Susan Ellis and Katherine Noyes' book Proof Positive: Developing Significant Volunteer Recordkeeping Systems, and Steve McCurley's handy book Volunteer Management Forms, which gives the reader basic form examples and the permission to alter or copy them.

Training/Consulting Tips for Chapter 4

Volunteer Insurance and Tax Issues

Purpose of the Chapter:

- * To introduce Managers of Volunteers to their role in insurance protection and risk management
- * To share key points about insurance issues related to volunteers
- * To review existing laws regarding tax deductions for volunteers and to provide the address and phone number to get an annual update of this information
- * To provide sample forms for volunteers to use in keeping track of their related tax deductions

Suggested Activities:

- * Have Managers of Volunteers develop a written description of insurance policies related to the volunteer program in their organization. (They could be asked to talk with their agency insurance agent before they come to the session in which liability issues and insurance will be discussed.)
- * Have Managers of Volunteers think through any high risk situations with which their volunteers may be involved. Discover if the agency and the volunteers are protected for these activities.
- * To reinforce learning with tax deductions, give participants a list of items, some of which are and some of which are not tax deductible, and have participants check off items which they believe are tax deductible for their volunteers.

Additional References:

Susan Ellis' book From The Top Down, pp. 118-125, has an excellent section written by a lawyer on questions of law relating to volunteer programs. Steve McCurley has published many articles on tax and legal issues appearing in the Journal "Voluntary Action Leadership." Since each state has its unique set of laws regarding volunteer liability, police checks, etc., it is advised to get your state's list of laws and impending legislation.

Training/Consulting for Chapter 5

Planning and Budgeting for Volunteer Programs

Purpose of the Chapter:

- * To have Managers of Volunteers become aware of the significance of their role in planning for the agency's use of volunteers
- * To share planning outlines and examples
- * To indicate items which should be part of a budget for managing a volunteer program
- * To explore options for determining the value of volunteer time

Suggested Activities:

- * Discuss strategies and importance of getting Managers of Volunteers involved in the planning process of their organizations.
- * Have Managers of Volunteers use MBO (Management By Objectives) to set a goal and an action plan to reach by some specific time frame in the future.
- * Have Managers of Volunteers evaluate their current budget, or, if they are operating without one, develop a budget using the Karn Equivalency Model of determining volunteer value. (See Chapter 5 in The Resource Kit.) Have Managers of Volunteers determine the value of volunteer-donated time for one position in their organization.

Additional References:

I would highly recommend all references listed in the annotated bibliography of the Kit, but if the client or participant can only avail themselves of one resource, I would suggest chapters 3, 11 and 13 in Susan Ellis's book From The Top Down.

Training/Consulting Tips for Chapter 6

Volunteer/Staff Relations

Purpose of the Chapter:

- * To appreciate the significance of good staff/volunteer relations
- * To be able to identify and detect any symptoms of staff resistance
- * To have an understanding of the potential causes of staff resistance
- * To understand the role of the Manager of Volunteers in volunteer/staff relations
- * To learn numerous ways to promote strong volunteer/staff relations within an organization

Suggested Activities:

- * Have Managers of Volunteers assess their organizations for any symptoms of possible staff resistance to using volunteers.
- * Put Managers of Volunteers in the role of the other paid staff in their organizations and ask them why they might resist using volunteers. (This will further sensitize them to some valid reasons for resistance.)
- * After discussing generalized methods of promoting good staff/volunteer relations, ask participants to devise 2 or 3 new ways to counter the problem within their organizations.

Additional References:

An excellent book, Essential Volunteer Management by Steve McCurley and Rick Lynch has a very good section on volunteer/staff relations (pp. 119-130). Another good source of information is From The Top Down by Susan Ellis, Chapter 5, "Understanding The Volunteer/Salaried Relationship," pp. 61-73.

Training/Consulting Tips for Chapter 7

Designing Volunteer Jobs

Purpose of the Chapter:

- * To appreciate the significance of job design in an organization
- * To think expansively when thinking job design
- * To learn methods of involving staff in the design of volunteer jobs
- * To assess agency's managerial readiness for using volunteers
- * To learn to write job descriptions

Suggested Activities:

- * Have Managers of Volunteers discuss new ways to utilize volunteers in their organizations.
- * Have Managers of Volunteers develop a new volunteer position which is designed from a release of tasks from their job description. (This will help prepare them to utilize this technique with their staff. See form, "Staff participation in designing volunteer jobs" in Resource Kit, Chapter 7.)
- * Have participants design new or revised job descriptions for their agency's volunteers if theirs do not include the essential elements of job design.

Additional References:

Two key resources for job design are Steve McCurley and Rick Lynch's Essential Volunteer Management, Chapter 3, "Creating Volunteer Jobs", pp. 27-38, and Marlene Wilson's The Effective Management of Volunteer Programs, Chapter 6, "Designing Jobs and Recruiting to Fill Them," pp. 101-120.

Training/Consulting Tips for Chapter 8

Recruiting Today's Volunteers

Purpose of the Chapter:

- * To expand participants' sense of who volunteers and why
- * To discover the impacts of demographic trends on volunteering
- * To examine the two major types of recruitment
- * To learn the 3 key elements in every recruitment message
- * To focus on recruitment of special populations

Suggested Activities:

- * Have participants identify the demographic trends most impacting their volunteer recruitment efforts. Ask them to share their plans to address the needed changes in recruitment or job design.
- * Have participants identify jobs in their organizations which call for non-targeted or targeted recruitment.
- * Participants can fill out the recruitment strategy form on a new volunteer they are attempting to recruit.
- * After learning of the 3 elements of a recruitment message and being exposed to some examples, let them develop their own message for a volunteer job within their organization.
- * Have participants explore ways to incorporate non-traditional volunteers into their ranks.

Additional References:

An excellent resource on recruitment is found in the book Essential Volunteer Management by Steve McCurley and Rick Lynch, Chapter 4, "Recruitment," pp. 41-57. There are also many excellent articles on the short-term volunteer ("episodic") by Nancy Macduff. Steve McCurley's book Recruiting Volunteers for Difficult or Long-Term Assignments gives practical ideas for attracting long-term volunteers.

Training/Consulting Tips for Chapter 9

Screening Through the Interview Process

Purpose of the Chapter:

- * To learn the purpose and values of taking time to personally interview prospective volunteers
- * To learn or review the 4 key steps in an interview
- * To learn techniques to say “no” to a prospective volunteer
- * To review the principles of 2 key skills in interviewing: open-ended questions and listening
- * To be sensitized to conducting non-discriminatory interviews
- * To learn how to prepare a contract between the volunteer and the organization

Suggested Activities:

- * Design open-ended questions that will elicit the necessary information you need in order to ensure the selection of the most qualified volunteer for a position in your agency.
- * Pair off participants. Give them a controversial topic to discuss (i.e., what are your feelings on abortion?). Ask one person to carefully **listen** to his/her partner for 5 minutes without making any statements or judgments. Then ask the listener to feed back what he/she heard. Reverse the procedure. Discuss how difficult listening is.
- * Have participants develop a sample agency/volunteer contract.
- * Give participants an opportunity to do some role play with interviewing.

Additional References:

Marlene Wilson's book The Effective Management of Volunteer Programs continues to have one of the best sections on volunteer interviewing - Chapter 7, "Interviewing and Placing Volunteers," pp. 121-138. An excellent recent resource is found in Steve McCurley and Rick Lynch's book Essential Volunteer Management, Chapter 5, "Screening and Interviewing," pp. 61-66.

Training/Consulting Tips for Chapter 10

Orientation and Training in Volunteer Programs

Purpose of the Chapter:

- * To learn what information should be included in a volunteer orientation session
- * To discover the essential pieces of information that should be included in a volunteer manual or handbook
- * To learn tips on volunteer job training and coaching
- * To look at ways to orient and train the staff in the effective utilization of volunteers

Suggested Activities:

- * Have participants share any written materials they have developed in the orientation or training of volunteers or staff.
- * In small groups, have participants help each other design the most effective type of orientation system to offer new volunteers in their organization (i.e., how often held, formal or informal, on-site or off-site, required or optional, use of video or special materials, which staff involved, etc.).
- * Discuss methods and times for training staff in the use of volunteers (i.e., in-service training, staff meetings, new staff orientations, etc.).
- * Problem solve around the issue of the Executive Director's resistance to allowing staff training in using volunteers.

Additional References:

For organizations who have not developed policy manuals, a good resource is Steve McCurley's monograph, Volunteer Management Policies. Two other good sources are 101 Ideas for Volunteer Programs by Steve McCurley and Sue Vineyard, pp. 38-47 and Essential Volunteer Management by Rick Lynch and Steve McCurley, Chapter 6, "Orientation and Training," pp. 69-74.

Training/Consulting Tips for Chapter 11

Supervision, Evaluation and Dismissal of Volunteers

Purpose of the Chapter:

- * To learn the unique factors in volunteer supervision
- * To learn key steps in effective delegation
- * To explore methods of supervision
- * To explore the purposes of having volunteer evaluations and some suggested formats to follow in conducting one
- * To learn the reasons and process for dismissing a volunteer and possible alternatives to dismissal
- * To learn how to fire a volunteer (and survive!)

Suggested Activities:

- * Discuss the blocks to good delegation and how to work around them.
- * Discuss the advantages and disadvantages of various types of supervision techniques referred to in the Resource Kit.
- * Practice giving an exit interview utilizing one of the formats in the Kit.
- * Share some “war stories” on firing volunteers and do some role playing to experience the process of firing someone.

Additional References:

An excellent resource for learning the art of delegation is Rick Lynch's book, Precision Management, Chapter 7, “Delegating for Results,” pp. 123-139. There is also a good chapter in Steve McCurley and Rick Lynch's book Essential Volunteer Management, Chapter 8, “Supervision Systems,” pp. 97-106.

Training/Consulting Tips for Chapter 12

Recognition of Volunteers

Purpose of the Chapter:

- * To explore the difference between tangible and intangible forms of recognition
- * To learn essential tips for giving meaningful recognition
- * To expand ideas for recognition techniques
- * To learn creative, inexpensive ways to say, "I noticed you!"

Suggested Activities:

- * Ask several members of the group to share their own experiences with receiving recognition, discussing whether it was meaningful to them and why.
- * Analyze the tangible and intangible ways organizations give recognition. Discuss how well they are received by recipients.
- * Put people in small groups and have them devise the most creative, inexpensive methods of recognition they can.
- * Distribute some flyers where participants can order recognition items.
- * Discuss how you can meet many different people's needs and motivations in a once a year formal volunteer recognition event (i.e., think of the types of people you will be honoring - high achievement, high power, high affiliation people and what their different needs would be for recognition). How would you incorporate all of these into your event?

Additional References:

The major, classic reference in the field is Sue Vineyard's book, Beyond Banquets, Plaques and Pins.