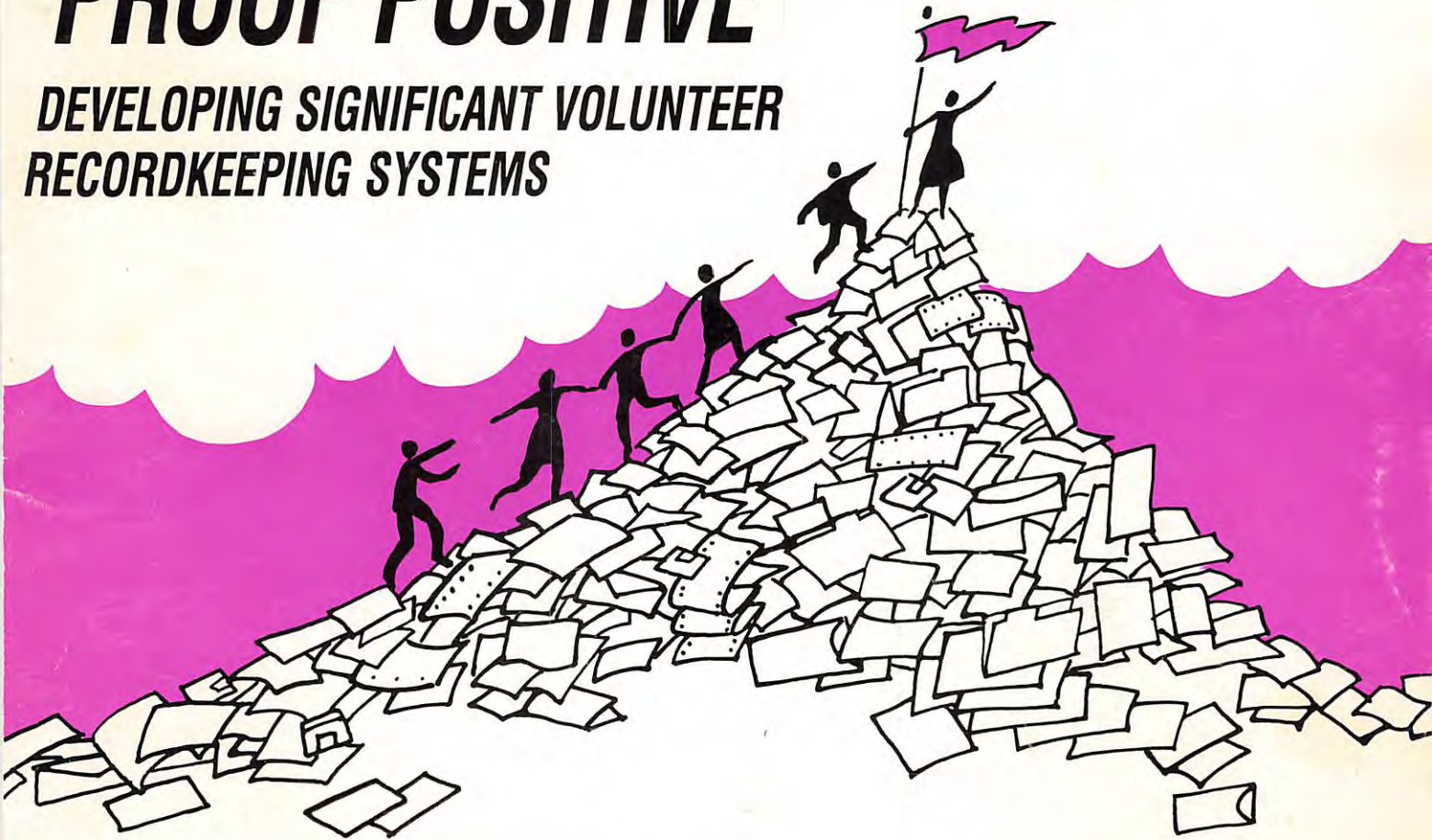


PROOF POSITIVE

DEVELOPING SIGNIFICANT VOLUNTEER RECORDKEEPING SYSTEMS



SUSAN J. ELLIS
KATHERINE H. NOYES

Revised Edition

*including sample forms and
a chapter on computers*

VOLUNTEER
Energize™ Series

A set of guidebooks for
volunteer leaders
published by **Energize**
INC.

PROOF POSITIVE

**DEVELOPING SIGNIFICANT VOLUNTEER
RECORDKEEPING SYSTEMS**

**SUSAN J. ELLIS
KATHERINE H. NOYES**

Revised Edition

*Chapter On Computers:
Bruce W. Bechtold*

*Cover illustration:
Sandy Clay Bauer*

*verso
contents
6 new intro*

24

38

46

51

back page

VOLUNTEER
EnergizeTM
Series

*A set of guidebooks for
volunteer leaders
published by* **Energize***

Electronic edition © 2002 by E, Inc.
ISBN 0940576295
URL:

Copyright © 1990 by ENERGIZE

ISBN 0-940576-10-4 Proof Positive, revised edition Second printing, 1993

ISBN 0-940576-02-3 Volunteer Energy Series (set)

Library of Congress Catalog Number 90-82887

This is a revised edition of **PROOF POSITIVE: DEVELOPING SIGNIFICANT VOLUNTEER RECORDKEEPING SYSTEMS** originally published in 1980 by ENERGIZE, ISBN 0-940576-03-1.

All rights reserved. No part of this book may be reproduced in any form, or by electronic or mechanical means, including information storage and retrieval systems, without permission in writing from the authors. However, individuals may copy sample forms presented in this book for use by volunteer programs.

Contents

	<i>2002 Update: Is this book still relevant in a world of computers?</i>	<i>i</i>
1	THINKING IT THROUGH	1
2	THE CORE SYSTEM	3
	Application Form... Volunteer Tracing System... Volunteer Fact Cards... Volunteer Folders... Master Log... Using the Master Log... Adapting the System ... <i>2002 Update</i>	
3	TIME AND ACTIVITY RECORDS	25
	Individual Time Reports... On-Site Attendance Forms... Off-Site Volunteers... Records about Group Volunteering ... Hard-To-Track Data... Meaningful Data	
4	COMPLETING YOUR SYSTEM	35
	Volunteer Progress Reports... Director's Log... Requests for Service Log	
5	DESIGN DECISIONS	39
	Forms... Format... Order... Color... Printing... Duplication ... Consolidation... Waste	
6	MANAGEMENT AND UPKEEP	43
	Who Does It?... Filing... Weeding and Updating... Guidelines for Forms Use	
7	PROOF POSITIVE	45
	Report Statistics... Dollar Value of Volunteers... Report Narrative... Sample Format	
8	THE MOVE TO COMPUTERS	51
	Do You Need a Computer?... What Can A Computer Do?... Computerized Volunteer Records... Kinds of Computers... "On Line"... A Word on Donations... Getting the Most from Your Computer	
9	PLUNGING IN	57
	Possible Resistance... Get Help... Other Perspectives... Checklist	

Before You Begin...

We feel a kinship with all readers of this booklet because we, too, have struggled with the complexities of designing and maintaining records on volunteer programs. The thoughts and suggestions on the following pages are based on our own experience and on what we have seen done by many other volunteer program directors. We offer these to you because they have been tested in many types of programs and they work!

The material here will make the most sense if you read it through in order, since we try to present a sequential examination of recordkeeping principles. Because every volunteer program is unique, we have not tried to create a single, universal recordkeeping design. Rather, we present the basic elements of a recordkeeping system and guidelines for developing your own version of the forms and procedures described. Although we have provided some "sample forms" as illustrations, our goal was to give you the practical, how-to information necessary to adapt and create a system that is right for you.

We hope you will find PROOF POSITIVE useful whether you are new to volunteer administration or a veteran. Please note that we use the word "program" as a general term to describe what volunteers are doing in the wide variety of agencies and organizations you represent. In the last section we give some ideas for implementing these recordkeeping practices, especially if you want to make changes in an already-existing system. The important thing to remember is that recordkeeping does not have to be drudgery and can become a satisfying (or even fun!) part of your job.

TEN YEARS LATER: In re-examining this book a decade after it was first published, we are pleased that so much of it remains pertinent. We are grateful to readers of the original edition for their comments and suggestions, many of which led to the revisions we have made in the following pages.

Technology has caught up with us and so PROOF POSITIVE now contains a chapter on computers. But a computer is only a tool for doing things faster and with less duplication. You still need a basic system for gathering data and a goal for how you will use it. That is why all the elements of the manual recordkeeping system we present in this book remain relevant even if you have a computer from the beginning of your program. If you later acquire a computer, having organized manual records will permit you to transfer easily to the electronic age.

Susan J. Ellis
Katherine H. Noyes

Philadelphia, 1990

insert page 1?

1

Thinking It Through

2002 Update:

As you read on the ~~fast~~ previous page, in 1990 we were on the cutting edge by even acknowledging the new availability of desktop computers. The world has changed! In 2002 most volunteer offices maintain records electronically.

Do you think of recordkeeping as boring, time-consuming, and unrelated to the more rewarding aspects of day-to-day work with volunteers? Do you gather and report only the minimum amount of data required by "higher-ups"? How often do you re-examine and redesign your forms and procedures? How often do you throw out forms that have lost their value?

In answering these questions, recognize that you control your recordkeeping system and that you can mold it to do whatever you need it to. Recordkeeping only seems a waste of time if it is an end unto itself. Therefore you must integrate this responsibility into the other aspects of program management. Start by identifying the variety of uses to which you can put the data collected. Look at the following list and determine which uses are important to you (and add others not mentioned, of course!):

- To document volunteer achievements
- To document your own achievements
- To justify program expansion
- To provide information for public relations/media contacts
- To convince resistant salaried staff of the worth of volunteers
- To develop a program history
- To recognize the work of volunteers
- To identify gaps in service
- To support volunteers' income tax returns, job resumes, college applications, insurance claims, etc.
- To be accountable
- To demonstrate "community support"
- To use as "in-kind match" in funding proposals
- To identify volunteer training needs

- To keep you in touch with what's going on
- To evaluate program effectiveness

But computers still don't do it all. You still have to gather, analyze, & report on the data. Be organized. You want to know what you need & what you've done. You need to make the data work for you. Don't let it get off target! Procedures for gathering data. 3. The data & report on the target! Procedures for gathering data.

To identify your training needs

To determine age, race, and other characteristics of all the volunteers

To aid in long-range planning

To get information to use in recruitment

Does your present recordkeeping system allow you to do all the things you selected above? If not, the time has come to reassess and redesign your methods.

Begin with this basic principle:

*** A good recordkeeping system
is a SYSTEM. ***

All forms, procedures and records must interlock and logically relate to one another. When a need for new information arises, new data collecting methods must be designed to mesh with the existing system.

2

The Core System

APPLICATION FORM VOLUNTEER TRACING SYSTEM

Volunteer Fact Cards
Volunteer Folders
Master Log
Using the Master Log
Adapting the System

No matter what kind of volunteer program you lead, there is a core of information which your recordkeeping system must provide. This is the data that tells you who is volunteering and for what. Outlined below is a basic system to give you this information.

APPLICATION FORM

A prospective volunteer application form is necessary for two reasons: to assist in your interview and screening process; and to document basic information about in-

dividual volunteers. The form should be seen as a *tool* to be used as a starting point in an interview. Whereas volunteer programs need to ask for some personal data from potential volunteers, there is no real reason to follow the paid employment application model in designing your form. The most common mistake made in designing application forms is to ask too much in writing that tells you too little about the potential volunteer.

Regardless of how you arrange your form, the following are elements to include on a basic application:

ELEMENT	CONSIDERATIONS
<i>(title of form)</i>	The word "application" does not have to appear on the top of the form, since it can be unnecessarily threatening to some individuals. Other options are <i>Prospective Volunteer Profile</i> or <i>Volunteer Candidate Form</i> .
Date	It is useful for follow up and filing purposes to have the date of the application visible at the top of the form.

ELEMENT	CONSIDERATIONS
Name of Volunteer, Address, and Telephone Number	Obviously this is important information, but do you need to ask for both "permanent" and "temporary" locations (such as would be applicable to some student volunteers)? Also, do you need "day" and "evening" telephone numbers?
Age, Sex, Race, Marital Status	These items may or may not be important to your assessment of a potential volunteer. Legally, you must have a <i>specific</i> purpose in asking for this information on a screening application --otherwise volunteers must be given the same civil rights protection as are candidates for employment.
Education	Think about exactly what you most want to know about the applicant's education. Do dates of graduation matter? Could this section of your form discourage a prospective volunteer without a formal degree? You could ask an open-ended question here, such as "describe any training you have had that relates to our type of organization" or "what was your most recent formal education?"
Relevant Experience	Be sure to indicate your interest in <i>both</i> salaried and volunteer work experience. While you may want to know the applicant's present occupation, do you need a lot of detail about present and past employers?
Interests & Skills	You can uncover this information in a number of ways. Realize that just because a person has a skill does not mean he or she necessarily wants to use it on your behalf. So ask for this information in relation to willingness to share the talent. Both open-ended and checklist questions can work well. If you select the checklist format, be sure that volunteer assignments really exist for all the skills listed, or else you are raising false expectations.
Availability	This is information that will probably change often. So you might want to note the person's possible schedule elsewhere rather than on the application form which will be kept as a permanent record.
Emergency Contact	It is a good idea to ask for the name, telephone number, and relationship to the applicant of a person to notify in case of emergency.

ELEMENT	CONSIDERATIONS
References, Transportation Needs, Health Restrictions, Parental Permission, Other Affiliations, Reason for Applying, etc.	<p>These--and other types of information --might be of help to you in screening and assigning a new volunteer. Select <i>only</i> those of real value to you.</p>
"Office Only" Notes	<p>At the bottom or on the back of the application form, leave space in which to jot down your notes during or after the interview, as well as places for indicating "final decision," "assignment," "starting date," etc.</p>
Initial Commitment	<p>It is extremely useful to write down the duration of the initial commitment of service offered by a new volunteer. If you note that a person intends to volunteer for approximately one year, you can later evaluate your retention success or failure.</p>

If the applicant *does not* become a volunteer, the application form should be kept as a record of the interview. This documents time spent by you and interest shown in the program. It might also demonstrate your concern for adequate screening.

Keep non-activated applications in a special folder or binder, chronologically.

If the applicant *does* become a volunteer, you are ready to begin a permanent record of that person's service, using the *volunteer tracing system*.

The following two pages show a sample volunteer application form, using some of the elements as described. As always, adapt this form for your specific needs.



2002 Update: Absolutely, positively ask for e-mail address!

PROSPECTIVE VOLUNTEER PROFILE SHEET

Date: _____

Name: _____
(last) (first) (m.i.)

Mailing Address: _____

(Is this address: ___home? ___business? ___temporary?)

Day Telephone: _____ Evening Telephone: _____

Present Occupation: _____

Employer (or School): _____

Please describe any paid or volunteer work experience you have had that might relate to your interest in volunteering here:

What training or formal education have you had that might help you volunteer with us?

Do you have any physical limitations on the type of work you could do here?

(over)

Interests/Skills The following are some of the skills needed for our volunteer assignments. Place a "C" next to all of those that you can do (and are willing to do!) and an "L" next to any you might like to learn.

- | | |
|-------------------------------------|---|
| ___ Drawing/painting | ___ Calligraphy |
| ___ Newsletter article writing | ___ Photography |
| ___ Computer data entry | ___ Party planning |
| ___ Coaching sports
Which? _____ | ___ Playing an instrument
Which? _____ |
| ___ Receptionist work | ___ Leading tours |
| ___ Working with small children | ___ Working with seniors |

What other skills or interests do you have that you'd like to use in your volunteering?

Availability How many hours per week do you wish to volunteer? _____

If you do not want a weekly schedule, what is your preference? _____

Please use the grid below to show your current availability to volunteer. Mark only those times that you most prefer.

	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday
Morning						
Afternoon						
Evening						

How long would you like your initial commitment to be with us?
 ___ six months ___ one year ___ other: _____

Emergency Contact: _____

For Office Use Only

Date of Interview:
 Interviewer:
 Action:

Notes:

VOLUNTEER TRACING SYSTEM

A three-part record system will assure that you have the following information easily available at all times:

- * exactly who is volunteering now, and for what;
- * basic facts on each volunteer, past and present;
- * the history of every volunteer assignment in the program;
- * comparative data on past and present volunteers.

The three components are: *Volunteer Fact Cards*, *Volunteer Folders*, and a *Master Log*.

Volunteer Fact Cards

This is an index card designed to give you quick reference to the most frequently-needed information about each volunteer. It is usually a 3" x 5" card and therefore can be kept within easy reach on a desk or cabinet. You should have the cards printed so that information can be transferred readily into the spaces provided, and so that the cards will look uniform, allowing information to be found in the same spot on each card. All the data on the Fact Card comes directly from the application form.

Regardless of how you arrange your form, the following are elements to include on a Fact Card:

ELEMENT	CONSIDERATIONS
<i>(order)</i>	Keep in mind that index cards are only partially visible unless removed from their storage box. This means that the most important information <i>to you</i> must be high up on the front of the card.
Name of Volunteer	This should be at the top of the card, last name first for alphabetical filing.
Assignment & Supervisor	This should also be at the top, perhaps in the right corner, opposite "name." Consider marking "assignment" in pencil, since it may change over time and your purpose for the Fact Card is to have <i>current</i> information. Or, leave enough room to add new assignments as they come along. This will avoid having to retype the entire card.
Address & Telephone Numbers	These are also important to have accessible, though you probably need the phone numbers more often than the address.
Emergency Contact	It would be important to have this at your fingertips, but it is hardly used every day. So it can appear on the bottom or even the back of the card.
Schedule	Again, this is changeable and so should be marked in pencil.

ELEMENT	CONSIDERATIONS
<i>(special uses)</i>	Your program may require special uses of the Fact Cards that suggest additional information to be included. For example, daily or weekly telephone contacts might need to be recorded. In this case, you might select a 5" x 8" or larger size card and print columns for "date," "response," etc. But only add such detail if it <i>really</i> contributes to the efficiency of your work.
<i>(duplication)</i>	A duplicate Fact Card might be useful for the volunteer's immediate supervisor to keep. Such a duplicate should be made at the same time as the original is made for your master file of cards.
<i>(active/terminated)</i>	The file box in which you store Fact Cards should be divided into an "active" and a "terminated" section, or "current" and "past." All cards should be filed <i>alphabetically</i> within the appropriate section. It is useful to keep the cards of volunteers who have left the program because you may need to contact them or they may someday "reactivate" themselves.
<i>(special clusters)</i>	This Fact Card file is meant to be a complete program record of all volunteers in alphabetical order. If you feel you <i>really</i> need to identify subgroups of volunteers quickly (such as certain assignments, geographic regions, age groups, etc.), this can be done either by <i>color coding</i> or by making duplicate cards for storage in separate boxes. But for most programs the Master Log (see page 11) will meet these needs.

Here's how a fact card might look:

VOLUNTEER FACT CARD	
Name _____ Day Phone _____ Eve Phone _____ Address _____ _____	Assignment/Supervisor Schedule
Starting Date: _____ Ending Date: _____	
Emergency Contact _____	

Master Log

The Master Log is the most comprehensive and permanent record of your program. Yet it is simple to maintain and provides a wealth of management information.

The Master Log is a looseleaf notebook. All pages follow the same format, but are divided into sections by *volunteer*

assignment category. No matter how many assignments you have--or how few volunteers are handling each one--you must nevertheless make a section for each category.

The Master Log is a *chronological* record of each assignment. Nothing within it is alphabetical--you have your Fact Cards and Volunteer Folders for that.

Each page in the Master Log is headed like this:

Master Log							
Volunteer Assignment: _____							
NAME	AGE	SEX	RACE	START DATE	(Optional Columns)	ENDING DATE	COM'T

The elements of each page, from left to right, include:

ELEMENT	CONSIDERATIONS
Name of Volunteer	It does not matter whether you write first name first or last name first. Remember this is not an alphabetical log.
Age, Sex, Race	<p>One of the catch-22's of administration is that you are legally barred from using information about an applicant's age, sex or race as a screening device, but you are then asked questions by funding sources such as: "what is the racial distribution of your volunteers?" You are permitted to ask for such data <i>once</i> volunteers are <i>accepted</i> into the program. These columns in the Master Log, therefore, allow you to note such data <i>once</i> and in such a way as to provide cumulative program statistics.</p> <p>For <i>age</i>, if you have asked for a birthdate, enter the month and year in the Log. Do not enter the actual age today, since that will change as time progresses. Date of birth never changes. If you do not ask for date of birth, you still have a good</p>

ELEMENT	CONSIDERATIONS
<p>Starting Date</p> <p><i>(optional columns)</i></p> <p>Ending Date</p> <p>Commitment</p>	<p>sense of who falls into certain age ranges: high school, young adults, retired people, etc. So you can develop a <i>code</i> for your own use and exercise your best judgement in placing volunteers into appropriate categories. Then enter the code designation into the "age" column in the Master Log. Be sure to provide a <i>key</i> to your code in the front of the book.</p> <p>Sex can be noted simply as F or M.</p> <p>Race can be coded as necessary, using letters such as: W(hite), B(lack), H(ispanic), A(sian), NA (Native American), etc.</p> <p>Month, day and year--or just month and year, depending on your need. Since this Master Log is a permanent record and will cover all the years of your program activity, always note the <i>year</i> with any date entry.</p> <p>This Log must be useful to you. It should allow you to record <i>major</i> items that you wish to document either for management or reporting purposes. All other information will appear in the Volunteer Folder or elsewhere, so use additional columns in the Log. Some possible column headings to add might be: "orientation date," "uniform receipt date," milestones such as "100 hours served," etc. Use as many or as few columns as are applicable.</p> <p>Month, day and year--or just month and year.</p> <p>If you noted the volunteer's original commitment of service time, you can very easily compare the "ending date" with the "starting date" and assess whether or not the commitment was upheld. (In fact, you may want to use one of your optional columns to record the volunteer's initial commitment period right in the Log.) So, in the last column, you can place either a "✓" for a completed commitment, or a "+" for more time given, or a "-" for less time given. In this simple way, you can definitively report on your retention rate by going down this column and counting your ✓ and + marks.</p> <p><i>Special Note:</i> Despite all the debate about "successful" retention rates, the only really <i>measurable</i> and <i>meaningful</i> indicator of retention is whether a person remains as a volunteer for at</p>

ELEMENT	CONSIDERATIONS
	<p>least as long as s/he initially planned. This means that a person could indicate at the start the intention to volunteer for one month, do so and legitimately stop after that time. By using this "commitment" column, you can record that period of service as <i>fulfilled</i>, rather than having it look as if that volunteer dropped out unexpectedly. The Master Log will be an accurate reflection of the satisfaction of volunteers with their participation in the program.</p>

How to Use the Master Log

In the first week of April 19X1*, you interview and accept a new volunteer, Ann Asset. She will be assigned as a Case Aide, but will begin in June and plans to work for three summer months. You hold her application, but do *not* begin the record-keeping system for her yet.

In the second week of April, you interview and accept Matthew Motivated. He begins work as a Case Aide the following week. You make up a Fact Card and Volunteer Folder for him, with an additional Fact Card for his immediate supervisor. You open the Master Log to the section on Case Aides and enter him on the next available line:

Master Log							
Volunteer Assignment: <u>Case Aides</u>							
NAME	AGE	SEX	RACE	START DATE	(Optional Columns)	ENDING DATE	COM'T
Pearl Previous	3/22	F	B	1/X1			
Ellen Early	1/50	F	H	2/X1			
»»» Matthew Motivated	5/67	M	W	4/X1			

* We are using the accounting textbook trick of 19X1, 19X2, etc. to indicate years in our examples.

April is a big recruiting month for you and you add still another Case Aide, William Willing. (You also add other volunteers who

accept different assignments and are therefore entered onto those designated Master Log pages.)

Master Log							
Volunteer Assignment: <u>Case Aides</u>							
NAME	AGE	SEX	RACE	START DATE	(Optional Columns)	ENDING DATE	COM'T
Pearl Previous	3/22	F	B	1/X1			
Ellen Early	1/50	F	H	2/X1			
Matthew Motivated	5/67	M	W	4/X1			
William Willing	2/21	M	NA	4/X1			

2

During May, you keep adding volunteers, but no new Case Aides. And then

suddenly it's June. Ann Asset reports to work and you enter her accordingly:

Master Log							
Volunteer Assignment: <u>Case Aides</u>							
NAME	AGE	SEX	RACE	START DATE	(Optional Columns)	ENDING DATE	COM'T
Pearl Previous	3/22	F	B	1/X1			
Ellen Early	1/50	F	H	2/X1			
Matthew Motivated	5/67	M	W	4/X1			
William Willing	2/21	M	NA	4/X1			
Ann Asset	3/58	F	H	6/X1			

3

By the end of the summer, your Case Aide list has grown nicely. By August 30, however, two volunteers have departed. One is Ann Asset who, as you remember, was only scheduled to work for the summer and therefore fulfilled her commitment.

However, Sam Surprise got transferred in his salaried job and is moving out of state. He leaves unexpectedly after only one month of service. Your Master Log page will record all of this as follows:

Master Log							
Volunteer Assignment: <u>Case Aides</u>							
NAME	AGE	SEX	RACE	START DATE	(Optional Columns)	ENDING DATE	COM'T
Pearl Previous	3/22	F	B	1/X1			
Ellen Early	1/50	F	H	2/X1			
Matthew Motivated	5/67	M	W	4/X1			
William Willing	2/21	M	NA	4/X1			
Ann Asset	3/58	F	H	6/X1		8/X1	✓
Debbie Duty	4/52	F	B	6/X1			
Molly Mediocre	1/35	F	B	7/X1			
Sam Surprise	8/63	M	W	7/X1		8/X1	—
Fred Fervent	9/37	M	A	8/X1			

Use a yellow or other very light color "highlighter" marker and *cross through the entire line* of those volunteers who have terminated. In this way, you can tell at a glance who is active, and who has left. Yet the information remains readable and part of the overall historical record of that assignment.

There are three common contingencies that the Master Log system accommodates:

- (1) volunteers who hold more than one assignment
- (2) volunteers who transfer assignments
- (3) volunteers who reactivate after a previous termination

(1) *More Than One Assignment:* One of the problems of systems that do not break down data assignment-by-assignment is that volunteers who handle several responsibilities at the same time often do not get credit for them. Also, it is easy to forget the extra hands that kept a certain project going during a peak period. The Master Log avoids this by legitimately documenting the complete involvement of each volunteer.

Begin by determining the "primary" role of the volunteer, either based on the assignment receiving the greatest proportion of hours served or arbitrarily. For example, Tillie Talent is a Case Aide who occasionally does art work. You therefore consider "Case Aide" as her primary assignment and "Artist" as her additional assignment. The Case Aide page in the Master Log would look like this:

Master Log							
Volunteer Assignment: <u>Case Aides</u>							
NAME	AGE	SEX	RACE	START DATE	(Optional Columns)	ENDING DATE	COM'T
Pearl Previous	3/22	F	B	1/X1			
Ellen Early	1/50	F	H	2/X1			
Matthew Motivated	5/67	M	W	4/X1			
William Willing	2/21	M	NA	4/X1			
<hr/>							
Fred Fervent	9/37	M	A	8/X1			
»»» Tillie Talent (also Artist)	6/61	F	W	9/X1			

On the page for Artists, Tillie is entered like this:

Master Log							
Volunteer Assignment: <u>Artists</u>							
NAME	AGE	SEX	RACE	START DATE	(Optional Columns)	ENDING DATE	COM'T
Art Nouveau	11/59	M	W	8/X1			
»»» **Tillie Talent (p: Case Aide)	6/61	F	W	9/X1			

The designation "p: Case Aide" tells you Tillie's *primary* assignment. In this way, Tillie is credited for two simultaneous assignments and you have an accurate count of how many Case Aides *and* how many Artists you have working. However, because

of the two asterisks (**) preceding Tillie's name on the Artist page, you will not count her a second time in any *overall* volunteer count. She will be "picked up" when you count the Case Aide page.

(2) *Transfers*: Transfers are easy. Let's say Joe Jump begins work in September as a Case Aide, but in October decides he would

rather be a Driver. On the Case Aide page in the Master Log, you enter this:

Master Log							
Volunteer Assignment: <u>Case Aides</u>							
NAME	AGE	SEX	RACE	START DATE	(Optional Columns)	ENDING DATE	COM'T
Pearl Previous	3/22	F	B	1/X1			
Ellen Early	1/50	F	H	2/X1			
Matthew Motivated	5/67	M	W	4/X1			
William Willing	2/21	M	W	4/X1			
~~~~~							
Tillie Talent (also Artist)	6/61	F	W	9/X1			
→ Joe Jump	3/70	M	W	9/X1		Transfer to Driver 10/X1	

On the Driver page, you enter this:

Master Log							
Volunteer Assignment: <u>Drivers</u>							
NAME	AGE	SEX	RACE	START DATE	(Optional Columns)	ENDING DATE	COM'T
Bill Buss	4/51	M	W	7/X1			
Kelly Carr	5/60	F	A	8/X1			
→ Joe Jump	3/70	M	W	Transfer from Case Aide 10/X1			

(3) *Reactivated Volunteers*: Also easy. Find the volunteer's name in the previous pages, noting his or her termination date. Re-enter the reactivated volunteer on the appropriate assignment page. Next to the new starting date, note: "Reactivated."

## ADAPTING THE SYSTEM FOR YOU

The Master Log concept is very flexible and can be adapted to a variety of circumstances. For example, if you are coordinating a volunteer program with several building sites, you can create a separate Log for each location. If you need to track certain special categories of volunteers, such as student interns, court-referred, or work program/stipended, you can label a section of the Log for them. Similarly, create Log sections for your Advisory Council or for service on major committees.

Some programs find it helpful to assign each new volunteer a number that is then used for filing, computer entry, and statistical counting. Numbers are not re-used when volunteers leave the program, so the digits keep ascending. If you have this sort of system, designate the *first* column in the Master Log for "number" and note it before each volunteer's name. When volunteers hold more than one assignment, their individual number is repeated on each Log page. If a volunteer re-activates, his/her original number is also reactivated.

The beauty of the Master Log is that simply by *counting* information in the columns, you can quickly and accurately answer a wide variety of questions about your program at any particular date in time. To demonstrate how you do this, use the following pages to give it a try.

*On the following two pages you will find the four Master Log sheets previously presented.*

*Pretend it is October 31, 19X1. (Happy Halloween!)*

*See if you can answer the questions below by carefully counting the columns of data given. The answers appear on page 22.*

## QUESTIONS

1. How many volunteers have been active with the program during 19X1?
2. How many volunteers have been with the program since it started in January?
3. How many volunteers began work during October 19X1?
4. How many Artists are there currently in the program?
5. How many Receptionists are there currently in the program?
6. How many volunteers terminated during October?
7. Of the three volunteers who terminated since January, how many maintained their initial commitment of service?
8. How many men and how many women have volunteered so far this year?
9. How many volunteers this year have been over the age of 60? (For this exercise, consider anyone born on or before 1930 to be 60+.)
10. How many volunteers are actively involved as of October 31?



Master Log							
Volunteer Assignment: <u>Artists</u>							
NAME	AGE	SEX	RACE	START DATE	(Optional Columns)	ENDING DATE	COM'T
Art Nouveau	11/59	M	W	8/X1			
**Tillie Talent (p: Case Aide)	6/61	F	W	9/X1			

Master Log							
Volunteer Assignment: <u>Case Aides</u>							
NAME	AGE	SEX	RACE	START DATE	(Optional Columns)	ENDING DATE	COM'T
Pearl Previous	3/22	F	B	1/X1			
Ellen Early	1/50	F	H	2/X1			
Matthew Motivates	5/67	M	W	4/X1			
William Willing	2/21	M	NA	4/X1			
Ann Asset	3/58	F	H	6/X1		8/X1	✓
Debbie Duty	4/52	F	B	6/X1			
Molly Mediocre	1/35	F	B	7/X1			
Sam Surprise	8/63	M	W	7/X1		8/X1	—
Fred Fervent	9/37	M	A	8/X1			
Tillie Talent (also Artist)	6/61	F	W	9/X1			
Joe Jump	3/70	M	W	9/X1		Transfer to Driver 10/X1	

Master Log							
Volunteer Assignment: <u>Drivers</u>							
NAME	AGE	SEX	RACE	START DATE	(Optional Columns)	ENDING DATE	COM'T
Bill Buss	4/51	M	W	7/X1			
Kelly Carr	5/60	F	A	8/X1			
Joe Jump	3/70	M	W	Transfer from Case Aide 10/X1			

Master Log							
Volunteer Assignment: <u>Receptionists</u>							
NAME	AGE	SEX	RACE	START DATE	(Optional Columns)	ENDING DATE	COM'T
Polly Polite	9/42	F	B	1/X1			
Henry Hie	8/50	M	A	2/X1		10/X1	+
Doris Door	3/66	F	W	5/X1			
Gail Grin	8/58	F	W	10/X1			

## ANSWERS

1. 18 (Remember: do not count Joe Jump or Tillie Talent twice)
2. 2
3. 1 (Joe Jump was transferred in October, but not newly added)
4. 2
5. 3
6. 1 (And 1 "transferred")
7. 2 (1 exactly and 1 more than originally committed)
8. 8 men, 10 women
9. 2
10. 15

How did you do? It becomes easier with practice. Obviously, what you just did with only four Master Log pages can work in exactly the same way for as many assignment categories and volunteers as you have.

On the next page is a blank Master Log form. We have left two blank columns for your optional use.





## 2002 Update.

This chapter may seem hopeless outdated to you because of its discussion of such quaint tools as paper index cards. ~~The~~ The majority of readers will immediately go to a computer to set up their records, bypassing manual forms. But, again, the basic concepts of what information you need about tools, & how you need to keep it current — beyond an "address list" — are as important to define in 2002 as they were when recordkeeping was done on parchment with quill pens!

# 3

## Time and Activity Records

INDIVIDUAL TIME REPORTS  
ON-SITE ATTENDANCE FORMS  
OFF-SITE VOLUNTEERS  
RECORDS ABOUT GROUP  
VOLUNTEERING  
HARD-TO-TRACK DATA  
MEANINGFUL DATA

For better or for worse, tallies of volunteer hours served are almost universally requested as a primary indicator of the contribution of volunteers to an organization or community. Documenting hours sounds straightforward, but can become a headache as programs grow in size and complexity. The goal, therefore, is to develop a method of collecting this data that is accurate and workable. Variables to consider in designing forms and procedures include:

*The location of volunteer service:* Do all or some volunteers actually work on-site in an organizational office/facility? Do all or some volunteers work at scattered sites, or on their own?

*Hidden time:* Are volunteers spending additional time preparing for their volunteer assignment or doing outside things related to the organization? Is such service being effectively documented?

*Your needs vs. other needs:* Does your facility require a daily record of who was in the building? How often do

you want to compile tallies of hours for both individual volunteers and the program as a whole?

Note that there is a distinct difference between the need to document the ongoing service record of each volunteer and the value of knowing how many and which volunteers serve on a given day or during a given month. You may want to do *both*, but the rationales are different. The former is part of your necessary supervision, recognition, and support of volunteers as individuals. The latter provides management information to help you in program and space scheduling, planning, and salaried staff relations, as well as providing a legal record for the agency.

There are many models of documenting time being used successfully in countless programs. If you have a system that works for you, that's great. However, if you have no system yet or are dissatisfied with what you are now doing, consider the following possibilities.

## INDIVIDUAL TIME REPORTS

An Individual Time Report is a one-page form designed to be completed by each volunteer and submitted to you on a regular basis. This is one instance in which the

procedure you develop for completing and collecting the Time Reports is as important as the form itself. Regardless of how you arrange your form, the following are elements you might include:

ELEMENT	CONSIDERATIONS
<p><b>Name of Volunteer &amp; Assignment</b></p> <p><b>Period Covered</b></p>	<p>Obviously this information is needed at the very top of the page.</p> <p>There should be a space for noting the "Week of _____" or the "Month of _____," or whatever period of time you have designated.</p>
<p><i>It is easiest to design time sheets in columns; the following are possible column headings:</i></p> <p><b>Date</b></p> <p><b>Hours</b></p>	<p>For each day on which the volunteer works, an entry will be made.</p> <p>This can either be a column for "total hours" that day, or be a more detailed breakdown such as:</p> <p style="padding-left: 40px;">In /Out for Meal/In from Meal/Out</p> <p>This information can be filled in exactly or rounded off to the nearest quarter or half hour.</p> <p><i>Special Note:</i> There are times when it is hard to pinpoint exact number of hours served. It is legitimate to <i>estimate</i> the average time for a particular volunteer task and to use that in a time tally. For example, taking a child to the movies might be "counted" as 4 hours of service (in the knowledge that sometimes this activity takes more or less time, balancing your estimate). See page 30 for more on this way to record volunteer work not conducive to "signing in."</p>
<p><b>Location</b></p> <p><b>Summary of Activities</b></p>	<p>You might want to know where the time was spent: "office," "field," "client's home," "own home," etc.</p> <p>You might want to create a wide column in which a volunteer can note the type of activity (or highlights) handled on each date recorded. If you want to know the names of the clients/participants with whom the volunteer spent time, ask for that</p>

ELEMENT	CONSIDERATIONS
	<p>to be included here. Encourage volunteers to log time spent <i>preparing</i> for volunteer work as well as time on site. Such a record not only gives you a quick overview of how volunteers are being utilized, but also gives the volunteer a sort of progress diary of his or her involvement.</p>
<p><b>Questions, Problems, or Suggestions</b></p>	<p>Another possible column could be for noting questions or problems needing supervisory attention. But if volunteers write things into this column, be sure that you (or someone) respond!</p>
<p><b>Total Hours</b></p>	<p>At the bottom of the sheet, leave space for totalling the hours recorded on the sheet.</p>
<p><b>Supervisor's Signature</b></p>	<p>You might find it useful to have the volunteer's immediate supervisor (paid or volunteer) sign the form after reviewing it. This is the person most likely to notice if the volunteer did not record all time contributed in that period and can follow up to complete the data.</p>

Train all volunteers to complete their Individual Time Report every day they work for you. You must continually emphasize the importance of this quick task, and explain its value *to the volunteer*. Points to stress are:

- * having an accurate record of days and times served supports a volunteer's IRS forms and insurance claims, and documents work experience for resumes;
- * the volunteer doubles his or her contribution to the organization by keeping accurate time records that can later be converted into in-kind matching funds for a variety of grants;
- * keeping track of hours and activities leads to appropriate recognition.

If you set forth the firm expectation that completing Time Reports is part of a volunteer's job, you will get results. Do not

let those few individuals who are lax in completing the forms get away with it. Follow up and *prove* you read them!

Where you physically place the Individual Time Reports has a great deal to do with how well they are completed. Options include:

(1) Individual "mail slots" for each volunteer: This works for smaller programs in which volunteers work on site. Make sure the forms are *kept* in each slot and are collected and replaced by your office each month (or week) *on time*. You might want to print the form on brightly colored paper so that it will always be visible in the slot, regardless of other mail or messages.

(2) A *looseleaf notebook* containing all Individual Time Reports in alphabetical order. This can either be kept as one notebook in a central location or as several notebooks





placed at the main work sites for volunteers. Again it is imperative that the sheets are collected and replaced on time.

When you collect the Individual Time Reports each month or week, see that each volunteer's "total" of hours served is entered on the Individual Work Record in that volunteer's Folder (see page 10 ). For your program reporting needs, you compile whatever totals you wish, e.g., number of hours given to each assignment, number of hours given per site, etc. Then you file the entire set of Individual Time Reports together in a folder and file each folder in chronological order.

For volunteers holding more than one assignment, you can either make up two separate Time Reports (noting on each sheet that it is part of a set), or you can use the one form and instruct the volunteer to record which assignment he or she was carrying on which date. Then you can total the hours for each assignment separately on the same sheet.

A sample Individual Time Report, incorporating many of the elements just suggested, appears on the previous page.

## ON-SITE ATTENDANCE FORMS

Those of you who want to be aware of which volunteers are on-site on a daily basis must utilize an additional form. Options include:

*Daily Sign-In Sheet:* This is not meant to replace the Individual Time Reports because that would require the immense task of finding and transferring all data on individual volunteers from up to 31 sheets per month. Rather, it should be a simple form requiring a volunteer to sign in as proof of attendance that day. The volunteer logs hours, other notes about activities or progress (see page 35), etc. on his or her Individual Time Report, kept near the Sign-In Sheet. Do not ask volunteers to repeat hours on both forms. This would be unnecessary duplication. Keep in mind that this system requires storage of up to 31 lists per month. Do you want this?

*Monthly Grid:* An easier and more useful method would be to design a monthly grid such as the one on the next page.

You write all the volunteers' names in the left column at the start of the month, adding new volunteers as necessary. You can make up a grid for each assignment. The grid itself can be large and posted on a wall.

Each volunteer places a check mark in the appropriate date column, next to his or her name, when reporting to work. The volunteer also completes the Individual Time Report, kept near the grid. Or, you can eliminate the separate Time Report by asking each volunteer to enter the total hours served each day in the correct box.

This method allows you to count volunteers in attendance each day as well as for the entire month. At a glance, you see attendance patterns, both for individual volunteers and for the program as a whole. You can cross check the accuracy of the Individual Time Reports by making sure that every volunteer has logged hours for each day checked on the grid.

If volunteers are recording their hours directly onto the grid, adding across on each line gives you each volunteer's monthly total of hours, while adding down tells you the number of hours contributed each day by all volunteers in attendance.

## OFF-SITE VOLUNTEERS

Much of this discussion on how to record volunteer hours focuses on volunteers who serve in your facility, coming on site to do their work. But many volunteer assignments do not require this sort of physical base and are done off-site instead, in "the field." This means that you, as program leader, do not see volunteers while they are working and can only capture their contributions by relying on them to report back to you. It is possible to use the same time or progress reports for off-site volunteers as for on-site ones, but ask that the forms be mailed in to you on a monthly basis. You can even supply a stamped, self-addressed envelope for this purpose.

Because many programs have found it difficult to get 100% cooperation in



their reports on the units of activities, you multiply these times the hour estimates you have established and are able to report the "estimated total hours contributed" with a high degree of accuracy.

As with all averages, it is true that some games or visits will be longer and others shorter than usual. But over time these will balance out. If a volunteer has spent an exceptionally long time on a particular activity, s/he can certainly report this to you for inclusion in the statistics.

## RECORDS ABOUT GROUP VOLUNTEERING

The parts of the core system just described are for keeping track of individual volunteers. However, you may also be working with community groups or other organizations that provide you with the time and services of their members.

Make up a *folder* for each sponsor organization and keep these folders in a special section of your file. Each folder can then store all correspondence and other records related to the sponsor. The very first sheet of paper in the folder should be the current name, address and telephone number of your contact or liaison with the group--this year's president, project committee chair, etc. Further, you can attach a modified version of the Individual Work Record onto the inside cover of the folder. This is where you record the dates and special projects done by group members.

Your recordkeeping procedure will be determined by the way in which volunteers come to you from the sponsor organization:

*Assigned to You Regularly:* If volunteers from the group are assigned to you on a regular basis, you can incorporate them into your usual recordkeeping system as individuals. You can note on their individual Volunteer Folders that they come via a particular sponsoring group.

*Sent for Special Projects:* If the sponsor is sending a group of volunteers to handle a one-shot project, such as a party, you need a method to document the number of people involved and the amount and type of

involvement. Therefore, you can develop a *Special Projects Report* that can be completed on the day of the event. At the top of the form, provide space for date, name of sponsor group, type of activity, and other identifying information. Then provide lines for each participating volunteer to sign in (which documents the names of everyone involved for insurance purposes and also for later recognition/thanks by you). If you expect to send personal notes of appreciation, have each volunteer also give you his/her address on the form.

If the participating volunteers are all coming and leaving at the same time, you can simply note the number of hours the activity took and multiply that times the number of volunteers to determine the total contribution of time for that event. If each volunteer serves on a different schedule, or spent a different amount of time preparing for the event, make a column for "hours" and have each person note her or his personal total on the line with name and address. Then you can add up the column to calculate the grand total of hours contributed.

Note the name of the leader of the group and ask her or him to initial the form, indicating that it shows the names of all participants, before submitting it to you. Special Project Reports should be filed in the manner most useful to you:

- * If you want a history of that group's involvement, file their Reports in their folder.
- * If you want a yearly record of all group projects regardless of sponsor, file all Reports into a yearly "Special Projects" folder.
- * If you want a monthly compilation of all volunteer activity, both individual and group, file the Special Projects Reports in the monthly folders with the Individual Time Reports.

You can cross-reference information as necessary. Remember to pick up the tally of hours served from the Special Projects Reports when compiling and reporting your grand totals of all volunteer activity.

See next page for a sample Special Project/Group Sign-In Sheet.



## HARD-TO-TRACK DATA

Your volunteer program may benefit from some types of volunteer services that are difficult to document--yet should be reported and recognized in some way. Some examples are:

- * the time spent by members of the Board of Directors
- * the work various committee members do in-between meetings
- * the contribution of "on call," standby volunteers
- * the involvement by clients of your organization as participants in self-help efforts or in running a special event
- * the time spent by any volunteer preparing for an on-site assignment

These sorts of contributions are often invisible to the organization even though they are critical to the success of programs.

You might develop a quarterly report form to "capture" this sort of contributed service, giving people the opportunity to tell you what they have been doing on your behalf that has not been documented elsewhere.

## MEANINGFUL DATA

Whether or not you collect and report on hours contributed by volunteers, remember that the only valid indicator of the *impact* of volunteer service is the quantity and quality of *work performed*. Therefore, you always want to keep data on what volunteers do as well as on how long it takes them to do it: number of patients visited, number of children tutored, number and variety of special entertainment provided, etc.

If you can report on "benchmarks" achieved, you will do even more to show the value of volunteers. For example, how many students have moved to a higher reading level as a result of volunteer tutoring sessions? How many probationers have improved their school or work attendance since being matched with a volunteer? What percentage of residents now attend the weekly exercise class as compared to before the volunteers accompanied them? This type of information will not only mean something to your administration, it will be important recognition to volunteers themselves.

Because all organizations are different, you will have to determine what data you need to collect and the best ways to do so.



# 4

## Completing Your System

VOLUNTEER PROGRESS REPORTS  
DIRECTOR'S LOG  
REQUESTS FOR SERVICE LOG

Though the core system just described provides a great deal of valuable information, it still may not answer all of your management questions. Most volunteer programs have additional recordkeeping needs unique to their function or structure. In planning the forms to complete your system, be sure you know *why* you are gathering any additional data and *how* you will use what you collect.

### VOLUNTEER PROGRESS REPORTS

Concern for accountability has caused some volunteer programs to require detailed reports from volunteers describing all their activities. This paperwork is appropriate when such reports are actually read and *used*. For example, if a volunteer's report becomes part of a client's file as a supplement to other staff reports, then you are justified in asking for details. However, all too often volunteer reports accumulate in a file cabinet and serve no real purpose.

Before you invent another form, examine your timekeeping system to see if you can incorporate simple and efficient activity reports without burdening volunteers with paperwork. For example, we have

already suggested (page 26) that individual timesheets could include a column for daily *highlights* of a volunteer's activity.

To insure that you receive accurate and complete reports (if you do decide to require them), be sure that volunteers understand the rationale for this task. They should feel that their reports are an important part of their overall contribution to the agency or organization. If you are introducing a new report form, or making changes in your recordkeeping system that will require more work for volunteers, be sure to involve volunteers in all stages of the process. After all, who is better able to tell you how hard or easy the form is to complete than the very people who will be asked to use it? Also, volunteers may come up with some creative and easy ways of gathering the data.

Some volunteers may balk at submitting reports about their contact with clients if they feel that their relationship should be a confidential one. One approach is to design a report form that can be completed by the volunteer and the client *together* --sort of a "diary" of their shared time.



## DIRECTOR'S LOG

Keeping a personal log of your own activities as director of volunteers can be very helpful in managing your time, documenting the work that you do in coordinating the program, and juggling the details of the job.

Some people use their appointment calendars to record their activities in diary

form. This method works to a certain degree, but it is difficult to retrieve specific information without having to weed through random notes on each page.

A more useful personal logging system is to use a separate notebook for this purpose, kept close at hand on your desk. Pages are divided into columns--as many as you need to cover all the types of activities you perform. For example:

Date	Telephone Calls	Letters	Prospective Volunteer Interviews	Meetings	Expenses	(etc.) →→

Some of the columns record data that you may not be capturing elsewhere. For example, by listing all prospective volunteers you interview, you have a monthly total of your screening efforts that documents how many people were screened out as well as how many were eventually accepted. Here is also where you can record your speaking engagements and other time-consuming activities that should be included in your monthly report (see page 46).

Use whatever abbreviations mean something to you, e.g., "t" and "f" work well

for "to" and "from" under the telephone and correspondence columns. At the end of each day, draw a line horizontally across the page and you are ready to start again. This means you keep working down the page and through the notebook, producing a continuous record.

Initially it will take a conscious effort to remember to jot down everything you do, but before long it will become second nature. And you will be surprised at how often you refer back to previous entries.



this way, you will document inappropriate requests (their sources, frequency, etc.) and be able to show that you respond consistently in a helpful way to appropriate requests.

This log should be used for requests from sources outside your organization, as well as from in-house staff. So you can record the variety of ways you are called upon to help other volunteer programs, referring agencies, the press, etc. Over the course of several months, such data can help you prove the volunteer program's role in the community. On the other hand, when you review the in-house sources of requests, you will gain specific information about exactly who does and does not utilize the program.

If you receive a great number of requests, or operate something like an information and referral project, you can increase the usefulness of this system by

adding one other component: a request form. This form is where you can note all the details of the request and how you handled it. It can be completed by the requester or by you while you speak to the requester on the phone. *Number* each form consecutively as it comes in, noting the number in the log, next to date. Then file all completed forms *numerically* in your file cabinet. This makes it easy to use the log as an index to your completed forms and to refer back to previous requests.

One of the most satisfying ways to use the data in the Requests for Service Log is at the annual volunteer recognition event. Think about how good volunteers will feel when you are able to thank them not only for fulfilling their regular assignment, but also for giving a special tour on quick notice to those visitors from Kenya! Now *that's* recognition.

## 2002 Update

Word processing and spreadsheet programs will make ~~keeping~~ the sorts of records described in this chapter much easier to maintain and use. For example, computers give us the ability to sort one set of information in multiple ways: alphabetically, by assignment, by demographic details, etc. Providing we collected + posted this information in the first place...

# 5

## Design Decisions

**FORMS  
FORMAT  
ORDER  
COLOR  
PRINTING  
DUPLICATION  
CONSOLIDATION  
WASTE**

Here are some guidelines to help you make the right decisions in each of the areas that are crucial to the design of your system.

### FORMS

The heart of every recordkeeping system is forms. Your program needs and objectives should govern what forms are developed, which in turn generate procedures, data, and records. Good forms end up *saving* time, not wasting it.

### FORMAT

Select the format for each of your forms that will maximize its use. Ask yourself: Will this form be kept as a record or will the information be transferred onto something else? Is this form only for in-house purposes or will it be seen by many others? How and where will it be kept? How often will it be referred to?

A good recordkeeping system involves a creative combination of formats appropriate to the varied purposes of forms. Format options include:

#### *Paper:*

- * Use inexpensive, low-quality paper for forms that are in-house and temporary.
- * Use paper of greater weight and quality for forms that are permanent records.
- * Use half-sheets or third-sheets if that is all you need.
- * Keep size uniform if the form is part of a series of related forms.
- * For a long form, consider the pros and cons of printing on both sides of the paper vs. using two separate pages stapled together.

#### *Card Stock:*

- * Use card stock (index card weight) instead of paper when the form contains information that is needed often and therefore will be

handled frequently. Cards wear better than paper.

- * Index cards are easy to count and to group into special clusters of information when necessary.
- * All the standard sizes of index cards have matching table-top storage boxes. This allows information on index cards to be kept at your fingertips.
- * Select the size card that adequately accommodates the quantity of information. Be aware that a common mistake is to include more information on a card than is needed, thus making the card crowded and hard to read.

Storage options include folders and loose-leaf/binder notebooks.

## ORDER

As important as your content is the way in which you order the information requested. Too many forms are a jumble of questions that skip from subject to subject. Consider the following:

- * Follow a logical sequence of questions, grouping related items together.
- * Place important information near the top of the form, working your way to the bottom or to the other side with secondary information.
- * Leave sufficient space for data to be entered.
- * Vary the way in which you ask for information, especially in order to save time and effort in completing the form. Columns and boxes to check off are very useful for this purpose.

## COLOR

Color is a wonderful tool for record-keeping systems, provided that it is used sparingly and consistently. The major purposes of using color are: quick recognition of material; easy retrievability; and to make a particular form distinctive or noticeable.

For example, if you want to differentiate a specific project, unit or aspect of your program, you could print *all* forms related to it in the same color. Or, you could color code an index file or folders to indicate particular age groups, sexes, geographic locations, assignment sites, or whatever subgroupings you most need to see at a glance.

But beware. Color coding stops being effective when no one can remember what the colors represent!

## PRINTING

First, every new form should be pilot-tested before you pay good money to have it printed formally. Only once a form is actually in use can you be sure it is doing what you designed it to do. Most volunteer program recordkeeping systems do not require many printed forms; mimeographed or photocopied forms do just as well. However, all forms must be legible and add to the positive image of your program. Formal printing should be considered mainly for those forms seen by the public, such as volunteer application forms.

Second, *do not overprint!* After pilot-testing a form and revising it if necessary, try to estimate the number of copies you will need in a year. Be conservative. It is better to reprint than to have out-of-date and unusable copies left over.

At the bottom of each form, note the date of printing and how many copies you made, e.g., "6/X1: 500." This will allow you to keep track of your needs for the form. A revision could then be noted: "Rev. 6/X2: 500."

If your program has a logo, you might consider using it on those forms that will be seen by the public or even by other agency staff. This is another way of keeping your program visible and of making forms more pleasant to complete.

## DUPLICATION

Only when you examine the total picture can you recognize unnecessary duplication of information and ways in which you can eliminate forms and procedures. If a system is allowed to grow randomly, irrelevant information is often repeated, wasting time.

For example, it is common always to cluster "name, address and telephone number" and to repeat or transfer this complete cluster onto *every* form. But usually all you really need is the volunteer's *name*. As long as the Volunteer Fact Card contains all this information, it is rarely necessary to keep repeating it. If you duplicate the data, whenever a change of address occurs, corrections must be made in *every* place the original information appears! This is what makes recordkeeping tedious and boring.

## CONSOLIDATION

Duplication is relatively easy to recognize once the system is looked at as a whole, but the potential for consolidation may require more scrutiny. Ask yourself:

- * Could additional questions, boxes to check, etc. be added to one form, thereby eliminating a second (or more) form(s)?
- * Could printing a form in several colors eliminate the need for several versions of that form that differ now mainly in their headings?
- * Could two, closely-related forms be completed simultaneously, thus easing collection efforts?

It is a challenge to find ways to streamline your system by effectively consolidating forms and procedures.

## WASTE

Be honest: if you cannot think of a reason why you are collecting some piece of information--STOP DOING IT!

# 6

## Management and Upkeep

WHO DOES IT?  
FILING  
WEEDING AND UPDATING  
GUIDELINES FOR FORMS USE

### WHO DOES IT?

Clerical volunteers who enjoy the tasks of recordkeeping can be extremely helpful in collecting and tallying forms and statistical information on a regular basis. However, it is imperative that only one or two people handle the key tasks of logging and filing data. This assures consistent entries. Usually this would be the responsibility of the director of volunteers and the volunteer program secretary.

A word to the wise: stay current with your recordkeeping tasks and they will not become unmanageable.

### FILING

A file cabinet can become a permanent wastebasket unless items stored in it are easily retrievable. You should organize your files in a way that fits your management needs. Just be sure that you (and anyone else who uses the file) are consistent in how items are placed, retrieved, and returned. Some points to consider are:

*Eye-level:* Place often-needed files in upper file cabinet drawers, making them easier to use at a comfortable eye level.

*Order:* Total alphabetical order is not the best way to arrange file folders. Consider the types of information you are storing in the file and determine useful "subject headings" under which you can cluster materials either alphabetically or chronologically. Use "file guides" (heavy cardboard dividers that are higher than the folders and therefore immediately visible) to label and separate the clusters.

Some subject headings you might want to use include: Active Volunteers; Inactive Volunteers; Sponsor Organizations; Annual Recognition Events; Special Projects; Monthly Reports; Media Contacts; Recruitment Efforts; Grants and Budgets; etc.

*Correspondence:* Most correspondence should be filed in a specific folder relating to the subject of the letter or to the sender/recipient. Try to avoid "catch all" folders labelled simply "Correspondence 19X1." If you accumulate several pieces of paper related to the same subject, person, or project, make a special folder to hold them all. Only place "one-shot" items into a general miscellaneous correspondence folder.

**Place Markers:** Whenever you or anyone else removes a folder from the file, insert a place marker strip in the vacant space. You can create such strips from cardboard or colored construction paper, cutting them to a size a bit higher than the file folders. Inserting a strip when removing a folder makes refiling quick and easy. If useful to you, create space on the marker for noting the date, time, and person removing the file folder. Keep a stack of the marker strips on top of the file cabinet for this purpose.

**Inside the Folder:** Within each folder, arrange materials chronologically, with the most recent item on top. Staple or clip related items together, avoiding a folder filled with loose bits of data that fall out with use.

**Labels:** The way you label each folder contributes to better use of the file system. Whenever possible type labels or at least print large and legibly. Labels should be placed consistently at the same location on each folder, though this can vary with each subject heading cluster. For example, all folders filed behind the file guide reading "Sponsor Organizations" might have their labels placed at the far right corner, while all folders under "Special Projects" might have labels at the far left corner. Within sections avoid "staggered" labeling, since it is easily disrupted when folders are added or deleted.

## WEEDING AND UPDATING

One way to assure that your recordkeeping system remains meaningful as time goes on is to review each part of the system on a regular basis. Evaluate whether or not each form or procedure is still accomplishing what it was designed to do. If it is not, make revisions as necessary and

*discard* or *discontinue* what is no longer useful.

To be sure that this important task is not overlooked, try scheduling an annual "Weeding Out Week" during which you examine your forms and go through your files for outdated material.

The question often arises as to how long you should retain information, especially on past volunteers. There are no set rules, but you might want to use five years as a guideline. This amount of time should be sufficient to enable you to produce documentation for any IRS audit or insurance question that might arise. For records older than five years, do what your space allows. If necessary, place older records into storage boxes and label the contents clearly.

Historical material about the volunteer program as a whole, especially items useful to future directors, should never be discarded.

## GUIDELINES FOR FORMS USE

Every time you introduce a new or revised form, take the time to draw up an instruction sheet for its completion and use. Be sure that this instruction sheet is distributed to everyone who will be using the form. Even if the form is completely "in-house" or very simple, having an instruction sheet on file will be a great orientation tool for a new secretary or for your successor.

A sample copy of each form and the accompanying instruction sheets should be placed into a looseleaf notebook to produce a "forms manual." Even if you revise or delete a form, leave the original in the manual and add the newer versions following it (or in front of it). This will provide you with a history of your recordkeeping system.



# 7

## Proof Positive

REPORT STATISTICS  
DOLLAR VALUE OF VOLUNTEERS  
REPORT NARRATIVE  
SAMPLE FORMAT

Now that you have a recordkeeping system that provides you with a continuous flow of valuable data, you can put it to work in support of volunteers. In fact, you have a *responsibility* to convey the progress and achievements of volunteers collectively, both to your organization's administration and to the volunteers themselves.

It does take time to write good monthly reports, but you will find that a well-designed recordkeeping system will almost write the report for you. A monthly report should include both statistics and a narrative--regardless of whether or not your superiors request it! If volunteers are truly having an impact, then there should be something to "proclaim" on a regular basis. And if *you* don't do it, who will?

### REPORT STATISTICS

You can develop a statistical "cover sheet" to your monthly report that highlights such basic information as how many volunteers are actively fulfilling what assignments. Simply by counting the relevant columns in your Master Log (see pages 11-22), you can quickly complete a grid such as the one on the next page.

Note how this system provides much more focused and valuable information--in

an easy to read way--than something like one lump figure of "volunteers this month" or "total hours served." These two overall figures actually appear on the grid, in the lower right hand corner, but are fully substantiated by all the data in the entire grid. As a management tool, this proposed statistical report allows you to track patterns of recruitment and retention, as well as variations in the ratio of volunteers to hours served in each assignment.

Notice how this grid reports transfers and double assignments. The transfer shown (refer to Joe Jump on page 17) affects only the assignment category totals, not the grand total of volunteers on board, which is unchanged by a transfer. Transfers are only reported in the month in which they occur; in subsequent months transfers are absorbed into the regular totals.

The double assignment (refer to Tillie Talent on pages 15-16) is a bit more complex and must be reported every month for as long as the multiple assignment continues. Here, Tillie Talent is actually counted within the totals for Case Aides. However, she also appears as the +1 in the Artists category. Reading across the Artists line, you can tell at a glance that the program benefits from 1+1, or 2 Artists. Nevertheless, the notation +1 does *not* affect

OCTOBER 19X1

VOLUNTEER PROGRAM MONTHLY STATISTICS

<u>Assignment</u>	<u>Number at Start of Mo.</u>	<u>Number New This Month</u>	<u>No. Ended This Mo.</u>	<u>No. Carried to Next Mo.</u>	<u>Hours</u>
Case Aides	9	0	0 + 1 Transf.	8	240
Artists	1+1	0	0	1+1	35
Receptionists	3	1	1	3	100
Drivers	2	0 + 1 transf.	0	3	48
<hr/>					
TOTALS:	15	1	1	15	423

[ 2002 Update: Wow, is this easier to do on a computer! ]

the grand total of volunteers on board (15), in which Tillie has already been legitimately counted once as a Case Aide.

If there are any major changes in statistics, such as a large rise or fall in the number of volunteers in a given month or a given assignment, explain why in your narrative. Similarly, describe any new assignment added--or the reason for a deletion. The more explanation you can give about your statistics, the more they will accomplish for you.

If your program has several large components, you may want to give a statistical breakdown for each, using additional grids divided into appropriate columns. If volunteering by groups is a substantial part of your program, add a statistical report to document this.

As you decide which statistics to report, give your program--and yourself--credit for such data as:

- * number of interviews of *prospective* volunteers
- * number of tours or other community relations conducted by your office
- * number of requests from *administration* handled by volunteers

* number and type of consultations given to salaried staff (such as department heads, the p.r. director, etc.)

* number of times someone from the community called to ask you for information, help, to speak, etc.

Such data demonstrates the full range of a volunteer program's activities and shows what you do with your time. The fact that you screen adequately, represent the organization to the public, and assist many levels of staff, adds to the proof that you are an asset worth supporting.

## DOLLAR VALUE OF VOLUNTEERS

It is sometimes useful to convert the data on volunteer hours contributed into "dollars and cents" to give a different perspective on the value of such donated services. If you do this, avoid the inaccurate technique of using the minimum or median wage as a valuation of volunteer time. Almost all volunteer assignments would warrant a higher hourly salary on the open market than such low figures.

Instead, you want to develop a legitimate dollar equivalent for donated time--based on dollar figures that will vary

with each volunteer assignment in your agency. Since employees are hired on a pay scale, it makes sense that volunteers also should be considered at different pay levels to match the various assignments they do.

For a complete discussion of the "true dollar value" of volunteers, see Chapter 11, "The Dollar Value of Volunteers," by John Paul Dalsimer, CPA in *From the Top Down: The Executive Role in Volunteer Program Success* by Susan J. Ellis, Energize Books, 1986.

## REPORT NARRATIVE

Again, never submit statistics without a narrative that explains the overall context of the figures quoted. Narratives do not have to be lengthy, but they should adequately describe the highs and lows of the period covered. Some points to remember:

- * The person reading your report does not necessarily understand the daily workings of the volunteer program. So assess everything you write in terms of its clarity. Being too brief or using in-house jargon may defeat your purpose. You can check your success at making your point by having an objective person read your narrative before you submit it.
- * When reporting a special project do not assume that the reader recognizes why it is "newsworthy." Consider giving information such as: how many volunteers are involved? what types of volunteers (ages, backgrounds, etc.)? has this been done before? will it be done again? who requested it? what is the expected outcome? which agency staff have been involved?
- * Give credit, by name, to volunteers *and salaried staff* who do an extra special job. This is real recognition and helps in your relationships with employees.
- * *Do not be afraid to admit problems*, providing you explain them and describe your proposed plan of attack to solve them.

* Be alert to additional uses for your report. Some ideas include:

- Share with the volunteers (after all, it's *their* report!)
- Share with all department heads/board members
- Share with key community organizations
- Share with funding sources
- Send to the local newspaper
- Compile into an Annual Report

## SAMPLE FORMAT

Of course there are many ways to compose a narrative report and you must pick the style most suited to you. As a guide, you might want to use the following three worksheet pages. Try your hand at writing paragraphs on the variety of subjects described. See if the final product succeeds in giving a full picture of volunteer activities during the month. Experiment with other ways of presenting program information.



## VOLUNTEER PROGRAM MONTHLY REPORT NARRATIVE

(1) _____ has been an exciting month for our Volunteer Program. During the past weeks, we launched: *(one or more new projects involving volunteers, or a special event, or a new recruiting campaign, etc.)*

(2) As can be seen from our statistical summary on the cover sheet of this report, much activity occurred this month. Of special interest is: *(anything "out of the ordinary" such as a high number of new volunteers or volunteers leaving the program, or an explanation of a new volunteer job title/category)*

(3) Last month, this report mentioned that a number of projects are being developed. All progressed further this month, especially:

(4) Volunteers are initiating several ideas, still in the planning stages. These include: *(...and progress will be reported next month)*

(5) Having highlighted the new things that are going on, we would like to note that the assignments and projects already underway continue to provide a high caliber of service to our consumers and agency. As an example:

(6) Though things are generally moving along at a fine pace, the program is experiencing some difficulty with: *(brief description of a problem and why it is troublesome)*

To solve this problem, we intend to: *(outline a strategy, including help needed)*

(7) The Volunteer Office provided orientation and training this month in a number of ways: *(summarize types, size of group, length of sessions, which staff were involved, etc.)*

Volunteer Program staff also benefitted from participation in volunteerism training seminars this month: *(describe topics, sponsor, value to you)*

(8) Our statistics document services to agency consumers, but this month we also responded to requests for assistance from agency staff. Such requests--and our method of help--included:

(9) Program coordinators and volunteers were in touch with many community organizations and individuals this month. Some of our most productive contacts included:

(10) *(Other possible things to include in your narrative:)*

- * publicity received during month*
- * appendix of unsolicited letters of thank you to the program*
- * information on your publications, such as a newsletter*
- * your interrelationship with the rest of staff, such as serving on an agency committee*
- * results of any program evaluations*
- * needs assessments*
- * recognition received (awards, etc.)*

(11) In looking ahead to next month, the Volunteer Program plans to concentrate on these major priority areas, and might need to call upon the resources of the agency in the following ways:

Enthusiastically submitted,

---

Director, Volunteer Program

# 8

## The Move to Computers

2002 Update

*Ironically, this chapter - which was the most "current" in 1990 - is now the most out-of-date.*

*Is it? Even though there is more that could be said the principles Bruce outlines below are still completely applicable.*

*Because computer programming is a specialty, we have asked a specialist to write this chapter. Bruce W. Bechtold is founder and President of BWB Associates, a personal computer consulting and training firm in Dauphin, Pennsylvania. He holds an MBA, has taught in the College of Business at Shippensburg University (PA), and has led national seminars in advanced data base applications development. Bruce is the developer of V.I.M.-- Volunteer Information Management--a personal computer software program to manage and track all related information for volunteer projects. He designed V.I.M. based on his own volunteer work helping a local nursing home develop a computerized recordkeeping system.*

*2002 Update: VIM is no longer available + Bruce gone back to industry. For a current list of v.m. software go to...*

Everything you have read so far about designing a manual volunteer recordkeeping system is necessary for designing a computerized system. Although they may seem mysterious, computers are only machines for recording, organizing, processing and retrieving data. The previous chapters give you a methodical way of looking at what information you need to collect and organize in order to manage a successful volunteer program. As your program grows in size, you

DO YOU NEED A COMPUTER?  
WHAT CAN A COMPUTER DO?  
COMPUTERIZED VOLUNTEER RECORDS

KINDS OF COMPUTERS

"On Line"

A Word on Donations

GETTING THE MOST FROM YOUR COMPUTER

may come to a point at which using a computer is the next step for you to take in order to handle effectively the volume of information that is being generated.

The most important thing to consider in the decision to computerize is the software. Software is the set of instructions ("program") that the computer uses to do everything it does. There are many different types of software on the market, each performing a specific function.

### DO YOU NEED A COMPUTER?

You need a computer if:

- * You are swamped by paperwork of all kinds.
- * You can't keep track of people or tasks with your manual system because the volume has exceeded your available time.
- * You have a lot of repetitive paperwork, such as letters and reports that are basically the same from month to month.

- * You are collecting information about volunteers, but just can't sort through it to make it useful for improving the delivery of service.
- * Your program has been expanding and you want to get organized before the paperwork buries you!

A computer is a tool for managing information, so the more information that you have to manage, the more benefits a computer may offer you.

## WHAT CAN A COMPUTER DO?

A computer can simplify many of the tedious tasks involved in keeping information about volunteers and their activities up to date. In a manual system, you need to duplicate much information to be able to make sense of it. As an example, on each form, index card, and report you must re-write volunteer names, phone numbers, and other pertinent identifying data. With a computer, this basic type of duplication is eliminated or greatly reduced.

There are many other more general things you can do with a computer. *Word processing* is a way of writing memos, letters, reports and other things previously generated by typewriter. In fact, if you are familiar with typing, then you already know the basic concept of word processing. By using a computer and word processing software, you can eliminate repetitive typing. By entering a letter or memo into a computer, you can save that document and later retrieve it to print again or modify for some other purpose. Over time you build up a reservoir of letters to use and re-use, saving the time that would have been needed to retype and reproofread everything.

Most word processing software has the ability to "merge" a list of names and addresses into a form letter, so that you can send out personalized letters and announcements with minimal effort (especially useful for volunteer recognition!).

*Database management* software is used to manage lists of information, giving you the ability to organize, sort, and selectively examine data in your files. This is where you can store volunteer tracking

information, such as mailing addresses and records of assignments or available hours. Database management software lets you do things such as print a list of volunteers in alphabetical order, by zip code, by assignment held, in order of starting date with your organization, or by any other criteria you build into your program.

You can use *desk-top publishing* software to create a monthly newsletter or various recruitment brochures and flyers. This software offers page layouts and graphics functions. Combined with a laser printer, desk-top publishing software can produce printshop quality originals.

*Spreadsheet* software, such as LOTUS 123, allows you to manage and manipulate numbers easily. You can use spreadsheet software to create and monitor your budgets. When you enter your budget figures, you can perform "what-if" scenarios. For instance, if you have a certain dollar amount budgeted for recognition event expenses, you can experimentally change the costs for meals, entertainment, and volunteer gifts, and instantly see how those changes affect the bottom line.

You can also buy a customized program to meet your specific needs. There are many computer programs written to manage information unique to certain fields or types of organizations. Your agency may have an employee, consultant or volunteer capable of designing and programming custom software for you. If you decide to have a software program especially developed, be prepared to make a big commitment of time and money to have this effort be successful. You must have someone who understands your operations in detail to be able to write a software program that will satisfy your requirements.

## COMPUTERIZED VOLUNTEER RECORDS

Your first decision will be whether to purchase one of the available volunteer management software programs or to design your own software. The best idea is to research exactly what the packaged programs do and how much flexibility they provide for you to add data unique to your needs. Talk to directors of volunteers actually *using* the



product. Make a list of what you absolutely must be able to do and what would be nice to do, but not essential. Then talk to the distributor of the program and see how your list matches the software's capabilities.

Once you have your software installed, you are ready to begin computerizing your volunteer information system. One of the first things you will need to do is record basic data on each active volunteer.

This includes: name, address, day and evening phones, emergency contact, and any other identifying information. You also will want to record other useful things you learn from volunteers during their screening interview and from their application form: available hours, skills, hobbies, etc.

Here is a sample computer screen (using the V.I.M. program) designed to input this type of volunteer information:

VOLUNTEER INFORMATION	
Volunteer Code: 12345	Title, Name: Ms. Ellen Early
Volunteer Code of Primary Family Member:	Sex: F Birth Day: 01/07/50
Address: 123 South Main Street	Home Phone: 717-555-1234
Apt. E	Work Phone: 717-555-9090
City: Newtown ST: PA ZIP: 19111-	Is this a TEEN?: N
Is this volunteer currently active? (A=active/N=not): A	
Application Date: 07/06/88	Interview Date: 07/07/88 Orientation: 07/10/88
Volunteer will be active until: / /	Actual end of service: / /
Hobbies/Interests: None	Volunteer Related Information
VOLUNTEER ASSIGNMENT	
Job Code: 1234	Reading Program Aide
Starting: 07/12/88	Until When: / / Actual End Date: / /
Days & Times: Every wednesday 7 - 9 pm.	
Department Code: VOLUNTEER	CAMPUS PROGRAM VOLUNTEER
Supervisor Code: WOODR	
Is this an Active(A) or Not active(N) assignment? A	
Location: LIBRARY	Area: BETHANY CENTER

It is also important to know which volunteers have been assigned to do what jobs. As already noted earlier in this book, some volunteers have more than one as-

signment that they do at different times. Here is a sample computer screen for entering data on volunteer assignments:

BETHANY VILLAGE VOLUNTEER PROGRAM  
VOLUNTEERS

05/22/90  
22:22:13

VOLUNTEERS

Code	Name	Home Phone	Active
⇒ EARL1	Ellen Early	717-555-1234	A
EGAN1	Jean Egan	717-766-6955	A
EGGE1	William	0443	A
EICH1	Mary Eic	2154	A
EMME1	I. Wilso	1641	A

Volunteer Related Information

VOLUNTEER ASSIGNMENT

Job Code: **WVIR** Reading Program Aide NVA  
 Starting: **07/12/88** Until When:  **/ /** Actual End Date:  **/ /**  
 Days & Times: **Every wednesday 7 - 9 pm.**  
 Department Code: **VOLUNTEER** **CAMPUS PROGRAM VOLUNTEER**  
 Supervisor Code: **VOLDIR**  
 Is this an Active(A) or Not active(N) assignment? **M**  
 Location: **BETHANY** Area: **BETHANY CENTER**

While being able to store all the information about your volunteer program is a benefit of a computer, your first task is to figure out what information is really important--useful to you as a manager--and what you need to know.

For example, if you often search for volunteers to come in at short notice, it may be important to store the days and times a volunteer is willing to serve. If you want to monitor the turnover rate in a particular assignment or unit, then you must somehow record the starting and ending dates of all assigned volunteers.

Everything described in the preceding pages of PROOF POSITIVE can be entered into a computer. The manual system offered here frequently records data in columns or boxes. These correspond to the computer concept of "fields": specific units of information that are uniform, comparable, and can be sorted and organized.

One more note about software: be sure your database is able to retain the history of your volunteer program. When

you mark a volunteer as "inactive," the computer should still be able to retrieve information about that volunteer when you ask for reports that go back in time-- while leaving that inactive volunteer off any list of current volunteers. This is a good test of what your proposed software can do.

## KINDS OF COMPUTERS

There are three different types of computers: personal, mini, and mainframe. A personal computer is the typical office desk-top computer. Mini and mainframe computers have the power necessary for large computing jobs that require many people to be able to input and access various information at the same time. A personal computer is one that stands alone, so you can use it whenever you want. Personal computers, in general, can better serve the needs of individuals and departments that do not need to be tied in with the rest of the organization on a constant basis.

There are many brands of personal computers from which to choose. Your decision about which computer to get should be based on what software you will be using and on whether you need something compatible with other computers already operating in your organization.

## "On Line"

One of the great benefits of personal computers is that you have all your records literally at your fingertips whenever you turn on the machine and can interact with your database at all times. But you may be in an agency that already has a functioning mainframe computer with which your office now will be linked--but without a "terminal" placed in your office. You may therefore be asked to submit written forms to a centralized data processing unit. The information will be entered into the computer for you and you will receive periodic "print-out" reports of your data.

This is a step above doing everything manually, but it obviously means that the printouts will not be current for each day and you are not able to enter your database to ask management questions when you need them. If you must link with a mainframe computer, try to have a terminal placed in your office so that you can be "on line" daily with your data.

## A Word On Donations

If you are in a nonprofit organization, you may be able to obtain a donated computer system from a business or even an individual. Though this may be a great opportunity, if the donated system does not run the right type of software for your needs, you could end up wasting a lot of time.

If you can still get the right kind of software for the donated equipment, you may face other problems. Is the equipment in good condition? Who can fix it if something goes wrong? Are any warranties or maintenance agreements still in effect? In the early days of personal computers there were many brands made by companies that are no longer in existence. If the donated machine is one of these "orphaned" comput-

ers, is there someone who can still support (i.e., service, answer questions about, provide supplies for) the equipment?

It helps to understand the possible concerns before you accept donated computer equipment. But there are plenty of good, reliable computers out there that can continue to provide much service, so a donation may be the best way for you to obtain a computer at minimum expense. It does not make much difference what brand of computer you get as long as you know that you will have the necessary software to make it useful for you.

## GETTING THE MOST FROM YOUR COMPUTER

In the beginning you will find that the computer may take more of your time, instead of saving you time. This is to be expected as you make the conversion from a manual system to a computerized one. In order for the computer to become a time-saver, you must first prime it with data. As you enter more and more information into the computer, and as your experience grows, you will begin to see the benefits of the computer.

Once your data is in the computer, you can begin to do the things that make use of the incredibly rapid sorting capability of the machine. Here are some of the ways you can make the most of your records (providing your software allows you to do these):

- * When a flu outbreak causes ten volunteers to miss their scheduled day, you can generate a list, with phone numbers, of any other volunteers who said they might be available on short notice. (Again, this presupposes you *asked* all volunteers whether they might be called--the computer only contains information you put into it!)
- * Before your annual recognition event, you can generate a list of volunteers in order of their starting date with the program--listing the most veteran volunteers first.

- * You can search for any volunteer who has not been active for more than 30 days and follow up to learn why.
- * On a weekly basis you can make a list of any unfilled volunteer assignments-- by unit, by date of request, or by any other criterion.
- * You can send a letter to all people who left their volunteer assignment in the last six months, asking them for feedback on their experience in your organization.
- * As often as you want, you can issue a report to each department, unit, committee chair, or anyone else about the volunteers assigned to them.

Every one of these examples could be done manually, equally well. But the computer can do the work in a fraction of the time it would take to do it with paper forms and a typewriter. You are more likely to *use* your data when you can access it simply and quickly.

## Back Up Your Data!

Enough cannot be said about making sure your data has been "backed up." *Back up your data regularly and often!!!* If something goes wrong with your computer equipment and you have a backup of your data, you will only lose the time that it takes to service the equipment. Otherwise, you will lose all of the time that you have invested and will have to re-enter the information.

As time goes on, computers will become more and more affordable and accessible. For large volunteer programs involving more than 100 volunteers at a time, computers are already a tool that is more cost-effective than plowing through paperwork. The key is developing the *software* that provides the director of volunteers with ways to enter and then use the most meaningful data to support volunteer efforts. Everything begins with your ability to describe what you need from the computer.

(For more information about the V.I.M. software program developed by Bruce Bechtold, contact ENERGIZE.)

# 9

## Plunging In

POSSIBLE RESISTANCE  
GET HELP  
Other Perspectives  
CHECKLIST

If you are now brimming over with ideas about designing or redesigning your recordkeeping system, you may also be feeling somewhat overwhelmed at the size of the task. There are no real shortcuts, since this is a complex job in which details matter a great deal. But you can meet this challenge in a way that lets others share in the decision making and implementation.

### POSSIBLE RESISTANCE

You may have to be prepared to encounter some resistance to initiating or changing a recordkeeping system, especially if you inherited your present data-gathering process from a predecessor. Anything that looks like more paperwork will be met, at best, skeptically. But if you can show the new system's benefits--and enforce the rules for submitting forms consistently with everyone--after a period of time resisters will either comply or leave. Keep in mind that a volunteer who does not want to tell you what s/he is doing may not be doing all that much!

Sometimes volunteers argue "I don't care about how many hours I work here" or "You don't need to count my time and thank me." One response is to point out

that recordkeeping is important for the organization's sake (see page 1).

Keeping records is another way for volunteers to show their commitment to your organization. Such data actually increases the value of the volunteered service by providing concrete evidence of community support that can be used in various ways. So point out that filling in those forms is really a *form of contribution* to the cause.

### GET HELP

One suggestion is to form a Records Review Committee (or a Records Development Committee, depending on your starting point) made up of experienced volunteers. Also consider salaried staff representatives (remember that secretaries can be very helpful in this area). The volunteer program secretary certainly should be on the Committee from the very beginning. The Committee's purpose is to examine your recordkeeping as a total system, evaluating each piece and offering suggestions for redesigning or streamlining. Additional input can be requested from anyone who actually fills out your forms.

Another suggestion is to declare a sort of "moratorium" on regular work for one week, during which you and the Records Review Committee concentrate your efforts on making needed changes. The benefit of such a total immersion approach is that it allows you time to work with the entire system at once, rather than drawing out the process in bits and pieces over several months. It is also easier to "sell" your new forms and procedures as a complete and efficient *package*--a more effective way of introducing changes than coming out with something new every month. You can then even call a staff meeting to present and explain everything at once. If you do not yet have a forms manual, this approach obviously makes it simple to develop one in a relatively short amount of time.

## Other Perspectives

When you meet or talk with other volunteer administrators, include record-keeping as a subject for sharing. You will find that looking at many sample forms from a variety of organizations helps you crystallize your own needs.

## CHECKLIST

As a final aid, here is a list of questions to be kept in mind by you and your Committee as you evaluate existing forms and make decisions about future ones. These questions review and summarize the mental process of forms development.

1. Why do we need this form?
2. Why did we select this format?
3. How often is this form used?
4. Who completes this form? Do they know how?
5. What happens to the completed form?
6. Where and how do we store this information?
7. How often do we need to refer to the data?
8. Who else needs access to this information? How often?
9. How well does this form mesh with the rest of our recordkeeping system?
10. Does this form do what we want it to do?

ENERGIZE, Inc. is a training, consulting and publishing firm specializing in volunteerism. It offers a corps of expert consultants directed by Susan Ellis--a nationally-recognized leader in the volunteer field. All ENERGIZE consultants have first-hand, practical experience in working with volunteers and offer you assistance with a fresh approach and dynamic delivery style.

Founded in 1977, ENERGIZE has helped clients throughout the United States, Canada, and South America, dealing with a wide range of community involvement issues.

ENERGIZE will design a consultation or training plan especially for you. Fees are determined by project requirements. If you are interested in computerizing your volunteer recordkeeping, we will link you with BWB Associates, Ltd. and their V.I.M. software program.

ENERGIZE publishes books and videotapes on practical aspects of volunteer management. Sample titles include:

*FROM THE TOP DOWN: The Executive Role in Volunteer Program Success*

*SELF-HELP ACCOUNTING: A Guide for the Volunteer Treasurer*

*NO EXCUSES: The Team Approach to Volunteer Management*

*CHILDREN AS VOLUNTEERS*

*THE CHURCH PUZZLE GAME*

*COLLEAGUES: The Employee/Volunteer Relationship*

*TOGETHER: Volunteer-to-Volunteer Relationships*

We also have a full line of "Volunteer Energy" recognition products.

For more information, please contact:

  
5450 Wissahickon Avenue, INC.  
Philadelphia, PA 19144 • (215) 438-8342

*change*

**The most-used reference tool for designing and maintaining records on volunteer involvement...PROOF POSITIVE is an easy-to-use guide that shows you:**

- * *what a good recordkeeping system can do for you*
- * *how to develop a volunteer application form*
- * *the basic components of an efficient volunteer tracking system (with or without a computer)*
- * *ideas for recording the work of groups, gathering volunteer progress reports, and organizing your filing system*
- * *how a computer can be of help (when you're ready)*
- * *how to keep track of your own activities as well as those of volunteers*
- * *how to create regular and annual reports that win support for the real achievements of volunteers*
- * *the ways that data gathering and reporting help in volunteer/employee relations, recognizing volunteers, and in-house marketing of the volunteer program*

**Whether your eyes glaze over at the mention of recordkeeping or you love to work with numbers...PROOF POSITIVE will be your trusted desktop reference!**

---

Susan J. Ellis and Katherine H. Noyes are two of the most respected authors in the volunteerism field. Since 1978 they have consistently produced (in collaboration and individually) books and articles to help leaders of volunteer efforts achieve success, including *By the People: A History of Americans as Volunteers*. Susan is President of ENERGIZE, Inc., and travels throughout the world conducting training seminars on all aspects of volunteer management. Katherine is Director of Program Services at the Virginia Office of Volunteerism and President of the Association for Volunteer Administration (1990-1993).

ISBN 0-940576-10-4



5450 WISSAHICKON AVENUE  
PHILADELPHIA, PA 19144  
(215) 438-8342